

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

DELIVERABLE T1.4.1. PREPARING THE GROUND FOR SUSTOURISMO TESTING PHASE

T1.4.1. PREPARING THE GROUND FOR SUSTOURISMO TESTING PHASE	Prefinal version Oct. 2022
Authors	CERTH
Contributions	ALL



Table of Contents

Table of Contents.....	2
1. Introduction.....	12
1.1 Work package T1; “Tourism in ADRION; understanding the needs under a sustainability spectrum”	12
1.2 Activity 1.4; “Preparing the ground for SUSTOURISMO testing phase”	13
1.3 Deliverable Structure	14
2 The special context of SUSTOURISMO cases	14
2.1 The case of Thessaloniki (Greece)	14
2.1.1 The overview of Thessaloniki city	14
2.1.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Thessaloniki.....	17
2.1.3 Searching the tourism policy background and finding gaps and opportunities	26
2.1.4 Learning from best practices on tourism and mobility.....	27
2.1.5 Learning from tourist surveys - the path forward as revealed by the tourists	28
2.1.6 Listening to tourism and mobility stakeholders - insights from the 1 st Technical Round Table.....	30
2.1.7 Combining finding in a SWOT analysis for the case of Thessaloniki.....	31
2.1.8 Drafting of the SUSTOURISMO touristic packages of Thessaloniki	35
2.2 The case of Epirus (Greece).....	43
2.2.1 The case of Igoumenitsa	43
2.2.2 The case of Preveza	63
2.3 The case of Region Emilia Romagna (Italy).....	82
2.3.1 The overview of Emilia-Romagna costal area	82
2.3.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Emilia-Romagna	87
2.3.3 Searching the tourism policy background and finding gaps and opportunities	90
2.3.4 Learning from best practices on tourism and mobility.....	91
2.3.5 Learning from tourist surveys - the path forward as revealed by the tourists	93
2.3.6 Listening to tourism and mobility stakeholders - Insights from the 1 st Technical Round Table.....	95
2.3.7 Combining finding in a SWOT analysis for the case of Emilia-Romagna and Ravenna	96



2.3.8	Drafting of the SUSTOURISMO touristic packages in Ravenna.....	97
2.4	The case of Friuli Venezia Giulia (Italy).....	103
2.4.1	The overview of Friuli Venezia Giulia.....	103
2.4.2	Learning by the numbers and facts; tourism data and connectivity level for the case of Trieste - Grado - Aquileia's area.	104
2.4.3	Searching the tourism policy background and finding gaps and opportunities	121
2.4.4	Learning from best practices on tourism and mobility.....	122
2.4.5	Learning from tourist surveys - the path forward as revealed by the tourists	122
2.4.6	Listening to tourism and mobility stakeholders - Insights from the 1 st technical round table.....	126
2.4.7	Combining findings in a SWOT analysis for the case of Friuli Venezia Giulia Region	127
2.4.8	Drafting the SUSTOURISMO touristic packages of Friuli Venezia Giulia Region	128
2.5	The case of Ljubljana (Slovenia)	133
2.5.1	The overview of Ljubljana city	133
2.5.2	Learning by the numbers and facts; tourism data and connectivity level for the case of Ljubljana	137
2.5.3	Searching the tourism policy background and finding gaps and opportunities	144
2.5.4	Learning from best practices on tourism and mobility.....	145
2.5.5	Learning from tourist surveys - the path forward as revealed by the tourists	146
2.5.6	Listening to tourism and mobility stakeholders - insights from the 1 st Technical Round Table.....	147
2.5.7	Combining finding in a SWOT analysis for the case of Ljubljana	147
2.5.8	Drafting of the SUSTOURISMO touristic package of Ljubljana	149
2.6	The case of Zadar (Croatia)	152
2.6.1	The overview of Zadar city	152
2.6.2	Learning by the numbers and facts; tourism data and connectivity level for the case of Zadar	156
2.6.3	Searching the tourism policy background and finding gaps and opportunities	167
2.6.4	Learning from best practices on tourism and mobility.....	169
2.6.5	Learning from tourist surveys - the path forward as revealed by the tourists	170
2.6.6	Listening to tourism and mobility stakeholders - insights from the 1 st Technical Round Table.....	173
2.6.7	Combining finding in a SWOT analysis for the case of Zadar	174



2.6.8	Drafting of the SUSTOURISMO touristic packages of Zadar	175
2.7	The case of Tivat (Montenegro)	180
2.7.1	The overview of Tivat	180
2.7.2	Learning by the numbers and facts; tourism data and connectivity level for the case of Tivat	183
2.7.3	Searching the tourism policy background and finding gaps and opportunities	189
2.7.4	Learning from best practices on tourism and mobility	190
2.7.5	Learning from tourist surveys - the path forward as revealed by the tourists	191
2.7.6	Listening to tourism and mobility stakeholders - insights from the 1 st Technical Round Table.....	191
2.7.7	Combining finding in a SWOT analysis for the case of Tivat	192
2.7.8	Drafting of the SUSTOURISMO touristic packages of Tivat.....	193
2.8	The case of Berat (Albania)	197
2.8.1	The overview of Berat	197
2.8.2	Learning by the numbers and facts; tourism data and connectivity level for the case of Berat	203
2.8.3	Searching the tourism policy background and finding gaps and opportunities	212
2.8.4	Learning from best practices on tourism and mobility	214
2.8.5	Learning from tourist surveys - the path forward as revealed by the tourists	216
2.8.6	Listening to tourism and mobility stakeholders - insights from the 1 st Technical Round Table.....	219
2.8.7	Combining finding in a SWOT analysis for the case of Berat	222
2.8.8	Drafting of the SUSTOURISMO touristic packages of Berat	224
2.9	The case of Belgrade (Serbia)	232
2.9.1	The overview of Belgrade	232
2.9.2	Learning by the numbers and facts; tourism data and connectivity level for the case of Belgrade	234
2.9.3	Searching the tourism policy background and finding gaps and opportunities	238
2.9.4	Learning from best practices on tourism and mobility	239
2.9.5	Learning from tourist surveys - the path forward as revealed by the tourists	240
2.9.6	Listening to tourism and mobility stakeholders - insights from the 1 st Technical Round Table.....	240
2.9.7	Combining finding in a SWOT analysis for the case of Belgrade	241



2.9.8	Drafting of the SUSTOURISMO touristic packages of Belgrade	242
3	Building technological solutions for promoting SUSTOURISMO targets; the SUSTOURISMO app 248	
4	Sum up	252
ANNEX A	256

TABLE OF FIGURES

Figure 1:	Transnational Action Plan of SUSTOURISMO project	12
Figure 2:	The pilot area of Thessaloniki	14
Figure 3:	The location of Region of Central Macedonia at the TEN-T	16
Figure 4:	The location of Thessaloniki at the TEN-T network and the transport nodes	16
Figure 5:	Urban Sea Transport of Thessaloniki	17
Figure 6:	Total international arrivals in Greece 2015-2019 [Source: insete.gr]	18
Figure 7:	Top Origin Countries for Greek International Tourism (top arrivals), 2019 [own elaboration of data from insete.gr]	19
Figure 8:	Average spending per trip per tourist, 2015-2019 data [insete.gr]	20
Figure 9:	Average spending per trip per tourist, 2015-2019 data [insete.gr]	20
Figure 10:	Average length of stay, 2015-2019 data [insete.gr]	21
Figure 11:	International arrivals at RCM [insete.gr]	22
Figure 12:	Revenues from international arrivals at RCM [insete.gr]	22
Figure 13:	International arrivals at Thessaloniki's Airport [www.hcaa.gr]	23
Figure 14:	Connectivity of Thessaloniki's Airport [Thessaloniki Convention Bureau]	23
Figure 15:	International arrivals at Thessaloniki's Airport [www.hcaa.gr]	24
Figure 16:	Domestic Tourism in RCM [insete.gr]	25
Figure 17:	International arrivals in Thessaloniki [insete.gr]	25
Figure 18:	Domestic tourism in Thessaloniki [insete.gr]	26
Figure 19:	Thessaloniki's pilot area in SUSTOURISMO	35
Figure 20:	Flow diagram for Thessaloniki TP1	38
Figure 21:	Flow diagram for Thessaloniki TP2	41
Figure 22:	The pilot area of Igoumenitsa	44
Figure 23:	The location of Region of Epirus	45
Figure 24:	The location of Igoumenitsa Port	46
Figure 25:	Total international arrivals in Greece 2015-2019 [Source: insete.gr]	47
Figure 26:	Top Origin Countries for Greek International Tourism (top arrivals), 2019 [own elaboration of data from insete.gr]	48
Figure 27:	Average spending per trip per tourist, 2015-2019 data [insete.gr]	49
Figure 28:	Average spending per trip per tourist, 2015-2019 data [insete.gr]	50
Figure 29:	Average length of stay, 2015-2019 data [insete.gr]	50
Figure 30:	International arrivals at Region of Epirus [insete.gr]	51
Figure 31:	Revenues from international arrivals at Region of Epirus [insete.gr]	52



Figure 32: International arrivals at Preveza' s Airport [www.hcaa.gr]	52
Figure 33: Domestic Tourism in Region of Epirus [insete.gr]	53
Figure 34: International arrivals in Thesprotia [insete.gr]	54
Figure 35: International arrivals at Igoumenitsa Port [insete.gr]	54
Figure 36: Igoumenitsas's pilot area in SUSTOURISMO.....	60
Figure 37: Flow diagram for Igoumenitsa's TP	62
Figure 38: The pilot area of Preveza	63
Figure 39: The location of Region of Epirus	64
Figure 40: The location of Aktion Airport.....	65
Figure 41: Total international arrivals in Greece 2015-2019 [Source: insete.gr].....	66
Figure 42: Top Origin Countries for Greek International Tourism (top arrivals), 2019 [own elaboration of data from insete.gr]	67
Figure 43: Average spending per trip per tourist, 2015-2019 data [insete.gr]	68
Figure 44: Average spending per trip per tourist, 2015-2019 data [insete.gr]	68
Figure 45: Average length of stay, 2015-2019 data [insete.gr]	69
Figure 46: International arrivals at Region of Epirus [insete.gr]	70
Figure 47: Revenues from international arrivals at Region of Epirus [insete.gr]	71
Figure 48: International arrivals at Preveza' s Airport [www.hcaa.gr]	71
Figure 49: Domestic Tourism in Region of Epirus [insete.gr]	72
Figure 50: International arrivals in Preveza [insete.gr]	73
Figure 51: Domestic tourism in Preveza [insete.gr].....	73
Figure 52: Preveza's pilot area in SUSTOURISMO.....	80
Figure 53: Flow diagram for Preveza's TP	81
Figure 54: Emilia-Romagna Provinces and underlined the 3 provinces composing the Romagna Sub-Region.....	83
Figure 55: Emilia-Romagna Region main transport infrastructures (Source: Emilia-Romagna Region)	85
Figure 56: Romagna main rail network (Source: Elaboration ITL)	86
Figure 57: Romagna main touristic cities and rail connections (Source: Start Romagna).....	87
Figure 58: Emilia Romagna riviera	89
Figure 59: Ravenna Sant'Apollinare in Classe Basilica.....	90
Figure 60: Rimini riviera.....	93
Figure 61: ROGER App	94
Figure 62: Promotional campaign of the Rail Smart Pass developed during the Interreg Adrion Inter-Connect project.....	98
Figure 63: The two SUSTOURISMO physical points	100
Figure 64: General scheme of the Ravenna tourist package.....	101
Figure 65: The revised version of the Ravenna SUSTOURISMO Info-Graphic.	102
Figure 66: Total international arrivals and overnight stays in Italy (2015-2019)	105
Figure 67: Total revenues by year from international tourism in Italy (2015-2019)	105
Figure 68: Top origin countries for international tourists (arrivals 2019)	106
Figure 69: Top origin countries for international tourists (thousand arrivals, 2019)	107
Figure 70: Focus on ADRION countries for international tourists (arrivals 2019).....	107



Figure 71: Modal share by transport mode for international tourists, 2019 [Source: own elaboration on bancaditalia.it data]	108
Figure 72: Modal share by country for international tourists (2019, arrivals) [Source: own elaboration on bancaditalia.it data]	108
Figure 73: Modal share by country- focus on tourists from Germany (2019, arrivals)	109
Figure 74: Modal share by country - focus on tourists from Greece (2019, arrivals)	109
Figure 75: Average spending per trip per person of international tourists (2015-2019)	110
Figure 76: Average length of stay of international tourists (2015-2019)	110
Figure 77: Domestic tourists that made at least a trip with 1 overnight stay (2015-2019)	111
Figure 78: Average spending per overnight stay - Domestic tourists (2015-2018) [Source: own elaboration on bancaditalia.it data]	111
Figure 79: Total international arrivals (2015-2019) [Source: own elaboration on regione.fvg.it data]	112
Figure 80: International arrivals by countries, 2019 [Source: own elaboration on regione.fvg.it data]	113
Figure 81: Average length of stay of international tourists (2015-2019) [Source: own elaboration on regione.fvg.it data]	113
Figure 82: Total arrivals of domestic tourists (2015-2019) [Source: own elaboration on regione.fvg.it data]	114
Figure 83: Average length of stay of domestic tourists (2015-2019) [Source: own elaboration on regione.fvg.it data]	114
Figure 84: Location of Trieste Airport [Source: google.maps.it]	115
Figure 85: Connectivity of Trieste's Airport (2020-2021) [Source: triesteairport.it]	116
Figure 86: Arrivals and departures of international passengers at Trieste airport (2014- 2019) [Source: own elaboration on regione.fvg.it data]	116
Figure 87: Arrivals and departures of domestic passengers at Trieste airport (2014- 2019) [Source: own elaboration on regione.fvg.it data]	117
Figure 88: Location of Trieste seaport [Source: google.maps.it]	117
Figure 89: International arrivals in Trieste (2015-2019) [Source: own elaboration on regione.fvg.it data]	119
Figure 90: International arrivals in Gorizia, Grado, Aquileia (2015-2019) [Source: own elaboration on regione.fvg.it data]	120
Figure 91: Domestic arrivals in Gorizia, Grado, Aquileia and in Trieste (2015-2019)	120
Figure 92: Overnight stays of domestic tourists in the pilot area (2015-2019)	121
Figure 93: The flow diagram of the pilot of Aquileia & Grado, FVG	130
Figure 94: Graphics of pilot in Aquileia, FVG, 2022	132
Figure 95: Ljubljana the capital of Slovenia (source: https://velo-city2020.com/en/)	133
Figure 96: Main and regional lines (single/double track)	135
Figure 97: PRI railway lines in the Republic of Slovenia	136
Figure 98: Foreign tourist overnight stays in Slovenia 2015-2019 [Source: Statistical Office of the Republic of Slovenia]	137
Figure 99: Foreign tourist arrivals in Slovenia 2015-2019 [Source: Statistical Office of the Republic of Slovenia]	138



Figure 100: Top Origin Countries for Slovenian International Tourism (top arrivals), 2019 [own elaboration of data from Statistical Office of the Republic of Slovenia]	138
Figure 101: Average daily expenditure per foreign tourist, 2019 data [own elaboration of data from Statistical Office of the Republic of Slovenia]	139
Figure 102: Average principal mean of transport to Slovenia, 2019 data [own elaboration of data from Statistical Office of the Republic of Slovenia]	140
Figure 103: Tourist arrivals in Ljubljana 2010-2018 [Ljubljana Tourism].....	141
Figure 104: Overnight stays in Ljubljana 2010-2019 [Ljubljana Tourism]	141
Figure 105: Domestic tourism in Ljubljana [Tourism Ljubljana]	142
Figure 106: Railway transport in Slovenia [Slovenian Railways, Passenger Transport].....	143
Figure 107: Traffic in Ljubljana airport 2014-2019 [Fraport Slovenia].....	143
Figure 108: Ljubljana's pilot area in SUSTOURISMO: Ljubljansko Barje (Ljubljana marshes) are the largest Slovene and southernmost European wetlands	149
Figure 109: The flow diagram of the pilot of Ljubljana	151
Figure 110: The pilot area of Zadar	152
Figure 111: The location of city of Zadar at the A1 Zagreb-Split-Dubrovnik motorway	154
Figure 112: The Port of Gaženica	155
Figure 113: Zadar Airport runway extension project	156
Figure 114: Zadar bus schedule	156
Figure 115: Total international arrivals in Croatia 2015-2019 [Source: Croatian Bureau of Statistics]	157
Figure 116: Top Origin Countries for Croatian International Tourism (top arrivals), 2019 [own elaboration of data from Croatian Bureau of Statistics]	158
Figure 117: Mode of arrival in Croatia by type of transport, 2017 & 2019 data, expressed as a percentage [own elaboration of data from Institute for Tourism's <i>Attitudes and expenditures of tourists in Croatia - TOMAS</i> surveys]	159
Figure 118: Average spending per overnight stay (in €), 2017 & 2019 data [own elaboration of data from Institute for Tourism's <i>Attitudes and expenditures of tourists in Croatia - TOMAS</i> surveys]	159
Figure 119: Average length of stay (days), 2015-2019 data [own elaboration of data from Institute for Tourism's <i>Attitudes and expenditures of tourists in Croatia - TOMAS</i> surveys]....	160
Figure 120: International arrivals in Zadar County [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]	161
Figure 121: International overnight stays in Zadar County [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data].....	162
Figure 122: International average spending per overnight stay (in €) in Zadar County [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]	163
Figure 123: International passenger arrivals/departures at Zadar Airport [own elaboration of data from Zadar Airport's statistics]	163
Figure 124: Connectivity of Zadar Airport [Zadar Airport]	164
Figure 125: Number of passengers and cruise ships in Port of Zadar through years [Port Authority Zadar]	165



Figure 126: Domestic Tourism in Zadar County [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]	165
Figure 127: International tourist arrivals & overnight stays in Zadar [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data].....	166
Figure 128: Domestic tourism in Zadar [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]	167
Figure 129: SWOT for Zadar.....	175
Figure 130: Flow diagram for Zadar TP1	177
Figure 131: Flow diagram for Zadar TP2.....	178
Figure 132: Flow diagram for Zadar TP3.....	179
Figure 133: The pilot area of Tivat	180
Figure 134: Tivat Centre	182
Figure 135: Tourist accommodation structure in Tivat in 2018	186
Figure 136: Example flow diagram for the 1 st TP of Tivat	196
Figure 137: (on the left) The map of Albania and (on the right) the Region of Berat shown in red	198
Figure 138: number of visitors in the city of Berat from 2006 to 2019	198
Figure 139: Economic sectors - shares in % (2019)	199
Figure 140: Buffer Zone and Historical Centre, Berat UNESCO, 2008	201
Figure 141: Land Use & Protected Areas Map, (Geoportal ASIG, n.d.).....	202
Figure 142: Tourists number in Albania from 1993 to 2019. Source: Institute of Statistics and World Bank.....	204
Figure 143: Statistics regarding tourism in Albania	204
Figure 144: Countries with the largest number of tourists in Albania	205
Figure 145: Arrivals in Albania by transportation mode for the years 2015 - 2019 (cumulative). Source: Institute of Statistics and own analysis	206
Figure 146: Arrival of international tourists in Albania according the transportation mode used from 2014 to 2019	207
Figure 147: (on the left) the road from Berat to Tirana International Airport according to Google Maps	207
Figure 148: (on the left) Average spending per overnight stay and per year in Albania for the period 2015-2019 (on the right): Average length of stay in Albania for the period 2015 - 2019 Source: Institute of Statistics and own analysis	208
Figure 149: Revenues (in million Euros) from the touristic sector for the period 2015 - 2019. Source: Institute of Statistics and own analysis	209
Figure 150: Number of tourists (both international and domestic) in the city of Berat for the period 2015 - 2019, Source: Regional Directorate of Culture and own analysis.....	211
Figure 151: (on the left) Average spending per overnight stay and per year in Berat for the period 2015-2019, (on the right): Average length of stay in Albania for the period 2015 - 2019 Source: Institute of Statistics and own analysis	211
Figure 152: Berat's pilot area in SUSTOURISMO	224
Figure 153: Flow diagram for Berat's TP1	227
Figure 154: Flow diagram for Berat's TP2	229



Figure 155: Part of the text of the Memorandum of Agreement signed between the Regional Council of Berat the Artisan Centre “Margarita”	230
Figure 156: State roads, Area Belgrade (Source: Public Enterprise Roads of Serbia website https://www.putevi-srbije.rs/images/pdf/referentni-sistem/Karta_drzavnih_puteva.pdf)	233
Figure 157: Top 5 Origin Countries for Serbian International Tourism (top arrivals), 2018 (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019)	235
Figure 158: Number of over night stays of tourist from countries that visit Serbia the most (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019)	236
Figure 159: Number of domestic tourists at national level, from 2015 to 2018 (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019).....	236
Figure 160: Number of arrivals of foreign tourists in Belgrade, from 2014 to 2018 (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019)	237
Figure 161: Arrivals of domestic tourists in Belgrade, from 2014 to 2018 (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019).....	237
Figure 162: Walking tour in Belgrade (google maps background used, picture further elaborated by FTTE)	242
Figure 163: Flow diagram for Belgrade TP1	245
Figure 164: Flow diagram for Belgrade TP2	247
Figure 165: SUSTOURISMO app and benefiting effect.....	249

TABLE OF TABLES

Table 1: SWOT for Thessaloniki in the context of SUSTOURISMO project	31
Table 2: SWOT Analysis for Igoumenitsa in the context of SUSTOURISMO project.....	58
Table 3: SWOT Analysis for Preveza in the context of SUSTOURISMO project	77
Table 4: SWOT analysis for Emilia-Romagna and Ravenna in the context of SUSTOURISMO project	96
Table 5: Points in SUSTOURISMO app per action	99
Table 6: Satisfaction per transport mode	124
Table 7: SWOT for SUSTOURISMO FVG case	127
Table 8: Road network in Slovenia in km, 2019	134
Table 9: SWOT for Ljubljana in the context of SUSTOURISMO project	148
Table 10: Interested stakeholders for supporting SUSTOURISMO goals in this phase.....	150
Table 11: International tourist arrivals, overnights and average spending in Montenegro in 2019	184
Table 12: Total tourist arrivals and overnights in Tivat in 2015-2019.....	185
Table 13: Tourist arrivals and overnights in Montenegro and Tivat in 2018	185
Table 14: Total number of passengers at Tivat Airport in 2015-2019	187
Table 15: SWOT for Tivat in the context of SUSTOURISMO project	192
Table 16: SWOT for Berat	222
Table 17: Interested stakeholders for supporting SUSTOURISMO goals	230
Table 18: SWOT for Belgrade in the context of SUSTOURISMO project	241



Table 19: Key services included in the first year of SUSTOURISMO testing phase & cooperation schemes supporting provision 253

This report has been produced as part of SUSTOURISMO project (<https://sustourismo.adrioninterreg.eu>).

SUSTOURISMO project is funded under the Interreg V-B Adriatic-Ionian programme and the S.O. Promote the sustainable valorisation and preservation of natural and cultural heritage as growth assets in the Adriatic-Ionian area.

This deliverable has been produced with the financial assistance of the European Union. The content of the deliverable is the sole responsibility of SUSTOURISMO Partnership and can under no circumstances be regarded as reflecting the position of the European Union and/or ADRION programme authorities.

1. Introduction

1.1 Work package T1; “Tourism in ADRION; understanding the needs under a sustainability spectrum”

Work Package T1 is the first technical package of the project essentially crucial, as under its context the basis of the SUSTOURISMO project will be set, leading to the Transnational Action Plan of the project. The Action Plan as depicted in figure 1, is based on four main pillars, directly related to all the package’s activities.

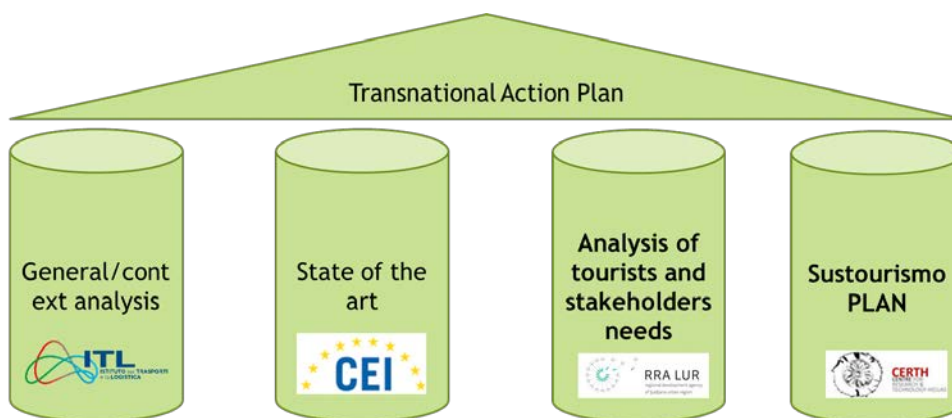


Figure 1: Transnational Action Plan of SUSTOURISMO project

WPT1 Activities are strictly related to each other providing the info needed in order the testing phase of the SUSTOURISMO project to be prepared. More specifically the four Activities are structured as follows:

Activity T1.1 is entitled ‘The tourism culture of ADRION; EU, ADRION and national/local strategies’ and its main objective is the definition of priorities in terms of sustainable tourism via sustainable mobility for each pilot case, in order to be considered during the pilot’s and **touristic packages’ (TP)¹** design and implementation process. For this, a series of actions have been designed and implemented including the analysis of existing policy/legislative/strategic documents and action plans for tourism promotion at EU, ADRION region and national levels, the analysis of existing cooperation schemes on tourism promotion and cross-sectorial cooperation schemes that have proven effect on users’ needs coverage.

¹ *In SUSTOURISMO project, with the term ‘touristic packages’ we refer to the joint promotion of sustainable mobility modes and ways of transport and of other services of touristic interest.*



Activity T1.2 entitled 'Capitalizing on past and ongoing experience on sustainable tourism and on initiatives for user's engagement in sustainable planning' aims to perform a state of art analysis on previous projects' results at EU level as well as smart applications that have already successfully been promoted by other countries achieving a high level of tourists' engagement and participation. This approach provides to all partners the opportunity to exchange experiences while it also inspires them to decide the appropriate for each case pilot and touristic package.

Activity T1.3, entitled, 'Common tourism identity in ADRION; needs and challenges' aims to identify and analyse the tourists' different needs in each pilot case, while it also examines and captures stakeholders' needs in terms of various contexts such as economic, infrastructure, services provision, etc. In this framework, interview surveys in tourists are conducted, while also round tables with stakeholders' participation are organized following a common approach in all pilot cases.

The last one Activity T1.4 entitled 'Preparing the ground for SUSTOURISMO testing phase', is based on the results of all three previous activities in order the SUSTOURISMO plan to be prepared and elaborated for the promotion of sustainable tourism via sustainable mobility in Adrion touristic areas. Activity T1.4 is described in more detail in the following section.

WPT1 is linked with the other two technical Work Packages of the project, as it concentrates useful information that will be the basis for the SUSTOURISMO app development, the core product of the project (under WPT2) as well as the pilots' and touristic packages design, while it also collects information from the relevant capitalization activities organized to take place under WPT3 according to the Application Form of the project. The SUSTOURISMO plan that will be elaborated under this Work Package will also be the basis for the SUSTOURISMO Transnational Strategy to be developed under WP3.

1.2 Activity 1.4; "Preparing the ground for SUSTOURISMO testing phase"

Activity T1.4 as mentioned in the previous section, is based on the state of art results as well as the tourists' and stakeholders' needs and priorities definition, in order a clear image to be shaped by each pilot case regarding the actions and the touristic packages' design for the promotion of the sustainable tourism in ADRION cities. The actions will include the SUSTOURISMO app development and the rewards for tourists who will download and use the app. In this context, under Activity T1.4 the project's partners will formulate the SUSTOURISMO network, identifying key players in order to engage them to reward schemes and signing relevant Memorandums of Understanding for ensuring a fruitful cooperation throughout the project's duration.

In more detail, a first attempt for the description of the SUSTOURISMO app architecture and its services is presented in Chapter 3 of the current deliverable. Based on this description the app's developers will finalize the SUSTOURISMO app architecture under WPT2. Moreover, the first Round Table to be organized by all partners under WPT3 will feed the pilots' and touristic packages' design process leading to more concrete ideas of the appropriate pilots to be tested during WPT2.



1.3 Deliverable Structure

The current deliverable is structured around three chapters except of the (first) introductory one; the second contains the description of the SUSTOURISMO Touristic Packages (TP) per SUSTOURISMO case as well as the procedure for concluding in the proposed TPs, the third one links the TPs with the SUSTOURISMO app to be developed while the last concluding chapter presents the TPs main components in a nutshell so as the interested reader to reach a quick understanding of the TPs per case.

2 The special context of SUSTOURISMO cases

2.1 The case of Thessaloniki (Greece)

2.1.1 The overview of Thessaloniki city

In the framework of SUSTOURISMO project, CERTH /HIT is responsible for the pilot case of Thessaloniki, GR - Figure 2 (Thessaloniki is a city in the Region of Central Macedonia in Greece).



Figure 2: The pilot area of Thessaloniki

Thessaloniki is the second largest city at national level and the first one in the Region of Central Macedonia (RCM) as its population corresponds to the 17% of the whole region's population. The city of Thessaloniki is the capital of the Region having a dynamic role as a metropolis of the



Balkan region. The city is a strong political, economic and industrial centre in northern Greece and for many years has been an attractive tourism destination. **Built near the sea**, at the back of Thermaikos Gulf, it is a modern metropolis well known for a number of reasons such as its **rich historical and cultural heritage numbering 15 UNESCO sites**, its natural and geographic location, its **gastronomy**, **film festivals and events** taking place throughout the year and the fact that is the **second largest transport hub in the country**.

Traditionally, the city of Thessaloniki was characterized by a dynamic character and a high extroversion; its multicultural background, its port, the second largest port in the country, the Thessaloniki International Fair, its proximity to Balkans (road and railway gate of Greece from/to Balkans) and its strong link to academia were crucial reasons supporting this forceful profile. However, **intense deindustrialisation (businesses moved abroad to escape austerity) has started even from 1990's and continued strongly during the decade 2008-2018** (negative trends in the tourism, services and manufacturing sectors). The economic crisis that hit Greece since 2008, led to a reduction of the per capita domestic product of the Metropolitan Area of Thessaloniki by 35% (in 2015, the per capita GPD in Thessaloniki was 13.628 euro while in 2008 it was 19.454 euro, ELSTAT data) and to a high unemployment rate (around 30%) which is even higher for young people. The 'brain drain' is a phenomenon with great dimensions during the last decade. In addition, traditional local markets and local micro-entrepreneurship have shrunk dramatically. Bright exceptions however exist since the city has much invested the last years in recovering from the hard economic situation; entrepreneurship has shyly started arising while local actions and initiatives are supporting start ups. Within 2014-2016 the previous negative trend in GPD has slowed down and reversed in 2017 however for recovering much are needed; in 2018, the unemployment has slowed to 20.7% (167.8 thousands) which is still quite above the before-crisis values, although it has been steadily decreasing since 2013 (1). Basic infrastructure projects completion (such as roads, airport modernization, metro system operation etc.) and higher private investments along with innovation boost can be the way out of the crisis. **ICT, digitalization and innovation are on the crux of city's and regions agendas** while support of tourism sector seems also a top priority.

As for all countries, COVID-19 pandemic, has influenced hardly Thessaloniki's economy, an influence that is vague enough when will disappear.

Regarding city's position in the transport networks, Thessaloniki is located at the crossroad of the **two most important national road axis** (PATHE motorway, Patras/Athens/Thessaloniki/Evzonoi - Greek - FYROM borders and Egnatia Odos linking Igoumenitsa - Western Greece - to Greek - Turkish borders) providing entrance to Eastern Europe and Balkans (Figure 3).

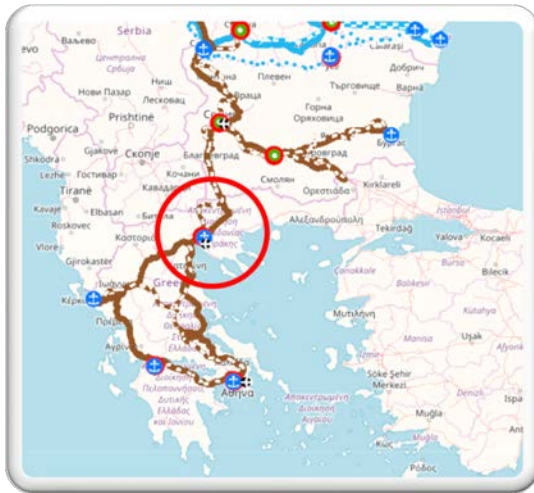


Figure 3: The location of Region of Central Macedonia at the TEN-T

Thessaloniki is the Greek rail gateway to Balkans (Figure 4, the first red circle from the left) through Sofia (BG) - one train operates daily on the route Thessaloniki - Sofia - Thessaloniki. The itinerary Thessaloniki - Skopje - Beograd operates on a seasonal basis and will operate in the beginning of the Summer 2020 again.

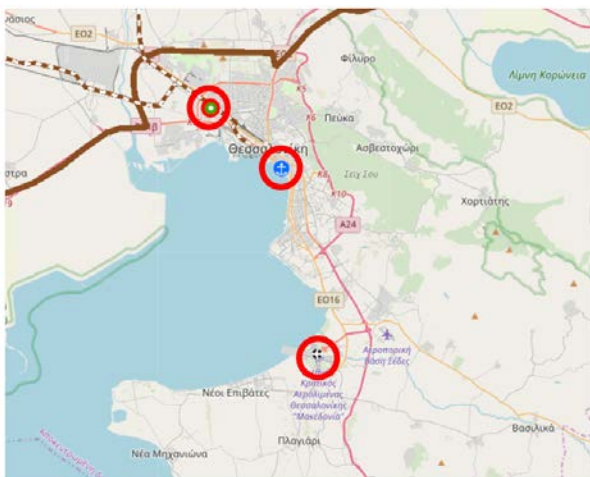


Figure 4: The location of Thessaloniki at the TEN-T network and the transport nodes

The second largest port of Greece is located in Thessaloniki, however it is not serving high passengers flows. Cruise tourism has started however rising in Thessaloniki (Figure 4, red circle in the middle).

Thessaloniki Airport (SKG) (Figure 4, red circle at the lower point) is an international airport serving the wider area. It is the **second-busiest airport in Greece in terms of flights served** and the **third-busiest in terms of passengers served** in 2016, with over 6 million passengers.

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 much from local authorities; therefore an extensive bike and walking paths nexus has been created in the city connecting also the outer of Central Business District areas. Furthermore, 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 as in Figure 5.



Figure 5: Urban Sea Transport of Thessaloniki

Lastly, the last years shared **bikes and e-scooter companies** have started offering services to Thessaloniki's citizens and tourists (stations are found at many points around the city).

2.1.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Thessaloniki

The current chapter discussed the tourism data for the Greek SUSTOURISMO case up to 2020 when the outbreak of COVID-19 pandemic caused a harm effect on tourism and transport as well as in the majority of daily operations (it is estimated that up to 70% decline faced in tourism industry in Greece during 2020). The tourism data presented regard all three levels, national (Greece), regional (Region of Central Macedonia) and local (Thessaloniki city) and are analyzed in order to



come up with insights and opportunities for the case of Thessaloniki that represents the Greek pilot case in SUSTOURISMO project.

- **National level**

As stated in the OECD Tourism Trends and Policies 2020 (2), tourism is one of the most important sectors of the Greek economy and a key pillar of economic growth.

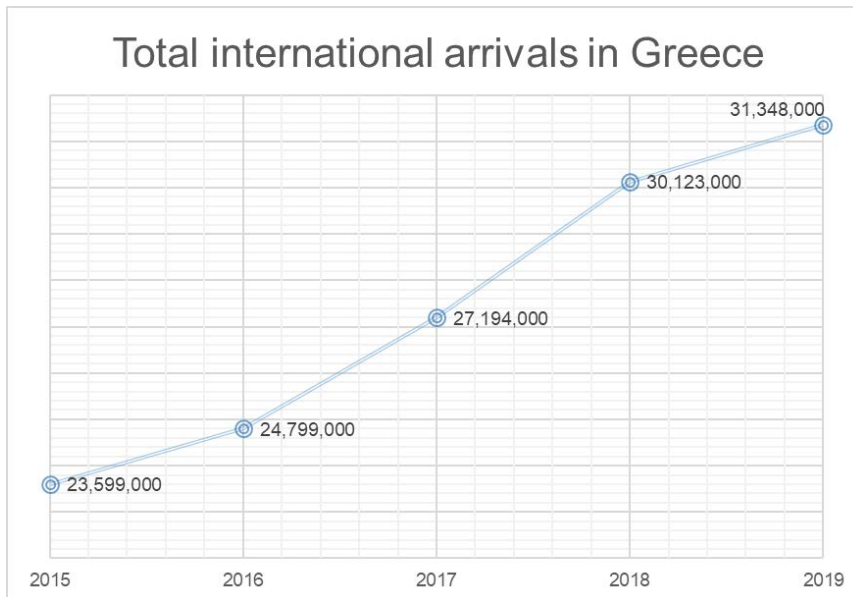


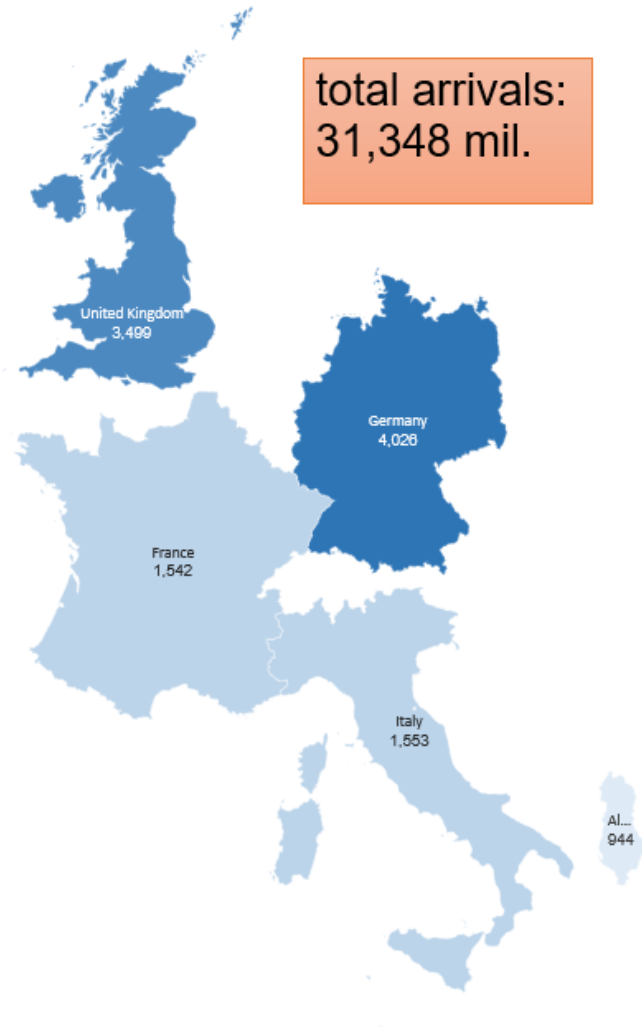
Figure 6: Total international arrivals in Greece 2015-2019 [Source: insete.gr]

Tourism GDP accounted for 6.8% of total GVA in 2017. The sector directly employed 381 800 people in 2018, accounting for 10.0% of total employment in the country. Tourism is an export champion in the Greek economy. Travel exports accounted for 43.3% of total service exports in 2018. In 2018, inbound tourism to Greece was at an all-time high with a record 33.1 million international tourist arrivals, an increase of 9.7% over 2017. Tourists from other EU countries accounted for almost two-thirds of total visits, an increase of 15.1% over the previous year. The volume markets of Germany (+18.2%) and France (+7.3%) grew significantly, recording a total of 4.4 million and 1.5 million visits respectively, as did arrivals from the United States which reached 1.1 million visits, representing an annual growth of 26.9%. Nights in all means of accommodation rose by 8.1% compared with 2017, to reach 230.7 million.

Also, in 2019, the upward trend of international tourist arrivals continued reaching the top number of 31.348.000,00 arrivals and giving to the country a revenue of approximately 17,7 million euros.



Greece:
top origin countries based on No of arrivals, 2019 (in millions)



Powered by Bing
© GeoNames, Microsoft, TomTom

Figure 7: Top Origin Countries for Greek International Tourism (top arrivals), 2019 [own elaboration of data from insete.gr]

The main origin countries that refer to the top 5 arrivals are Germany, United Kingdom, Italy, France and Albania.

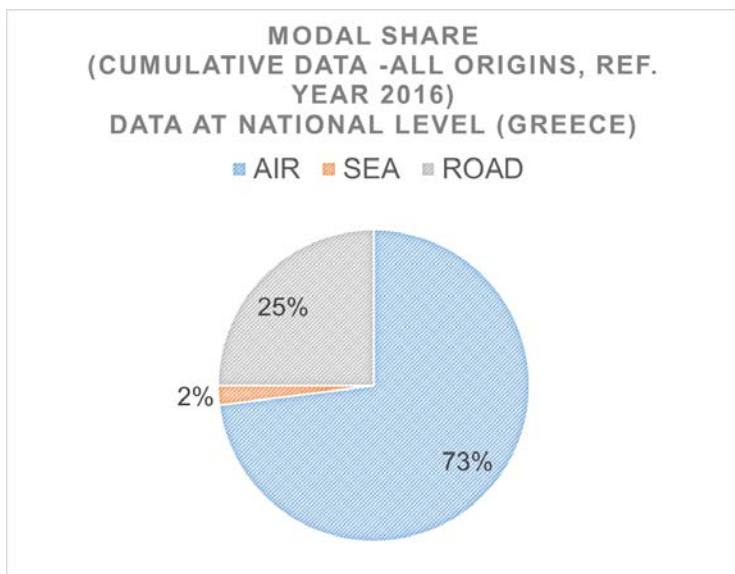


Figure 8: Average spending per trip per tourist, 2015-2019 data [insete.gr]

The majority of tourists arrives by airplane (low cost airlines have played crucial role in this selection, results of Inter-Connect Interreg ADRION project) while when focusing on tourists from Western Balkans, the private car is predominant which can be a sign on the low public transport connectivity of the area and its last leg, Greece. Italian tourists seem also to choose sea transport when they are visiting the wider catchment area of the western Greek ports (Igoumentista, Corfu, Patras).

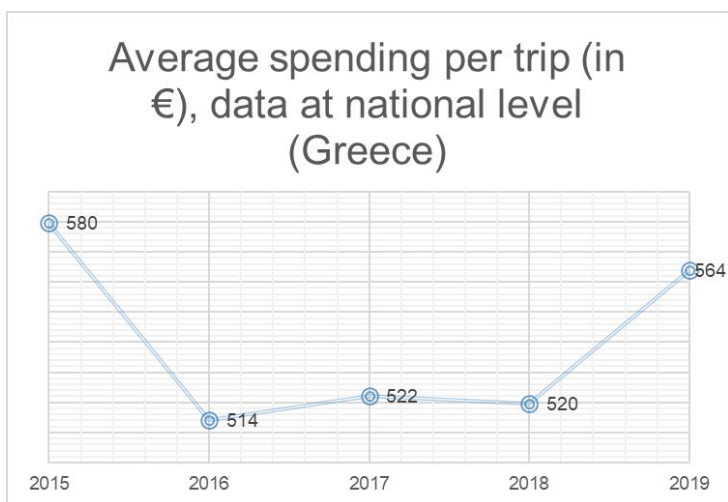


Figure 9: Average spending per trip per tourist, 2015-2019 data [insete.gr]



The average spending per tourist seems to be stable enough within the years, around 500euro per person is spent in Greece.

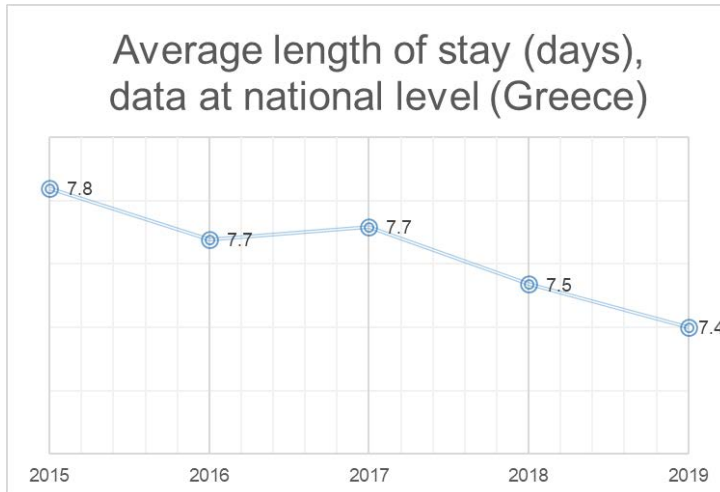


Figure 10: Average length of stay, 2015-2019 data [insete.gr]

The average length of stay seems also stable throughout the last years, around one week, with a slight decreasing trend. Combining the data of the above figures, the relevant stakeholders in the tourism sector considering also the orientations of the general tourism policy can conclude in suggestions on how to increase the revenues of the sector (i.e. should we offer more alternatives, do we need to focus on city breaks?).

Domestic tourists made 5.7 million trips in 2018, up 3.6% over 2017. Only 4.7% of domestic trips were for business purposes in 2017, with the vast majority being leisure orientated. The majority of domestic visitors stayed with friends or relatives or in other non-rented accommodation, with only 34.2% of visits using paid accommodation.

- **Regional level**

Region of Central Macedonia (RCM) has become Greece’s most popular region for tourists, winning over international visitors and welcoming 7.9 million tourists in 2018, up by 22 percent against 2016, and accounting for 22 percent of all visits to the country, making it the leading region welcoming the country’s international arrivals recent data revealed (3). As depicted in the following two figures, the figures (arrivals and revenues) are slightly reduced for 2019 which may be interpreted as an alert.

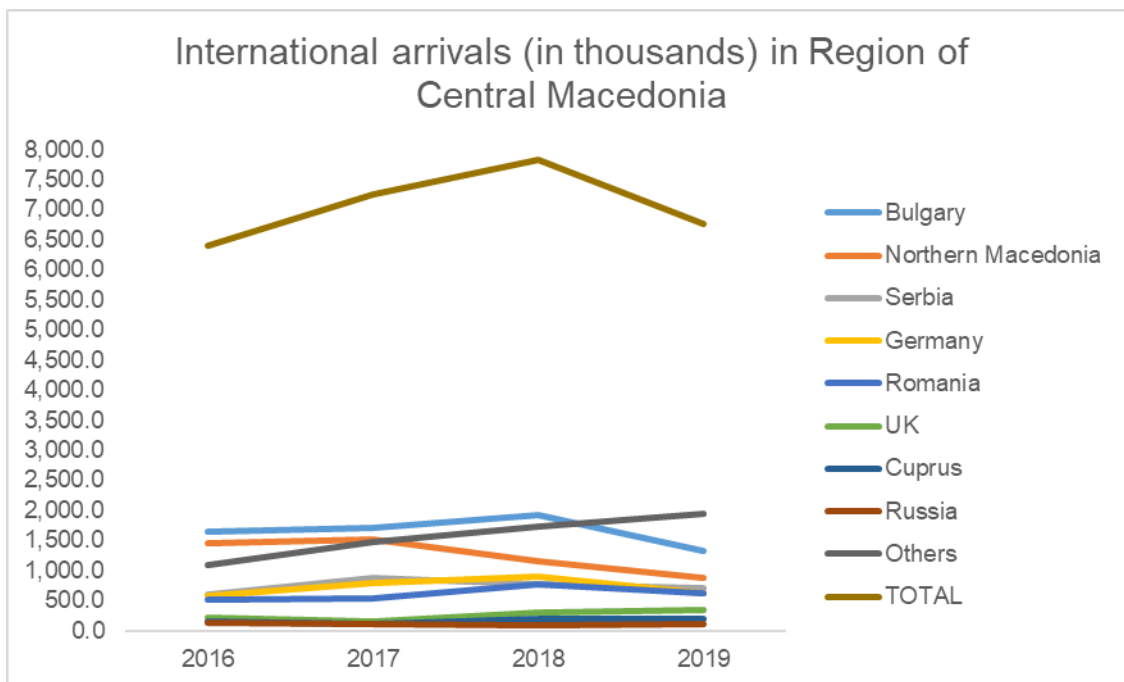


Figure 11: International arrivals at RCM [insete.gr]

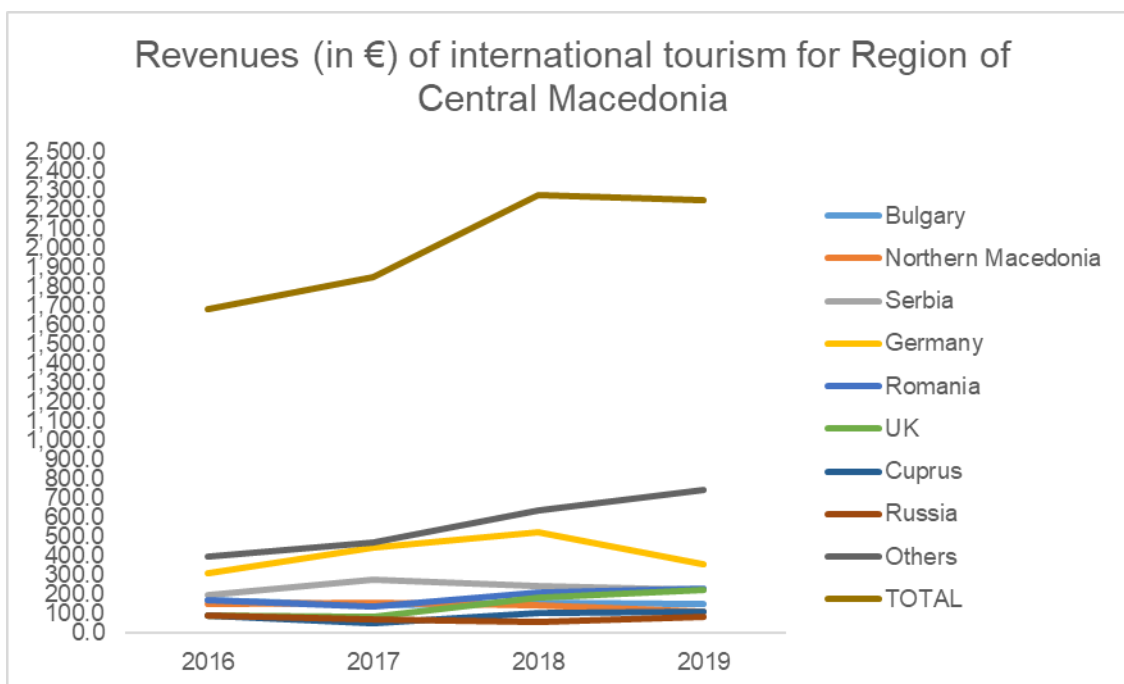


Figure 12: Revenues from international arrivals at RCM [insete.gr]



Figure 13: International arrivals at Thessaloniki's Airport [www.hcaa.gr]

According to INSETE's Greek regions competitive study, the region recorded a 35% rise in tourism-related revenue to 2.3 billion euros compared to 2016. People from Israel seem to be a dynamic pool of tourists for the Region taking advantage and simultaneously pushing the air connectivity upgrade between Israel and air hub cities in RCM. France and Bulgaria are also countries that show their interest for the natural and cultural beauties of the area.

The main airport in the Region of Central Macedonia is Thessaloniki's International Airport which is the second biggest airport in Greece located 14 km of the city centre and serves many connections at European level as depicted in the following figure.



Figure 14: Connectivity of Thessaloniki's Airport [Thessaloniki Convention Bureau]



Thessaloniki is easily reached by direct international flight connections to about 117 direct destinations, including major cities around the world and has 22 daily flights to Athens (4).

The last years, before 2020 and COVID-19 pandemic, efforts for supporting also cruise tourism in Thessaloniki and its wider area were made without however reaching the desired levels yet.

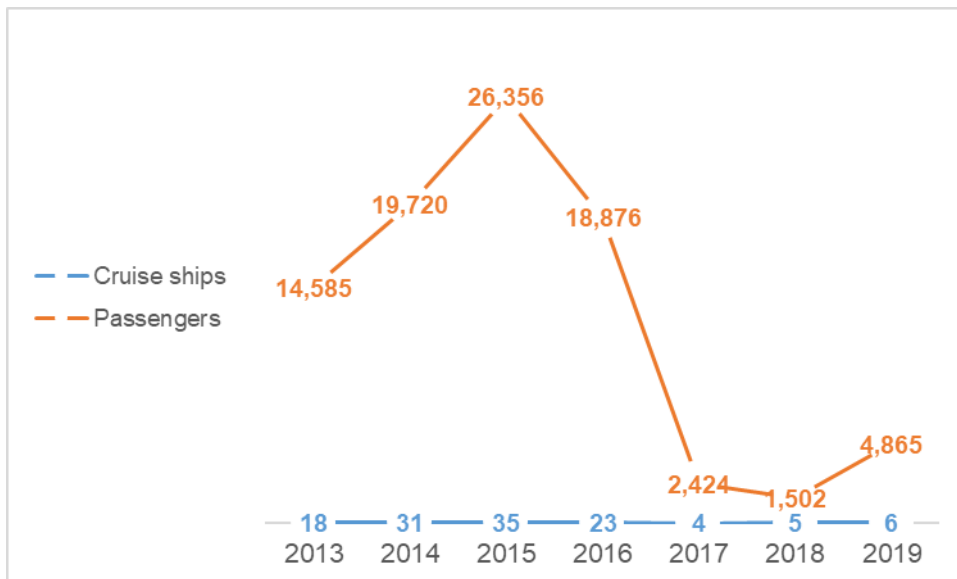


Figure 15: International arrivals at Thessaloniki's Airport [www.hcaa.gr]

International rail (combined with bus services when the demand is not so high) connections from Skopje and Sofia to Thessaloniki are also trying to attract and serve tourists from Balkans the last years where the re-operation of international rail services took place.

Regarding domestic tourism, the following figure depicts a rising trend of RCM up to 2016 and then a slight decline.

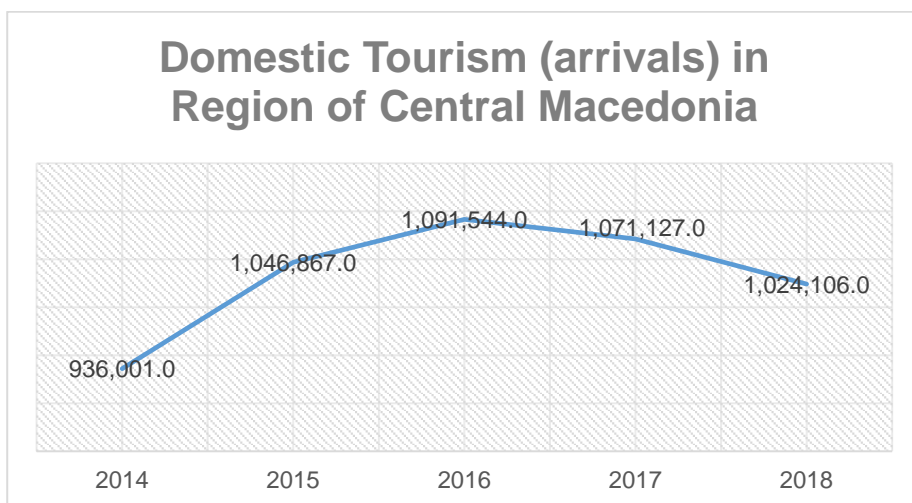


Figure 16: Domestic Tourism in RCM [insete.gr]

- **Metropolitan/City level**

Thessaloniki is a place offering different opportunities to a tourist. Its natural and cultural beauty, its nightlife, the cuisine, the proximity to Halkidiki (famous beaches), its students' community (many academia and research institutes), the festivals are all of them main attractions for tourists. It seems that the last year, combined and coordinated actions including great efforts of the Thessaloniki Tourism Organization (TTO) (5), have upgraded the interest of tourists for the city.

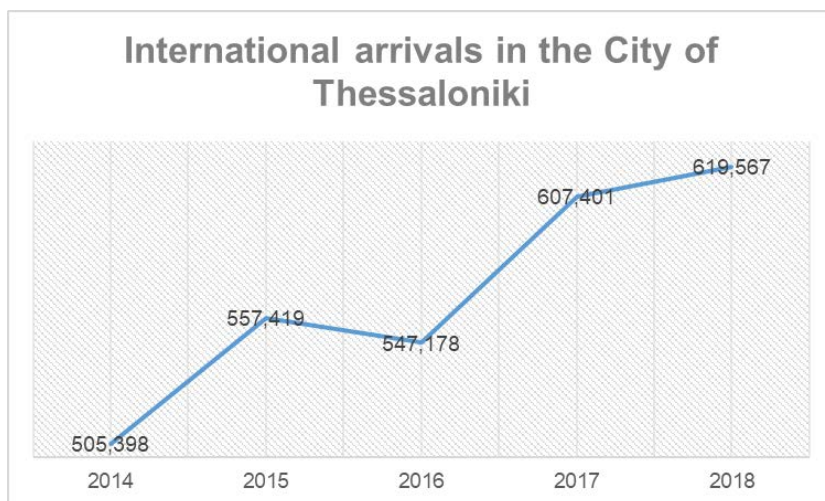


Figure 17: International arrivals in Thessaloniki [insete.gr]

Thessaloniki traditionally captures also domestic tourism as depicted in the following figure.

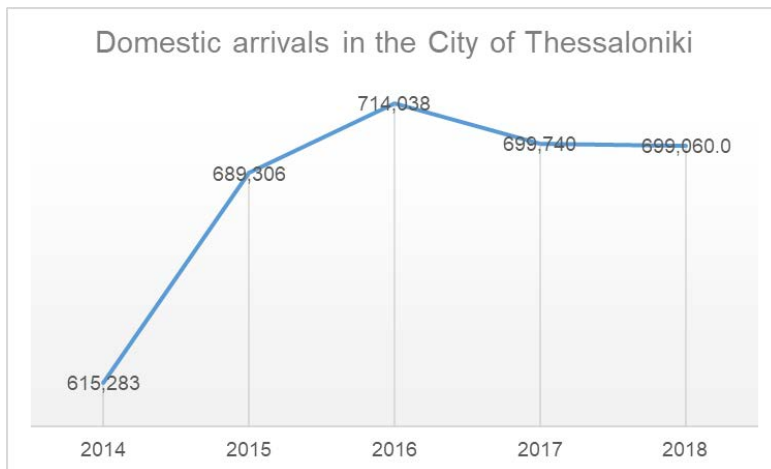


Figure 18: Domestic tourism in Thessaloniki [insete.gr]

As a takeaway of the tourism data critical interpretation (with the injection of existing knowledge on the tourism sector progress as well as of the general overview of Thessaloniki’s connectivity (above) we can say that the last years Greece and RCM have well triggered tourists’ interest while more focused actions in line with the umbrella strategy for tourism can show the way towards further tourism development. Also, Thessaloniki as a city presents many opportunities for tourism growth achievement however, better coordinated actions as well as the strong involvement of local community seem to be prerequisites for reaching the set goals.

2.1.3 Searching the tourism policy background and finding gaps and opportunities

The review of national, regional and local strategies and initiatives that took place in the context of Del. T1.1.1. ‘The SUSTOURISMO context. Analysis of policy documents on sustainable tourism and transport in the ADRION area (6) had as a final goal to identify areas of interventions according to the already published and followed tourism strategy.

The review of the strategic documents revealed basic axes around which Thessaloniki can concentrate. These axes are:

- Development of **integrated** and thematic tourism products that will promote the character of **‘unique experience’** through the use of alternative transport modes.
- **Attraction of new investments**, which will also include mobility investments for providing to all visitors’ alternative options to visit the touristic sights in a more sustainable way.
- Development of **alternative-to-car traffic networks** at destinations and promotion of ‘city break’ tourism through the design and implementation of integrated pedestrian and bicycle networks which will upgrade the urban environment and will enhance the alternative



transport trips. Alliances (i.e. authorities with industry, local communities and key stakeholders) and tailored to the city-needs cooperation schemes are deemed necessary.

- Creation of an **integrated bicycle network and expansion of the bike-sharing network**.
- **Reorganization of the existing Public transport system** of the city.
- Development of **thematic paths** in the context of city break development product which can be accomplished by:
 - Short walks in easy-to reach areas for pedestrians
 - Routes through selected sights and 'experiences' of the city presenting a common theme (e.g. museums, archaeological sites, highways)
- **Enhancement of maritime services** in the context of the Maritime Tourism Development product, which can be accomplished by:
 - Excursions to coastal destinations
- **Promotion of sustainable mobility** in tourists through the **use of marketing tools such as mobile applications** providing information for alternative trips within the visiting region.

Based on the above and on the current situation in Thessaloniki's connectivity and transport services provided to tourists (relatively low attractiveness of public transportation, absence of harmonized and integrated services), this is probably the time for Thessaloniki to catch up; upgrade public transport services - an action that will boost the tourism sustainable growth of the city -, further support the creation of integrated and organized pedestrian and bicycle networks connecting the city's points of interest - an action that will promote the completion of sustainable travel trips within the city - and start involving local community and entrepreneurship to a user-centered and a digitalized era for tourism (and not only) sector.

2.1.4 Learning from best practices on tourism and mobility

The state of art review on previous projects and ongoing innovative initiatives from across Europe that boost sustainable tourism development took place under Deliverable T1.2.1 'State-of-the-art on sustainable tourism' with a view to learn from the others and successfully transfer best examples to SUSTOURISMO cases (7). CERTH/HIT identified for Thessaloniki some interesting points from the review of the best practices that are:

- **Creating touristic packages** for attracting visitors such as guided tours passing from specific points of interest within and outside the city combining workshops related to the area's local traditions and features (8)
- **Creating a network committed to the promotion of sustainable mobility in tourism** by adding new sustainable mobility services (bike rental services, bike carriage services and flexible transport services.) for visiting specific tourism destinations.



- **Raising awareness** and familiarizing tourists with e.g. the culture, heritage and customs of a destination enhancing the likelihood of making sustainable in-trip choices through the provision of located based services (9)
- Introducing **visitor management techniques** such as queues, reservations, pricing, timed entry etc. for facilitating the tourist experience. A typical example is the use of **touristic cards** providing free access and electronic pass to main tourist attractions and public transportation systems, reduced rates for taxi and car-share, etc. (10), (11), (12)

Building on the above experience and taking into account the inherent characteristics of Thessaloniki, a first mapping of city's strong points that could be combined under touristic packages can be;

- Its **coherent historical city centre** where numerous of museums, monuments and archaeological sites are concentrated provides the opportunity to implement well-designed **guided thematic walks**, providing tourists the opportunity to visit specific points of interest of the city **on foot, or by bicycle**. Its **gastronomy** can lead to the creation of guided tours passing from specific points of interest **combining workshops** related to the area's local cuisine
- Its beautiful beaches providing '**Sea & Sun**' activities are located in 30 minutes distance from the city centre offering the opportunity to increase planning capacities on sustainable mobility of port cities through specific actions such as organization of **coastal trips** from the city centre combining also the use of bicycle
- A **modern bicycle rental system** already operates in the city giving the floor for future extension and infrastructure improvement
- The recently **innovated sea front** is one of the most frequented places for both tourists and visitors and provides direct connections of the city centre with the east and west part of the city via walking, bicycling or using the sea transport system

What the city needs however to tackle in order to achieve the provision of integrated services combining sustainable mobility and unique city experience is the low private sector participation in such initiatives, the absence of established collaboration schemes between the tourism and transport sector, the low interest or awareness of tourists for sustainable options and the low interest of local community to participate in coordinated efforts for promoting such integrated offers.

2.1.5 Learning from tourist surveys - the path forward as revealed by the tourists

The survey conducted for the case of Thessaloniki involving 300 tourists during September 2020 had as a goal to identify the needs of tourists and relate them to existing or potential mobility services and provisions. The timing of the survey unfortunately was not the favourable for tourism as a result the sampling was not the most representative. The COVID-19 pandemic which has



spread all over the world from the beginning of 2020, has adversely affected the tourist sector in Greece and has created a series of problems and distortions as far as tourism in Thessaloniki City is concerned, which in turn affected the characteristics and the quality of the responses - and, thus, the conclusions - of the survey itself. Focusing on the international tourists and trying to extract circumstances-independent needs (unaffected as possible by the pandemic), key takeaways from the survey are (13);

- Thessaloniki is a city that attracts tourists mainly for the ‘Sea and Sun’ product (proximity to Halkidiki, within one / two-hour drive from Thessaloniki and known for its sandy beaches and being one of Greece’s premier tourism destinations) however, there are less known and currently unexplored (and not well exploited so far) aspects and provisions the city can offer that worth further investing in; i.e. **cultural and natural areas, history, gastronomy, creative industries** etc.
- The proximity of Thessaloniki to the archaeological site of Vergina in the west to Mt. Olympus in the south and the monastic colony of Mt. Athos in the east is a point that can be further supported when we talk about tourism boost of the area. **Connection of this areas with the city centre of Thessaloniki with sustainable mobility options can mutually support areas’ growth and attractivity.** However, the **lack of the appropriate infrastructure** to support the use of alternative transport modes somehow impedes the whole idea.
- **An integrated app offering touristic information while giving the floor to tourists for expressing their ideas and complaints, seems that it is an interesting provision** at least for younger people. From one side, the city’s current level of digitalization is a gap that has to be covered soon enough while from the other side it is difficult enough to persuade tourists to download and use such an application. A structured promotion of such an app and the involvement of a good number of stakeholders giving offers to tourists are points that can add on app’s popularity. Therefore, the more the provisions through the app, the more the tourists will use it and the more the information and data captured to support policy making in tourism.
- **Daily excursions to the east part of Thessaloniki where beautiful beaches are located seems 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 might turn tourists in favor 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.
- The development of a **pre-paid touristic card** seems to interest tourists as according to their needs such a card would facilitate their trips providing ‘free access to the city’s public transportation system’, ‘offers regarding the provision of HO.RE.CA services’ and ‘free



access to museums and cultural sites. However, crucial issues such as the absence of strong collaboration between tourism and mobility key players may complicate and prevent the completion of such an initiative.

- **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. Taking into account, that a number of points of interest are located within the city centre, the idea of designing such tours seems a great opportunity for promoting sustainable tours within the city centre.

2.1.6 Listening to tourism and mobility stakeholders - insights from the 1st Technical Round Table

Thessaloniki's stakeholders' needs were identified through their participation in the first virtual SUSTOURISMO Round Table entitled '*Sustainable Tourism and Mobility in Thessaloniki. Needs, Requirements and Challenges for a Sustainable Development*', virtual event on the 4th of December 2020 [14]. During the RT, the key players from tourism and mobility sectors shared the following ideas and thoughts regarding the mutual support of sustainable tourism and mobility;

- **Synergies** between the local authorities and the private sector could lead to the development of touristic packages promoting the use of alternative transport modes within and outside the city and should be strongly supported. However, in some cases such an interest is not obvious from one or both sides, while also a discontinuity of efforts seem to play a negative role in the implementation of such initiatives.
- **The absence of an integrated tourism card combining both the provision of tourism and transport services to tourists**, is a crucial tourism-transport service missing from Thessaloniki according to all participants opinion. Therefore, a great opportunity arises for developing such a card in order Thessaloniki to be a modernized city destination facilitating its visitors' trips within and outside its urban area. A strong willingness to participate in the development of such a card has been noticed by all participants, however, institutional and legislative issues seem to prevent the process and need to be directly overcome.
- **Digitalization** of tourism sector seems as a necessary step towards both sustainability and profit increase
- **Engagement of tourists and stakeholders in mobility & tourism sector and integration of planning** seem also prerequisites
- Crucial conditions to be considered for ensuring a successful implementation of the touristic card are:
 - the introduction of a "smart ticket" in the Public Transport system of the city
 - ensuring security during the trip and provision of rationalized trip costs
 - all services should be carefully designed and developed, easy to use while the trip cost should be relatively low



- a complete touristic package should be developed based on tourists' needs and requirements and taking into account all the limitations of built environment and existing anthropogenic activities.

2.1.7 Combining finding in a SWOT analysis for the case of Thessaloniki

Combining the insights of the above findings, the current subchapter concludes in a SWOT analysis for the SUSTOURISMO case of Thessaloniki that serves and is mutually served by the objectives of the project; tourism and mobility hand by hand development.

Table 1: SWOT for Thessaloniki in the context of SUSTOURISMO project

Strengths	Weaknesses
<ul style="list-style-type: none"> • Thessaloniki has the 2nd largest airport in Greece that offers a good level of connectivity. Charter flights are also serving other origin countries. • Thessaloniki attracts visitors from Northern European countries and Russia which shows a dynamic also outside Balkans which were main countries of origin for many years. • Thessaloniki being the second largest city in Greece with the reputation of a 'hospitable and romantic' city attracts also domestic tourists - the frequent air connectivity among Athens, the capital city, and Thessaloniki supports domestic tourism (domestic tourism is a trend in tourism after the COVID-19 outbreak). • Thessaloniki is the country's second most important commercial centre • Coherent historical city centre where numerous of monuments and archaeological sites are concentrated 	<ul style="list-style-type: none"> • Thessaloniki attracts traditionally many tourists from Balkans which due to the low connectivity with Public Transport they are using for the long trip their private vehicles, a fact that is transferred also to intra-city trips. A hidden opportunity is however found here, providing them with good public transport services within the city while offering good visibility of provisions and services can shift them to active mobility and Public Transport. • Relatively low interest for international rail services from tourists side / Thessaloniki lies at the last leg of Balkans and the current structure of rail services asks for high trip travel times which is a big drawback for rail tourism boost • Relatively low current level of digitalization • Absence of strong collaboration between tourism and mobility industry key players • Lack of information points



- Several museums are located within the city centre
- Rich and famous gastronomy tradition
- Beautiful beaches offering 'Sea & Sun' activities are located in 30 minutes distance from the city centre
- It can offer diversified products among which creative industries and conventional tourism needs' coverage
- Proximity to the region of Halkidiki (Greece's premier tourism destinations), to the archaeological site of Vergina in the west, to Mt. Olympus in the south and to the monastic colony of Mt. Athos in the east.
- Thessaloniki's recently renovated sea front is one of the most frequented places for both tourists and residents. Environmentally friendly connections between the the city centre and the east and west part of the city can be strongly supported via walking, use of the city's rental bicycle system and sea transport
- Thessaloniki's transport hubs; international airport, growing port, city's central position as a rail hub (gate to Balkans)
- Thessaloniki's location serving the wider area of Balkans
- Alliances among stakeholders as the Great Partnership of Central Macedonia consisting of the following partners: Region of Central Macedonia, City of Thessaloniki, Hoteliers of Thessaloniki, Aegean Airlines, Thessaloniki Tourism Organization, Halkidiki Tourism Organization,

- Lack of organized touristic packages offers and propositions for individual visitors
- Absence of an integrated touristic card (pre-paid card) combining both the provision of tourism and transport services to visitors
- Low public transport connectivity of Thessaloniki to the rest Southeast Europe (including rail connections) - when the transnational part of the trip cannot be implemented by Public or mass Transport, the use of private vehicles also at the last legs of the trip (intracity trips) is easier to be conducted by cars.



Eurobank and Marketing Greece S.A.

- Initiatives that have already started towards getting Thessaloniki to a digital era

Opportunities

- The last years there is an upward trend in tourist arrivals and revenues from tourism sector at national level from which Thessaloniki can benefit - Greek has started becoming a strong European destination, a fact from which opportunities arise.
- Northern European countries rank at the top of arrivals in Greece - therefore the tourists arriving have a relative good economic background and spending is high enough. Furthermore, tourists from Northern European countries have traditionally showed a high interest for cultural sites and alternative tourism products which Greece and Thessaloniki can serve (i.e. eco-tourism).
- Thessaloniki is the capital city of Region of Central Macedonia, a region that was the 'winner' of tourist arrivals before the outbreak of COVID-19 pandemic. Although Thessaloniki does not capture the total of arrivals, there is a great opportunity of mutual support cities of RCM from this great number of arrivals.
- The port of Thessaloniki is trying to be part of the transnational cruise industry - cruise can be a strong pool of tourists for the city.
- Introduction of new and innovative technologies for enhancing the

Threats

- Not to get full benefits from Greek high recognition as a destination
- Not fully benefit from cruise passengers' excursions (cruise passengers are mainly taking advantage of organized trips that do not include so far visiting the city center - they are often visiting Olympus mountain in the neighborhood Prefecture of Pieria)
- Poor infrastructure supporting the use of alternative transport modes
- Public Transport services that need enhancement
- Minimum participation in financing innovative activities and initiatives by the private sector
- Negative effects for tourism at meta COVID-19 era (travel restrictions, slow virus containment and low consumer confidence)
- Leaving Covid-19 pandemic knowledge unexploited, turn back on traditional approached
- Low interest of local community to participate in coordinated efforts, low current bottom up approaches
- Discontinuity of efforts and initiatives (risk)



'tourism and mobility' services provision

- Enhancement of tourists' satisfaction through the provision of attractive offers
- Creation of strong collaborative networks among the public and the private sector - involvement of academia and research as moderator/facilitator
- Potential for 'slow tourism' growth (walking and cycling trips for leisure) as an instrument to share interest and protect the cultural and historical heritage of the city
- Alternative offers; eco-tourism, agro-food tourism
- Thessaloniki belongs to the most visited region of Greece and to a Region that has much supported and continues to support innovation, digitalization and smart entrepreneurship all areas where tourism can add on and can benefit from
- COVID-19 fight through increase of safety - tourism restart in a more structured way taking advantage of the knowledge created during this period
- Digitalization of tourism product, offer of innovative services, enter in the blockchain era
- Becoming part of wider networks promoting sustainable tourism, getting involved in promotional campaigns, exploiting marketing techniques for promoting city's products and services (*e-smartec Interreg Europe 2014 - 2020 project proposes some very interest channels to reach audience, engage and raise awareness)
- Attraction of private funds



- Optimal exploitation of financial resources and mechanisms for promoting sustainable tourism
- Thessaloniki as a home port opportunity

2.1.8 Drafting of the SUSTOURISMO touristic packages of Thessaloniki

Based on the above SWOT results while having the interest of specific stakeholders for joining a touristic package scheme and the support of Thessaloniki's Tourism Organization, the touristic packages of Thessaloniki started being drafted.



Figure 19: Thessaloniki's pilot area in SUSTOURISMO

The pilot phase for Thessaloniki refers to the provision of the following two touristic packages;

1. **Touristic Package A: 'Discovering the Byzantine aspect of Thessaloniki through a walking tour full of stories while further exploring the city by bike!'**

Under this package, tourists will have the opportunity to select well designed and organized thematic walking or bicycle tours within the historical city center and get to know the city's long history, art, tradition, flavors and aromas on foot or by bicycle. Through this experience, tourists



will be able to get familiar with Thessaloniki’s identity, its people and their daily habits. The package will include a professional tourist guide accompanying participants and informing them about all ‘passing by’ points of interest, while also specific agreements with traditional restaurants, bakeries, pastry shops, etc. will be achieved for brief or longer breaks during the tour, giving tourists the opportunity to get familiarized with the city’s rich gastronomy (Figure 19, red area).

Cooperating hotels: Capsis Hotel, Bristol Boutique Hotel, Blue Bottle, Colors, Colors Ladadika, Colors Thessaloniki Leaving

Combination of services	Operators / companies that accepted to offer the services during the testing phase	Duration
1) A guided walking tour	AMMON EXPRESS (https://www.ammonexpress.gr/)	3h
2) A bike ride	City BIKE (https://city-bike.gr/)	1h

Short description of the provided services

The walking tour in the Byzantine history of Thessaloniki

Starting the guide walking tour at the Upper Town (Ano Poli)², the tourist(s) will have the opportunity to find out the Byzantine aspect of the city accompanied with an experienced tour guide-archaeologist . The ‘travel’ to the history, starts with the Old Monastery of Vlatadon³, the unique Byzantine Monastery that remains in operation in Thessaloniki and offers a wonderful panoramic view of “The Bride of Thermaikos Gulf”. Continuing, walking through the picturesque alleys of Ano Poli, the tourist(s) reach(es) the Church of Hosios David⁴ with the unique mosaic of the 5th century and the remarkable mural paintings. Afterwards, the tour continues with a visit to the church of Saint Nicholas Orphanos⁵, a particular graphic church with exceptional mural paintings of the 14th century. The next stop is the glorious Rotunda⁶, one of the most ancient and most impressive monuments of the city. Finally the tourist(s) visit(s) the church of Saint Sofia⁷,

² <https://thessaloniki.travel/en/exploring-the-city/interesting-districts/ano-poli-upper-town>

³ <https://thessaloniki.travel/en/exploring-the-city/religion/greek-orthodox-churches/item/967-vlatadon-monastery>

⁴ <https://thessaloniki.travel/en/exploring-the-city/religion/greek-orthodox-churches/item/968-church-of-osios-david-latomou-monastery>

⁵ <https://thessaloniki.travel/en/exploring-the-city/religion/greek-orthodox-churches/item/973-church-of-saint-nikolaos-orphanos>

⁶ <https://thessaloniki.travel/en/exploring-the-city/interesting-districts/rotunda-melenikoy-navarinoy-square>

⁷ <https://thessaloniki.travel/en/exploring-the-city/themed-routes/mosaics-route/item/978-church-of-saint-sophia>



the «Big Church», as it used to be the metropolitan church of the city with the famous mural painting on its dome of the 9th century and the Early-Christian chapters of the 5th century. Saint Sofia, as well as all the previous monuments, are parts of the World Heritage sites of UNESCO.

The 'overview' of the city by bike or e-scooter

The tourist that participates in the 1st package, can also enjoy a free 1h ride (bike or e-scooter) to further explore the city.

The time frame for participation in Thessaloniki's SUSTOURISMO touristic package No1

The tourist that participates in, this first for the case of Thessaloniki, SUSTOURISMO touristic package can experience both services within three days - i.e. in the rational of an integrated card valid for 72 hours with two services, each one provided once.

The procedure for participating/booking, the role of cooperating actors and the points collection through the app is

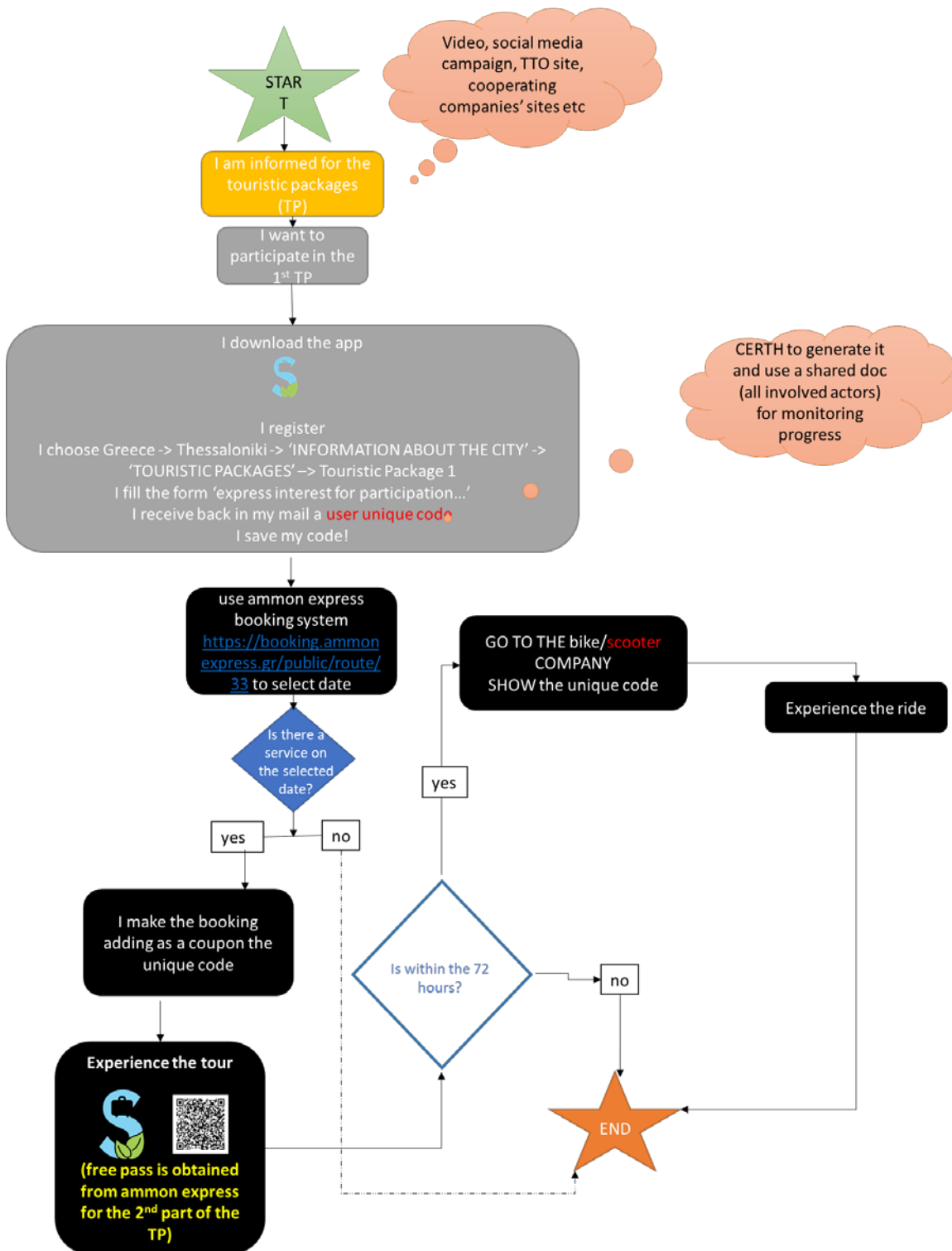


Figure 20: Flow diagram for Thessaloniki TP1



2. Touristic Package B: 'Walking talking food, Thessaloniki by boat & sea and sun experience'

Under this package, tourists will have the opportunity to visit famous beaches located at the east part of the city combining the use of sustainable transport modes (walking, bicycling, sea transport) (Figure 19, from city center - the red area - to the beaches at eastern part - green line). Special collaborations will also be examined and arranged among beach bars offering to tourists free umbrellas during their staying there or even refreshments in special prices. Possibility to use bikes for exploring the beaches will be explored.

Cooperating hotels: Capsis Hotel, Bristol Boutique Hotel, Blue Bottle, Colors, Colors Ladadika, Colors Thessaloniki Leaving

Combination of services	Operators / companies that accepted to offer the services during the testing phase	Duration
1) A guided walking tour	AMMON EXPRESS (https://www.ammonexpress.gr/)	2h
2) Traditional ferry boats from city centre to beaches of Peraia and the Neoi Epivates (and return)	Boats: KARAVAKI Thessaloniki Cruises (https://www.facebook.com/KaravakiThessalonikiCruises/)	50' trip duration (+ 50' return trip)
3) Free coffee in a beach bar in Neoi Epivates	Beach bar: WET RED ROSE (https://el-gr.facebook.com/WetRedRose)	Free time

Short description of the provided services

The walking talking food experience

The tourist(s) will have the opportunity to discover the unknown spots of the Greek cuisine in the city of Thessaloniki starting from 12 Tsimiski Street enjoying a traditional Greek coffee and getting ready to explore the city centre with all senses. As the tourists walk with an experienced escort - a professional of the Greek cuisine, they learn about the daily life in the city and details regarding the habits of the locals while treating themselves with traditional viands in the «hidden» spots of



the local markets. Among the stops of the tour are the local markets “Kapani”, “Modiano” and Louloudadika area⁸, groceries with organic products and “Athonos” square⁹.

Thessaloniki by sea - traditional boats from city centre to nearby beaches of Peraia and the Neoi Epivates¹⁰

The tourist that participates in the 2nd package, has the opportunity to explore the beauty of the city from a different point of view; traditional boat connects the port of Thessaloniki and the White Tower with the Blue Flag awarded beaches of Peraia and the Neoi Epivates. At the same time, it gives its passengers the opportunity to enjoy the beauties of Thessaloniki from another point of view, through a 50-minute route.

Sea and sun experience in Neoi Epivates before going back to Thessaloniki’s center

The ‘SUSTOURISMO’ tourist, when arriving in Neoi Epivates by boat, can enjoy a coffee in the beach bar ‘Wet Red Rose’. Then, the tourist can go back to the city center by the same boat (return trip).

The time frame for participation in Thessaloniki’s SUSTOURISMO touristic package No2

The tourist that participates in, this second for the case of Thessaloniki, SUSTOURISMO touristic package can experience all services within three days - i.e. in the rational of an integrated card valid for 72 hours (one guided tour, a round trip with the traditional boats, a coffee in Neoi Epivates).

The procedure for participating/booking, the role of cooperating actors and the points collection through the app

⁸ <https://thessaloniki.travel/en/exploring-the-city/interesting-districts/modiano-kapani-%E2%80%93-louloudadika>

⁹ <https://thessaloniki.travel/en/gastronomy/markets/athonos-square>

¹⁰ <https://thessaloniki.travel/en/things-to-do/sea-beaches/item/1262-thermaikos>

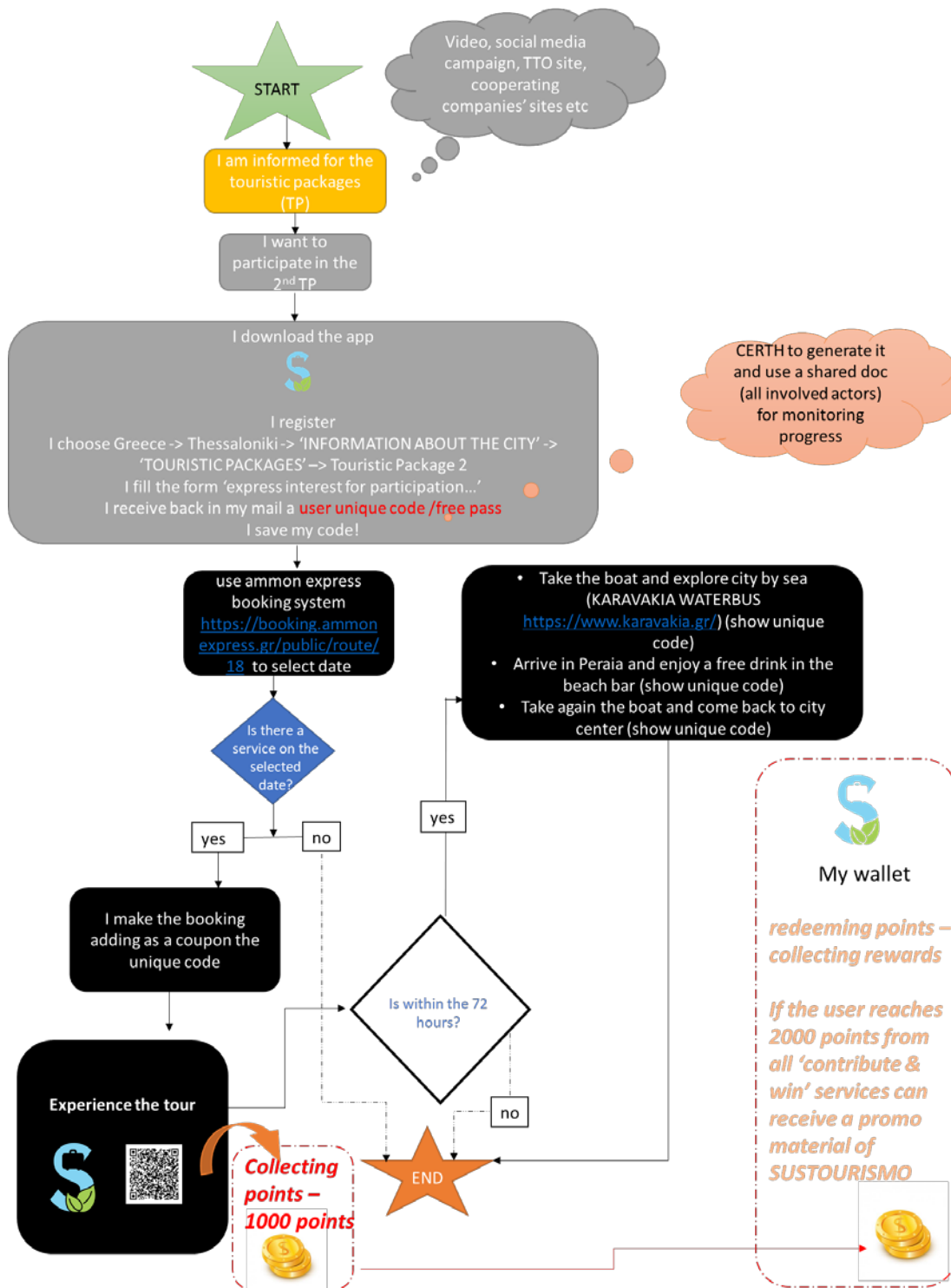


Figure 21: Flow diagram for Thessaloniki TP2



More information

As for the rest SUSTOURISMO cases, the pilot phase regards also an horizontal testing; this is the promotion of the use of a common app developed in the framework of the project, the SUSTOURISMO app. Both touristic packages and the SUSTOURISMO app have as a common goal the promotion of sustainable mobility of tourists within SUSTOURISMO cases. More information of the app and its objectives are presented in Chapter 3.

The role of city's hotels as well as of the Thessaloniki Tourism Organization in the promotion of the touristic packages and in the dissemination of SUSTOURISMO app is more than crucial;

- Hotels that will accept to participate in the testing phase will actively inform their visitors for both the packages and the app
- TTO will promote the packages by its site and all the rest available media and press channels (an MoU is signed among CERTH and TTO at the beginning of the project for the exploitation of all available channels in the promotion and dissemination of SUSTOURISMO outputs - ANNEX A)

Promotional leaflets, dedicated posts on social media, information on websites of hotels and other tourist-visited websites will support touristic packages dissemination and advertisement. Information on the touristic packages will also be available within the SUSTOURISMO app.

During the preparation and the testing phase, the stakeholders that have shown commitment in SUSTOURISMO goals will be assigned with specific responsibilities. For example;

- Hoteliers and TTO will inform tourists regarding the SUSTOURISMO app and the touristic packages
- Transport operators will participate in the packages' implementation offering their services to tourists (bike rental system, sea transport system).
- Tourist guides will support thematic routes creation according to tourist needs (both walking and bicycle routes) and will offer their services during the testing phase
- Special collaborations will be developed between traditional restaurants, pastry shops and bakeries offering to tourists specific traditional tastes, as part of the thematic tours package
- Special collaborations will be developed with entrepreneurs offering leisure activities at the east part of the city (beach bars, sports and beach activities, etc) providing to tourists special services, as part of the second touristic package etc.

The procedure of stakeholders' engagement is rather dynamic, thus during the trial phase, private companies or local authorities that might be interested to participate somehow in the pilot's implementation will not be excluded, on the contrary they will be strongly supported to act so. Memorandums of Understanding will be signed among CERTH and the actively involved stakeholders.



For engaging tourists in the touristic packages participation and in the SUSTOURISMO app use, rewards will be given therefore the role of the interested stakeholders is extended also to the provision of further offers to tourists.

The main long-term impacts expected from demand for the touristic packages are behavior change of tourists towards active and public transportation and an increase of sustainable transport modes use (walking, bicycle, public transport). Furthermore, the engagement of tourists in a crowdsourcing initiative that will support tourism data collection via the SUSTOURISMO app is estimated to add in the development of a new era in tourism where user is placed at the centre of planning and policy making.

References

1. Eurostat & <https://ec.europa.eu/>
2. OECD Tourism Trends and Policies 2020
3. <https://greekcitytimes.com>
4. <https://www.thessalonikiconventionbureau.gr/>
5. <https://thessaloniki.travel/>
6. The SUSTOURISMO context. Analysis of policy documents on sustainable tourism and transport in the ADION area, Deliverable T1.1.1., WP1, SUSTOURISMO project, Interreg ADRION 2014-2020, ITL Institute for Transport and Logistics Foundation -Bologna (Italy), Final Version 30/12/2020
7. SUSTOURISMO project, Deliverable T1.2.1 'State-of-the-art on sustainable tourism'
8. ALTER ECO app available at: <https://alter-eco.interreg-med.eu/>
9. Urbana Smart Card Ljubljana, available at: <https://www.visitljubljana.com/en/visitors/ljubljana-card>
10. Whim app available at: <https://whimapp.com>
11. LyonCityCard, available at: <https://en.lyoncitycard.com/>
12. Urbana Smart Card Ljubljana, available at: <https://www.visitljubljana.com/en/visitors/ljubljana-card>
13. SUSTOURISMO project, Survey of Thessaloniki, 1.3 deliverable
14. SUSTOURISMO project, 1st RT for Thessaloniki

2.2 The case of Epirus (Greece)

2.2.1 The case of Igoumenitsa

2.2.1.1 *The overview of Igoumenitsa city*

In the framework of SUSTOURISMO project, Regional 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).

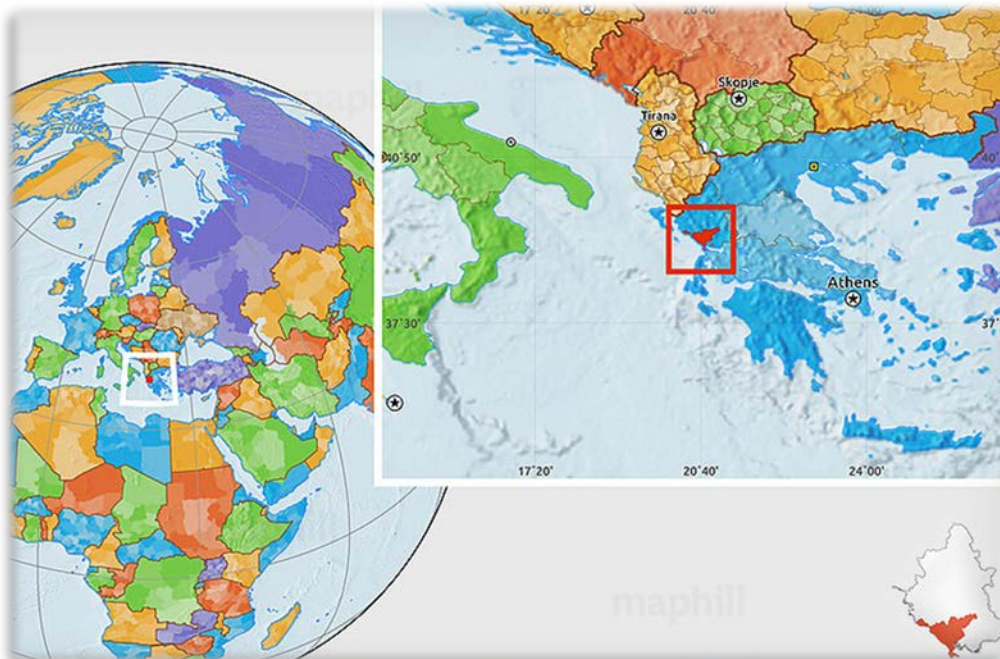


Figure 22: The pilot area of Igoumenitsa

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

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.

Igoumenitsa is a residential center at the prefectural level, dominated by the tertiary sector, which is mainly related to transport and tourism activities focused on the port of Igoumenitsa and the connection with the Egnatia Highway. Igoumenitsa is emerging as a western gateway to the country and a center of development with an interregional and transnational role, in parallel and complementary operation with Ioannina.

The main growth of the city was 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.

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.



Starting from Igoumenitsa there is also the possibility for excursions to the neighboring prefectures and for cruises to the Ionian Islands.

The visitor can combine his stay in Igoumenitsa with a series of activities that offer him the opportunity to enjoy the natural beauties, to get to know with the cultural wealth of the wider area and to feel the pulse of the modern city: walk or bike ride on the path right by the sea, coffee or drink in beach cafes, food in restaurants and small taverns, swimming in the impressive beaches of Drepano and Makrigiali overlooking the wetland. At the same time, anyone interested in the history and antiquities of the area can visit the Archaeological Museum of Igoumenitsa, the Castle of Igoumenitsa on the pine-covered hill, as well as the archaeological site of Lygia Tower which is a few kilometers away from the city of Igoumenitsa.

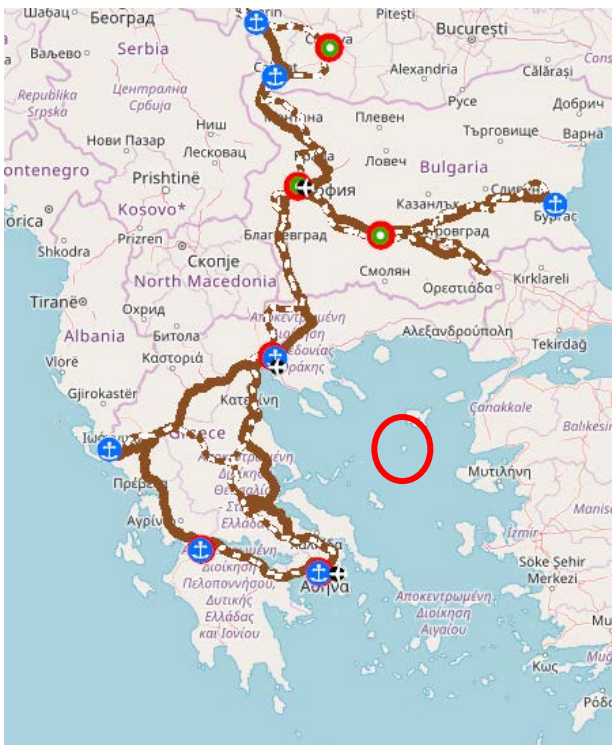


Figure 23: The location of Region of Epirus

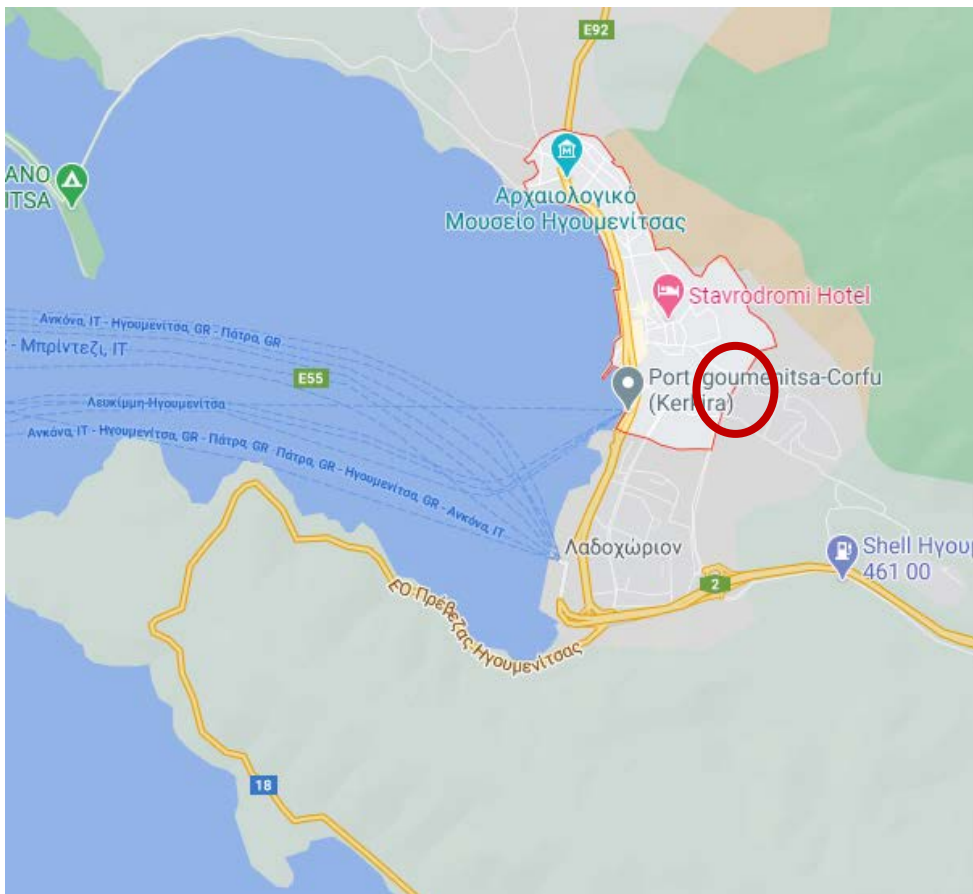


Figure 24: The location of Igoumenitsa Port

2.2.1.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Igoumenitsa

The current chapter discusses the tourism data for the Greek SUSTOURISMO case up to 2020 when the outbreak of COVID-19 pandemic caused a harm effect on tourism and transport as well as in the majority of daily operations (it is estimated that up to 70% decline faced in tourism industry in Greece during 2020). The tourism data presented regard to all three levels, national (Greece), regional (Region of Epirus) and local (Igoumenitsa city) and they are analyzed in order to come up with insights and opportunities for the case of Igoumenitsa in SUSTOURISMO project.



- National level

Tourism is one of the most important sectors of the Greek economy and a key pillar of economic growth.

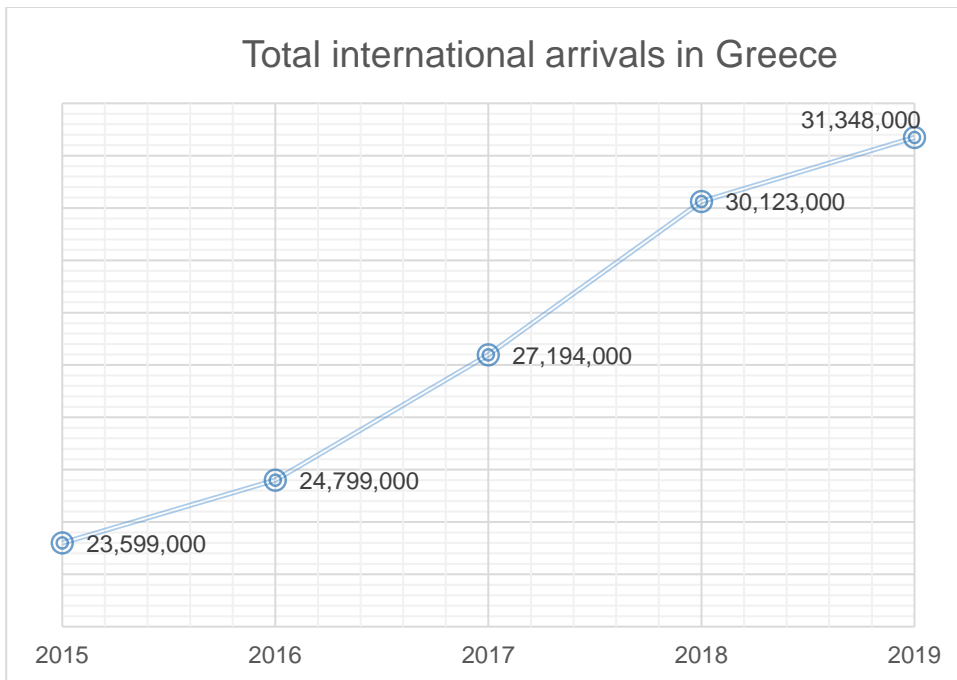


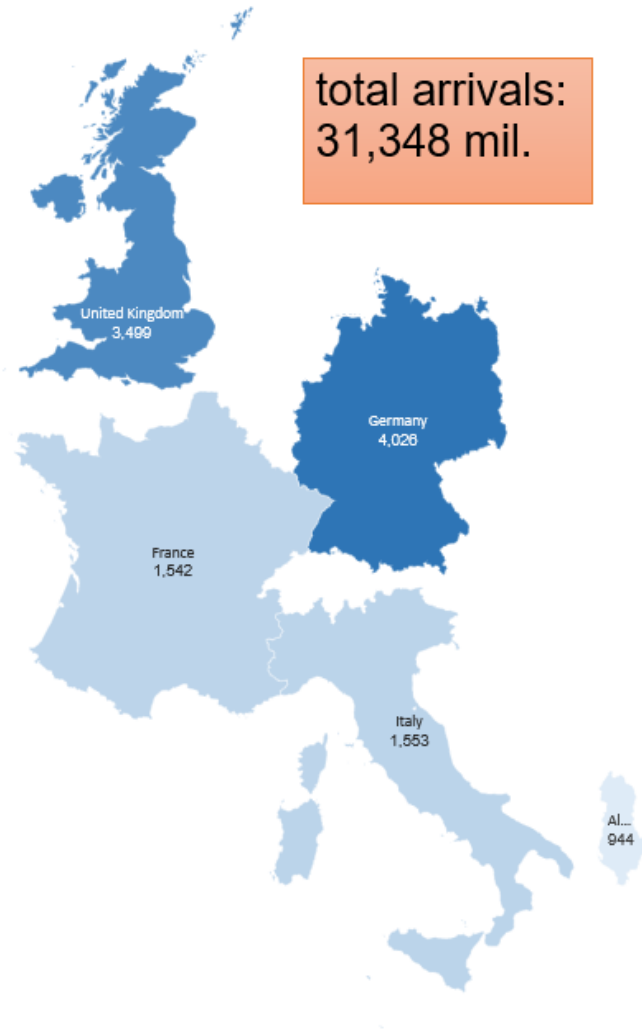
Figure 25: Total international arrivals in Greece 2015-2019 [Source: insete.gr]

Tourism GDP accounted for 6.8% of total GVA in 2017. The sector directly employed 381 800 people in 2018, accounting for 10.0% of total employment in the country. Tourism is an export champion in the Greek economy. Travel exports accounted for 43.3% of total service exports in 2018. In 2018, inbound tourism to Greece was at an all-time high with a record 33.1 million international tourist arrivals, an increase of 9.7% over 2017. Tourists from other EU countries accounted for almost two-thirds of total visits, an increase of 15.1% over the previous year. The volume markets of Germany (+18.2%) and France (+7.3%) grew significantly, recording a total of 4.4 million and 1.5 million visits respectively, as did arrivals from the United States which reached 1.1 million visits, representing an annual growth of 26.9%. Nights in all means of accommodation rose by 8.1% compared with 2017, to reach 230.7 million.

Also, in 2019, the upward trend of international tourist arrivals continued reaching the top number of 31.348.000,00 arrivals and giving to the country a revenue of approximately 17,7 million euros.



Greece:
top origin countries based on No of arrivals, 2019 (in millions)



Powered by Bing
© GeoNames, Microsoft, TomTom

Figure 26: Top Origin Countries for Greek International Tourism (top arrivals), 2019 [own elaboration of data from insete.gr]

The main origin countries that refer to the top 5 arrivals are Germany, United Kingdom, Italy, France and Albania.

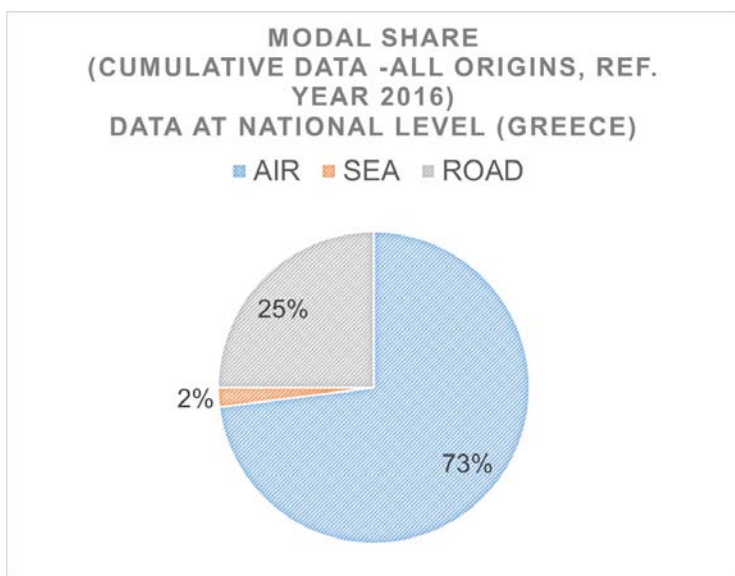


Figure 27: Average spending per trip per tourist, 2015-2019 data [insete.gr]

The majority of tourists arrives by airplane (low cost airlines have played crucial role in this selection, results of Inter-Connect Interreg ADRION project) while when focusing on tourists from Western Balkans, the private car is predominant which can be a sign on the low public transport connectivity of the area and its last leg, Greece. Italian tourists seem also to choose sea transport when they are visiting the wider catchment area of the western Greek ports (Igoumentista, Corfu, Patras).

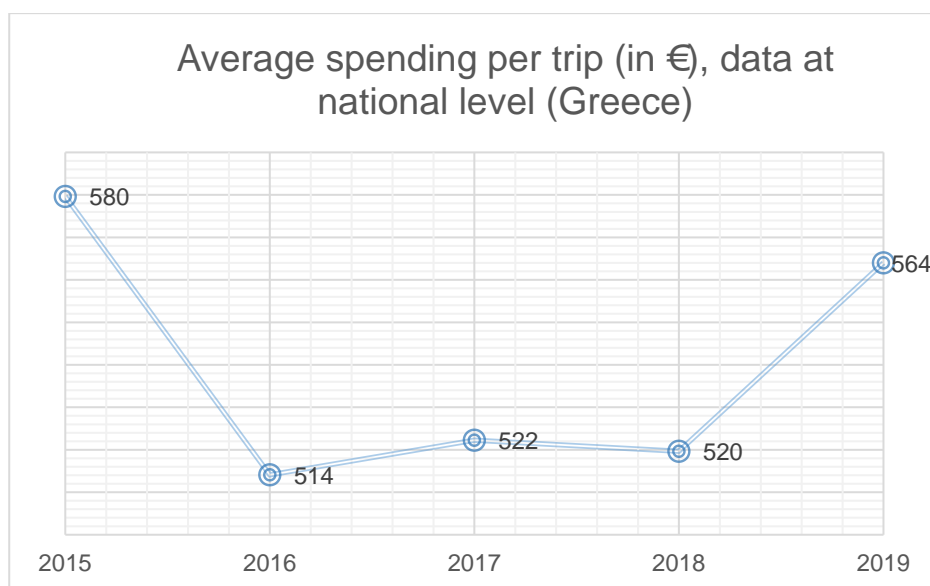




Figure 28: Average spending per trip per tourist, 2015-2019 data [insete.gr]

The average spending per tourist seems to be stable enough within the years, around 500euro per person is spent in Greece.

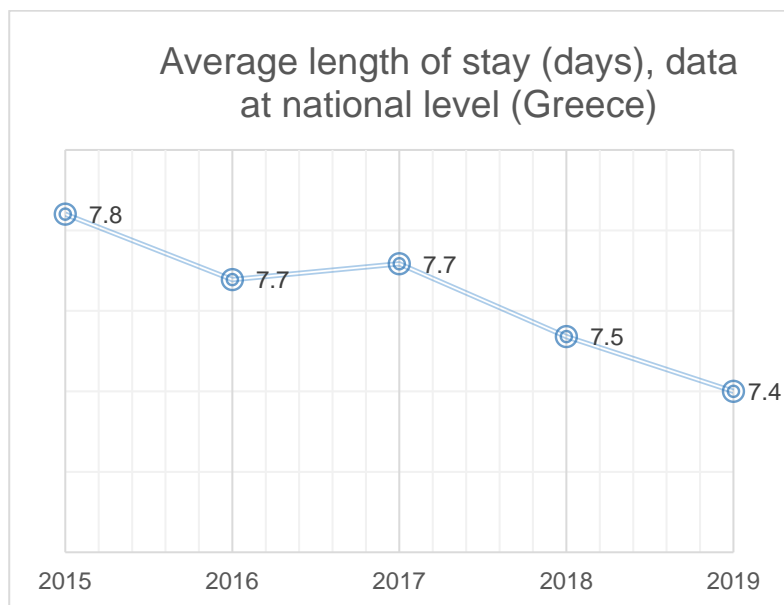


Figure 29: Average length of stay, 2015-2019 data [insete.gr]

The average length of stay seems also stable throughout the last years, around one week, with a slight decreasing trend. Combining the data of the above figures, the relevant stakeholders in the tourism sector considering also the orientations of the general tourism policy can conclude in suggestions on how to increase the revenues of the sector (i.e. should we offer more alternatives, do we need to focus on city breaks?).

Domestic tourists made 5.7 million trips in 2018, up 3.6% over 2017. Only 4.7% of domestic trips were for business purposes in 2017, with the vast majority being leisure orientated. The majority of domestic visitors stayed with friends or relatives or in other non-rented accommodation, with only 34.2% of visits using paid accommodation.



- **Regional level**

The Region of Epirus in 2018 received more than 800 thousand international visitors, an increase of 15% compared to 2016. As shown in the following 3 tables, the data (arrivals and revenues) are increased slightly for 2019.

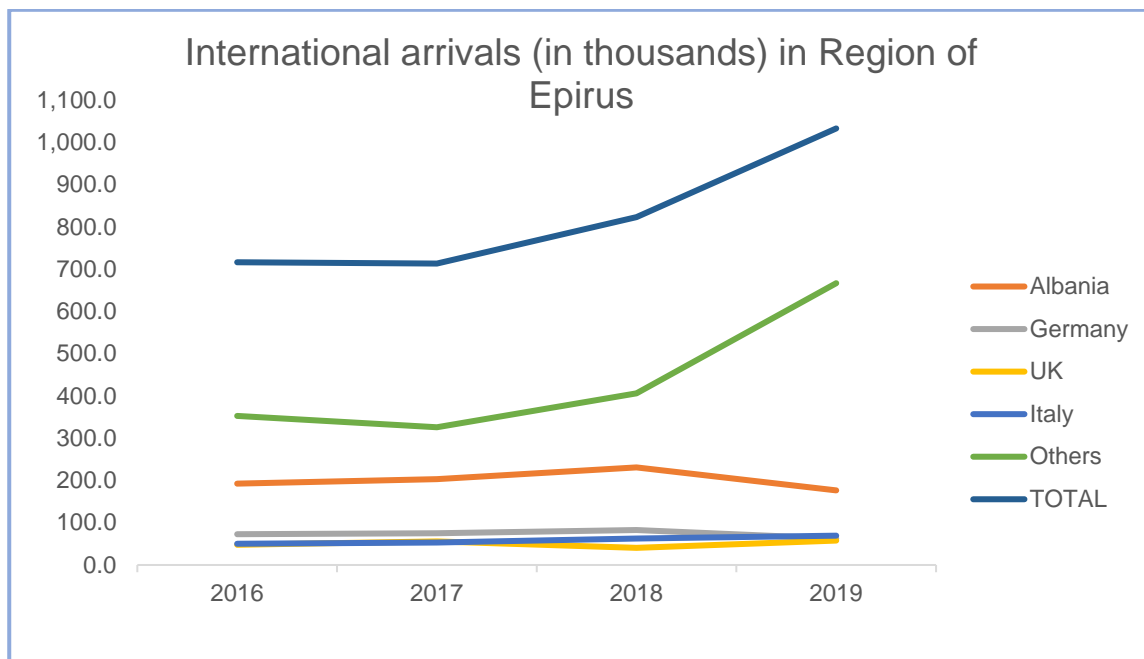


Figure 30: International arrivals at Region of Epirus [insete.gr]

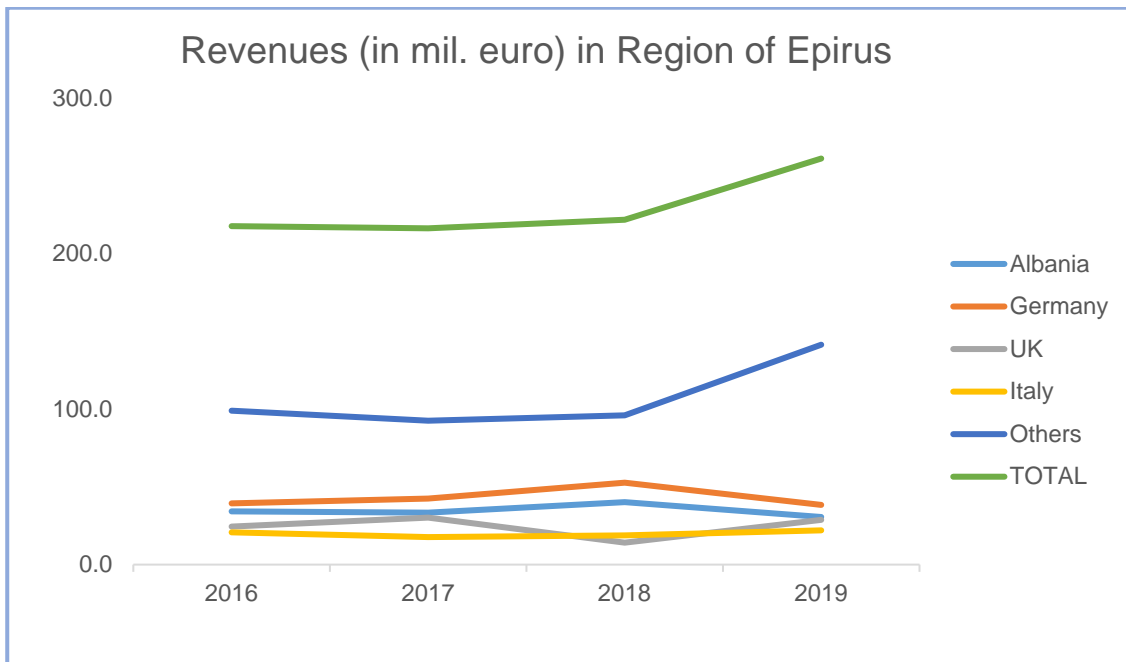


Figure 31: Revenues from international arrivals at Region of Epirus [insete.gr]



Figure 32: International arrivals at Preveza' s Airport [www.hcaa.gr]

According to the competitive study of INSETE for the Greek regions, the region recorded a 20% increase in revenues related to tourism to 261.3 million euros compared to 2016. People from all around the Europe seem to be a dynamic pool of tourists for the Region taking advantage and simultaneously pushing the air connectivity upgrade between Europe and air hub cities in Epirus.



Albania and Germany are also countries that show their interest for the natural and cultural beauties of the area.

Aktion International Airport is located 6.7km of Preveza's city centre and serves many connections at National and International level.

Regarding domestic tourism, the following figure depicts a gradual upward trend of trend of Region of Epirus from 2016 onwards.

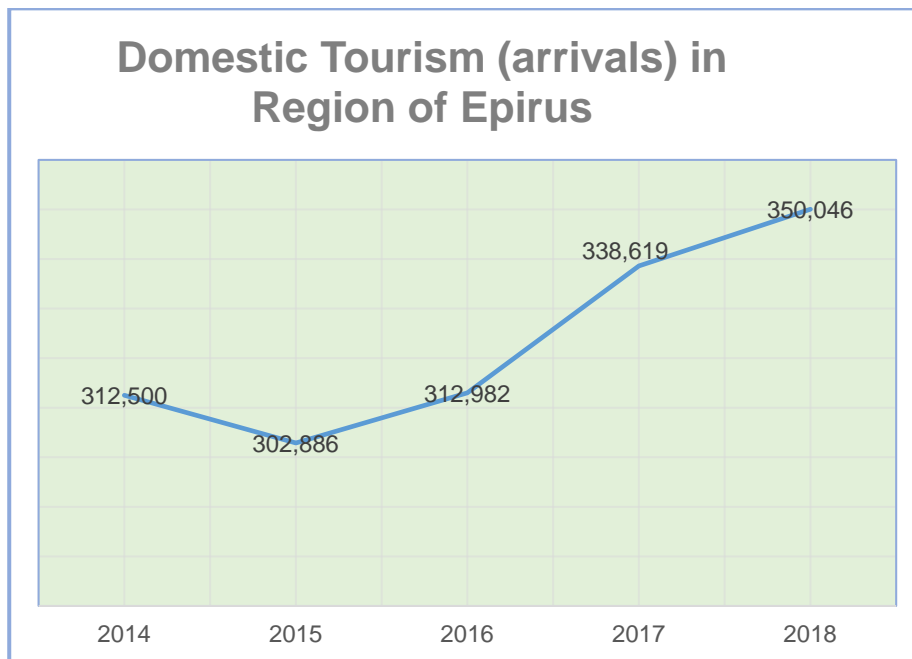


Figure 33: Domestic Tourism in Region of Epirus [insete.gr]

- City level

Igoumenitsa is a place offering different opportunities to a tourist: natural and cultural beauty, gastronomy, access to beautiful beaches. According to INSETE, it seems that in the last years, the interest of tourists for the area has upgraded.



Figure 34: International arrivals in Thesprotia [insete.gr]

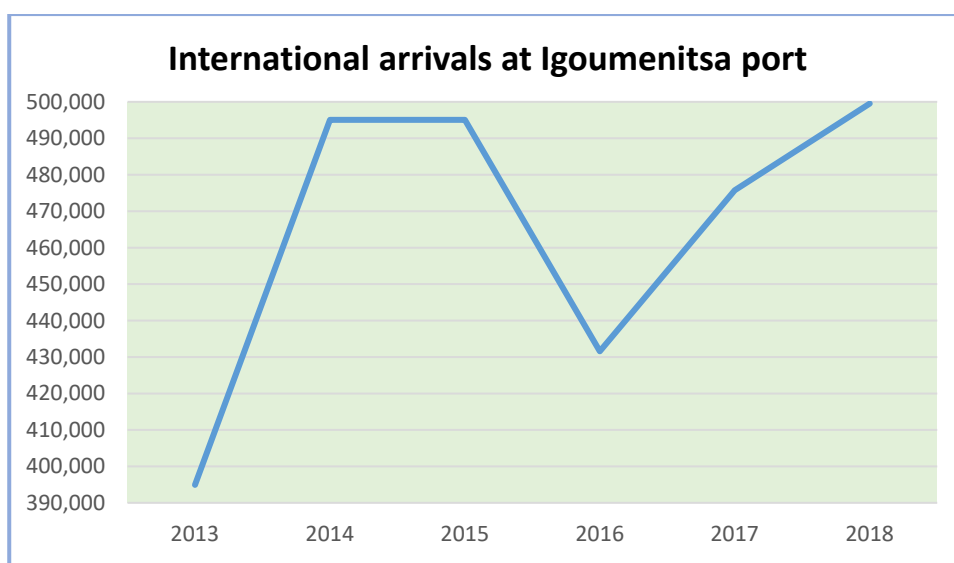


Figure 35: International arrivals at Igoumenitsa Port [insete.gr]

As a takeaway of the tourism data critical interpretation we can say that the last years Greece and Region of Epirus have well triggered tourists' interest while some focused actions in line with the umbrella strategy for tourism can show the way towards further tourism development. Also, Igoumenitsa presents many opportunities for tourism growth achievement however, a number of better coordinated actions as well as the strong involvement of local community seem to be prerequisites for reaching the set and create new goals.



2.2.1.3 Searching the tourism policy background and finding gaps and opportunities

The review of national, regional, and local strategies and initiatives that took place in the context of Del. T1.1.1. 'The SUSTOURISMO context. Analysis of policy documents on sustainable tourism and transport in the ADRION area' had as a final goal to identify areas of interventions according to the already published and followed tourism strategy.

The review of the strategic documents revealed basic axes around which Igoumenitsa can concentrate. These axes are:

- Development of **integrated** and thematic tourism products that will promote the character of '**unique experience**' through the use of alternative transport modes.
- **Attraction of new investments**, which will also include mobility investments for providing to all visitors' alternative options to visit the touristic sights in a more sustainable way.
- Development of **alternative-to-car traffic networks** at destinations and promotion of 'city break' tourism through the design and implementation of integrated pedestrian and bicycle networks which will upgrade the urban environment and will enhance the alternative transport trips. Alliances (i.e. authorities with industry, local communities and key stakeholders) and tailored to the city-needs cooperation schemes are deemed necessary.
- **Reorganization of the existing public transport system** of the city.
- Development of **thematic paths** in the context of city break development product which can be accomplished by:
 - Short walks in easy-to reach areas for pedestrians.
 - Routes through selected sights and 'experiences' of the city presenting a common theme (e.g., museums, archaeological sites, highways)
- **Enhancement of maritime services** in the context of the Maritime Tourism Development product, which can be accomplished by:
 - Excursions to coastal destinations
- **Promotion** of sustainable mobility in tourists using **marketing tools such as mobile applications** providing information for alternative trips within the visiting region.

Based on the above and on the current situation in Igoumenitsas' connectivity and transport services provided to tourists (relatively low attractiveness of public transportation, absence of harmonized and integrated services), this is probably the time for Igoumenitsa to catch up; upgrade public transport services - an action that will boost the tourism sustainable growth of the city -, further support the creation of integrated and organized pedestrian and bicycle networks connecting the city's points of interest - an action that will promote the completion of sustainable travel trips within the city - and start involving local community and entrepreneurship to a user-centred and a digitalized era for tourism (and not only) sector.



2.2.1.4 Learning from best practices on tourism and mobility

The state of art review on previous projects and ongoing innovative initiatives from across Europe that boost sustainable tourism development took place under Deliverable T1.2.1 'State-of-the-art on sustainable tourism' with a view to learn from the others and successfully transfer best examples to SUSTOURISMO cases. Some interesting points identified from the review of the best practices are:

- **Creating touristic packages** for attracting visitors such as guided tours passing from specific points of interest within and outside the city combining workshops related to the area's local traditions and features (MEDCYCLETOUR).
- **Creating a network committed to the promotion of sustainable mobility in tourism** by adding new sustainable mobility services (bike rental services, bike carriage services and flexible transport services.) for visiting specific tourism destinations (SUMPORT, SUMP- Sustainable Urban Mobility Plan, ADRIMOB, MEDCYCLETOUR, EV8- Eurovelo 8 Official Route)
- **Raising awareness** and familiarizing tourists with e.g. the culture, heritage and customs of a destination enhancing the likelihood of making sustainable in-trip choices through the provision of located based services (ADRION5, BRIDGE TRAD., 4ALL)
- Introducing **visitor management techniques** such as queues, reservations, pricing, timed entry etc. for facilitating the tourist experience. A typical example is the use of **touristic cards** providing free access and electronic pass to main tourist attractions and public transportation systems, reduced rates for taxi and car-share, etc.

Building on the above experience and taking into account the inherent characteristics of Igoumenitsa, a first mapping of city's strong points that could be combined under touristic packages can be;

- Its coherent historical city where museums, monuments and archaeological sites are concentrated provides the opportunity to implement well-designed guided walks, providing tourists the opportunity to visit specific points of interest of the city on foot or by bicycle. Its gastronomy can lead to the creation of guided tours passing from specific points of interest.
- Its beautiful beaches providing 'Sea & Sun' activities are located near the city centre offering the opportunity to increase planning capacities on sustainable mobility through specific actions from the city center combining also the use of bicycle

What the city needs however to tackle to achieve the provision of integrated services combining sustainable mobility and unique city experience is the lack of infrastructure, interconnection and often the quality of tourism product, the lack of cooperation and the interest of public and private sector in sustainable tourism and the lack of qualified staff that can meet the needs of an alternative tourist audience.



2.2.1.5 Learning from tourist surveys - the path forward as revealed by the tourists

The survey conducted for the case of Igoumenitsa during March - May 2021 had as a goal to identify the needs of tourists and relate them to existing or potential mobility services and provisions. The timing of the survey unfortunately was not favourable for tourism. The tourism restrictions in Greece and all around the world due to the COVID-19 pandemic has affected the number of the responses. As a result, the sampling was not the most representative. Focusing on the domestic tourists and trying to extract circumstances-independent needs (unaffected as possible by the pandemic), key takeaways from the survey are:

- Igoumenitsa is a city that tourists use as an intermediate stop of their trip and for the ‘Sea and Sun’ product. However, there are less known and currently unexplored aspects of the city and provisions it can offer that worth further investing in; i.e. cultural and natural areas, history, gastronomy, creative industries etc.
- The proximity of Igoumenitsa to archaeological sites, museums, natural countryside sights etc, can be further supported when we talk about tourism boost of the area.
- Connection of these areas with the city centre of Igoumenitsa with sustainable mobility options can mutually support areas’ growth and attractivity.
- An integrated app offering touristic information while giving the floor to tourists for expressing their ideas and complaints seems that it is an interesting provision. From one side, the city’s current level of digitalization is a gap that must be covered soon enough while from the other side it is difficult enough to persuade tourists to download and use such an application. A structured promotion of such an app and the involvement of a great number of stakeholders giving offers to tourists are points that can add on app’s popularity. Therefore, the more the provisions through the app, the more the tourists will use it and the more the information and data captured to support policy making in tourism.
- The development of a pre-paid touristic card seems to interest tourists as according to their needs such a card would facilitate their trips providing free access to museums and cultural sites, free access to the city’s public transportation system etc. and offers regarding the provision of HO.RE.CA services However, crucial issues such as the absence of strong collaboration between tourism and mobility key players may complicate and prevent the completion of such an initiative.
- Organized tours within the city centre of Igoumenitsa with a professional touristic guide is an intervention that tourists would be interested to participate in. Considering that a number of points of interest are located within the city center, the idea of designing such tours seems a great opportunity for promoting sustainable tours within the city center.

2.2.1.6 Listening to tourism and mobility stakeholders - insights from the 1st Technical Round Table

Thesprotia’s stakeholders’ needs were identified through their participation in the first virtual SUSTOURISMO Round Table entitled “ ‘Sustainable Tourism and Mobility. Needs, Requirements and Challenges for a Sustainable Development” , that was organized virtually on the 3rd of March 2021.



During the RT, the key players from tourism and mobility sectors shared the following ideas and thoughts regarding the mutual support of sustainable tourism and mobility;

- Synergies between the local authorities and the private sector could lead to the development of touristic packages promoting the use of alternative transport modes within and outside the city and should be strongly supported. However, in some cases such an interest is not obvious from one or both sides, while also a discontinuity of efforts seem to play a negative role in the implementation of such initiatives.
- The contribution of local society is very important and should be actively involved in the form of public consultation when policies are being shaped, of volunteering actions, of documenting local stories, memories etc.
- ICT, digital tools, social media etc., must be efficiently incorporated in any activity regarding tourism and promotion and a necessary step towards both sustainability and profit increase.
- Cooperation among public and private sector is an essential factor for sustainable development of all sectors.
- Engagement of stakeholders in mobility & tourism sector and integration of planning seem also prerequisites.

2.2.1.7 Combining findings in a SWOT analysis for the case of Igoumenitsa

Combining the insights of the above findings, the current subchapter concludes in a SWOT analysis for the SUSTOURISMO case of Igoumenitsa that serves and is mutually served by the objectives of the project: tourism and mobility hand by hand development.

Table 2: SWOT Analysis for Igoumenitsa in the context of SUSTOURISMO project

Strengths	Weaknesses
<ul style="list-style-type: none"> • Igoumenitsa is a coastal city in northwestern Greece and it is located in northern-western Epirus. • Igoumenitsa attracts visitors from all over Europe, which shows a dynamic as the last years the interest of tourists for the city has upgraded. • Regarding the city's position in the transport networks, Igoumenitsa's port is the second most important in Greece and it is in a key position, since it is geographically the closest port of Greece to Italy and the Balkan countries of the Adriatic Sea, thus being an important bridge of people and goods to 	<ul style="list-style-type: none"> • Relatively low current level of digitalization. • Absence of strong collaboration between tourism and mobility industry key players. • Lack of information points. • Lack of organized touristic packages, offers and propositions for individual visitors. • Inadequate public transport services provision. • Lack of appropriate infrastructure for alternative transport modes (bicycle paths)



and from Western Europe. Moreover, Egnatia Highway, the central artery of Northern Greece, starts from the Port of Igoumenitsa and ends at the Greek-Turkish border.

- The area has a rich and famous gastronomy tradition.
- Beautiful beaches are located very close to the city center.
- Creative industries can offer diversified products that meet tourist needs.
- Friendly connections between the city center and nearby locations can be strongly supported via walking and bicycling

- Absence of an integrated touristic card (pre-paid card) combining both the provision of tourism and transport services to visitors.
- Absence of organized network / routes for cycling,

Opportunities

- The last years there is an upward trend in tourist arrivals and revenues from tourism sector at national level from which Igoumenitsa can benefit - Greek has started becoming a strong European destination, a fact from which opportunities arise.
- Introduction of new and innovative technologies for enhancing the 'tourism and mobility' services provision.
- Enhancement of tourists' satisfaction through the provision of attractive offers.
- Creation of strong collaborative networks among the public and the private sector.
- Creating an organized network of bicycles.
- Potential for 'slow tourism' growth (walking and cycling trips for leisure).
- Alternative offers; eco-tourism, agro-food tourism.
- COVID-19 fight through increase of safety - tourism restart in a more

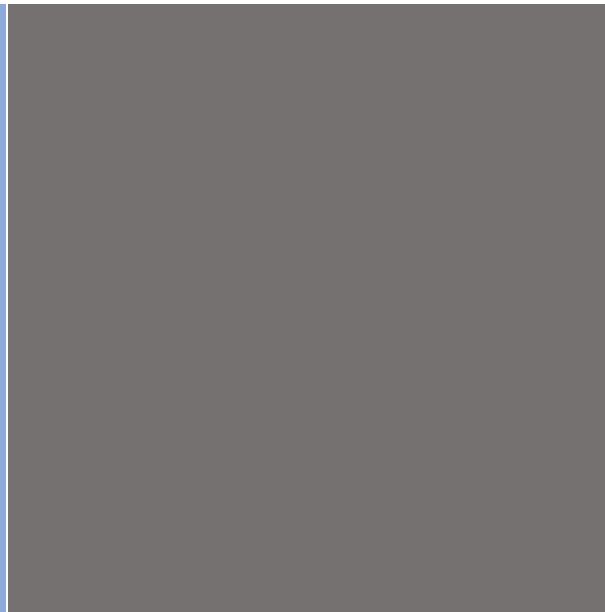
Threats

- Not to get full benefits from Greek high recognition as a destination
- Poor infrastructure supporting the use of alternative transport modes.
- Minimum participation in financing innovative activities and initiatives by the private sector.
- Negative effects for tourism at post COVID-19 era (travel restrictions, slow virus containment and low consumer confidence).
- Leaving Covid-19 pandemic knowledge unexploited, turn back on traditional approaches.
- Low interest of local community to participate in coordinated efforts.



structured way taking advantage of the knowledge created during this period.

- Digitalization of tourism product, offer of innovative services.
- Attraction of private funds
- Alliances among stakeholders, consisting of the following partners: Regional Unit of Thesprotia, Municipality of Igoumenitsa, Chamber of Commerce of Thesprotia, Association of Hotels of Igoumenitsa, New Association of Hotels of Preveza, Union of Rented Rooms of Parga, Federation of Tourism
- Optimal exploitation of financial resources and mechanisms for promoting sustainable tourism.



2.2.1.8 Drafting of the SUSTOURISMO touristic packages of Igoumenitsa

Based on the above SWOT Analysis results while having the interest of specific stakeholders for joining a touristic package scheme, the touristic packages of Igoumenitsa started being drafted.



Figure 36: Igoumenitsa's pilot area in SUSTOURISMO



The touristic package aims to explore and experience the city and nature on foot and by bicycle.

In this package, tourists will have the opportunity to experience the history and culture of the city through organized walking tours, focused within the city center. This tour will offer tourists the possibility to know the history, culture, art, tradition of the area and to experience local food and products. Also, tourists will have the opportunity to explore the city by bicycle. Through this route, tourists will have the possibility to experience the history and culture of the city, visit museums, castles and beaches.

The goal of this action is to increase cooperation with tour agencies, guides, hotels, local shops in Igoumenitsa. In that context, collaboration with professional tour guide would be possible in order to accompany tourists to the main points of interests, including sightseeing, visits at museums and monuments.

In order to make possible the development and implementation of such touristic packages, there is being an active work in order to develop a database of stakeholders which includes a pool of relevant interested parties that will be engaged throughout the project. Relevant stakeholders include: municipality of Igoumenitsa, regional / national agencies, chambers, trade associations, hoteliers association and catering associations.

Promotional leaflets, posts on social media, information on websites of the Municipality and other tourist-visited websites will support touristic packages dissemination and advertisement. Information on the touristic packages will also be available within the SUSTOURISMO app.

Memorandums of Understanding will be signed among the Regional Union of Municipalities Of Epirus and the actively involved stakeholders, for the promotion of the touristic package and the provision of further offers to tourists.

The procedure for participating/booking, the role of cooperating actors and the points collection through the app is;

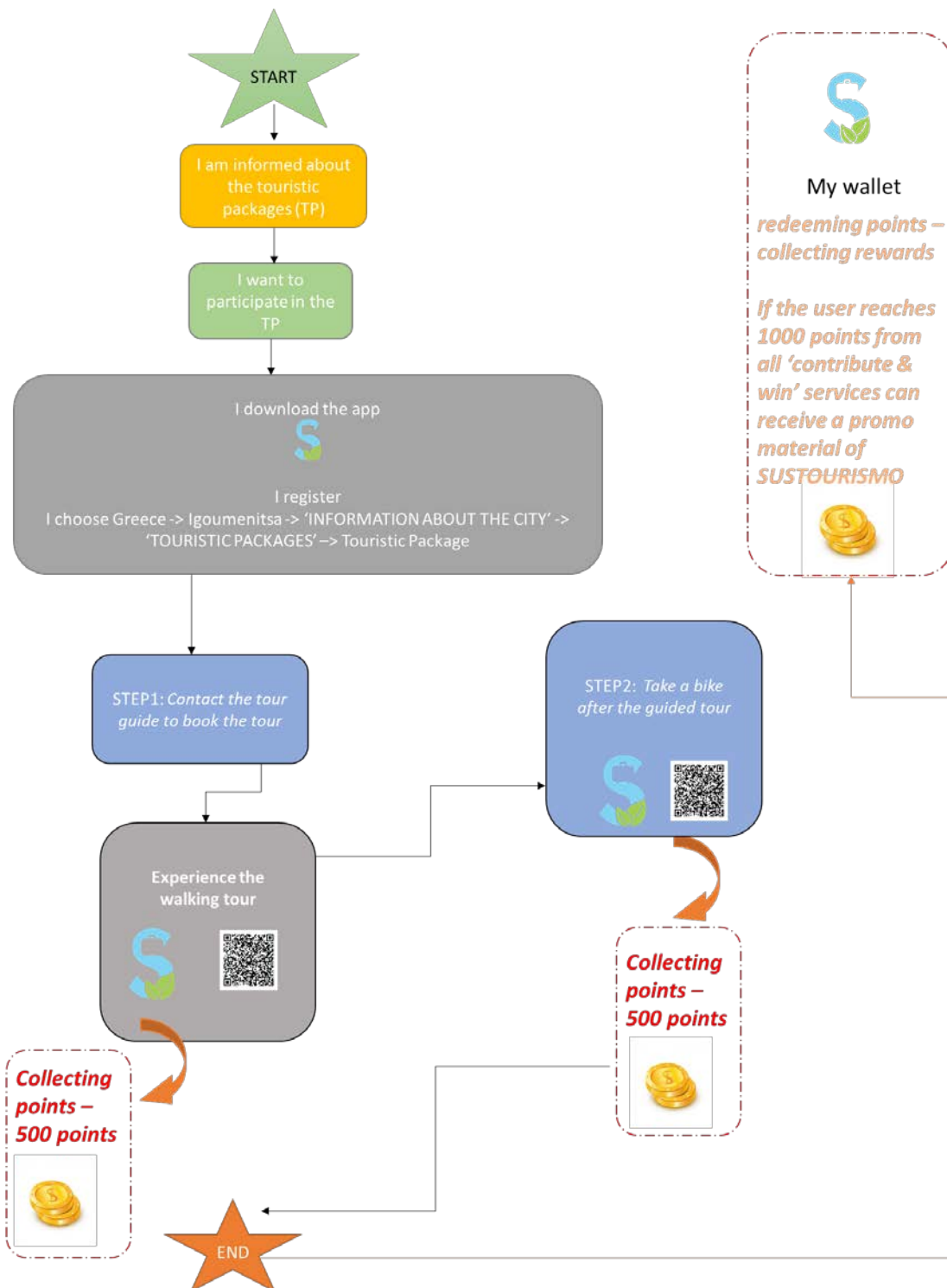


Figure 37: Flow diagram for Igoumenitsa's TP

2.2.2 The case of Preveza

2.2.2.1 The overview of Preveza city

In the framework of SUSTOURISMO project, 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).

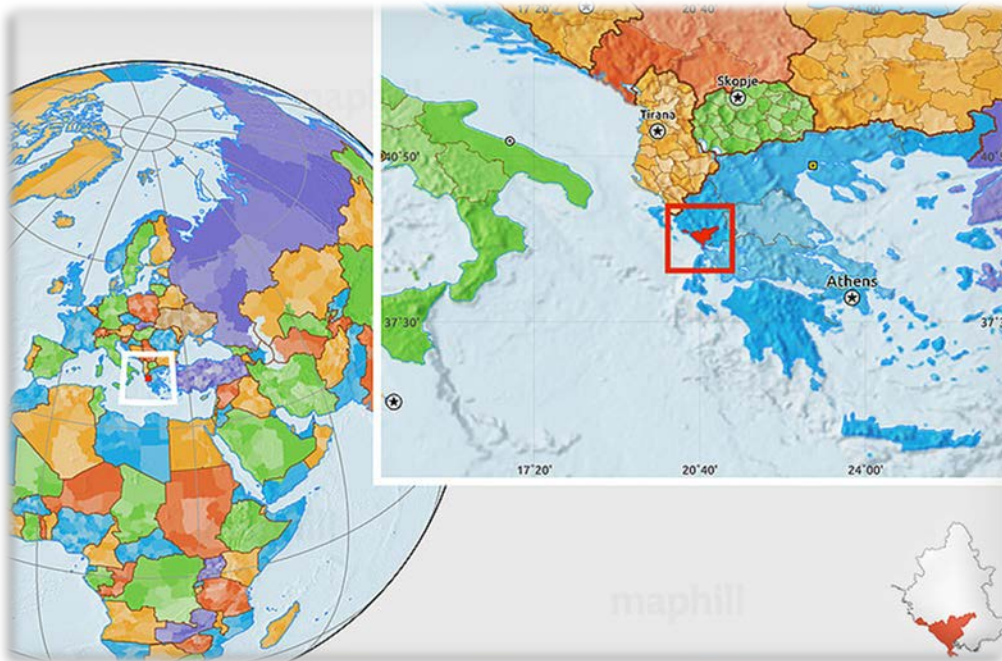


Figure 38: The pilot area of Preveza

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

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 is connected to Aktio with a high-tech Submarine Tunnel.

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.

Preveza is known for the protected wetland of the Amvrakikos gulf, the interesting archeological and historical monuments (Ancient Nikopolis, castles, churches and monasteries, the endless beaches (the largest sand beach in Europe), the historic center with Venetian influences (Venetian Clock), narrow alleys and picturesque taverns. The area is characterized by enchanting locations



with a lively tradition and rich local gastronomy. Its rich natural beauties and mild climate conditions are ideal for fast-paced tourist development.

From the area there is also the possibility for excursions to the neighboring prefectures and for cruises to the Ionian Islands. Starting from Preveza one can visit Igoumenitsa, Ioannina and its attractions (such as Dodoni, the Gorge of Vikos and Zagorochoia), Lefkada and Paxoi.

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.

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 between Aitolokarnania and the Southern Greece with the coastal zone of the prefectures of Preveza, Thesprotia and the port of Igoumenitsa.

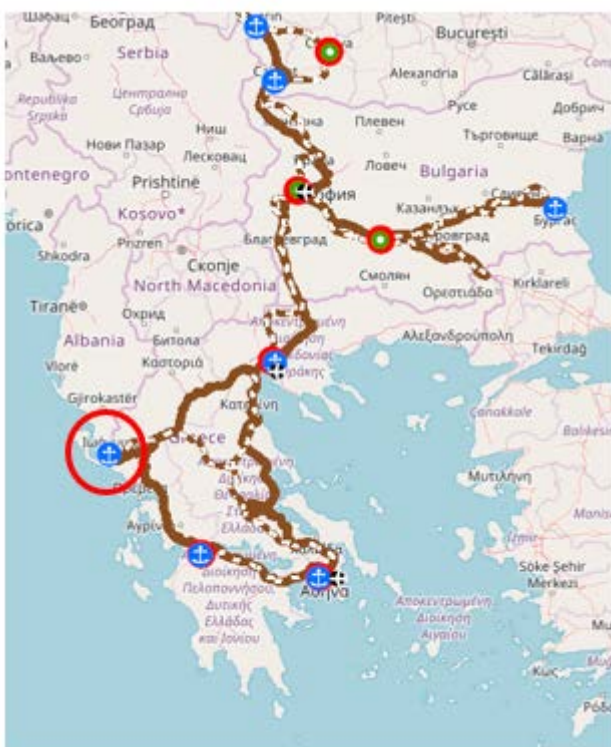


Figure 39: The location of Region of Epirus



Figure 40: 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.

2.2.2.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Preveza

The current chapter discusses the tourism data for the Greek SUSTOURISMO case up to 2020 when the outbreak of COVID-19 pandemic caused a harm effect on tourism and transport as well as in



the majority of daily operations (it is estimated that up to 70% decline faced in tourism industry in Greece during 2020). The tourism data presented regard to all three levels, national (Greece), regional (Region of Epirus) and local (Preveza city) and they are analyzed in order to come up with insights and opportunities for the case of Preveza in SUSTOURISMO project.

- **National level**

Tourism is one of the most important sectors of the Greek economy and a key pillar of economic growth.

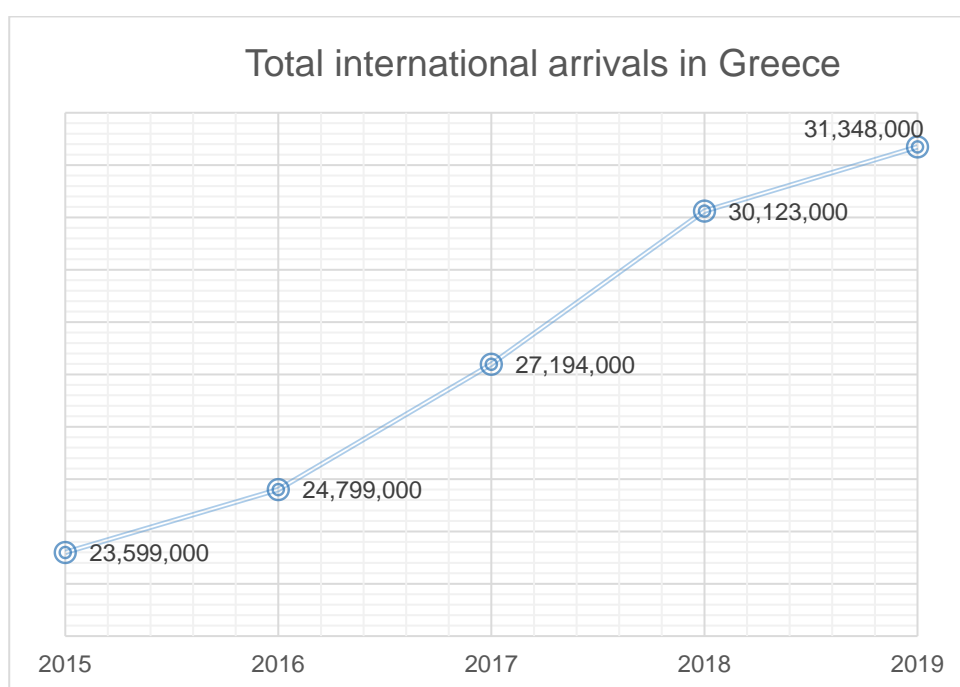


Figure 41: Total international arrivals in Greece 2015-2019 [Source: insete.gr]

Tourism GDP accounted for 6.8% of total GVA in 2017. The sector directly employed 381 800 people in 2018, accounting for 10.0% of total employment in the country. Tourism is an export champion in the Greek economy. Travel exports accounted for 43.3% of total service exports in 2018. In 2018, inbound tourism to Greece was at an all-time high with a record 33.1 million international tourist arrivals, an increase of 9.7% over 2017. Tourists from other EU countries accounted for almost two-thirds of total visits, an increase of 15.1% over the previous year. The volume markets of Germany (+18.2%) and France (+7.3%) grew significantly, recording a total of 4.4 million and 1.5 million visits respectively, as did arrivals from the United States which reached 1.1 million visits, representing an annual growth of 26.9%. Nights in all means of accommodation rose by 8.1% compared with 2017, to reach 230.7 million.



Also, in 2019, the upward trend of international tourist arrivals continued reaching the top number of 31.348.000,00 arrivals and giving to the country a revenue of approximately 17,7 million euros.

Greece:
top origin countries based on No of arrivals, 2019 (in millions)

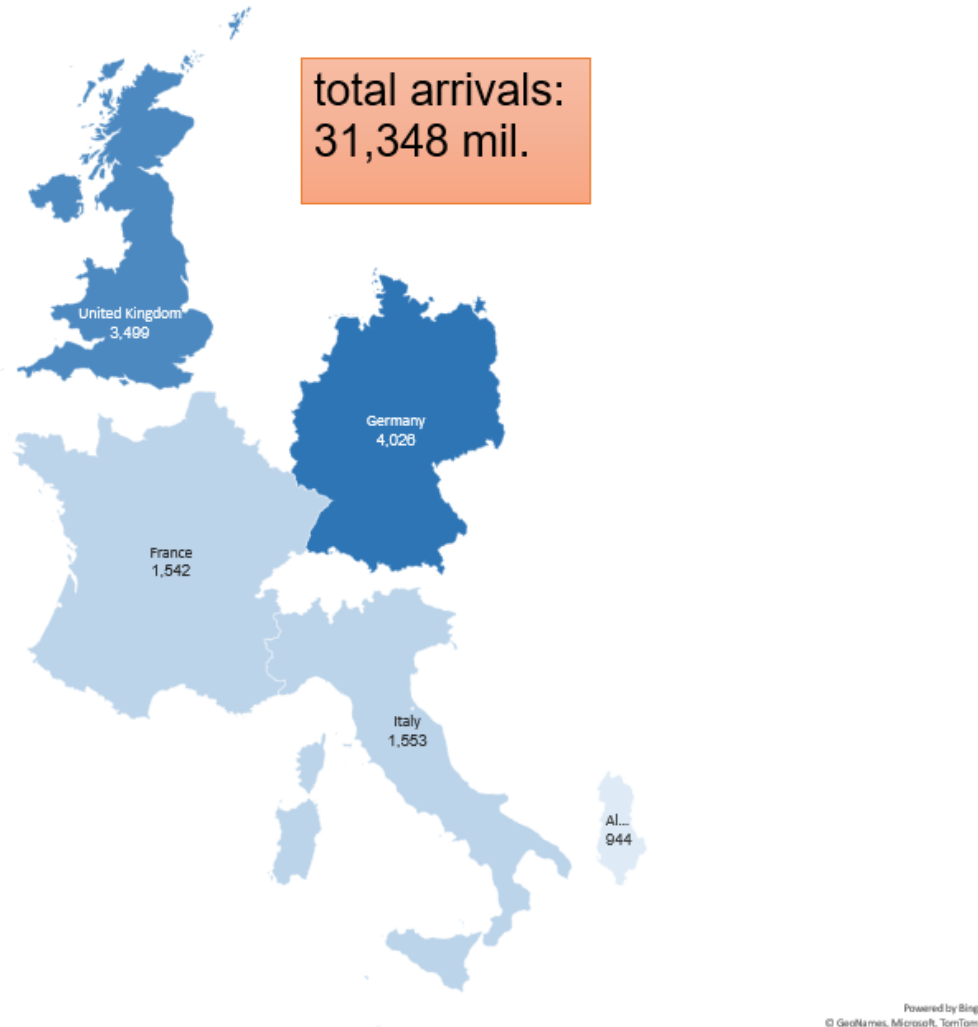


Figure 42: Top Origin Countries for Greek International Tourism (top arrivals), 2019 [own elaboration of data from insete.gr]

The main origin countries that refer to the top 5 arrivals are Germany, United Kingdom, Italy, France and Albania.

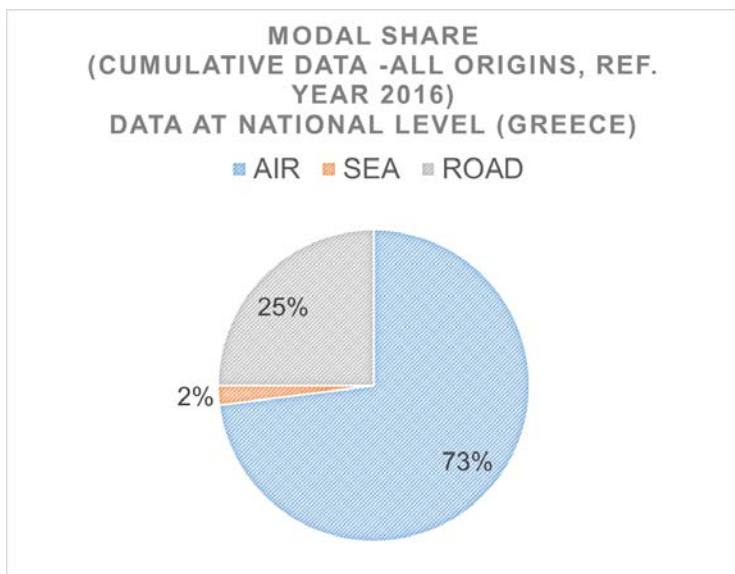


Figure 43: Average spending per trip per tourist, 2015-2019 data [insete.gr]

The majority of tourists arrives by airplane (low cost airlines have played crucial role in this selection, results of Inter-Connect Interreg ADRION project) while when focusing on tourists from Western Balkans, the private car is predominant which can be a sign on the low public transport connectivity of the area and its last leg, Greece. Italian tourists seem also to choose sea transport when they are visiting the wider catchment area of the western Greek ports (Igoumentista, Corfu, Patras).

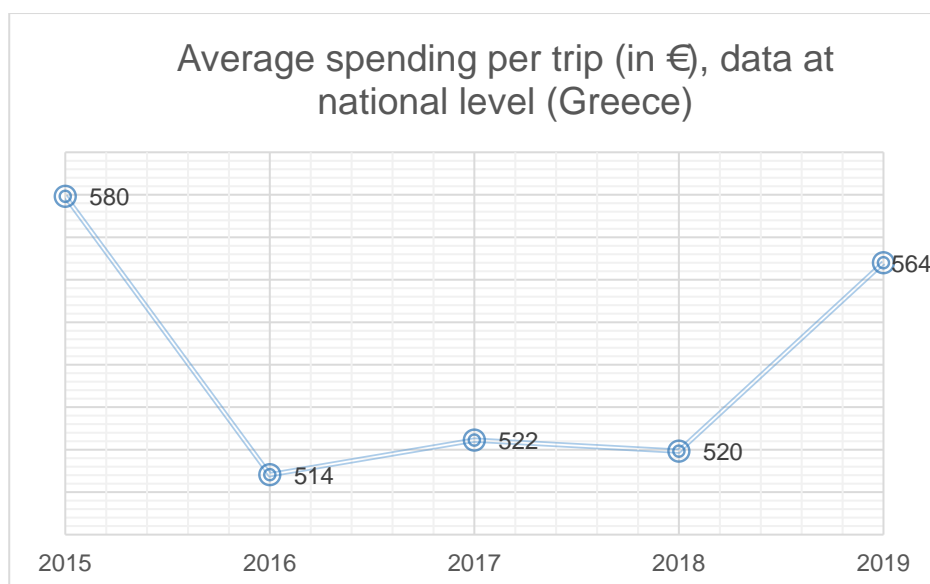


Figure 44: Average spending per trip per tourist, 2015-2019 data [insete.gr]



The average spending per tourist seems to be stable enough within the years, around 500euro per person is spent in Greece.

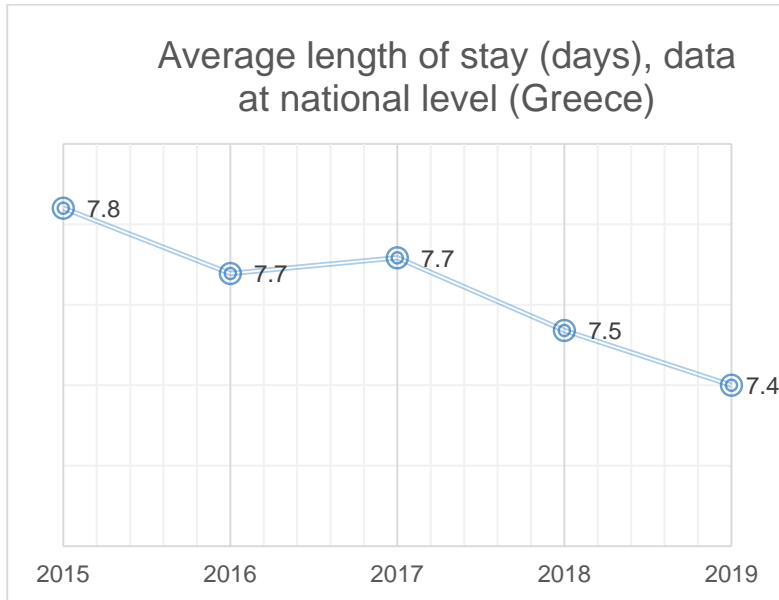


Figure 45: Average length of stay, 2015-2019 data [insete.gr]

The average length of stay seems also stable throughout the last years, around one week, with a slight decreasing trend. Combining the data of the above figures, the relevant stakeholders in the tourism sector considering also the orientations of the general tourism policy can conclude in suggestions on how to increase the revenues of the sector (i.e. should we offer more alternatives, do we need to focus on city breaks?).

Domestic tourists made 5.7 million trips in 2018, up 3.6% over 2017. Only 4.7% of domestic trips were for business purposes in 2017, with the vast majority being leisure orientated. The majority of domestic visitors stayed with friends or relatives or in other non-rented accommodation, with only 34.2% of visits using paid accommodation.



- **Regional level**

The Region of Epirus in 2018 received more than 800 thousand international visitors, an increase of 15% compared to 2016. As shown in the following 3 tables, the data (arrivals and revenues) are increased slightly for 2019.

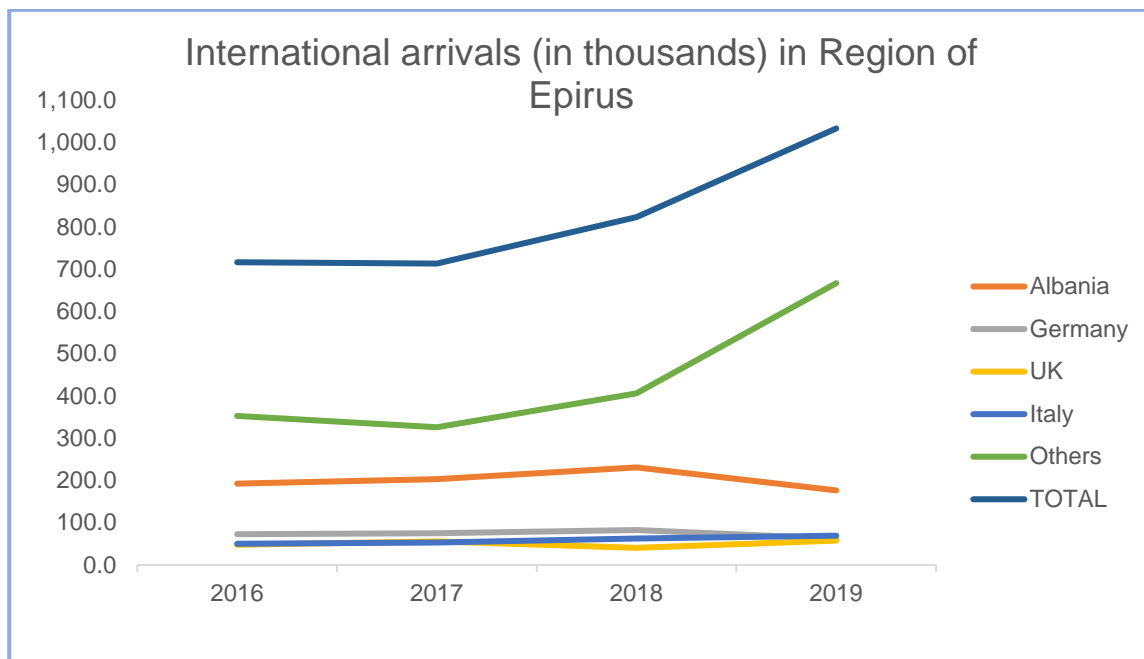


Figure 46: International arrivals at Region of Epirus [insete.gr]

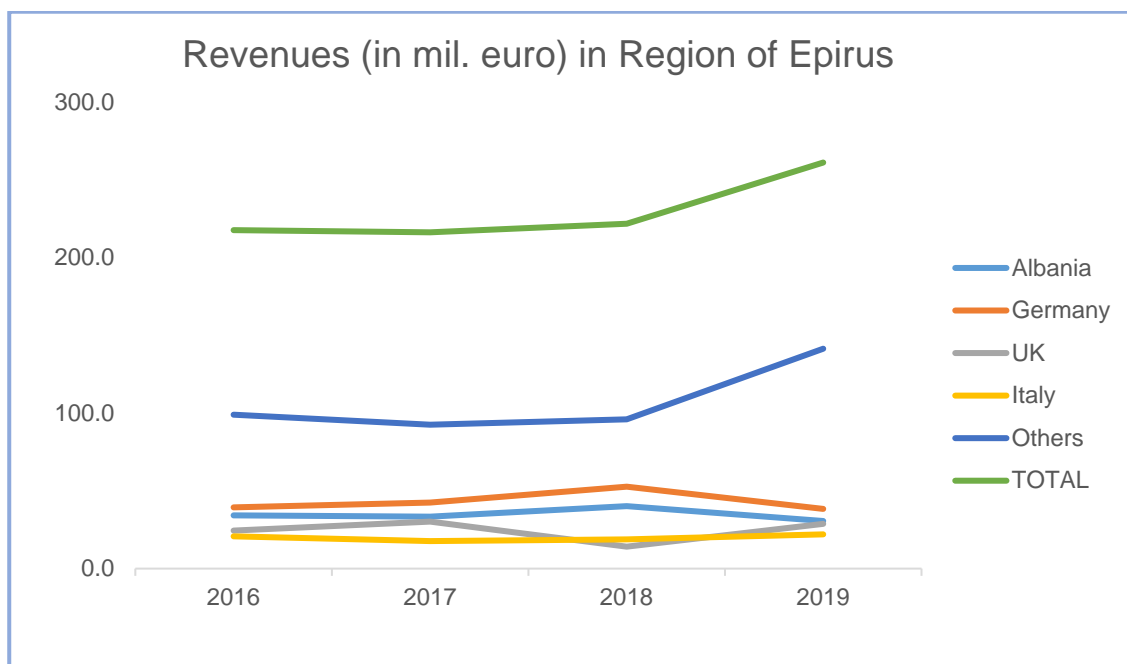


Figure 47: Revenues from international arrivals at Region of Epirus [insete.gr]



Figure 48: International arrivals at Preveza' s Airport [www.hcaa.gr]

According to the competitive study of INSETE for the Greek regions, the region recorded a 20% increase in revenues related to tourism to 261.3 million euros compared to 2016. People from all around the Europe seem to be a dynamic pool of tourists for the Region taking advantage and simultaneously pushing the air connectivity upgrade between Europe and air hub cities in Epirus.



Albania and Germany are also countries that show their interest for the natural and cultural beauties of the area.

The main airport in the Region of Epirus is Aktion International Airport which is located 6.7km of Preveza's city centre and serves many connections at National level.

Regarding domestic tourism, the following figure depicts a gradual upward trend of trend of Region of Epirus from 2016 onwards.

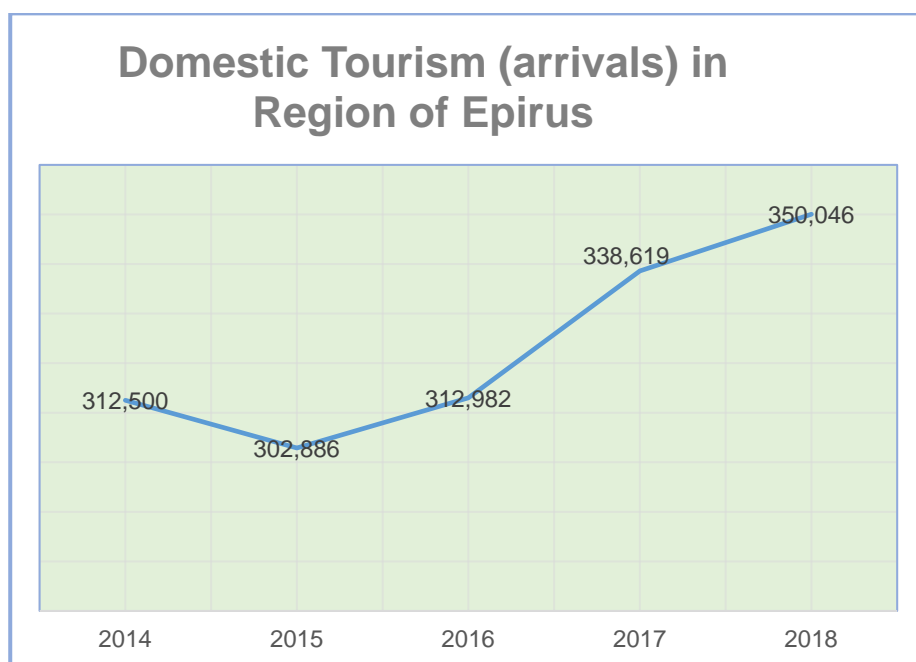


Figure 49: Domestic Tourism in Region of Epirus [insete.gr]

- City level

Preveza is a place offering different opportunities to a tourist: natural and cultural beauty, gastronomy, access to beautiful beaches. According to INSETE, it seems that in the last years, the interest of tourists for the for the area has upgraded.

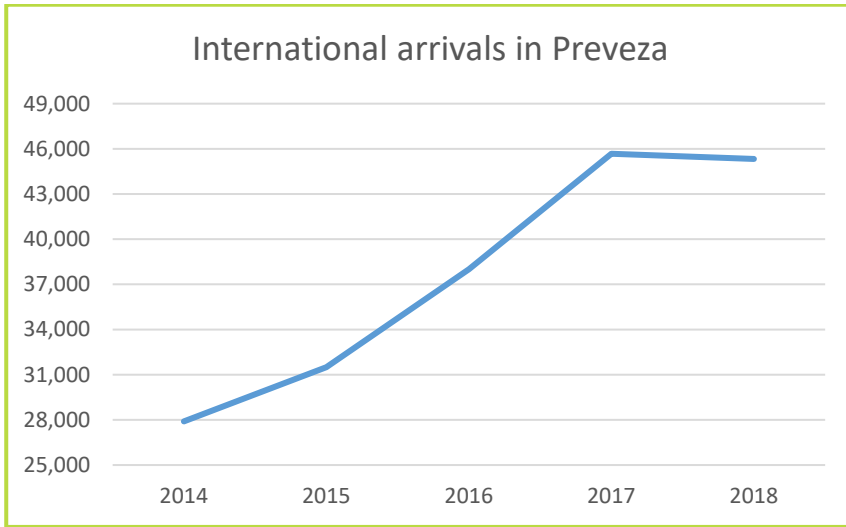


Figure 50: International arrivals in Preveza [insete.gr]

Preveza also captures domestic tourism as depicted in the following figure.

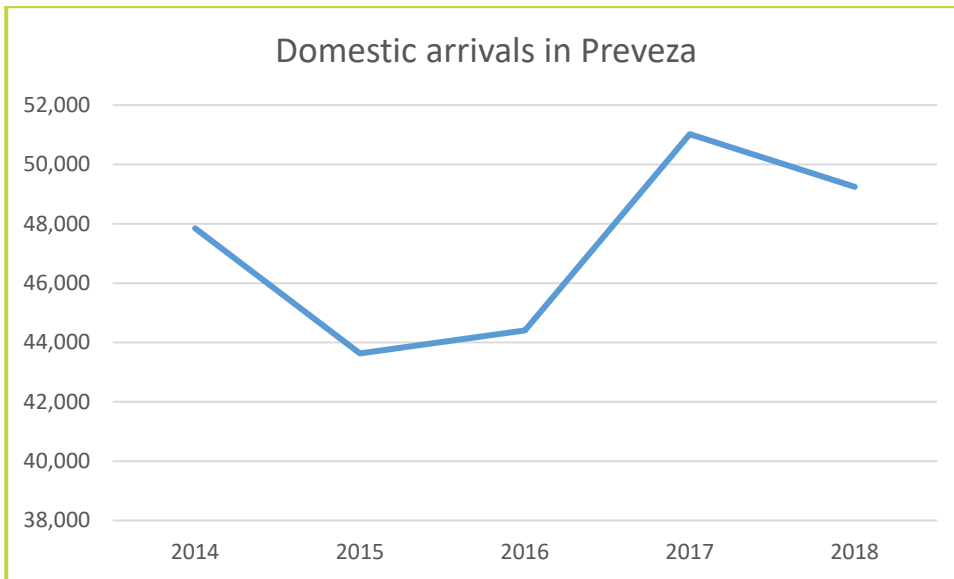


Figure 51: Domestic tourism in Preveza [insete.gr]

As a takeaway of the tourism data critical interpretation we can say that the last years Greece and Region of Epirus have well triggered tourists' interest while some focused actions in line with the umbrella strategy for tourism can show the way towards further tourism development. Also, Preveza presents many opportunities for tourism growth achievement however, a number of better



coordinated actions as well as the strong involvement of local community seem to be prerequisites for reaching the set and create new goals.

2.2.2.3 Searching the tourism policy background and finding gaps and opportunities

The review of national, regional, and local strategies and initiatives that took place in the context of Del. T1.1.1. 'The SUSTOURISMO context. Analysis of policy documents on sustainable tourism and transport in the ADRION area' had as a final goal to identify areas of interventions according to the already published and followed tourism strategy.

The review of the strategic documents revealed basic axes around which Preveza can concentrate. These axes are:

- Development of **integrated** and thematic tourism products that will promote the character of '**unique experience**' through the use of alternative transport modes.
- **Attraction of new investments**, which will also include mobility investments for providing to all visitors' alternative options to visit the touristic sights in a more sustainable way.
- Development of **alternative-to-car traffic networks** at destinations and promotion of 'city break' tourism through the design and implementation of integrated pedestrian and bicycle networks which will upgrade the urban environment and will enhance the alternative transport trips. Alliances (i.e. authorities with industry, local communities and key stakeholders) and tailored to the city-needs cooperation schemes are deemed necessary.
- Creation of an **integrated bicycle network**.
- **Reorganization of the existing Public transport system** of the city.
- Development of **thematic paths** in the context of city break development product which can be accomplished by:
 - Short walks in easy-to reach areas for pedestrians.
 - Routes through selected sights and 'experiences' of the city presenting a common theme (e.g., museums, archaeological sites, highways)
- **Enhancement of maritime services** in the context of the Maritime Tourism Development product, which can be accomplished by:
 - Excursions to coastal destinations
- **Promotion of sustainable mobility** in tourists using **marketing tools such as mobile applications** providing information for alternative trips within the visiting region.

Based on the above and on the current situation in Preveza's connectivity and transport services provided to tourists (relatively low attractivity of public transportation, absence of harmonized and integrated services), this is probably the time for Preveza to catch up; upgrade public transport services - an action that will boost the tourism sustainable growth of the city -, further



support the creation of integrated and organized pedestrian and bicycle networks connecting the city's points of interest - an action that will promote the completion of sustainable travel trips within the city - and start involving local community and entrepreneurship to a user-centred and a digitalized era for tourism (and not only) sector.

2.2.2.4 Learning from best practices on tourism and mobility

The state of art review on previous projects and ongoing innovative initiatives from across Europe that boost sustainable tourism development took place under Deliverable T1.2.1 'State-of-the-art on sustainable tourism' with a view to learn from the others and successfully transfer best examples to SUSTOURISMO cases. CERTH/HIT identified for some interesting points from the review of the best practices that are:

- Creating touristic packages for attracting visitors such as guided tours passing from specific points of interest within and outside the city combining workshops related to the area's local traditions and features.
- Creating a network committed to the promotion of sustainable mobility in tourism by adding new sustainable mobility services (bike rental services, bike carriage services and flexible transport services.) for visiting specific tourism destinations (CYCLO- Cycling Cities, SUMPOR, SUMP- Sustainable Urban Mobility Plan, ADRIMOB)
- Raising awareness and familiarizing tourists with e.g. the culture, heritage and customs of a destination enhancing the likelihood of making sustainable in-trip choices through the provision of located based services (ADRION5, BRIDGE TRAD., 4ALL)
- Introducing visitor management techniques such as queues, reservations, pricing, timed entry etc. for facilitating the tourist experience. A typical example is the use of touristic cards providing free access and electronic pass to main tourist attractions and public transportation systems, reduced rates for taxi and car-share, etc.

Building on the above experience and taking into account the inherent characteristics of Preveza, a first mapping of city's strong points that could be combined under touristic packages can be;

- Its coherent historical city where museums, monuments and archaeological sites are concentrated provides the opportunity to implement well-designed guided thematic walks, providing tourists the opportunity to visit specific points of interest of the city on foot or by bicycle. Its gastronomy can lead to the creation of guided tours passing from specific points of interest.
- Its beautiful beaches providing 'Sea & Sun' activities are located near the city centre offering the opportunity to increase planning capacities on sustainable mobility through specific actions from the city center combining also the use of bicycle.

What the city needs however to tackle to achieve the provision of integrated services combining sustainable mobility and unique city experience is the lack of infrastructure, interconnection and often the quality of tourism product, the lack of cooperation and the interest of public and private



sector in sustainable tourism and the lack of qualified staff that can meet the needs of an alternative tourist audience.

2.2.2.5 Learning from tourist surveys - the path forward as revealed by the tourists

The survey conducted for the case of Preveza during March - May 2021 had as a goal to identify the needs of tourists and relate them to existing or potential mobility services and provisions. The timing of the survey unfortunately was not favourable for tourism. The tourism restrictions in Greece and all around the world due to the COVID-19 pandemics has affected the number of the responses. As a result, the sampling was not the most representative. Focusing on the domestic tourists and trying to extract circumstances-independent needs (unaffected as possible by the pandemic), key takeaways from the survey are:

- Preveza is a city that attracts tourists mainly for the 'Sea and Sun' product however, there are less known and currently unexplored provisions the city can offer that worth further investing in: i.e. cultural and natural areas, history, gastronomy, etc.
- The proximity of Preveza to the archaeological site of Nikopoli is a point that can be further supported when we talk about tourism boost of the area. Connection of this areas with the city centre of Preveza with sustainable mobility options can mutually support areas' growth and attractiveness. However, the lack of the appropriate infrastructure to support the use of alternative transport modes somehow impedes the whole idea.
- An integrated app offering touristic information while giving the floor to tourists for expressing their ideas and complaints, seems that it is an interesting provision. From one side, the city's current level of digitalization is a gap that must be covered soon enough while from the other side it is difficult enough to persuade tourists to download and use such an application. A structured promotion of such an app and the involvement of a great number of stakeholders giving offers to tourists are points that can add on app's popularity. Therefore, the more the provisions through the app, the more the tourists will use it and the more the information and data captured to support policy making in tourism.
- The development of a pre-paid touristic card seems to interest tourists as according to their needs such a card would facilitate their trips providing 'free access to museums and cultural sites, free access to special events (festivals, sports events, etc. and offers regarding the provision of HO.RE.CA services. However, crucial issues such as the absence of strong collaboration between tourism and mobility key players may complicate and prevent the completion of such an initiative.
- Organized walking or bicycle tours within the city center of Preveza with a professional tourist guide is an intervention that tourists would be interested to participate in. Considering that several points of interest are located within the city center, the idea of designing such tours seems a great opportunity for promoting sustainable tours within the city center.



2.2.2.6 *Listening to tourism and mobility stakeholders - insights from the 1st Technical Round Table*

Preveza’s stakeholders’ needs were identified through their participation in the first virtual SUSTOURISMO Round Table entitled ‘Sustainable Tourism and Mobility in Preveza. Needs, Requirements and Challenges for a Sustainable Development’, that was organized virtually on the 3rd of March 2021. During the RT, the key players from tourism and mobility sectors shared the following ideas and thoughts regarding the mutual support of sustainable tourism and mobility;

- Synergies between the local authorities and the private sector could lead to the development of touristic packages promoting the use of alternative transport modes within and outside the city and should be strongly supported. However, in some cases such an interest is not obvious from one or both sides, while also a discontinuity of efforts seem to play a negative role in the implementation of such initiatives.
- The contribution of local society is very important and should be actively involved in the form of public consultation when policies are being shaped, of volunteering actions, of documenting local stories, memories etc.
- ICT, digital tools, social media etc., must be efficiently incorporated in any activity regarding tourism and promotion and a necessary step towards both sustainability and profit increase.
- Cooperation among public and private sector is an essential factor for sustainable development of all sectors.
- Engagement of tourists and stakeholders in mobility & tourism sector and integration of planning seem also prerequisites

2.2.2.7 *Combining findings in a SWOT analysis for the case of Preveza*

Combining the insights of the above findings, the current subchapter concludes in a SWOT analysis for the SUSTOURISMO case of Preveza that serves and is mutually served by the objectives of the project; tourism and mobility hand by hand development.

Table 3: SWOT Analysis for Preveza in the context of SUSTOURISMO project

Strengths	Weaknesses
<ul style="list-style-type: none"> • The city of Preveza is located in the southern tip of Epirus and in the middle of the north-western coastline of Greece that connects the Amvrakikos Gulf with the Ionian Sea. • Preveza attracts visitors from all over Europe, which shows a dynamic as the last years the interest of tourists for the city has upgraded. 	<ul style="list-style-type: none"> • Relatively low current level of digitalization • Absence of strong collaboration between tourism and mobility industry key players • Lack of information points • Lack of organized touristic packages offers and propositions for individual visitors.



- Preveza is known for the protected wetland of the Amvrakikos Gulf, the interesting archeological and historical monuments.
- Preveza is served by Aktion airport which is a few kilometres away. Its commercial port serves the needs of the area in many sectors, such as energy (oil, gas).
- The underwater road crossing Aktio-Preveza ensures the fastest connection of Aitolokarnania and Southern Greece with the coastal zone of the prefectures of Preveza- Thesprotia and the port of Igoumenitsa.
- Several museums are located within the city center.
- Coherent historical city center where monuments are concentrated.
- Rich and famous gastronomy tradition.
- Beautiful beaches offering 'Sea & Sun' activities are located near the city center.
- Creative industries can offer diversified products that meet tourism needs.
- Friendly connections between the city center and nearby locations can be strongly supported via walking and bicycling.

- Absence of an integrated touristic card (pre-paid card) combining both the provision of tourism and transport services to visitors.
- Absence of organized network / routes for cycling,
- Inadequate public transport services provision.
- Lack of appropriate infrastructure for alternative transport modes (bicycle paths)

Opportunities

- The last years there is an upward trend in tourist arrivals and revenues from tourism sector at national level from which Preveza can benefit - Greece has started becoming a strong European destination, a fact from which opportunities arise.
- Introduction of new and innovative technologies for enhancing the 'tourism and mobility' services provision.

Threats

- Not to get full benefits from Greek high recognition as a destination
- Poor infrastructure supporting the use of alternative transport modes.
- Public Transport services that need enhancement
- Minimum participation in financing innovative activities and initiatives by the private sector
- Negative effects for tourism at post COVID-19 era (travel restrictions, slow virus containment and low consumer confidence)



- | | |
|--|---|
| <ul style="list-style-type: none"> • Enhancement of tourists' satisfaction through the provision of attractive offers. • Creation of strong collaborative networks among the public and the private sector. • Creating an organized network of bicycles • Potential for 'slow tourism' growth (walking and cycling trips for leisure). • Alternative offers; eco-tourism, agro-food tourism. • COVID-19 fight through increase of safety - tourism restart in a more structured way taking advantage of the knowledge created during this period. • Digitalization of tourism product, offer of innovative services. • Attraction of private funds. • Alliances among stakeholders, consisting of the following partners: Regional Unit of Thesprotia, Municipality of Thesprotia, Municipality of Preveza, Chamber of Commerce of Thesprotia, Association of Hotels of Preveza, New Association of Hotels of Preveza, Union of Rented Rooms of Parga, Federation of Tourism • Optimal exploitation of financial resources and mechanisms for promoting sustainable tourism. | <ul style="list-style-type: none"> • Leaving Covid-19 pandemic knowledge unexploited, turn back on traditional approaches. • Low interest of local community to participate in coordinated efforts, low current bottom-up approaches. |
|--|---|

2.2.2.8 Drafting of the SUSTOURISMO touristic packages of Preveza

Based on the above SWOT Analysis results while having the interest of specific stakeholders for joining a touristic package scheme, the touristic packages of Preveza started being drafted.



Figure 52: Preveza's pilot area in SUSTOURISMO

The touristic package aims to offer tourists the opportunity to explore and experience the city on foot and by bicycle.

In this package, tourists will have the opportunity to experience the history and culture of the city through organized walking tours, focused within the city center. These tours will offer tourists the possibility to know the history, culture, art, tradition and to experience local food and products. Also, tourists will have the opportunity to explore the city of Preveza by bicycle. Through this route, tourists will have the opportunity to visit monuments, castles, and beaches.

The goal of this action is to increase cooperation with tour agencies, guides, hotels, local shops in Preveza. In that context, collaboration with professional tour guide would be possible in order to accompany tourists to the main points of interests, including sightseeing, visits at museums and monuments.

In order to make possible the development and implementation of such touristic packages, there is being an active work in order to develop a database of stakeholders which includes a pool of relevant interested parties that will be engaged throughout the project. Relevant stakeholders include: municipality of Preveza, regional / national agencies, chambers, trade associations, hoteliers association and catering associations.

Promotional leaflets, posts on social media, information on websites of the Municipality and other tourist-visited websites will support touristic packages dissemination and advertisement. Information about the touristic packages will also be available within the SUSTOURISMO app.



Memorandums of Understanding will be signed among the Regional Union of Municipalities of Epirus and the actively involved stakeholders, for the promotion of the touristic packages and the provision of further offers to tourists.

The procedure for participating/booking, the role of cooperating actors and the points collection through the app is;

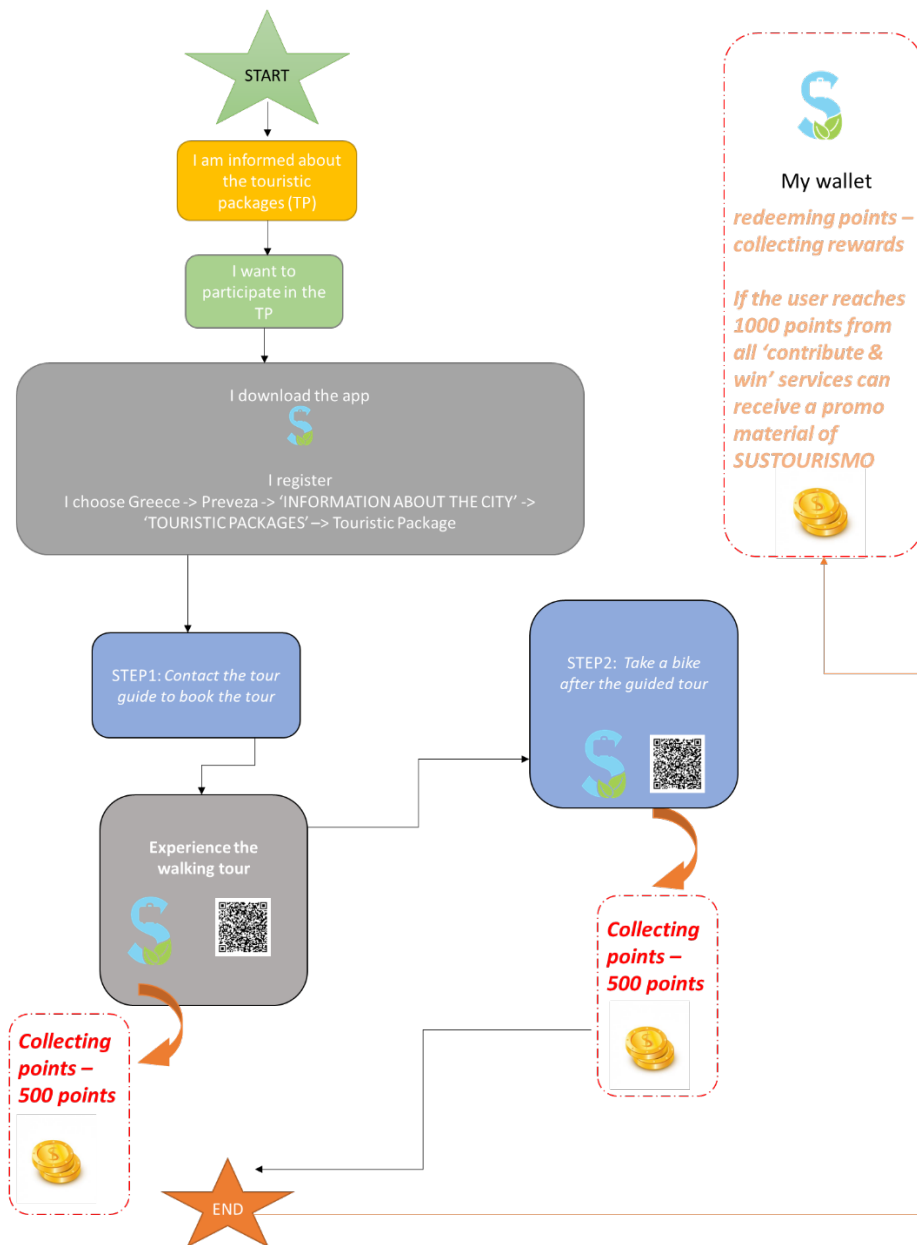


Figure 53: Flow diagram for Preveza's TP



2.3 The case of Region Emilia Romagna (Italy)

2.3.1 The overview of Emilia-Romagna costal area

In the framework of SUSTOURISMO project, ITL is responsible for the pilot case of the Emilia-Romagna Region with a focus on the Ravenna costal city.

The Emilia-Romagna Region is the sixth-largest region in Italy. The Region covers an area of 22 451 km² (7.4% of the national territory) and it has about 4.4 million inhabitants. It is divided into the eight provinces of Bologna, Ferrara, Modena, Parma, Reggio Emilia, Piacenza, Rimini, Ravenna and Forlì-Cesena. The last 3 Provinces are part of the historical sub region called Romagna on which the SUSTOURISMO project is focusing.

The Emilia-Romagna region boasts an enviable geographical position making it an ideal link between northern and southern Italy, as well as connecting the Mediterranean with the northern Europe. It is situated in central-northern Italy, in the heart of the country's most industrialised area. Its efficient network of infrastructures, strategic geographical position and excellent connections to the rest of Italy and the main European cities make the region a key business hub and a touristic attraction area.

The pilot focus is on the Romagna Sub-Region. There are three provinces in this pilot areas:

- Forlì-Cesena
- Rimini
- Ravenna

This is an area with a high "touristic vocation", related in particular to summer holidays on the "Riviera Romagnola" coastal areas.



Figure 54: Emilia-Romagna Provinces and underlined the 3 provinces composing the Romagna Sub-Region

From an economic point of view, the 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. Emilia-Romagna also ranks amongst the top regions in Italy for bureaucratic efficiency and quality of life. Small- and medium-sized enterprises (SMEs) are the driving force of the region's economy and have fostered the extraordinary spread of wealth across the entire regional territory. The dynamic nature of the production sector in Emilia-Romagna has resulted in high employment levels; indeed, employed inhabitants amount to over 68%, considerably higher than the Italian average.

Emilia-Romagna is the leading region in Europe in terms of entrepreneurship and economic dynamism. In 2018, the region had among the highest value in Italy in term of active people in working age (69.6%) and the women activity rate (62.7%). The unemployment rate was 5.9% in 2018, far below the national average (10.6%) and the one for Europe (6.9%) (Eurostat, 2019). In 2017, with a total GDP of € 157,177.28 m, the GDP PPS per capita was equal to € 35,800, one of the highest in Italy, after Lombardy (region of Milan, Italian financial pole) and some small autonomous and highly subsidized Alpine regions and provinces (Eurostat, 2019). In 2018, is the second region with the highest propensity to export in Italy and Europe (the first one is Lombardia 27.4% of export quota). The exports of Emilia-Romagna are about €63m with an increase of 5.7%. As of September 2018, there were 405,031 active enterprises located in the region, with a decrease of -0.4%. Like in the rest of the country, the majority of enterprises has less than ten employees. A large number of companies (about 43,000), belong to manufacturing industry. There is a slightly decrease of -0.5% comparing to 2017.



Manufacturing plays the leading role for the whole regional economy. It is concentrated on some powerful clusters, apparently belonging to traditional sectors, but able to activate medium and medium-high technology activities and high innovation capabilities. The most relevant group of industries are linked to mechanical engineering and automotive. We can list sport cars and motorcycles, agricultural machines, shipbuilding and offshore, industrial automation and robotics, various industrial sectors equipment (food processing and packaging, wood processing, ceramics, etc...), sensoristics and precision farming, medical equipment. Other powerful clusters are agri-food, construction materials and technologies, biomedical industries, fashion. Tourism and entertainment industries are very important in the coastal area. Cultural and gastronomic tourism is increasing in the last years.

Sectors that need to be reinforced are ICT and creative industries, still not enough developed and competitive. The service sectors in general is characterised by low productivity. Other original aspects of the region are: the huge (and unique in Italy) presence of the co-operative economy, especially in the agri-food, construction, logistics, retail, social economy, but also with successful manufacturing cases; widespread handcraft and micro enterprise tradition; increasing presence of multinationals by mergers and acquisitions of existing firms, and recently, by green field investments. In 2018, the employment rate was higher (69.9%) than the national level (58.5%) (Eurostat, 2019). The unemployment is constant in the recent years, it is 5.9% in 2018 (Eurostat, 2019). It is now below the national trend (10.6%) and also the European one (6.9%),

From the transport point of view, the region of Emilia-Romagna has a very good system of transport, with 574 km of motorways, 1,053 km of railways and airports 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 55: Emilia-Romagna Region main transport infrastructures (Source: Emilia-Romagna Region)

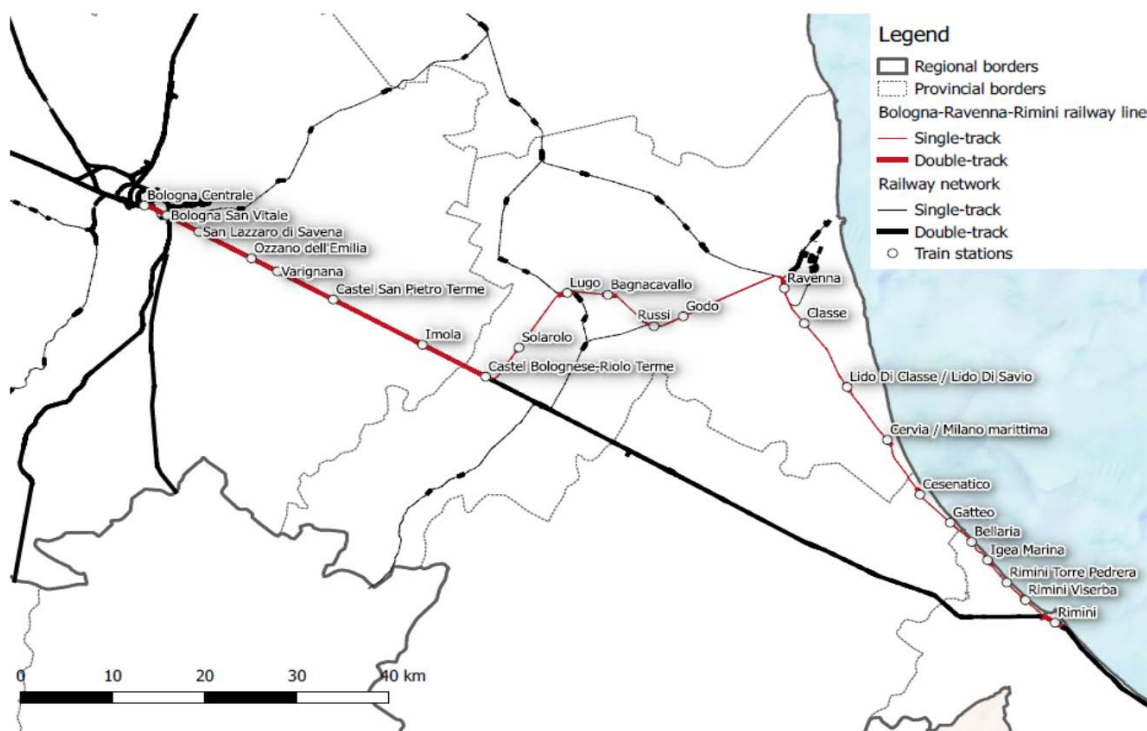


Figure 56: Romagna main rail network (Source: Elaboration ITL)

Emilia-Romagna is a top European tourism destination, welcoming more than 11.5 million visitors annually and generating 50 million overnight stays (pre Covid-19 numbers). Its unique attractions (historical, cultural, artistic, social, industrial and economic) provide visitors with several 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 Italian area. In 2018, in the Emilia-Romagna Region, 40.647.799 tourist were registered. More than the 80% of these tourists are registered in the Romagna area. In particular in Rimini (16.181.180), Ravenna (6.678.863), Forlì-Cesena (5.492.178) and Bologna (4.729.192), where Bologna is the only city that does not belong to Romagna. These very consistent touristic flows generate every year several problems related to traffic jam, both in the highway and on the local roads. In fact, a large part of these trips are conducted with private cars.



Figure 57: Romagna main touristic cities and rail connections (Source: Start Romagna)

As for all countries, COVID-19 pandemic, has influenced hardly Emilia-Romagna’s economy, an influence that is vague enough when will disappear.

2.3.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Emilia-Romagna

The current chapter concerns the tourism data for the Emilia-Romagna SUSTOURISMO case up to 2020, when the outbreak of Covid-19 pandemic caused a harm effect on tourism and transport as well as in the majority of daily operations.

The tourism data refers to three different geographical levels: national (Italy), regional (Emilia-Romagna Region) and local (Ravenna city). They are analyzed in order to come up with insights and opportunities for the case of Ravenna, that represents the Emilia-Romagna pilot case in SUSTOURISMO project.

National level: Italy



As stated in the OECD Tourism Trends and Policies 2020, while in the short-term the picture for tourism is mixed, mainly due to an uncertain economic outlook and external shocks such as health scares and extreme weather events, over the long-term tourism is expected to continue to grow.

In Italy, tourism continues to make an important contribution to the national economy. Including indirect effects, in 2017 it accounted for **13% of GDP** and employed **14,7% of the workforce**.

In line with global trends, arrivals data for 2018 shows steady and positive growth. According to accommodation statistics, the number of inbound visitors were **63.2 million** up from 60.5 million of the 2017 (growth of 4,4%). International overnight stays rose by **33,2%** between 2011 and 2018.

The expected final outlook for 2020 and 2021 in the international and national studies confirm heavy difficulties for tourism. The latest bulletin of the *ENIT*¹¹ (Italian National Tourism Agency) estimates that total visitors (international and domestic) **decreased by 50,9%** compared to the previous year, which equates to a total of 58.6 million visitors. In addition, total tourist nights decreased by 172 million. The impacts will be much greater for international arrivals than for domestic travel, with international visitors staying overnight decreased by 58% in 2020 while domestic visitors decreased by 31%. Only in 2023 the sector should slightly exceed the volumes of 2019. All Italian cities will suffer a significant impact in 2020.

Regional level: Emilia-Romagna

The growth of the tourist presences in the hospitality structures of Emilia-Romagna slows down in 2019: for the first time in five years, there was a slight decline in presences, of 0,7%, going from 40.647.799 in 2018 to 40.360.042 (29.748.427 Italians and 10.611.605 foreigners). The drop was 0,2% for Italians and 2,1% for foreigners.

However, there was a further increase in arrivals, which amounted to 11.597.928 (8.474.474 Italians and 3.123.454 foreigners). Compared to 2018, arrivals increased by 1,2%: for Italians, in particular, the increase was 1,4% and for foreigners by 0.7%.

The increase in arrivals and the simultaneous decrease in presences highlight a reduction in the length of stays in 2019, in line with the trend observed in previous years: the average stay has in fact decreased progressively since 2014 (3.84 days) to 2019 (3.48 days).

There was a clear decline in tourist arrivals expected in the final balance in 2020 compared to 2019. The latest data indicate a number of Italian tourists equal to 4.885.000 with a decrease of about 43% and of 879.000 foreign tourists with a decrease of about 72%. In total, a **decrease of 50,6%** is estimated due to Covid-19 emergency.

Same decreases also in tourist presences: it is estimated a total of presences of Italian tourists equal to 19.104,405 with a reduction of 35.8% and a presence of foreign tourists of 3.275.438 with a decrease of 69.1%, with an average of 44.5, slightly below the national average of 46%.

¹¹ ENIT - Agenzia Nazionale del Turismo, controlled by Ministry of Cultural Heritage and Activities and Tourism.



Figure 58: Emilia Romagna riviera

City level. Ravenna

2019 tourism sector situation - Before Covid-19 outbreak, data on tourism flows for the municipality of Ravenna highlighted that 2019 was another record year for this famous city of art (*source ISTAT¹²*). Ravenna city continues an unprecedented growth, from about 240.000 in 2016 to **264.000 tourists in 2019** (+2,8% on 2018, equal to an average of 724 tourists/day). These data have to be compared to a drop in overnight stays of 1,0% compared to a record 2018 for the city, which for the first time had exceeded **500.000 nights** (in 2019 there were about 498,000 nights spent by tourists).

In 2019, Italian tourists grew (with significant increases of tourists from Piedmont, Veneto, Puglia and the other municipalities of Emilia-Romagna) while foreigners remained stable (with overnight stays, however, down by around 3%), about 25% of the total, with the most consistent increase, around 20% from Croatia and 5,6% from UK. Tourist flows from France showed a little decrease (-1,8%) while German remained stable.

¹² ISTAT - Istitutonazionale di Statistica



Figure 59: Ravenna Sant'Apollinare in Classe Basilica

2020-2021 tourism sector situation - Obviously, due to the Covid-19 pandemic, in 2020 there was a great decline in the number of tourists who visited Ravenna. Currently there are no available data for the city of Ravenna alone but for the whole province (which also includes the small tourist towns on the coast).

For the province of Ravenna, 2020 was a black year in the historical series of tourist data, with number of arrivals of Italian tourists equal to 826.472 with a decrease, compared to 2019 of 35,6% and of foreign tourists equal to of 86.153, with a decrease of 68.0%. The total number of arrivals is therefore 912,625 with a decline of 41.2%.

Similar decline also in tourist presences: Italian tourists 3.571.575, a decrease of 32,7%, foreign tourists 434.913 with a decrease of 65,7%. In total the presence of 4.006.488 tourists was recorded, with a decrease of 39,1%.

2.3.3 Searching the tourism policy background and finding gaps and opportunities

The review of national, regional and local strategies and initiatives performed in the context of Deliverable T1.1.1 titled "The SUSTOURISMO context. Analysis of policy documents on sustainable tourism and transport in the ADRION area", was focused to identify areas of interventions, according to the already defined main regional tourism strategies.



The fundamental axes around which Emilia-Romagna Region is working for the strategic development of tourism are:

- **Sustainability**: a key element of the competitiveness of the regional tourism sector is to preserve natural resources and landscapes and attract investments for their protection. A sustainable vision for tourism is geared towards sharing opportunities across the country and throughout the year and introducing employment to new and established destinations.
- **Innovation**: in relation to tourist destinations, business models, professional profiles, marketing and the quality of services and products. Digitization is at the forefront of innovation, in relation to the distribution of information, decision-making by travellers and the expansion of information tools.
- **Accessibility (mainly in relation to the rural areas)**: it includes the expansion of access to less visited areas and the possibility of giving all types of visitors the opportunity to benefit from tourism and to fully appreciate the uniqueness of the destinations visited.

These axes and related actions are part of the operational plan linked to tourism and the new guidelines of the strategy for relaunching the sector after the Covid-19 pandemic. The railway connections with Bologna, Rimini, Florence and Forlì and the agreements with the airports of Forlì and Rimini, with the new routes for Russia, Iran, Poland, Austria and Germany will be fundamental for the next few years.

Regarding the mobility programmes, in 2019, Emilia-Romagna Region has developed the "Handbook on sustainable mobility in the Med area", i.e. a guide for solutions in terms of sustainable mobility, which is available to policy makers, local authorities, professionals and also to representatives of local and regional communities and citizens. This is the most relevant result of the INTERREG MED Mobilitas project (<https://mobilitas.interreg-med.eu/>) in terms of transferring the results on an urgently topical issue such as sustainable tourism.

Tourism that focuses on the coasts in summer, but also the movements of residents during peak hours during the rest of the year, cause significant traffic levels, with important repercussions on air quality, noise pollution and health, with high risk to make these places less safe and attractive.

The goal of the handbook is to enhance the projects and solutions created in the Mediterranean area specifically to respond to these problems. The volume collects the results produced by 7 projects of the network on sustainable mobility (CAMP-sUmp, EnerNET-Mob, LOCATIONS, MOBILITAS, MOTIVATE, REMEDIO and SUMPORT) that can be replicated in other territories, to enhance mobility policies and mobility actions.

2.3.4 Learning from best practices on tourism and mobility

The state of art review on previous projects and ongoing innovative initiatives from across Europe that boost sustainable tourism development was already analysed with Deliverable T1.1.2.



To capitalise on past and ongoing experience on sustainable tourism and on initiatives for users engagement in sustainable planning, ITL identified for Emilia-Romagna Region and Ravenna some interesting references, i.e.:

Interreg Central Europe SMACKER Project: promotion of public transport and mobility services through demand-responsive transport and the connection of local and regional systems to main corridors and transport nodes. Application of soft measures (e.g. behaviour change campaigns) and hard measures (e.g. mobility service pilots) for identification and promotion eco-friendly solutions for public transport in rural and peripheral areas to achieve more liveable and sustainable environments, better integration of the population to main corridors and better services feeding main public transport.

Interreg Italy-Croatia ICARUS Project: change in mobility by using the Mobility as a Service. The best practices developed through 8 pilot projects and a case study concern on timetables harmonization, car/bike sharing within transport nodes, ICT solutions for seamless flow of information, integrated intelligent multimodal payment systems, dynamic travel planning and cross-border intermodal services.

Interreg Adrion INTER-CONNECT Project: promotion of intermodal transport and guides the respective actors on how to turn connectivity plans into reality. Best practices concerning new solutions tailored to ADRION's specificities for the promotion of intermodal transport and guides the respective actors on how to turn connectivity plans into reality: Hubs clustering, identification of current and future trip generating poles, user surveys for mobility needs and expectations understanding, mapping of drivers, cooperation schemes establishment, soft mobility measures (e.g. integrated ticketing, harmonized timetables & procedures).

Interreg Italy-Croatia MOSES Project: The Moses project objective is to improve the accessibility and the mobility of passengers across the Adriatic area and its hinterland through the development of new cross-border, sustainable and integrated transport services and the improvement of physical infrastructures related to those new services. Best practices concern promotion of innovative sustainable transport solutions for cruise tourists. In detail: testing of innovative tools for e-booking and e-ticketing solutions, implementation of a new maritime fast-line transport service, testing of info-boards for passengers at ports, improving of bus and bike innovative connections systems, implementation feasibility study to increase sustainable marine transport routes, recovering of operational quay in ports, installation of eaves, and implementation of innovative electric bike sharing systems for cruisers.

Interreg Med SUMPORT Project: Best practices concern the drafting of the Sustainable Urban Mobility Plans in port cities. In detail the best practices refer to the design and implementation of various types of measures (e.g. bicycles lanes, bike sharing system, carpooling, ICT application for public transport). All these measures concern sustainable mobility with a concrete impact on citizens' everyday life.

CIVITAS DESTINATIONS Project: The project develop smart measures for enhancing sustainable mobility in a specific context of islands cities (small and medium) facing a high touristic demand. Some best practices can be adopted concerning integrated packages of smart measures for



enhancing sustainable mobility in specific context of islands cities facing a high touristic demand; moreover, indication can be adopted as smart communities can combine innovation and planning for boosting the sustainable transport ability to respond all travellers and resident's needs.

Building on the above experiences and taking into account the inherent characteristics of Emilia-Romagna Region, a first mapping of city's strong points that could be combined under touristic packages can be:

promotion of flexible public transport solutions for tourists and residents in peripheral areas;

promotion of sustainable transport solution in touristic areas;

promotion of innovative sustainable transport solutions for cruise tourists;

promotion of intermodal transport and guides the respective actors on how to turn connectivity plans into reality;

implementation of innovative electric bike sharing systems for cruisers;

better integration among sustainable transport and sustainable tourism solutions;

innovations and plans for boosting the sustainable transport ability.

2.3.5 Learning from tourist surveys - the path forward as revealed by the tourists

The survey conducted in the framework of the SUSTOURISMO project for the case of the Romagna coastal area, involving foreign and Italian tourists, were carried out in September 2020 mainly in Rimini (Romagna Riviera). Surveys consist of total 217 interviews.



Figure 60: Rimini riviera



The main data collected thanks to these surveys can be summarized in the following key points:

The tourists origin (the location where they normally they live) shows that: 88,5% were Italians and 11,5% were foreign. Actually, Rimini normally hosts many foreign tourists (particularly from northern Europe), but the survey period (September 2020) during the Covid-19 pandemic emergency, discouraged many foreign tourists from taking long journeys. The result was that, at least for 2020 summer, there was a large majority of Italian tourists who were able to reach Rimini by car or by short train trips.

Concerning Italian tourists, 32,3% came from the Emilia Romagna Region (the pilot site region) and 67,7% from other regions. The significant presence of tourists from the Emilia Romagna region is easily explained by the Covid-19 pandemic period, where even the Italian tourists were discouraged to travel medium/long distances



Figure 61: ROGER App

Existing ROGER App for regional mobility: Tourists from Emilia Romagna were asked if they knew this app. Out of 62 people who answered this question, 46 (74,2%) were aware of the ROGER App while 16 (23,8%) had never heard of it. Considering the total number of interviews, the percentage of tourists knowing the app is only of 21,2%. This low level of knowledge can be motivated by the relative short time that the ROGER app has been in operation and, overall, by the lack of promotion activities (i.e. information campaigns) developed by the Region, in particular toward the tourists in the summer season.

Regarding the tourists use of the ROGER App, out of the 46 tourists who declared to be aware of the ROGER App, 14 (30,4%) use the app at least once per month, 9 (19,6%) use the app between 2 and 5 times per month, 1 (2,2%) use the app regularly, 22 (47,8%) know the app, but never used it. Again, these percentages highlight the need of a more effective promotion activity of the ROGER App.

Integration into the ROGER App, of sustainable mobility services. From the interview results it turned out that bike and electric scooters rental companies, or bike sharing points are useful to be integrated into the App. Good interest also in the integration of module indicating the level of CO2 emission related to their behaviours during travels.



2.3.6 Listening to tourism and mobility stakeholders - Insights from the 1st Technical Round Table

Emilia-Romagna Region stakeholder needs were identified through their participation in the first virtual SUSTOURISMO Round Table, held in virtual modality on December 16th 2020.

The topics covered concerned:

SUSTOURISMO project and its links with ongoing projects in Emilia Romagna;

Regional policies concerning the themes developed by the SUSTOURISMO project;

Several aspects of the tariff integration of the various public transport systems in Emilia Romagna: perspectives and problems.

The round table made it possible to highlight, among other things, the needs of stakeholders in the field of mobility in the Emilia Romagna Region. Among these the main one is the promotion of sustainable tourism and transports at the regional level. This can be accomplished through *the digitalization of the public transport tickets*, the *integration of the different public transport solutions* and the *definition of touristic packages* able to promote/support a better and wider use of public transport solutions.

Regarding the public transport ticket integration, stakeholder highlighted the need of working on a public transport ticket integration action in order to increase the number of locals and tourists using the public transport services. This is a priority despite it is not an easy task and several technical and institutional barriers are still to be overcome. An important starting point for all these integration initiatives is the ROGER App, the MaaS app developed at the regional level and managed by Tper. Potential synergies among ROGER App and SUSTOURISMO Project will be explored more in depth in the next year.

The stakeholder confirm that it is fundamental to have an integrated app providing information to tourists and asking for collection/sharing of data and ideas. This approach has been used in many experiences developed in the past and is still a fundamental approach for a more sustainable tourism and transportation system. The Emilia Romagna Region has been working for many years for the promotion of an integrated app providing all the required information to final users, both on touristic and mobility sectors.

Now the priority is to limit (when possible) the proliferation of different apps in order to provide information on tourism and transport in a more coordinated way at the regional level. Providing an integrated app, that gives information to tourists and asking for collection/sharing of data and ideas, could be very useful. The challenge is to have a tool with integrated cross borders public transport information.

Potential of developing touristic packages. This activity aimed to promote a more effective nexus between sustainable tourism and transport at regional and local levels. There is an interest from all the participants to explore effective implementations of thematic touristic packages at



regional and local level. In the past, touristic promotions for people travelling around Romagna using the public transport were already tested. These initiatives were quite successful.

In conclusion, the round table highlighted the common interest of the stakeholders interested in the integration of mobility services in the Emilia Romagna Region. To achieve this goal, the current situation and planned future activities were examined.

This will therefore be the reference context in which the SUSTOURISMO project will carry out the planned activities in coordination with all the mobility service providers and mainly with the Emilia Romagna Region.

2.3.7 Combining finding in a SWOT analysis for the case of Emilia-Romagna and Ravenna

Combining the insights of the above findings, the current subchapter concludes in a SWOT analysis for the SUSTOURISMO case of Emilia-Romagna Region and Ravenna subarea, that serves and is mutually served by the objectives of the project (tourism and mobility hand by hand development).

Table 4: SWOT analysis for Emilia-Romagna and Ravenna in the context of SUSTOURISMO project

Strengths	Weaknesses
Long tradition in the promotion of sustainable mobility both for tourists and commuters (several investments in the last years for rail service improvement, etc.); Rich cultural and natural assets, with a lot of variety (from seaside tourism to mountain trekking); Growing role and numbers of the sustainable tourism in the Romagna area (and at regional level in general) mainly related to thematic tourism (food, etc.), trekking and biking.	Public transport offers often not adequately known by tourists; Difficulties in promoting integrating ticketing systems, its friendly use and convenient fares; Lack of touristic offers integrated with sustainable transport solutions; Lack of coordination among touristic and mobility regional and local departments.
Opportunities	Threats
Definition of better cooperation platforms and solutions for key tourism regional transports; Consistent investments for the promotion of more attractive and efficient public transport services (in particular the “Metromare” service, a surface high speed bus service connecting Rimini with Riccione); Improvement of the bike lines network (significant investments activated in the last years).	Covid-19 emergency for tourist presences and reduction of the availability in promoting innovative touristic and mobility services; Difficult change of mentality in Romagna where private car is still considered the main means of transport.



2.3.8 Drafting of the SUSTOURISMO touristic packages in Ravenna

In the framework of the SUSTOURISMO project, ITL, in collaboration with the **Ravenna Municipality (Transport and Tourism departments)** and **Start Romagna**, intends to work on a SUSTOURISMO touristic packages focusing on promoting sustainable tourism at local level.

The core of the SUSTOURISMO Ravenna integrated touristic-mobility package is the **Romagna Smart Pass** and the **Rail Smart Pass** integrated ticket. The Rail Smart Pass is an integrated rail and public transport ticketing solution allowing to travel for 3 or 7 days in all the Romagna area using a single ticket. It cost 25€ for 3 days and 50€ for 7 days. They can be purchased in the official ticket offices or on the App “My Cicero”. This ticket is an evolution of the “Romagna Smart Pass”, a ticket that allows you to travel with all buses around Romagna.

The goal of these touristic packages is the promotion of sustainable tourism and sustainable mobility among tourists in the Ravenna area. For these reasons the main SUSTOURISMO objectives can be summarized in:

- Improve the “user experience” of tourists travelling with the public transport, with a particular focus on the simplification of the ticketing fares system and purchase procedures (for example thanks a digitalization of the touristic tickets, etc.);
- Definition of dedicated rewarding systems for tourists travelling in a more sustainable way and using the local public transport solutions;
- Improve the coordination among the key regional/local touristic and transport stakeholders.

For all these reasons the key objective of our Ravenna SUSTOURISMO package is to award the tourists visiting Ravenna in a sustainable way using these two innovative public transport integrated tickets. Moreover this pilot intends to contribute in a better promotion among tourists (mainly foreigners) of these integrated tickets.

Touristic Package. Visit Ravenna with the Romagna Smart Pass and/or the Rail Smart Pass

Under this package ITL intends to contribute in supporting the regional promotional activities and strategies related to the increasing of public transport use among tourists. Based on the most recent available data presented in the previous paragraphs, it is clear that nowadays the tourists, mainly in the Emilia-Romagna coastal areas, used mainly the car for their travels.

The aim of the SUSTOURISMO Touristic package 1 is to promote the use of public transport contributing in increasing the attractiveness of these services. This objective will be reached working on the improvement of the public transport ticketing schemes starting from some integration experiences already supported in others EU projects (Rail Smart Pass).

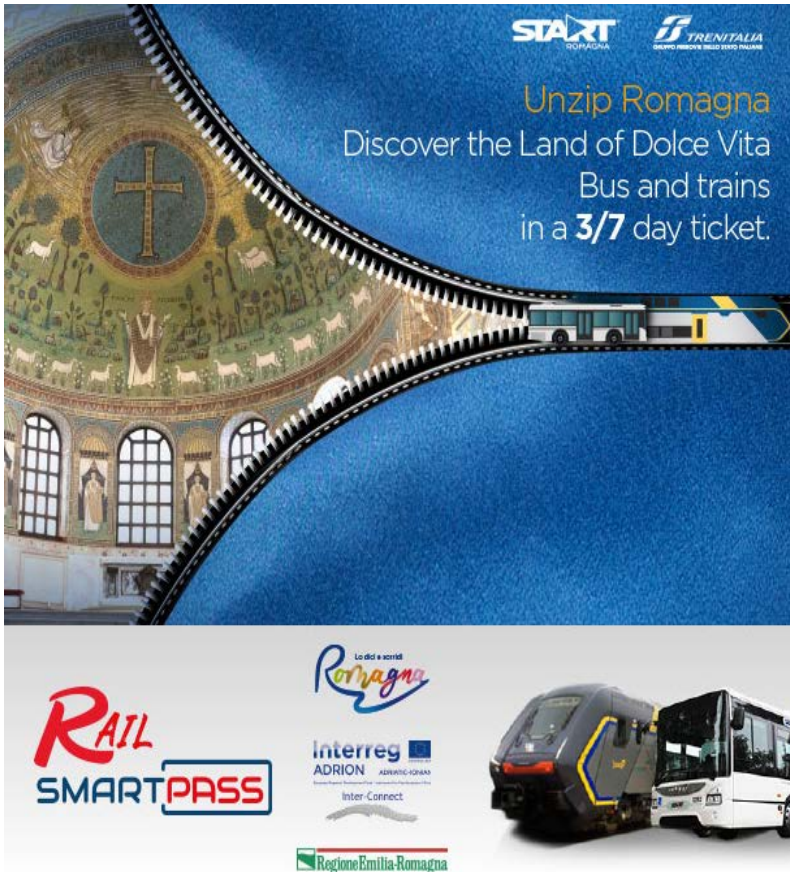


Figure 62: Promotional campaign of the Rail Smart Pass developed during the Interreg Adrion Inter-Connect project.

The Rail Smart Pass was defined in another Interreg Adrion project called “Inter-Connect” starting from another important integrated touristic ticket launched by Start Romagna some years ago and integrating all the local buses operating in the Romagna region: the Romagna Smart Pass. This integrated bus ticket is operative on 3 provinces (Ravenna, Forlì-Cesena and Rimini), over 80 municipalities, 5,551 km of road, over 150 lines and 6,000 stops served by over 600 vehicles. The Romagna Smart Pass is the easiest, fastest and most beneficial ticket to get around in Romagna. It lets to board at any stop and for any destination on the Start Romagna network for 3 days (11 €) or 7 days (22 €).

The challenge of the Rail Smart Pass is to add also the train services to the already existing Romagna Smart Pass. In the first testing period during the summer 2019, the Rail Smart Pass was valid for 3 or 7 days and can be purchased only from authorized resellers throughout the region.



The tickets were available only in paper version (no digitalization). The challenge is to make it possible to sell this ticket also online and using the most used integrated transport apps available in the market. The 3 days ticket costs 25€, the 7 days tickets costs 50€. The ticket test period was officially presented to the public on 23rd November 2019 in Rimini.

In relation to the SUSTOURISMO App, there are three specific actions we intend to reward in the SUSTOURISMO App:

- Owning the Romagna Smart Pass and/or the Rail Smart Pass;
- Visit the 6 Ravenna POIs identified in the SUSTOURISMO App - The six monuments with a SUSTOURISMO logo at the entrance are:
 - MAR - Ravenna Art Museum;
 - Dante Museum;
 - Domus of the Stone Carpets;
 - Rasponi Crypt and Roof gardens of "Provincia" palace;
 - Tamo Museum - All the adventure of the mosaic;
 - Classis Ravenna - Museum of the City and of the Territory.
- Use the SUSTOURISMO App.

The points schemes is summarized above.

Table 5: Points in SUSTOURISMO app per action

<i>Actions rewarded by the App</i>	<i>Points</i>
<i>Romagna Smart Pass and the Rail Smart Pass</i>	950
<i>Visit one of the Ravenna 6 POIs in the SUSTOURISMO App</i>	50
<i>SUSTOURISMO App: Trips recording & Evaluation</i>	50 per day (max 3 per day)
<i>SUSTOURISMO App: Proposals & Complaints</i>	50 per proposal & complaint (max 1 and 1 per day)
<i>SUSTOURISMO App: Counting Steps</i>	50 per 1000steps

In order to create physical points where the rewards can be retired, 2 different points were identified:



- The tourism office in the main city centre square;
- The public transport ticket office in the train station station (available since November 2021).

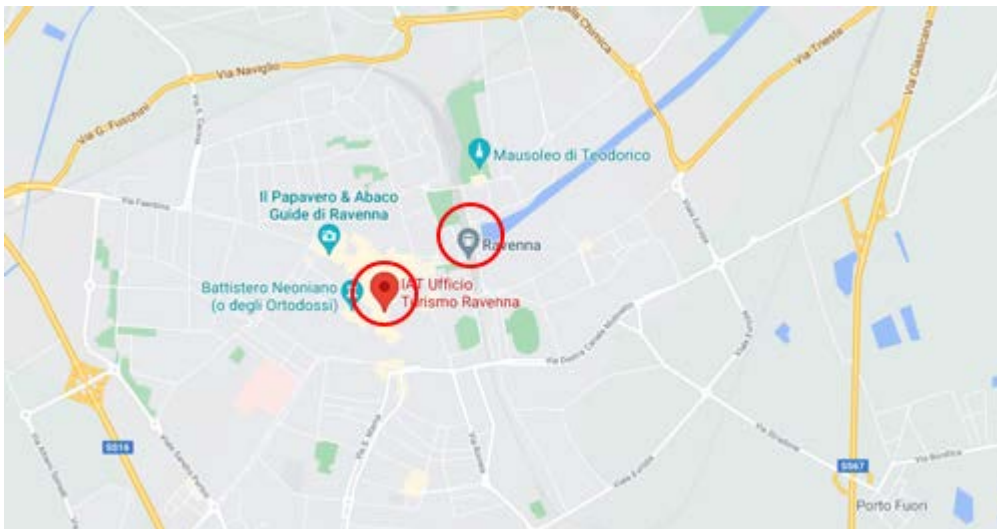


Figure 63: The two SUSTOURISMO physical points

Project posters will be displaced in the Ravenna IAT and in others touristic points in the city (not in the monuments as the law don't allow it). These posters will be also displaced in the available public transport ticketing points. The initiative will be promoted on the official Ravenna online touristic communication channels, first of all the Ravenna Tourism portal. We hope to be able to present the initiative also during some touristic events during the Summer 2021 and 2022.

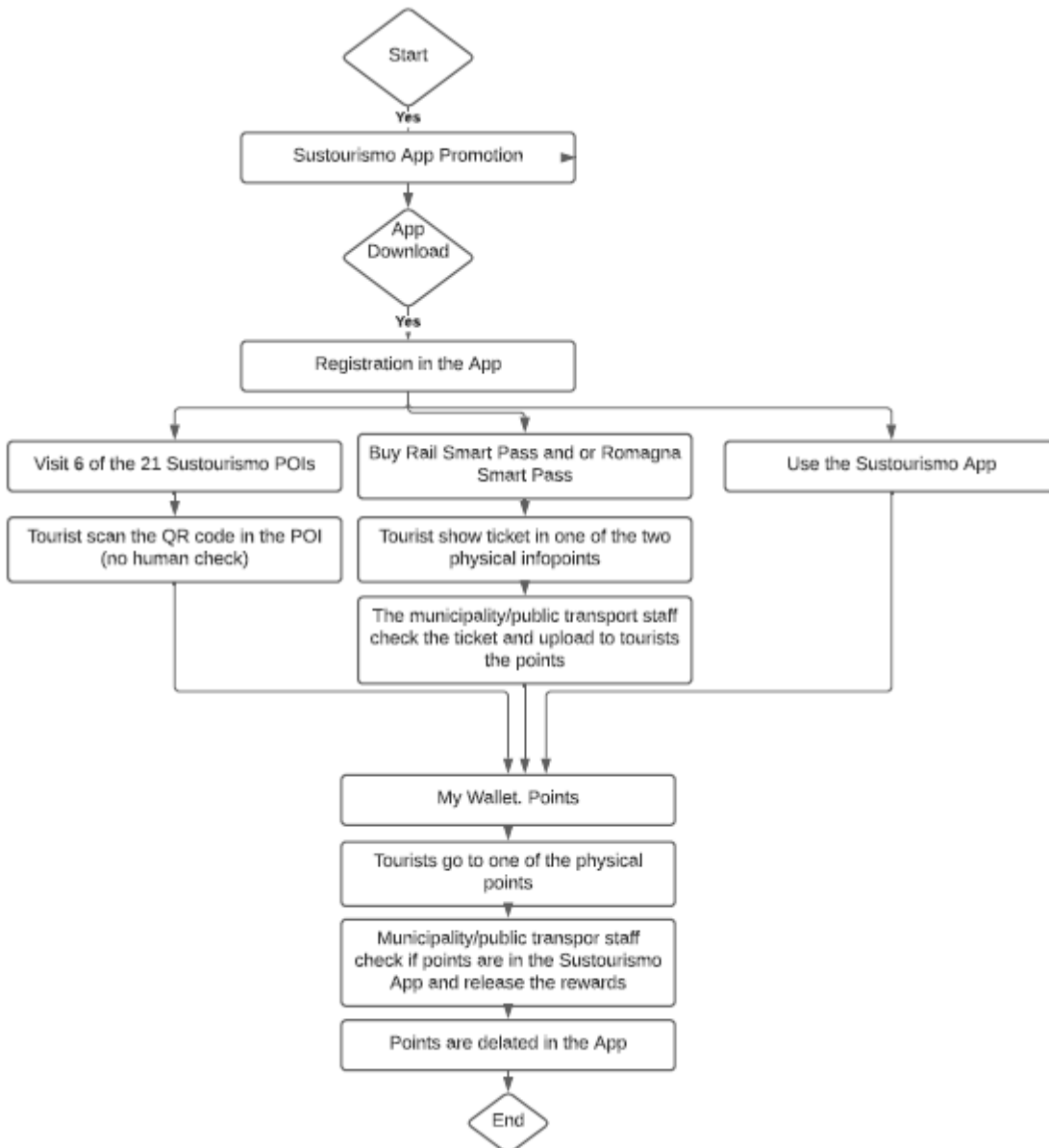


Figure 64: General scheme of the Ravenna tourist package

EDITION 2022

Based on the results of the 2021 and first semester of 2022, the 2022 (October-December 2022) pilot action was re-structured in order to correct some main constraints encountered, so to propose a new version able to attract more tourists.

The main limit identified in the first testing period was mainly related to the high price of the integrated public tickets needed to ask the SUSTOURISMO prize. In fact the 3 days Rail Smart Pass



ticket costs 25€, the 7 days tickets costs 50€. Instead the 3 days Romagna Smart Pass ticket costs 11€, the 7 days tickets costs 22€. Moreover both the integrated tickets were quite new offers and probably they are not still so known by the tourists.

For these reasons, in agreement with the Ravenna municipality and the public transport operator Start Romagna was decided to include in the SUSTOURISMO reward scheme also the single trip public transport ticket available in the Ravenna territory. The cost of a single trip ticket is 1,30€. In the view of the involved stakeholders this can help to involve an higher number of tourists. Moreover it was not possible to enlarge the number of involved local museums.

Interreg  **ADRION** ADRIATIC-IONIAN
SUSTOURISMO
ITL ISTITUTO DEL TRASPORTO
di LOMBARDIA

DISCOVER RAVENNA

"DISCOVER RAVENNA WITH THE PUBLIC TRANSPORT"

GET REWARDED FOR A SUSTAINABLE VISIT OF THE RAVENNA CULTURAL MASTERPIECES.

DOWNLOAD...

...THE SUSTOURISMO APP AND REGISTER



Available on the iPhone
App Store

ANDROID APP ON
Google play

BUY...

...A PUBLIC TRANSPORT TICKET TO VISIT RAVENNA (SINGLE TICKET, "ROMAGNA SMART PASS" OR "RAIL SMART PASS") (950 POINTS)

INFO ON START ROMAGNA WEBSITE
WWW.STARTROMAGNA.IT/ROMAGNA-RAIL-SMART-PASS/




VISIT...

...THE RAVENNA MONUMENTS AND SCAN THE QR CODE (50 POINTS)




OVERVIEW THE APP ON YOUR SMARTPHONE. SCAN QR CODE AND VISIT THE MONUMENTS TO OBTAIN A SPECIAL PRIZE IN ACCORDANCE WITH A SPECIAL PRIZE IN ACCORDANCE WITH THE SUSTOURISMO APP.

GO TO...

...THE INFOPOINTS AND ASK FOR YOUR SUSTOURISMO PRIZE (1000 POINTS)

- IAT TOURIST OFFICE RAVENNA, PIAZZA S. FRANCESCO 7.
- PUNTO BUS RAVENNA - START ROMAGNA S.P.A. TRAIN STATION (FROM NOVEMBER 2021).




FOR MORE INFORMATION AND THE REGULATION, VISIT TTL WEBSITE.

Figure 65: The revised version of the Ravenna SUSTOURISMO Info-Graphic.



2.4 The case of Friuli Venezia Giulia (Italy)

2.4.1 The overview of Friuli Venezia Giulia

In the framework of SUSTOURISMO project, CEI is responsible for the pilot case of Friuli Venezia Giulia Region, IT. Within the Region, the CEI will focus on a specific area that, after an extensive analysis, has been selected based on 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 understudy area represents a triangle connecting the urban centres of Aquileia, Grado and Trieste, thus encompassing:

- the Friulian coast, one of the most crucial tourist resources for 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;
- Trieste, a 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 Trieste, visitors can also benefit from an easy connection to natural areas along the coast or the inland, with a particular focus on Duino and the Karst.

The trends of "tourism" in Friuli Venezia Giulia can be summarised as follows:

- 2.5 million tourists arriving: attracted to a significant extent by the seaside resorts of Grado and Lignano Sabbiadoro, of which 50% are foreigners (they arrive first of all from Austria);
- 108 thousand of the arrivals are oriented in Carnia: it is an important part of the regional mountains, of which 31,000 are foreigners;
- 656 agro-tourism companies: there is an increase in this type of accommodation in support of new forms of sustainable tourism, which mainly provide "catering" and "accommodation" services;
- Trieste is the destination of considerable tourist flows: attracted by the city's central European and multicultural profile, also under the thrust of cruise tourism;
- tourist tendencies to favour the enjoyment of heritage are consolidated: natural, historical and artistic beauties represent the dimension of territorial "authenticity";
- there is a consolidation of cycling flows over medium and long distances: these flows come both from Central Europe (which represents the majority of travellers) and Eastern Europe; there are places, such as the Zoncolan, which attract cycling travellers from the United States and South America as well as from Europe.



2.4.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Trieste - Grado - Aquileia's area.

The current chapter discuss the tourism data for the Italian SUSTOURISMO case. Tourism data are presented focusing on three levels, national (Italy), regional (Friuli- Venezia Giulia) and local (Trieste's and Gorizia-Grado-Aquileia's area).

- **National level**

The Italian tourism sector, which plays an important role within the national economy, in recent years has experienced a steady and positive growth, in line with global trends.

According to the OECD¹³, in 2018 the Italian tourism industry directly employed 2.0 million people, accounting for 8.3% of employment. According to the yearly tourism survey performed by the Italian National Bank¹⁴, in 2019 international travel receipts reached 44.3 billion Euros, accounting for 41% of national service exports and about 8% of total exports. Exports of tourism services, thus, represented 2,5% of the Italian GDP.

The market share of Italy, the fifth largest country in the world by revenue along with the United Kingdom, remained stable in a globally expanding market (in 2019 revenues from international travel increased by 7,4% on the global level).

Although spending by travelers in Italy has increased on both business trips and vacations, it is the latter type that has driven growth in overall revenues, especially spending on mountain and seaside vacations, while spending on cultural or art city vacations, the most popular type among foreigners in Italy, has increased at a more modest rate.

Italy's tourism revenue growth in 2019 was primarily driven by traveler spending from Germany and Austria, among European countries, as well as the United States and Canada.

The impact of the epidemic on tourist flows, which began to manifest itself as early as in February 2020, has of course been dramatic: complete data for 2020 are not yet available, but, to name but one example, in March 2020 the decline in receipts for travel to our country amounted to about 80 percent compared to the same month of 2019.

13 OECD Tourism Statistics , "Tourism in the economy - Italy", Tourism Trends and Policies 2020.

14 Banca d'Italia, "Indagine sul turismo internazionale 2019",
<https://www.bancaditalia.it/pubblicazioni/indagine-turismo-internazionale/index.html>



International arrivals and overnight stays

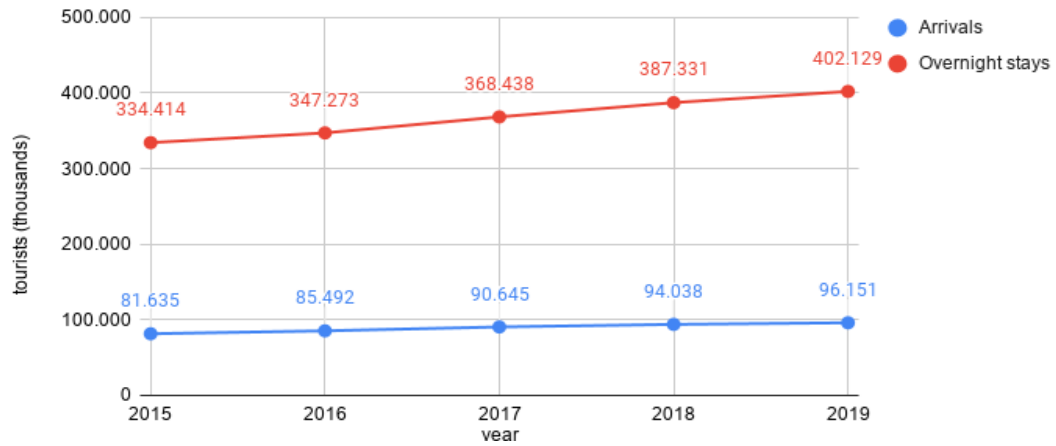


Figure 66: Total international arrivals and overnight stays in Italy (2015-2019)
 [Source: own elaboration on bancaditalia.it data]

Annual revenues

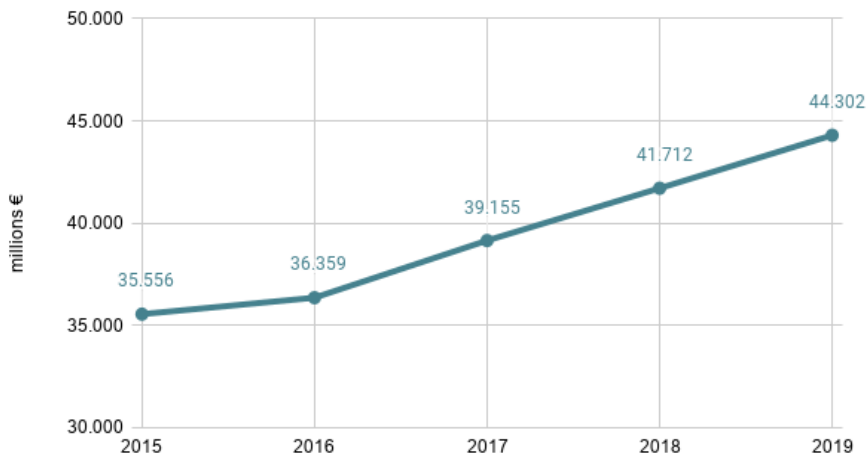


Figure 67: Total revenues by year from international tourism in Italy (2015-2019)
 [Source: own elaboration on bancaditalia.it data]



According to the Bank of Italy's survey of international tourism¹⁵, in 2019 spending by foreign travelers in Italy continued to increase at a sustained rate (6,2%).

Slightly more than 9 million foreign tourists, out of a total of 41.5 million who came to Italy to spend a vacation, have purchased a tourist package; this type of tourist corresponds to approximately one third of total revenues.

Also, in 2019, the upward trend of international tourist arrivals continued, reaching the top number of 96.151 thousand arrivals and giving to the country a revenue of approximately 44.302 million Euro.

Top origin countries

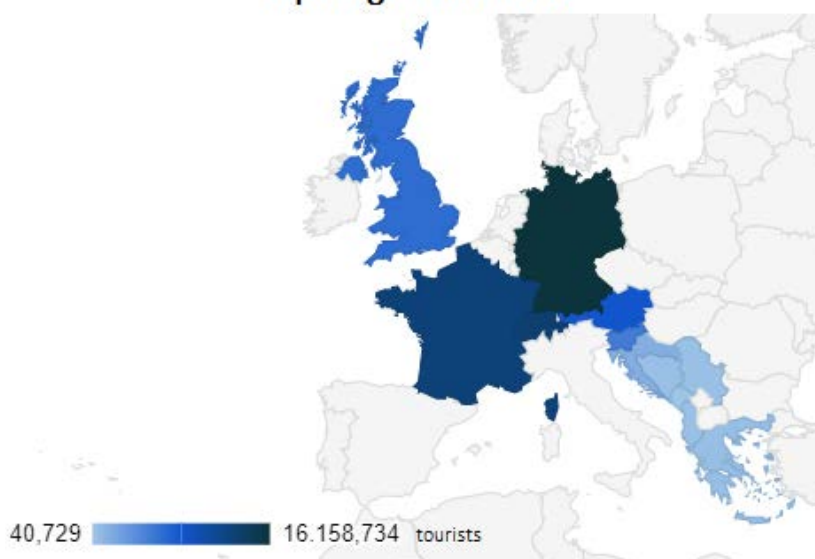


Figure 68: Top origin countries for international tourists (arrivals 2019)
 [Source: own elaboration on bancaditalia.it data]

The top origin countries are Germany, Switzerland, France, Austria and the United Kingdom.

¹⁵ Banca d'Italia, "Indagine sul turismo internazionale 2019",
<https://www.bancaditalia.it/pubblicazioni/indagine-turismo-internazionale/index.html>
 106



Top origin countries

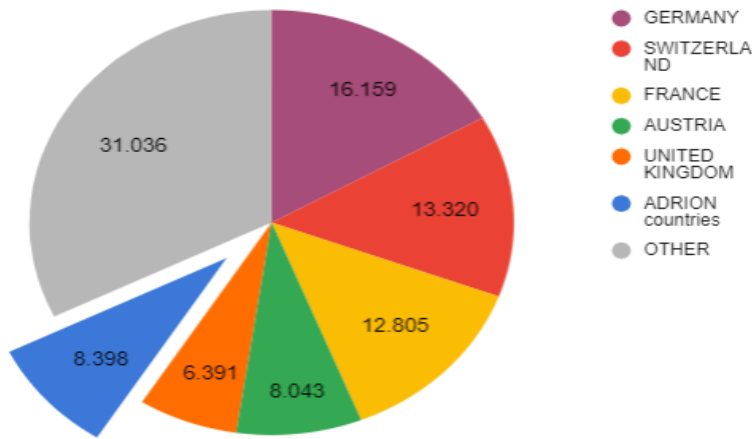


Figure 69: Top origin countries for international tourists (thousand arrivals, 2019)
 [Source: own elaboration on bancaditalia.it data]

As shown in Figures below, ADRION countries are also a significant source of tourist flows. In 2019, more than 8 million international tourists came from ADRION countries, specifically 62,8% from Slovenia, 19% from Croatia, 5,2% per Greece and between 4,8% and 3,7% from Bosnia and Herzegovina, Serbia and Albania.

Tourists from ADRION countries

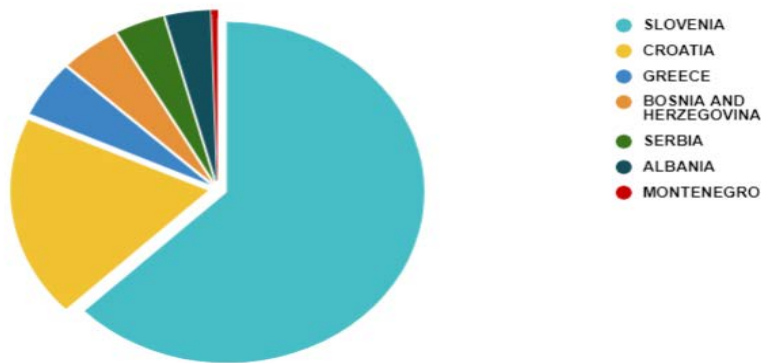


Figure 70: Focus on ADRION countries for international tourists (arrivals 2019)
 [Source: own elaboration on bancaditalia.it data]



Modal share

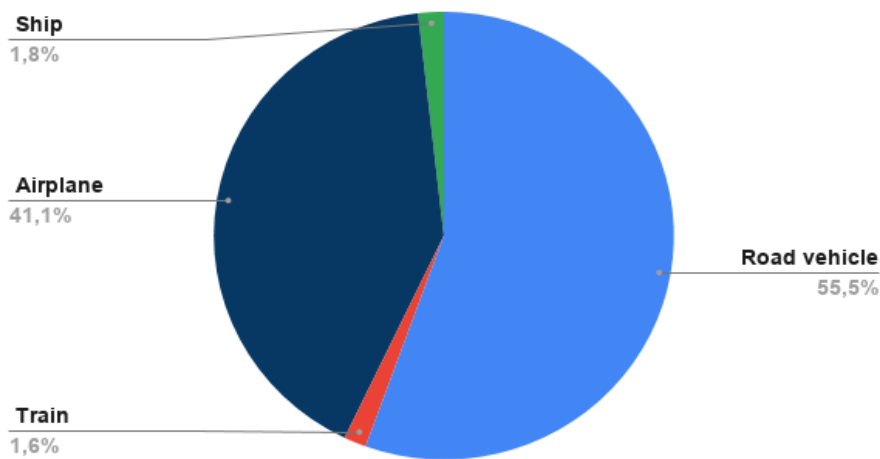


Figure 71: Modal share by transport mode for international tourists, 2019 [Source: own elaboration on bancaditalia.it data]

In 2019, the share of foreign travelers arriving in Italy by airplane has further increased, a trend that has been underway for some years favored by the spread of low-cost flights. Travelers who use airplanes to reach our country represent 41% of the total and 64% in terms of expenditure. However, road vehicles remain the most frequently used mode (55,5%), especially by the large proportion of non-resident travelers (excursionists). Slightly more than one out of ten tourists uses train or ship.¹⁶

Modal share by country

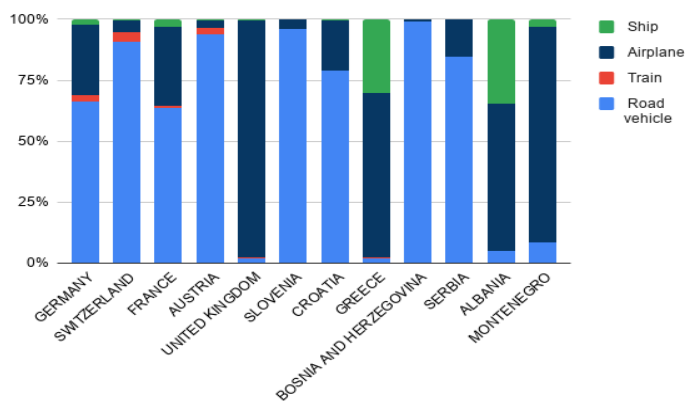


Figure 72: Modal share by country for international tourists (2019, arrivals) [Source: own elaboration on bancaditalia.it data]

¹⁶ Banca d'Italia , "Indagine sul turismo internazionale 2019", <https://www.bancaditalia.it/pubblicazioni/indagine-turismo-internazionale/index.html>
108



Figure below shows the modal share by country: Germany, Switzerland, France, Austria, Slovenia, Croatia, Bosnia and Herzegovina and Serbia travel mostly by road vehicle, while tourists from UK, Greece, Albania and Montenegro prefer the airplane.

Tourists from Germany - modal share

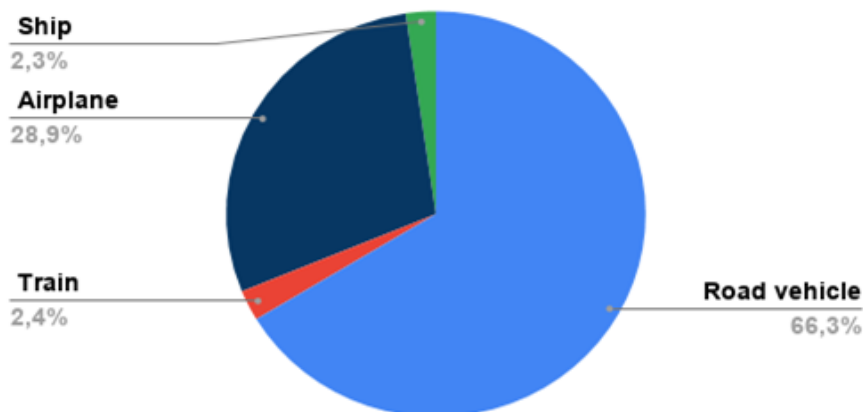


Figure 73: Modal share by country- focus on tourists from Germany (2019, arrivals)
 [Source: own elaboration on bancaditalia.it data]

Focusing on the modal share of German tourists, Figure above shows their preference for road vehicles over the airplane, the train and the ship mode.

Tourists from Greece - modal share

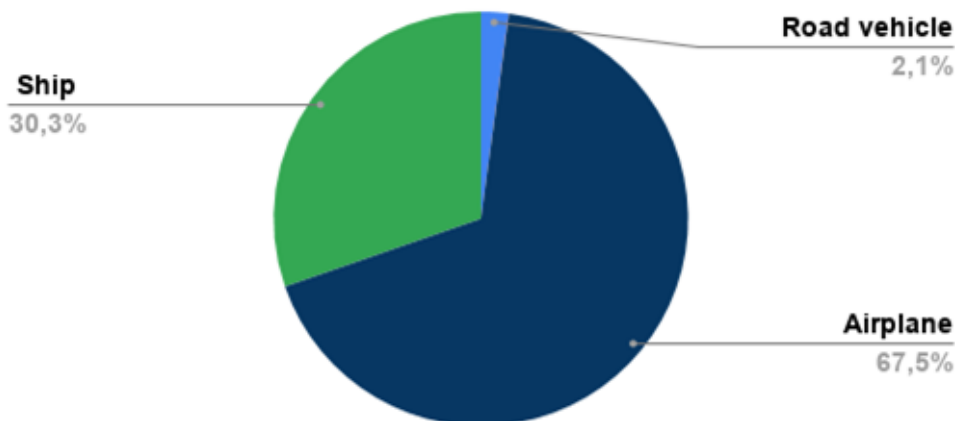


Figure 74: Modal share by country - focus on tourists from Greece (2019, arrivals)
 [Source: own elaboration on bancaditalia.it data]



The different tendency of Greek tourists, preferably reaching Italy by airplane (67,5%) and ship (30,3%), can be observed in figure above.

Average spending per trip per person

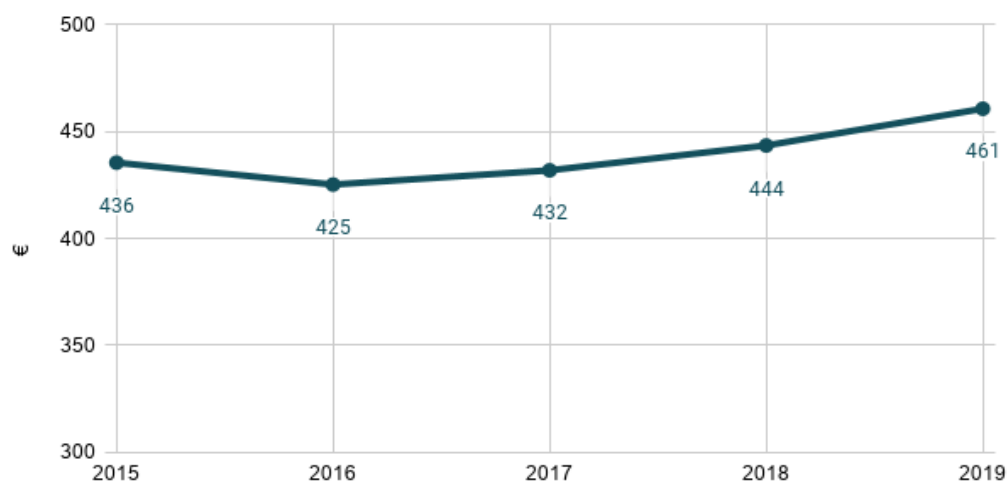


Figure 75: Average spending per trip per person of international tourists (2015-2019)
 [Source: own elaboration on bancaditalia.it data]

The average spending per tourist slightly increased during the past few years (from 436 to 461 Euros/day per person), with a little decrease in 2016.

Average length of stay

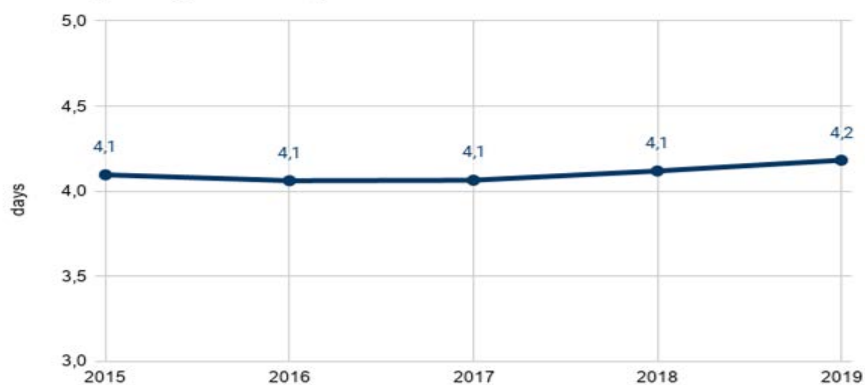


Figure 76: Average length of stay of international tourists (2015-2019)
 [Source: own elaboration on bancaditalia.it data]



The average length of stay seems stable at around 4 days throughout the last years.

Domestic tourism:

In recent years, domestic tourism has shown a steady increase in the number of trips, with a notable overall increase since 2015, but a slight decrease in 2019.

Trips of domestic tourists

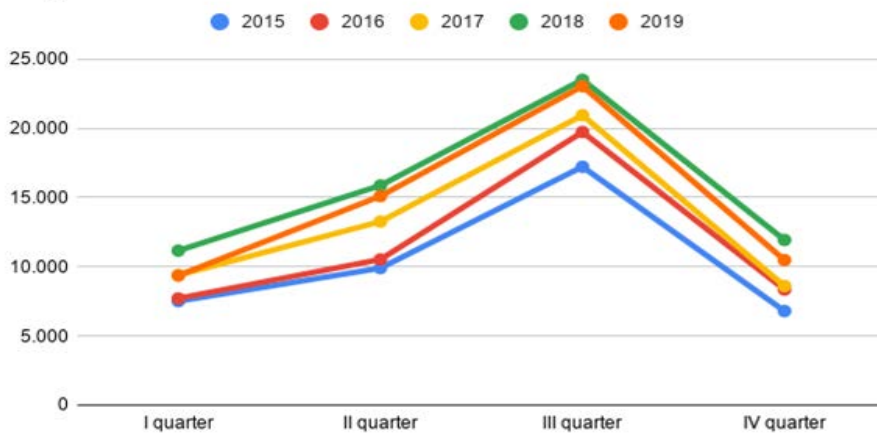


Figure 77: Domestic tourists that made at least a trip with 1 overnight stay (2015-2019) [Source: own elaboration on bancaditalia.it data]

The figure above presents, as well, the tendency to travel more during the 3rd quarter of the year, which corresponds to the summer holidays.

Average spending per overnight stay

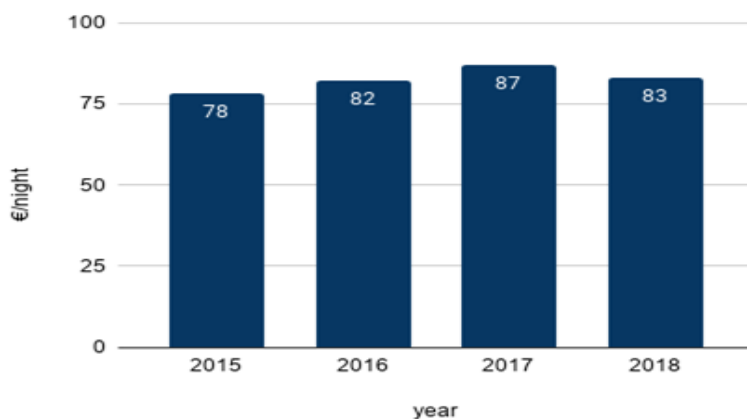


Figure 78: Average spending per overnight stay - Domestic tourists (2015-2018) [Source: own elaboration on bancaditalia.it data]



The average spending of the domestic tourist per overnight stay had a slight increase until 2017 and then decrease in 2018. Data concerning 2019 are not yet available.

- **Regional level**

According to the 2020 FVG Regional Statistical Yearbook¹⁷, 2019 was a year of expansion for tourism, with both arrivals (+1.8%) and stays (+0.8%) increasing to 2.66 million and 9.1 million, respectively. Tourists spent an average of 3.4 nights in the region per single vacation, with a longer stay by foreign tourists (3.7 nights).

The most popular month was August, with 479,732 arrivals and 2,163,571 overnight stays, due to a concentration of domestic flows in this month. Considering foreign tourists alone, July was substantially equal to August.

Tourist presences during the three major holidays in 2019 were all on the rise: at *Ferragosto* (15th August), the holiday with the highest number of overnight stays (619,979) the increase was +1.5%, Christmas (183,658 overnight stays) recorded a double-digit increase (+16.3%), Easter performed even better (+70.9% for a total of 210,388 overnight stays).

- International tourism

In 2019 Friuli Venezia Giulia confirmed itself as a very popular destination among foreign tourists, who accounted for 52.8% of arrivals and 56.8% of overnight stays. Foreign tourist arrivals in 2019 increased by 2.3% and overnight stays by 0.1%.

Total arrivals from international tourism

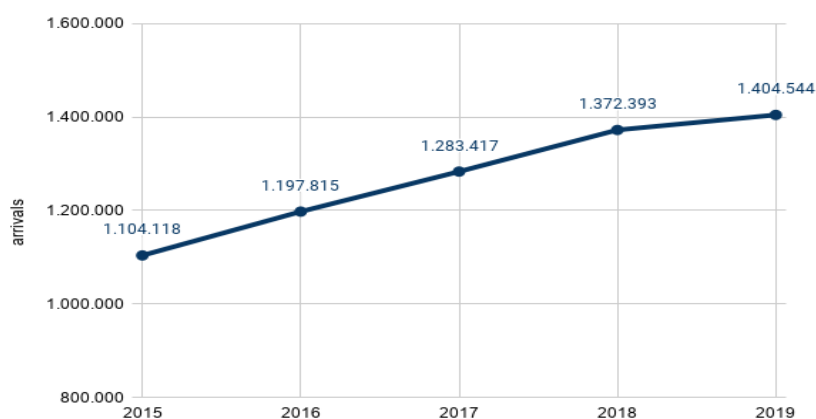


Figure 79: Total international arrivals (2015-2019) [Source: own elaboration on regione.fvg.it data]

¹⁷ Regione Autonoma Friuli Venezia Giulia, "Regione in cifre 2020 - Sintesi dei dati", www.regione.fvg.it/rafvfg/export/sites/default/RAFVG/GEN/statistica/FOGLIA67/allegati/Regione_in_cifre_2020_-_Sintesi_dei_dati.pdf



Figure above shows the increment of the total international arrivals in the Friuli Venezia-Giulia Region from 2015 to 2019.

Arrivals by country

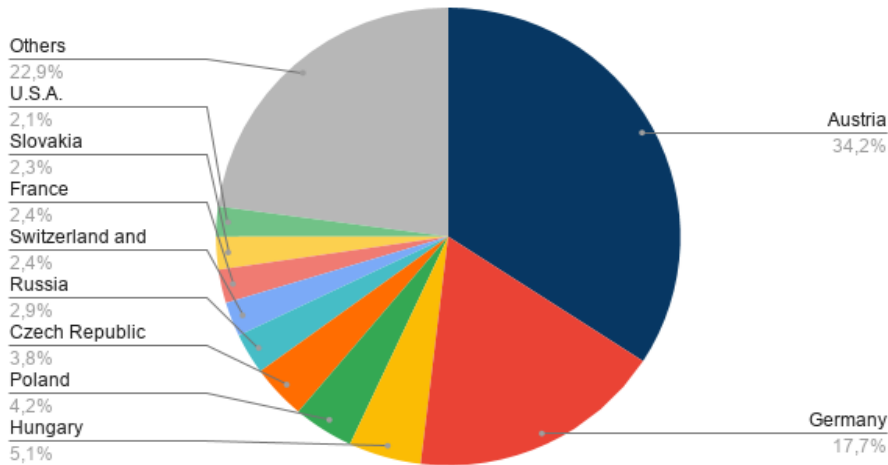


Figure 80: International arrivals by countries, 2019 [Source: own elaboration on regione.fvg.it data]

Distinguishing by nationality, 34% of the foreign tourists are Austrians, followed by 17,7% Germans and 5,1% Hungarians. Data related to Switzerland (2,4%) include, as well, tourists from Liechtenstein.

Average length of stay



Figure 81: Average length of stay of international tourists (2015-2019) [Source: own elaboration on regione.fvg.it data]



The average length of stay is slightly decreasing from 3,9 days in 2015 to 3,7 days in 2019.

Among the nationalities with the highest average stay were Slovaks and visitors from the Netherlands, both with an average stay of 5.2 days.

- Domestic tourism

Total arrivals from domestic tourism

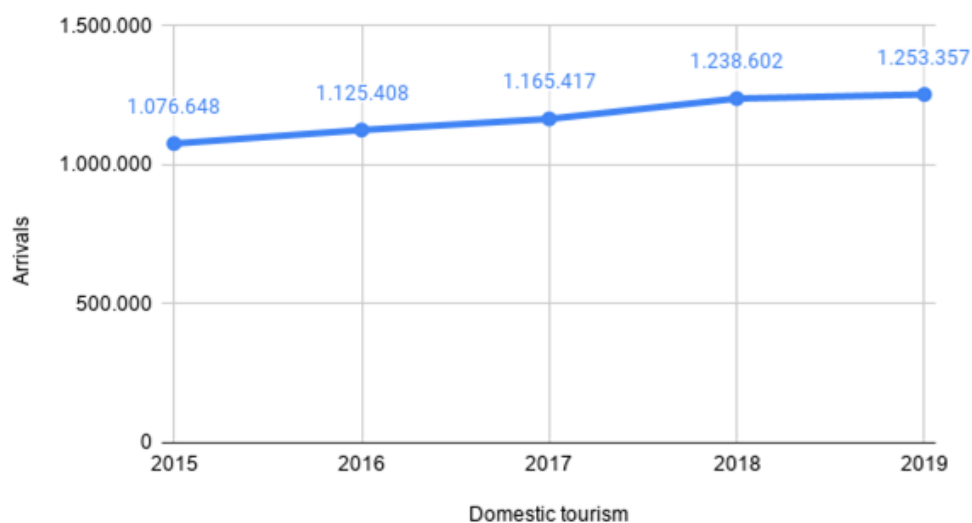


Figure 82: Total arrivals of domestic tourists (2015-2019) [Source: own elaboration on regione.fvg.it data]

Regarding domestic arrivals, Figure above depicts a rising trend of FVG region since 2015.

Average length of stay



Figure 83: Average length of stay of domestic tourists (2015-2019) [Source: own elaboration on regione.fvg.it data]



As shown in Figure above, the average length of stay of domestic tourists has remained more or less unchanged during the last years at 3,2 days per stay (lower than the average length of stay of international tourists).

- Trieste airport

Trieste Airport is an international airport located about 40 km north of Trieste city center. The airport, which connects the city mostly with other Italian cities and in Europe with Munich and London, is quite small compared with other airports in north-eastern Italy, such as Venezia and Treviso which are the most relevant in the area, especially for low-cost connections. With more than 11 million passengers, Venezia airport is the fourth-busiest airport in Italy so the majority of the tourists heading to Friuli Venezia Giulia arrive and depart from this hub.¹⁸

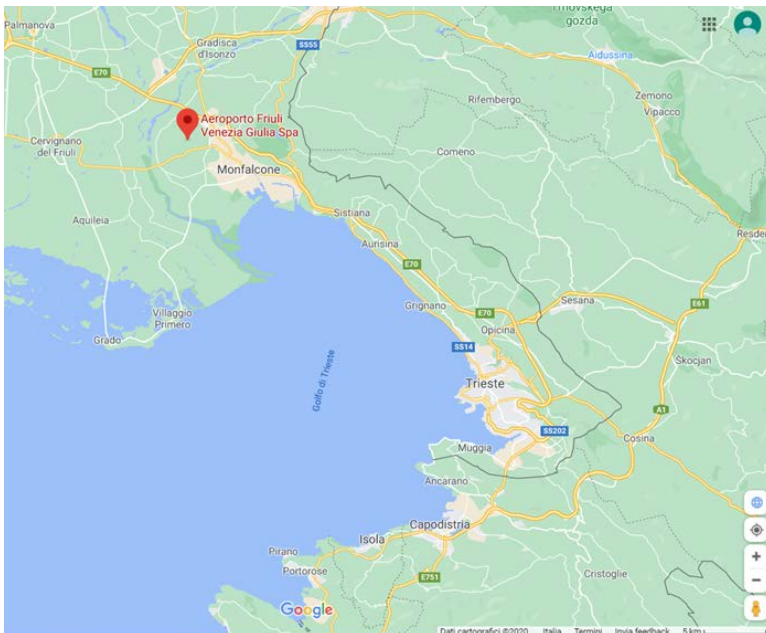


Figure 84: Location of Trieste Airport [Source: google.maps.it]

¹⁸ Ass. Aeroporti, *Statistiche*, 2020 <https://assaeroporti.com/statistiche/>
115



Figure 85: Connectivity of Trieste’s Airport (2020-2021) [Source: triesteairport.it]

In 2019, the passengers departing from or landing in Trieste’s airport were 783 thousand.¹⁹

Figures below show trends in international and domestic arrivals and departures of commercial flights since 2014 (private flights and direct transfers, for a total of about 3.500 passengers in 2019, are not included)

International passengers - Trieste airport

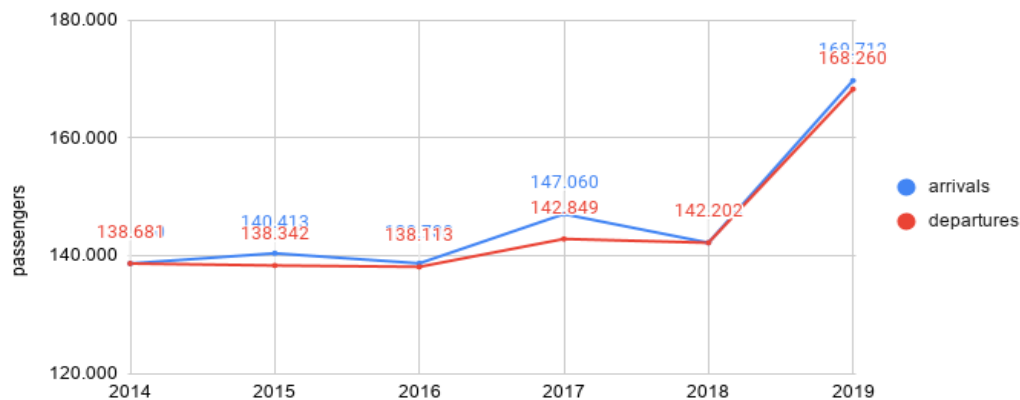


Figure 86: Arrivals and departures of international passengers at Trieste airport (2014- 2019) [Source: own elaboration on regione.fvg.it data]

¹⁹ Trieste Airport, <https://triesteairport.it/it/corporate/lazienda/aeroporto-fvg/dati-di-traffico/>
116



Domestic passengers - Trieste airport

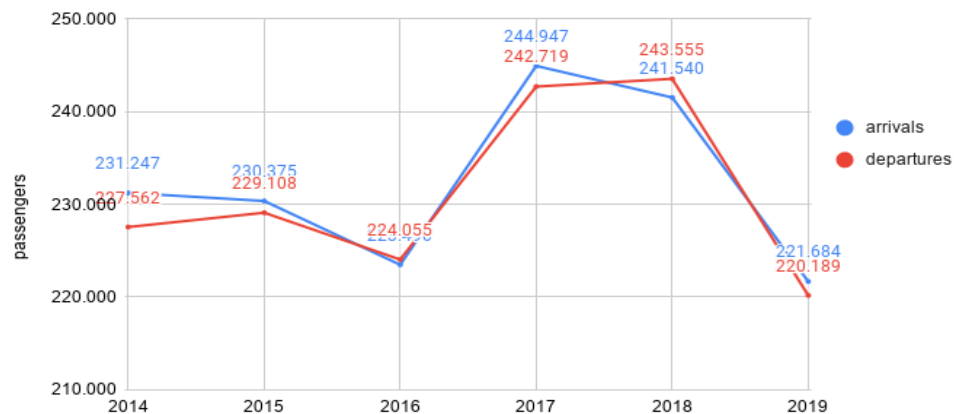


Figure 87: Arrivals and departures of domestic passengers at Trieste airport (2014- 2019) [Source: own elaboration on regione.fvg.it data]

- Trieste seaport

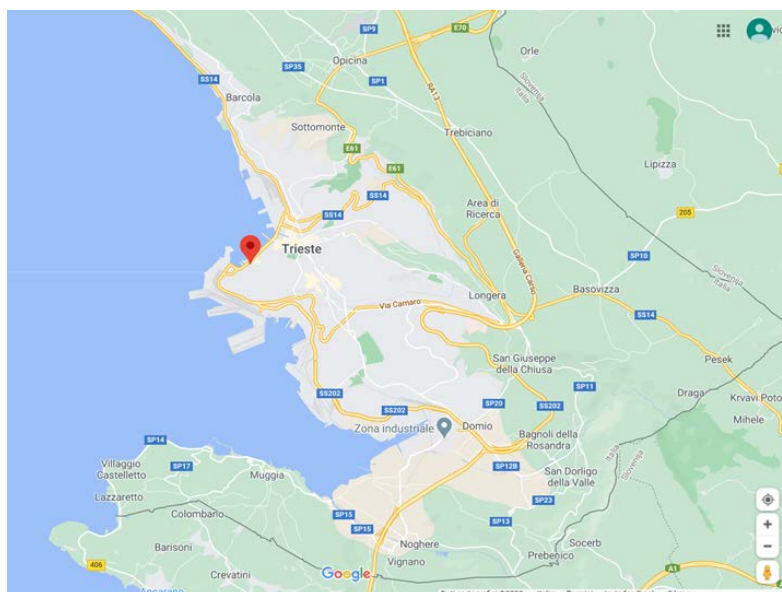


Figure 88: Location of Trieste seaport [Source: google.maps.it]

Located at the intersection between shipping routes and the Baltic-Adriatic and Mediterranean TEN-T core network corridors, the Port of Trieste is an international hub for overland and sea



trade, playing a decisive role in long-distance intercontinental maritime transportation and short/medium-distance intra-Mediterranean trade²⁰.

On the contrary, from a tourism point of view, the port currently does not play a crucial role as a gateway to the area, with about 191.000 cruise passengers and 13.700 local and ferry passengers in 2019²¹.

A development in this sense is however under discussion, mainly in connection with the critical issues related to the access of large ships to Venice: 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 the next few years.

- **Metropolitan/City level**

Within Region Friuli Venezia Giulia, the SUSTOURISMO project will focus on a specific area indicatively represented by a triangle connecting the urban centres of Aquileia, Grado and Trieste, selected on the basis of its tourism potential, but also considering the availability of services and infrastructures for sustainable mobility.

The area of interest will be, thus, touching upon:

- the Friulian coast, one of the most important tourist resources for 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 city of **Trieste**, beloved urban tourism and cultural destination, thanks to its central-european and multicultural profile.

Available statistical data presented in this section do not match exactly the chosen area, since they are made available by the regional DMO, Promoturismo FVG, for the tourism zones of:

- Trieste and the Karst;
- Grado, Aquileia and Gorizia.

According to available data, the city of Trieste has been in 2019 one of the leading forces of tourism growth in Friuli Venezia Giulia (+ 11,1% international arrivals and +8,4 domestic arrivals, compared to 2018, significantly better than the regional average).

Among the main strengths to be mentioned are Miramare Castle and the historic international sailing regatta "Barcolana", both implementing joint communication strategies with other regional realities. Another factor of attraction is Trieste's online reputation which is becoming more and more self-enforcing thanks to social reviews and media appearances, building on communication investments in the last years. The city can also count on a series of new thematic itineraries,

²⁰ www.porto.trieste.it/

²¹ Assoportri: <https://www.assoportri.it/media/6757/trieste-2018-2019.pdf>



recently activated: a religious itinerary, a coffee itinerary combined with tasting offers, a literary itinerary (connected with the candidacy as Unesco Creative City). ²² The average length of stay amounted to 2,4 day.

In 2019, the area of Grado, Aquileia, and Gorizia was particularly penalized by the rains of May, which caused a decrease in domestic tourist arrivals. This was however largely compensated by the increase of international arrivals. Total overnight stays decreased in 2019 compared to 2018, however remaining higher than the values recorded in the years 2015-2017. The average length of stay (4,2 days, thus higher than the regional average) is positively influenced by Grado's characterization as a seaside destination.

International arrivals -Trieste

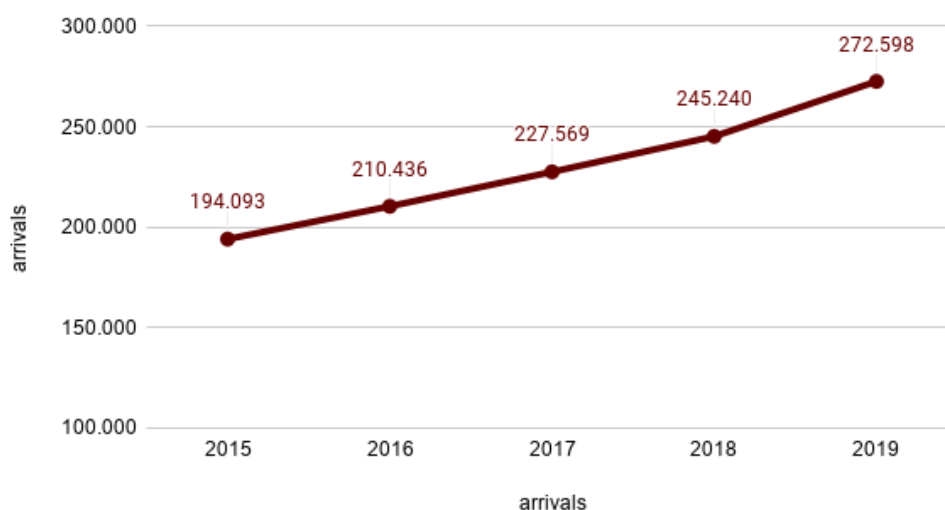


Figure 89: International arrivals in Trieste (2015-2019) [Source: own elaboration on regione.fvg.it data]

²² www.promoturismo.fvg.it/proxyvfs.axd/allegato,/r97713?,
www.promoturismo.fvg.it/proxyvfs.axd/allegato,/r99880?,

L. Goriup, 2019, "Il boom di Trieste traina la crescita del turismo in Fvg", *Il Piccolo* online,
<https://ilpiccolo.gelocal.it/trieste/cronaca/2019/07/24/news/turismo-stranieri-in-crescita-il-boom-di-trieste-fa-da-traino-1.37176129>



International arrivals - Gorizia, Grado, Aquileia

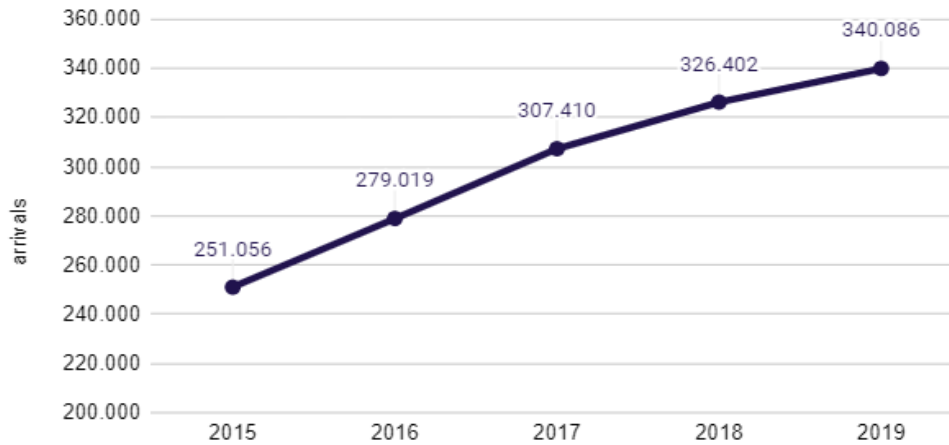


Figure 90: International arrivals in Gorizia, Grado, Aquileia (2015-2019) [Source: own elaboration on regione.fvg.it data]

Domestic arrivals

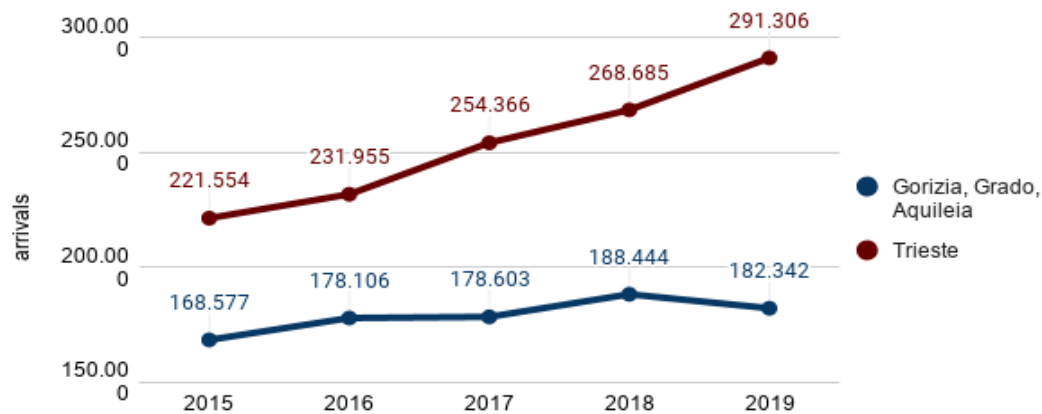


Figure 91: Domestic arrivals in Gorizia, Grado, Aquileia and in Trieste (2015-2019) [Source: own elaboration on regione.fvg.it data]



Number of overnight stays

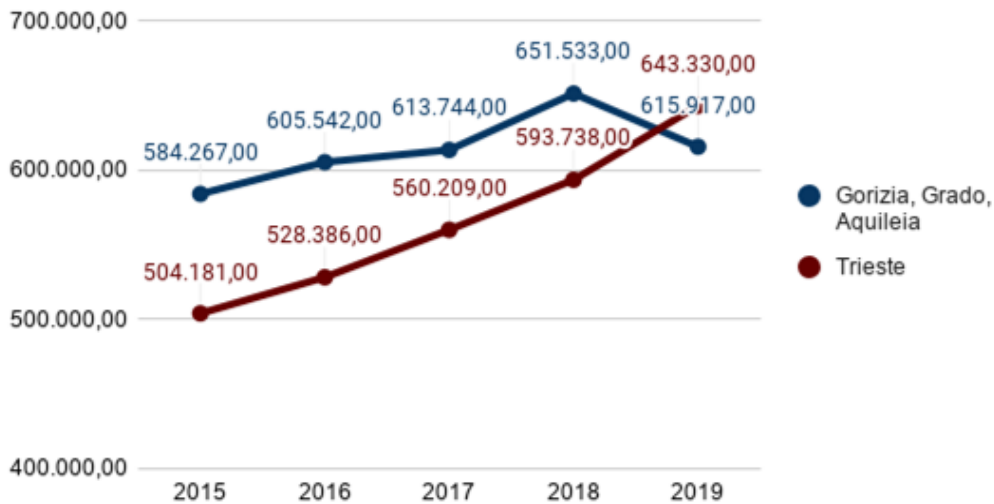


Figure 92: Overnight stays of domestic tourists in the pilot area (2015-2019)
 [Source: own elaboration on regione.fvg.it data]

2.4.3 Searching the tourism policy background and finding gaps and opportunities

The review of national, regional and local strategies and initiatives was implemented in the framework of D.T1.1 in which the key actors and their interactions have been mapped and primary strategic/policy documents have been analysed. Regional programming in the tourism, transport and environment sectors has identified several challenges to address to improve competitiveness. In particular, three main objectives have been identified:

- to establish Friuli Venezia Giulia as a "destination" region capable of consolidating and attracting new tourist flows, both from Europe and from other continents;
- to act so that the "passing through" flows along the N-S and E-W axes create added value;
- to guarantee the "connectivity" between the various parts of the territory and the "accessibility" to landscapes, heritages, places and any other destination that allows to reach them easily, quickly and safely.

Based on this assessment, the following main lines of action have been identified:

- further enhancement of the environmental, historical and cultural heritage (beyond UNESCO sites);
- promotion of agri-food sector excellence (cheese, wines), as well as of unique "experiences" (e.g. WWI memorial paths, literary tours, etc.);



- improved connection between cities, inland and coastal areas with a focus on flexible (customisable) and sustainable alternatives to the use of private cars;
- fostered transnational, cross-border cooperation in the field of passenger mobility and intermodal transport, cycling tourism, and experiential paths and trails;
- improved communication and accessibility.

While the pilot area and, more generally, the Region are now predominantly a short- or medium-term destination for domestic and proximity travellers, enhancing stakeholders' capacities along the lines mentioned above could increase its attractiveness and consolidate the sector (and deriving positive socio-economic impacts).

2.4.4 Learning from best practices on tourism and mobility

The appraisal of previous and ongoing projects and other initiatives served as a baseline for the designing of the SUSTOURISMO specific intervention and led to the development of D.T1.2.1.

The assessment showed that public and private stakeholders along the sustainable mobility and tourism value chains in the Friuli Venezia Giulia Region have been particularly active in this respect, with relevant experience accrued.

However, the analysis showed also that the emphasis was predominantly on the promotion of connectivity and intermodality, while “softer” measures that would support travellers on-site with information and services have been somewhat less in the focus. This is an advantage for SUSTOURISMO that - with the development of the mobile application and related contents - could contribute to improve tourists' experience.

Substantial efforts have been invested in promoting cycling tourism. This was achieved by strengthening “infrastructural” aspects (bike+rail connections, bike+bus services, bike sharing and charging points for e-bikes, etc.), but also by developing relevant support services and ICT. SUSTOURISMO will contribute to these efforts by developing dedicated packages and tailoring the mobile application (also) to the needs of cycling tourists.

In most cases, enhanced networking and multi-stakeholder approach have been highlighted as missing links/bottlenecks that limit the capacity to consolidate local destinations by increasing tourists' loyalty. Also in this case, SUSTOURISMO will contribute by fostering multi-stakeholder dialogue in round-tables and further interaction.

2.4.5 Learning from tourist surveys - the path forward as revealed by the tourists

Survey methodology

In the test survey phase, which should have been conducted in the city center of Trieste at the very beginning of October 2020, an initial check was performed in order to evaluate if it was



plausible to reach an adequate number of respondents on the streets. Because of the rapid worsening of the pandemic situation, the number of tourists and their willingness to take part in a complex interview were strongly reduced. For this reason, it was decided to look for people who recently visited Trieste, Grado or Aquileia through direct and indirect connections, and contact them by email and phone. CEI also promoted the survey through its communication and social channels.

Finally, 251 persons who visited the area in the previous year were interviewed by phone or by means of an online questionnaire. The final group of respondents included:

- 152 females, 98 males (1 person didn't provide this information);
- 109 persons in the age group 22-40 years, 109 persons in the age group 41-60 years, 31 persons in the age group 61-80 years;
- 58 persons with secondary education or less; 190 persons with college-level education.

The interviewed persons came from a wide range of Italian areas, some located in the immediate surroundings of the project area (thus representing the "proximity tourism" market segment, particularly relevant at the moment), others at a much greater distance (Sardinia and other southern Italian regions). The chosen survey methodology did not allow for an effective involvement of foreign tourists, so it was decided to focus on Italian visitors, which are, however, representative of the current tourism situation in which international leisure trips are strongly limited.

The weak side of this solution was that the answers were based on tourists' memories, even if generally quite recent. The strong side was that the respondents were interviewed in a comfortable environment, at a convenient time for them, thus all of them generally replied to all questions, even providing further suggestions and specifications where allowed.

Considering that the specific characteristics of the pilot action to be activated by the CEI partner were still to be defined, it was decided that the primary goal of Section C of the survey should be to better understand which features of the upcoming SUSTOURISMO app could provide the ideal basis for the local pilot action.

In order to deepen this analysis, an additional survey instrument was set up. For this purpose, an online questionnaire was created containing only section C questions, slightly adapted. This version was proposed on two platforms commonly used by university students or young researchers to collect, through questionnaires, data for their own work. In a few days it was possible to collect about forty feedbacks. Almost all respondents were in the age range 20-31 years, of particular interest for a proposal focused on the use of a digital tool.

Survey results

In line with Trieste and Aquileia being urban and cultural tourism destinations where shorter **stays prevail**, almost 39% of respondents did not remain overnight (as proximity tourists or since they were travelling to another destination), almost 52% stayed between one and three nights and only



slightly less than 7% remained for a longer stay. Most of them had **already visited** the area before, in some cases many times. In 6 out of 10 cases, the reason for visiting was **sightseeing**. 1 in 10 persons came respectively for business tourism or visiting friends or family. Only about 5% of respondents bought an organized trip, while the overwhelming majority **travelled independently**. Almost all respondents looked for **information online**, some of them also relied on advice from friends and relatives.

When asked about **transport modes** selected in order to **reach the area**, the most used were private cars, chosen by more than 6 out of 10 tourists. 26% of visitors arrived by train, 5% chose a touristic bus and 4% booked a flight. Both camper vans and motorbikes were chosen by less than 1% of tourists. The great majority of visitors (almost 82%) were satisfied or very satisfied with their choice, about 18% were neutral or somewhat satisfied. No one declared to be completely dissatisfied with their choice.

Considering the reasons behind the choice, only about 3% of respondents said it was the only available option. Almost half of them mentioned superior comfort as the reason, a quarter of them selected quickness as main reason. Smaller percentages of respondents was motivated by the attractiveness of the route, the lower cost or the easy, 3,2% because it was the only option. 3,2% chose thinking about the environment and 1,6% because it was easy to book.

When asked about **trips within the destination**, visiting it **on foot** was the most common first choice (63%), followed by the use of a then **private vehicle** (26%) or **city buses** (6%). Only a small percentage of visitors mentioned rented vehicles, bicycles or taxis as their first choice. Private vehicles, city buses or walking were the most popular second choices, chosen by around 15% of respondents each. Different levels of satisfaction were connected to these different choices:

Table 6: Satisfaction per transport mode

	Very satisfied / Satisfied	Neutral / Somewhat satisfied	Not satisfied at all
On foot	90,4%	8,3%	1,3%
Private vehicle	53,0%	34,8%	12,1%
City bus	50%	50%	-

Considering **gaps/difficulties** encountered during the trips within the city, 27% concerned "Heavy traffic" and 17% "Lack of organized integrated tourism - transport information provision". "Sense of unsafety due to Covid-19", "Lack of appropriate infrastructure for alternative transport modes" and "Inadequate public transport services provision / Low public services quality" accounted each for about 10%-11% of mentioned gaps. "Lack of connectivity between areas of interest", "Lack of adequate connectivity between the city center and the major transport hubs" and "Lack of parking options" accounted each for about 7%-8% of mentioned gaps.



4 out of 10 respondents also took a **trip outside the main destination** during their stay. 81% of them used a private vehicle, 16% travelled by public or touristic bus, only in two cases visitors rented a vehicle. Level of satisfaction was high or good for the great majority of people travelling by private car, with only 2 respondents completely unsatisfied, while most visitors travelling by bus were neutral or partially satisfied, but nobody was completely dissatisfied.

Considering **gaps/difficulties** encountered during the trips outside the city, they were about equally divided, in this order, among "Lack of adequate connectivity with public transport system between the city and the areas of interest", "Heavy Traffic", "Lack of appropriate infrastructure for alternative transport modes (bicycle paths)" and "Lack of organized information provision regarding the transport options for trips outside the city.

As already mentioned, one of the most relevant goals of the survey for CEI partner was to better understand which **features of the upcoming SUSTOURISMO app** could provide the ideal basis for the local pilot action. Following the main results in this respect are summarized.

Among respondents, the propensity to use a mobile app to get touristic information was very high: eight out of ten would do it and they would generally like to have access to a broad range of information within the app (point of interests within or outside the city, cultural sites and museums, transport modes, events). The least interesting categories were thematic routes and tourist services, which would, anyway, be required by about half of respondents. About two thirds of the respondents would also like to have the possibility to express their complaints through the app.

Respondents were approximately equally divided between those who would use the app more frequently in case they were rewarded for that and those who wouldn't (with a small prevalence of the first group). Considering the preferred type of reward, slightly more than half of the answers focused on discounts on cultural sites and museums, 37% regarded regarding HO.RE.CA. offers and only 8,7% discounts on transport modes. It can be interesting to mention that the parallel survey addressed to students included an additional option, in order to investigate whether gadgets could be an attractive reward, but only 1 respondent was interested in this possibility.

In the section C of the survey, respondents were asked if they would be willing to **contribute in making local mobility more sustainable** by providing information on their movements through the app. The need for registration and a commitment of about 10 minutes time were envisaged. More than half of the respondents (57,6%) declared they would collaborate, 30,8% said they wouldn't, 11,6% could provide information in case rewards were foreseen.

Among respondents not willing to contribute, 48,6% were interested but deterred by the time required, 27% didn't want their trips to be recorded, 16,2% were not comfortable using apps and 8,1% were just not interested.

The interest toward the "**pedometer**" feature was also analyzed, with very positive results: 53,8% of respondents answered they would like to use such a feature and an additional 12,7% said they could in case this was set up as a game. Among interested respondents, 42,2% thought a final map would be a nice souvenir of the trip, 37% were curious to know how much they walk around during



holidays, 20,7% thought the app could make their walks more stimulating. Probably more relevant, are the answers of respondents who wouldn't use the pedometer: most of them (64,3) didn't find it interesting enough or are generally uncomfortable using apps, but more than 1 in 4 (26,2%) wouldn't do it because of privacy concerns and about 1 in 10 (9,5%) already uses a different pedometer app.

The **parallel survey addressed to students** gave quite comparable results, highlighting an even higher propensity towards the use of the proposed app features, along with more relevant concerns for privacy issues (1 in 2 respondents who wouldn't provide information mentioned this as the reason).

2.4.6 Listening to tourism and mobility stakeholders - Insights from the 1st technical round table.

The first consultation was conducted through four individual interviews with representatives of essential regional actors involved in the nexus of tourism and sustainable mobility, namely the LPT operator, the Regional tourism promotion agency, a Local Action Group and the local representative of a national organisation promoting cycling and cycling tourism.

The stakeholders substantially agreed upon the proposed pilot area representing a significant juncture between different transregional and transnational cycling and walking routes. The proposed pilot area is popular among cycle tourists owing to the network of significant cycling routes and the cultural, naturalistic and gastronomic offer. Moreover, it boasts efficient intermodality, in which the Friuli Venezia Giulia Region and the LPT operator invested relevant resources.

At present, the services offered are judged as sufficient to satisfy the demand for LPT/bike intermodality. However, stronger coordination among stakeholders is deemed necessary to enhance effectiveness and ensure targeted promotion. Cooperation among institutions, tourist operators, and LPT providers would facilitate planning and adaptation, particularly the preliminary assessment of the demand and ex-post verification of the services' adequacy.

Also, the stakeholders pointed out the need for enhanced management and planning of intermodal transport: while efforts are being made in this sense at the institutional level, SUSTOURISMO could contribute to the process addressing it from the point of view of users.

Infrastructural gaps have been pointed out as a critical bottleneck as well. Apparently, this aspect is beyond the SUSTOURISMO range of action, yet the project could prioritise the topic by delivering end-users voice through the mobile application's dedicated functionalities (complaints).

Similarly, the SUSTOURISMO project could raise awareness of sustainable tourism's potentials among entrepreneurs, thus stimulating the broadening of dedicated offer and services. This will also be actively pursued through networking and the definition of touristic packages.



2.4.7 Combining findings in a SWOT analysis for the case of Friuli Venezia Giulia Region

Table 7: SWOT for SUSTOURISMO FVG case

<p>STRENGTHS</p> <ul style="list-style-type: none"> ✓ Geographical position ✓ Variety of landscapes ✓ Richness of cultural heritage ✓ Agri-Food excellence ✓ Proximity with destinations in AT, HR, SI ✓ Consolidated flows and emerging opportunities ✓ Consistent infrastructure (cycling) ✓ Possibility to design coherent packages ✓ Strong and diversified HORECA 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> ! Limited accessibility ! Insufficient visibility and lack of recognition as a consolidated destination ! Lack of coordination among institutions ! Lack of coordination among stakeholders and with institutions ! Infrastructural gaps ! Lack of integrated offers ! Lack of dedicated services
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> ✓ Assets matching with current trends (slow-, eco-, gastro- tourism) ✓ Supportive regional administration ✓ Committed key stakeholders ✓ Growing demand for intermodal services (bike-train) ✓ Growing cruising sector which might entail positive impacts on local destinations (transformation from hub to destination) ✓ Proximity tourism from CEE ✓ Growing awareness of the value of natural heritage and active holidays ✓ Consolidation of flows linked to cultural events ✓ Valorisation of the “pass-through” flows 	<p>THREATS</p> <ul style="list-style-type: none"> ! Limited flexibility and capacity to adapt to new trends ! Insufficient prioritization of the sustainability factor in tourism ! Lack of innovation in businesses ! Competition with neighbouring countries and Italian regions, instead of synergies ! Inability to bridge the infrastructural gaps ! Incapacity to intercept new travellers and consolidate the region as a top destination ! Reliance on established/traditional flows, particularly internal/domestic



2.4.8 Drafting the SUSTOURISMO touristic packages of Friuli Venezia Giulia Region

The design of the tourism initiative to be promoted by CEI partner within its pilot action was a quite challenging process, during which the initial concept went through many revisions. In particular, the pilot action went through two editions, one in 2021 and one in 2022. Both concepts were elaborated taking into account the suggestions and feedbacks collected by local stakeholders, and for the second edition also the outcomes of the pilot 2021.

EDITION 2021

The pilot action was conceived as an initiative combining at least two different sustainable travelling options, as well as some of the most relevant FVG attractors. The most relevant issue encountered was the operational involvement of the regional stakeholders: all of them fully supported the goals of SUSTOURISMO project but, being mainly public bodies or private entities operating within public procurement procedures, required longer times and complex procedures for joining new initiatives. Also, the difficult situation of private tourism businesses because of the pandemic crisis was a relevant obstacle in involving them in the set-up of *Contribute&Win* schemes.

The initiative which was proposed could not be framed as a touristic package, at least according to a legal definition, since it did not involve the combined selling of more than one touristic service.

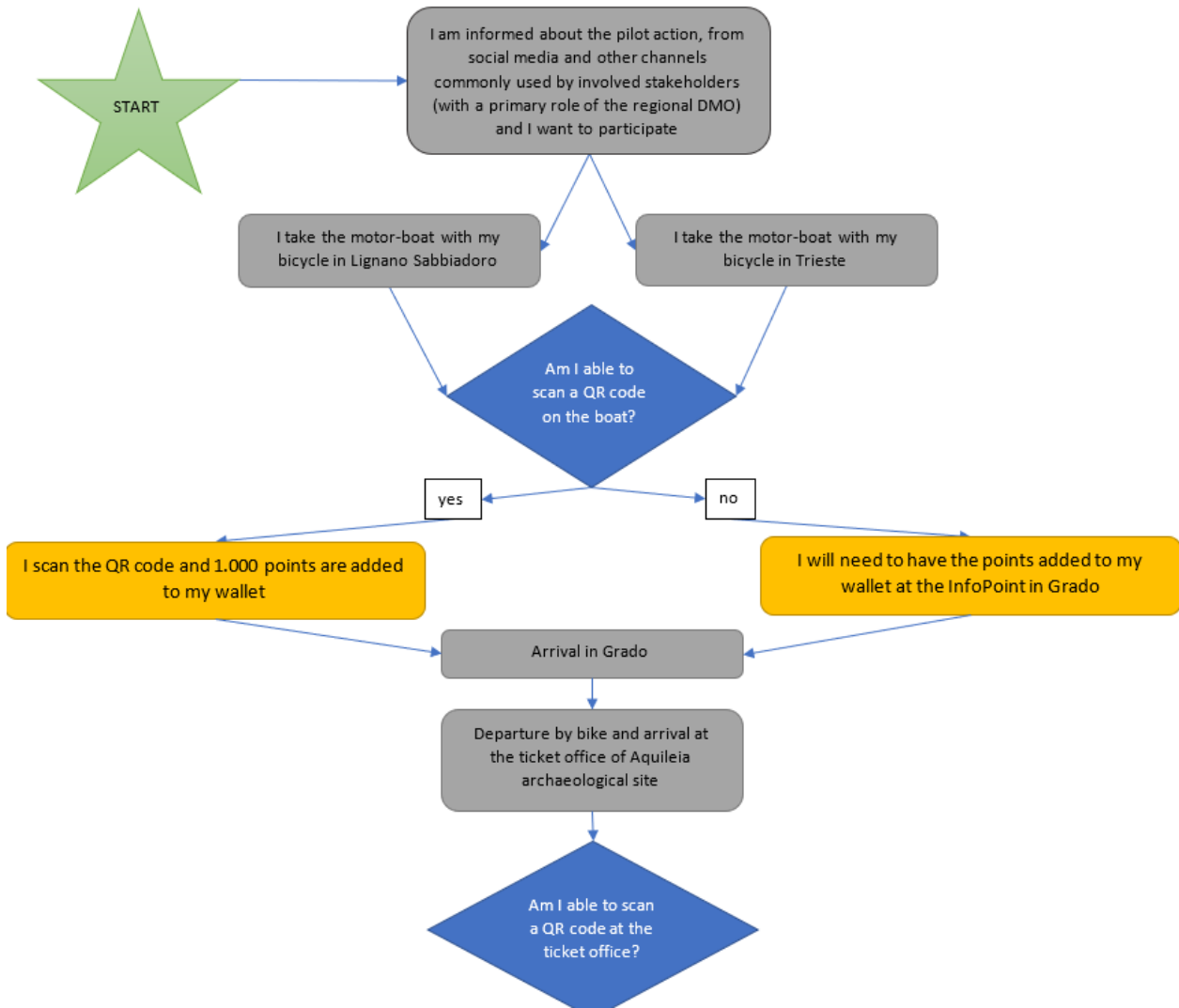




Figure 93: The flow diagram of the pilot of Aquileia & Grado, FVG

The proposal was set up as a challenge to be posed to the SUSTOURISMO app users, which were invited to reach the primary seaside destination of Grado using the maritime public transport services provided in the summer months by the regional PT operator (TPL FVG), departing from Trieste and from Lignano Sabbiadoro²³.

In order to obtain a reward, consisting of specifically made SUSTOURISMO gadgets (t-shirts, bicycle lights), participants had to cycle from Grado to Aquileia, one of the most relevant cultural attractors in FVG Region, thanks to its archaeological site. The approximately 11 km itinerary run along the Alpe Adria Bike Route, with a first scenic stretch across Grado Lagoon.

²³ The maritime connection Lignano Sabbiadoro-Grado is funded by the CEI-led Interreg Italy Croatia Strategic Project "MIMOSA".



Participants had the possibility to accumulate points by scanning SUSTOURISMO QR codes both on the motorship and at the ticket offices in Aquileia. Points could be redeemed, in exchange for rewards, at the Tourism Information Point managed by the regional DMO in Grado.

EDITION 2022

Based on the results of the previous year, the 2021 pilot action was re-structured in order to correct the main constraints encountered, so to propose a 2022 edition able to attract more visitors.

The main limits identified in 2021 were the following:

- Difficulty in involving tourists and potential participants, due to the fact the APP was launched too close to the summer period, and due to COVID-19 situation;
- Lack of flexibility in accessing the experience (due to the strict time-tables of the maritime public service);
- Scarce attractiveness of such an experience for cyclo-tourists who are interested in longer paths.

Therefore, after several discussions and exchange of views with local stakeholders, and after considering different available options, the pilot action was revised and enlarged as scope:

- The destination of Aquileia was confirmed;
- The implementation period was enlarged, from mid-July to end of September;
- The use of sustainable public services was opened to other means: maritime services, train and bus services could be combined with biking in order to participate in the initiative;
- New rewarding systems were included.

SUSTOURISMO: TAKE A RIDE ON THE GREEN SIDE (again!)



**Take a ride on the green side (again!)
Visit Aquileia sustainably**

Interreg ADRION ADRIATIC-IONIAN
European Regional Development Fund - Instrument for Pre-Accession II Fund

SUSTOURISMO

Participate in SUSTOURISMO Days
August 2, 23, and 30 and September 6

CEI
CENTRAL EUROPEAN INITIATIVE

Every Day is a SUSTOURISMO Day
Earn 1000 points

- Download the **SUSTOURISMO** app to register
- Bring your bicycle and take a boat, train or bicycle bus from anywhere in the region
Remember to keep your boat, train or bike-bus ticket!

Cycle to Aquileia and go to the **Aquileia Info Point**
www.turismofvg.it/info-utili/uffici-turistiche/aquileia-info-point
Show your ticket and frame the **QR Code** to earn 1000 points

Enjoy the beauty of Aquileia's heritage!

Participate in SUSTOURISMO Days
Earn 2000 points

- Download the **SUSTOURISMO** app to register
- Bring your bicycle and take a boat, train or bicycle bus from anywhere in the region
Remember to keep your boat, train or bike-bus ticket!

Cycle to Aquileia and go to the **Aquileia Info Point**
www.turismofvg.it/info-utili/uffici-turistiche/aquileia-info-point
Show your ticket and frame the **QR Code** to earn 2000 points

How to use your 2000 points
Frame the **QR Code**, spend 1000 points and pick up your gadget

Come with us to sample the wines and foods of Aquileia
Spend 1000 points to participate in a wine and food tasting organised for you by a sustainable producer in the Aquileia area

Other benefits during SUSTOURISMO Days – together we stand!
Enjoy a discount on purchase of a 48-hour FVG card 48 at the Info Point (only if all 25 participants take part in the initiative)

SUSTOURISMO Days are held on August 2, 23 and 30 and September 6

SUSTOURISMO Days are open to a maximum of 25 participants per day, with registration.

Frame the QR code to register

Figure 94: Graphics of pilot in Aquileia, FVG, 2022

Participation in the initiative “Every Day is a SUSTOURISMO Day” (1,000 points). For the entire duration of the contest, excluding the dates of the 4 SUSTOURISMO Days, the user could receive the points by downloading the SUSTOURISMO App and reaching the town of Aquileia in a sustainable way (by motorboat, bus or train, using the passenger + bicycle transport service), starting his/her journey from any point in the Region. When presenting the ticket for the passenger + bicycle transport service at *the PromoTurismo FVG Info Point in Aquileia*, 1,000 points were credited in the personal wallet inside the app by scanning the dedicated QR code. Points could be redeemed in exchange for a gadget (T-shirts, led-lights and foldable glasses) directly at the Info Point in Aquileia.

Registration and participation in the “SUSTOURISMO Days” (2,000 points). The “SUSTOURISMO Days” were scheduled as follows: 2nd August, 23rd August, 30th August and 6th September. For each day, the participation was open to a maximum of 25 participants, upon registration. The “SUSTOURISMO days” were conceived as promotional days of sustainable tourism in the Aquileia area, combining sustainable tourism mobility, cultural offer and the promotion of local food and wine produced by a sustainable company. To access the 2,000 points available, the individual participant had to download the SUSTOURISMO App and reach the town of Aquileia in a sustainable way (by motorboat, bus or train, using the passenger + bicycle transport service) starting his/her journey from any point in the Region. When presenting the ticket for the passenger + bicycle



transport service at the PromoTurismo FVG Info Point in Aquileia, 2,000 points were credited in the personal wallet inside the app by scanning the dedicated QR code. Points could be redeemed in the form of a gadget (1,000 points) at the Info Point in Aquileia; moreover, registered participants were able to redeem the prize (1,000 points) corresponding to a sustainable food and wine experience at the sustainable company identified and indicated by the organizer.

2.5 The case of Ljubljana (Slovenia)

2.5.1 The overview of Ljubljana city

In the framework of SUSTOURISMO project, PIL /RDA LUR is responsible for the pilot case of Ljubljana, SI - Figure 91 (Ljubljana in the capital city of Slovenia in the Ljubljana urban region).



Figure 95: Ljubljana the capital of Slovenia (source: <https://velo-city2020.com/en/>)

The Ljubljana urban region encompasses 25 municipalities and has a total population of 537.893. The region covers an area of 2.334 km², which equals 12.6% of Slovenian territory.

The Ljubljana urban region is the Slovenian region with the biggest concentration of knowledge and creative potential as this is where the key state, scientific, research, educational and cultural institutions are based. Owing to the large number of companies and jobs, the region generates more than a third of Slovenia's GDP, meaning that it is also the most economically developed region in the country (RRA LUR, The Regional Development Programme 2014-2020).

Though Ljubljana is one of the smallest European capitals, it is an economic and cultural hub of Slovenia. Therefore, it has a lot to offer to locals and visitors alike, which is confirmed by the recent high growth of tourism. Ljubljana offers top culinary experiences due to mix of different cultural traditions. It was awarded with the title Green capital in 2016 and as such offers also relaxation in nature. Ljubljana is also a conference and congress city, where many memorable venues can be found.

As all touristic cities, Ljubljana was greatly impacted by the COVID-19 epidemic.



The official data about the number of cases show that Slovenia has been hit with the second wave of the COVID-19. The coronavirus disease has been spreading rapidly and the number of cases among the population has been rising exponentially, therefore, the Government declared an epidemic on the entire territory of the Republic of Slovenia (source: Visit Ljubljana, <https://www.visitljubljana.com/en/visitors/>).

Ljubljana has always been an important point on international transport corridors and the final point of migration flows in Slovenia. In the middle of the 19th century, an important southern railway Ljubljana of the Austro-Hungarian monarchy ran through and since then the railway has played an important role in the Ljubljana urban region. With the proliferation of the use of personal vehicles and the construction of the motorway junction, the development of the railway networks unfortunately stalled, although data show that the number of passengers on trains has increased.

Road network

The motorway density in Slovenia is higher than EU-28 average. The links with the neighbouring EU Member States and the southeast Europe is equally good as well. In other words, you will easily reach Slovenia from anywhere in Europe by car or lorry within a day or two.

Table 8: Road network in Slovenia in km, 2019

Motorways	Highways	Trunk roads	Regional roads	Local roads	Public paths
692	96	807	5,129	13,326	18,909
Roads TOTAL	38,784				
International roads (off all roads)	E-594				

Source: Ministry of Public Administration, 2018.

Implementation of the National Motorway Construction Programme began in 1994 when Slovenia had less than 200 km of motorways. According to the Programme 533 km of motorways, expressways and other public roads were built since 1994. The construction and modernisation of the road network will continue and follow the target of 660 kilometres of modern highways, expressways and other public roads.

Railway network

Ljubljana hub is the main reference node for Slovenia and is part of the TEN-T core network being crossed by core network corridor N 3, Mediterranean, Algeciras - Kosice. With reference to direct connections currently operating, it must be noted how they are operating towards other hubs of the Danubian area (especially Zagreb) while there is a substantial absence of connections across the Italy-Slovenia border. In fact connections with Italy are guaranteed either by means of



intermodal solution, including local bus services, or using Villach rail station as intermediate interchange point. More in general, total travel times less than 24 hours are experienced in 8 cases. For what concerns the rail passenger demand, higher values are experienced with reference to Zagreb and Budapest.

The public railway infrastructure (PRI) of the Republic of Slovenia comprises a total of 1,207.7 km of main and regional railway lines, out of which 333.5 km are double-track and 874 km are single-track railway lines. This is presented in next figure. The length of tracks is 1,541.2 km. Most railway lines are opened for the mixed traffic of passenger and freight trains. Length of the railway lines intended exclusively for the freight transport is 106 km and 2 km of railway lines are opened only for passenger traffic.

Passenger trains connect all parts of Slovenia. The Slovenian Railways network is linked to all major European cities with modern InterCity and EuroCity trains.

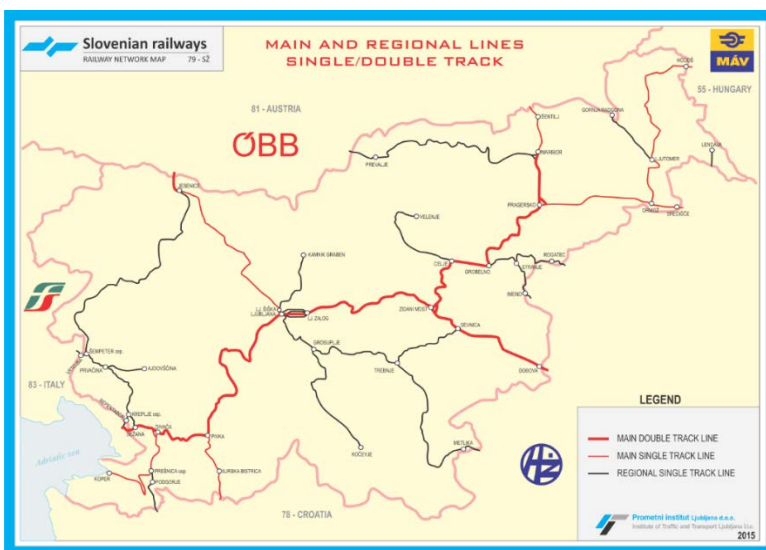


Figure 96: Main and regional lines (single/double track)

There are 504 km of electrified railway lines, which are practically fully electrified with DC system with a nominal voltage of 3 kV, only the border sections are electrified with the same system as the neighbouring countries, namely Austria (15 kV, 16.67 Hz) and Croatia (25 Hz, 50 Hz). The figure below demonstrate all railway lines of the public railway infrastructure of the Republic of Slovenia.

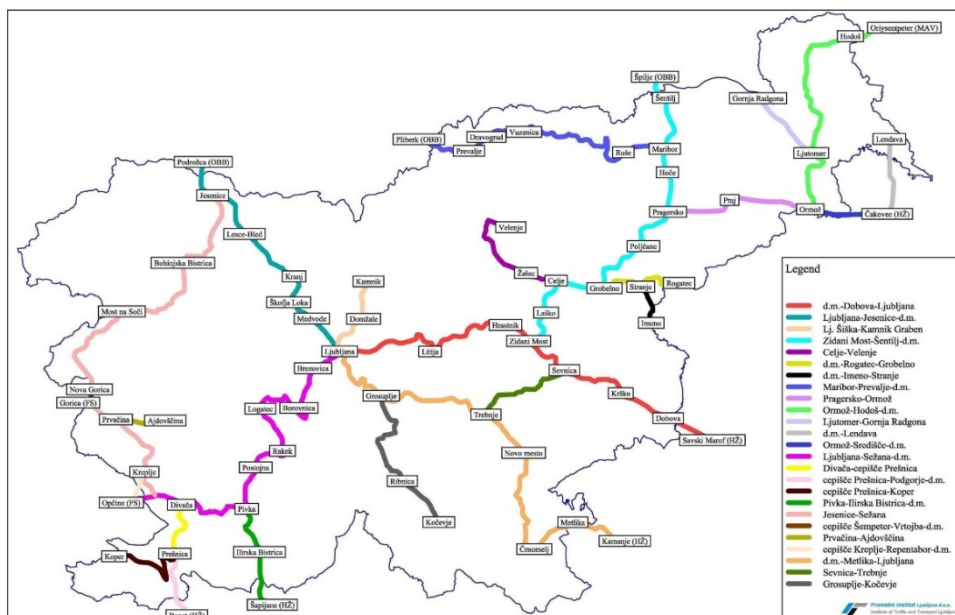


Figure 97: PRI railway lines in the Republic of Slovenia

There are 3,348 bridges, viaducts and passages on the PRI network with a total length of 17 km. The number of tunnels and galleries is 93, with a total length of 37.4 km.

The whole PRI network consists of 128 stations (out of which 8 stations are intended only for freight transport, 8 stations are only for passenger transport and 112 are mixed traffic stations) and 135 railway halts, which together accounts for 263 stop facilities.

Air transport

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

The year 2015 will be remembered in particular for integration of Aerodrom Ljubljana into the Fraport Group, and for a sharp increase in passenger numbers. Passenger numbers in public transport are up 10.3% on the previous year at over 1.4 million passengers, while the total cargo tonnage is comparable (approx. 18,500 tonnes).



2.5.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Ljubljana

The current chapter discussed the tourism data for the Slovenian SUSTOURISMO case up to 2020 when the outbreak of COVID-19 pandemic caused a harm effect on tourism and transport as well as in the majority of daily operations. In 2020, Slovenia recorded 51% fewer arrivals and more than 42 % fewer overnight stays. Drastic decline in the number of foreign guests was partially offset by the growth of domestic tourists (+21% arrivals and +33% overnight stays compared to 2019). The tourism data presented regard national (Slovenia) and local (Ljubljana city) level and are analyzed in order to come up with insights and opportunities for the case of Ljubljana that represents the Slovenian pilot case in SUSTOURISMO project.

- **National level**

In 2017, the GDP related to tourism amounted to EUR 2.3 billion, or 5.3 % of total GDP. Considering the direct and indirect impacts, tourism contribution to the GDP is estimated to be EUR 3.6 billion, that is approximately 8.4 % of total GDP. In 2018, tourism exports amounted to EUR 2.7 billion, creating a tourism balance of payments surplus of EUR 1.7 billion. In 2018, tourism industries employed 68 150 people and directly accounted for 7.7 % of total employment in the country. Travel exports accounted for 34.0 % of total service exports in 2018. Inbound tourists amounted to 4.4 million in 2018, up 10.9 % from the previous year.

Overnight stays for international tourists in all accommodation categories totalled 11.2 million in 2018, an increase of 15.4 % over 2017. Core markets included Italy (13.5 % of all inbound overnight visitors), Germany (11.4 %), Austria (8.6 %), Croatia (4.9 %), the Netherlands (4.2 %), the United Kingdom (3.7 %), and Serbia (3.1 %). The Netherlands and Germany, experienced year on year growth of 22.7% and 15.9 % respectively. In 2018, domestic trips totalled 10.9 million, of which 2 million (18.3 %) were overnight stays, and 8.9 million (81.7 %) same-day visits. The total number of overnights in all accommodation was 5.4 million, an increase of 11.1 % from 2017.

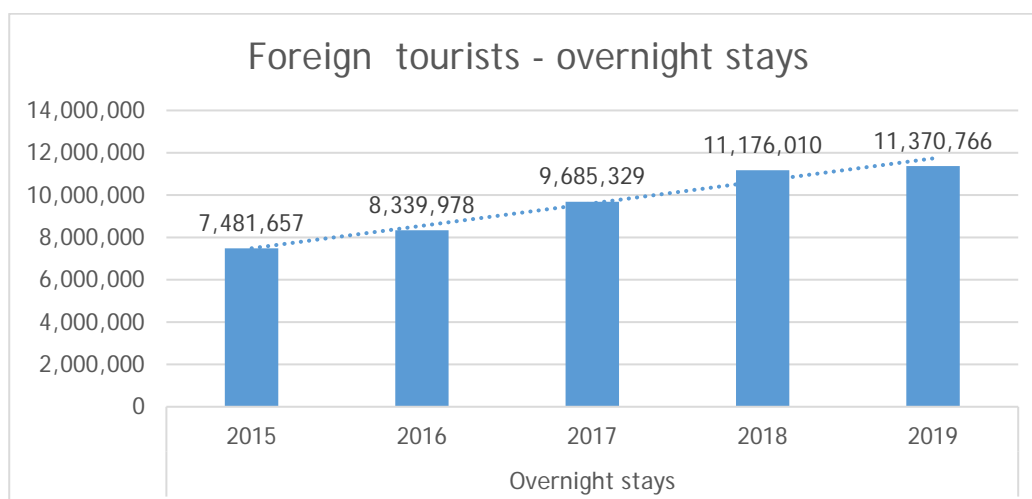


Figure 98: Foreign tourist overnight stays in Slovenia 2015-2019 [Source: Statistical Office of the Republic of Slovenia]

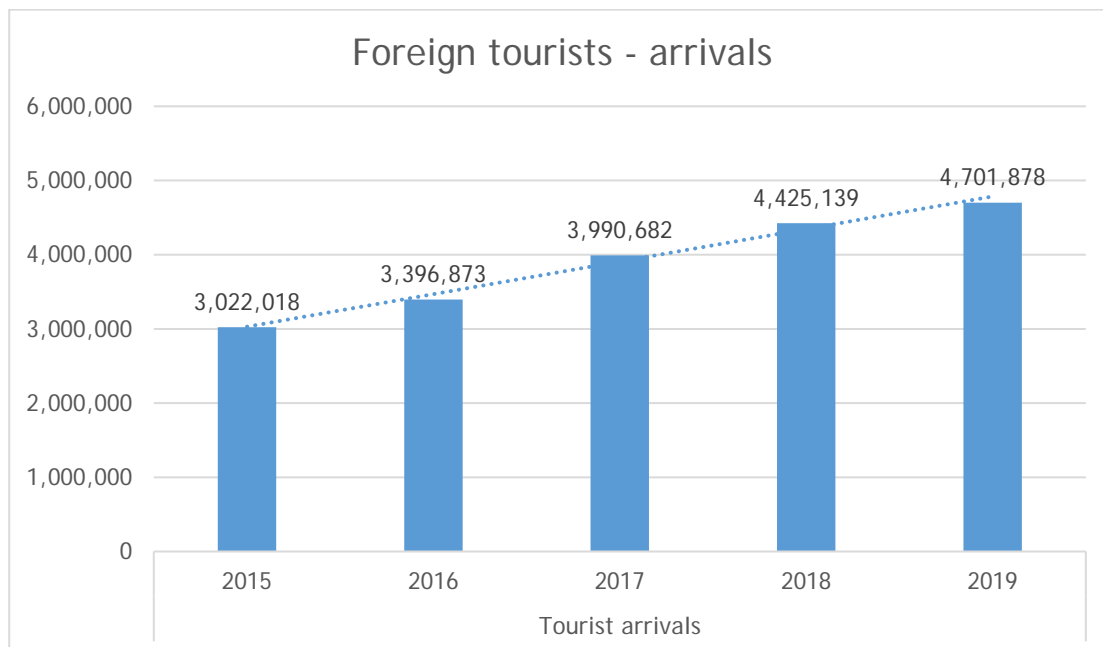


Figure 99: Foreign tourist arrivals in Slovenia 2015-2019 [Source: Statistical Office of the Republic of Slovenia]

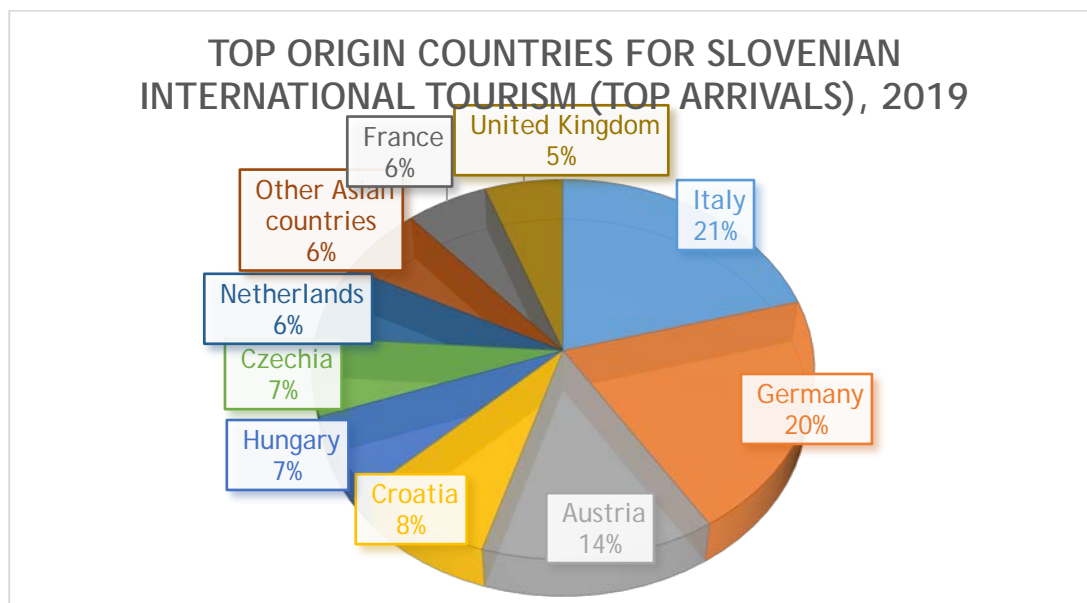


Figure 100: Top Origin Countries for Slovenian International Tourism (top arrivals), 2019 [own elaboration of data from Statistical Office of the Republic of Slovenia]



The main origin countries that refer to the top 5 arrivals are Italy, Germany, Austria, Croatia and Hungary, together they represent 70 % of all arrivals to Slovenia in 2019.

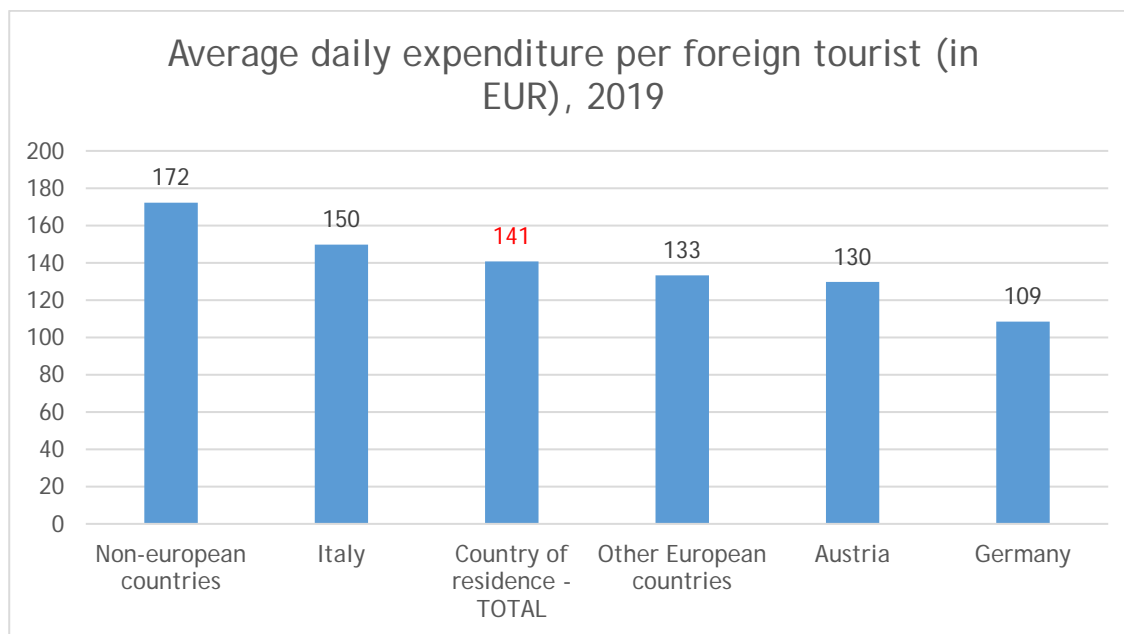


Figure 101: Average daily expenditure per foreign tourist, 2019 data [own elaboration of data from Statistical Office of the Republic of Slovenia]

The average spending per foreign tourist in Slovenia differs among different countries of origin. Tourists from Non-European countries tend to spend more than tourists from EU countries. Average daily expenditure is 141 EUR.

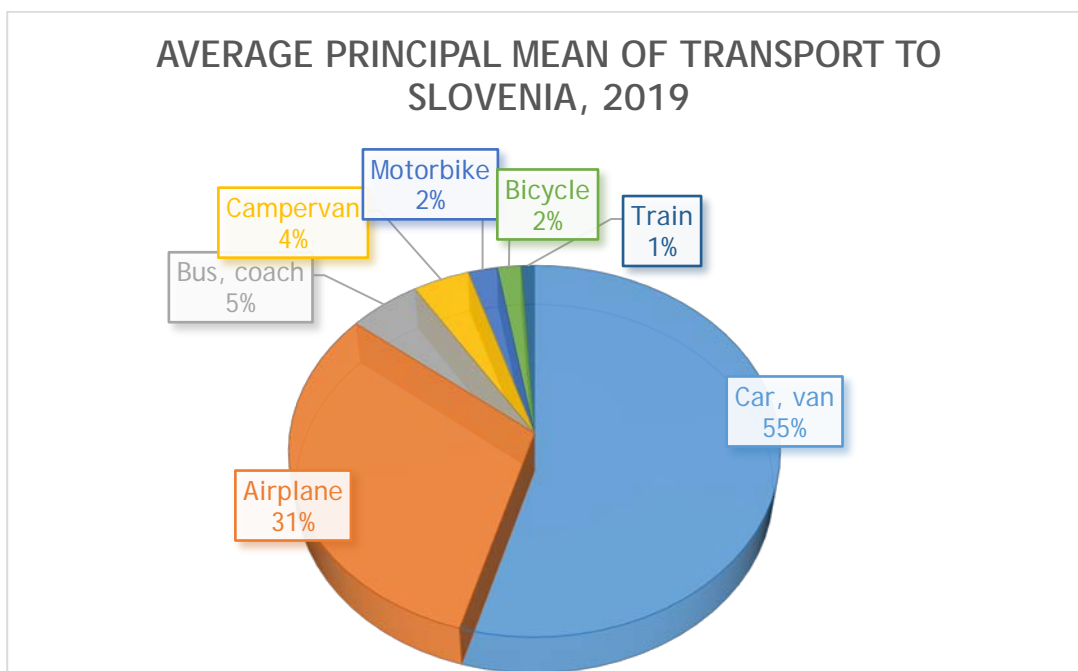


Figure 102: Average principal mean of transport to Slovenia, 2019 data [own elaboration of data from Statistical Office of the Republic of Slovenia]

The majority of tourists arrive by car and van, airplane is the second main transport mode (low cost airlines have played crucial role in this selection), unfortunately the train is least chosen mode of transport which can be a sign on the low public railway transport connectivity of the area and poor infrastructure that leads to slow travel times.

- **Domestic tourism**

In 2019, the highest numbers of tourist arrivals ever were recorded in tourist accommodation establishments; domestic tourists generated more than 1.5 million arrivals (1 % more than in 2018) and 4.4 million overnight stays (2 % fewer than in 2018). Domestic tourists generated the most overnight stays in health (spa) resorts (39 % of domestic overnight stays). In 2019, (domestic and foreign) tourists generated the most overnight stays in municipalities Ljubljana (14 %) and Piran (12 %) (Statistical Office of the Republic of Slovenia).

- **Metropolitan/City level**

Numerous visitors describe Ljubljana as a hidden gem of Europe. Being a city with a green soul and a high level of environmental awareness, Ljubljana has managed to preserve its green character to the present day. It boasts excellently preserved green spaces and nature even in the heart of the city centre. The soul of the city is the Ljubljanica River, crossed by picturesque bridges. Nowadays, the banks of the Ljubljanica are picturesque promenades, which are also meeting and socialising points. All of the bridges spanning the river are interesting architecturally. They join people symbolically and literally, and street artists also find inspiration there, making



the city even livelier and more attractive. The pulse of the city is lively and creative, with numerous events and festivals. Positioned on the crossroads of different great culinary traditions, Ljubljana is also a foodie heaven, with local chefs really making an impact in the last few years (Tourism Ljubljana, 2021).

Tourist arrivals to Ljubljana, 2010-2018

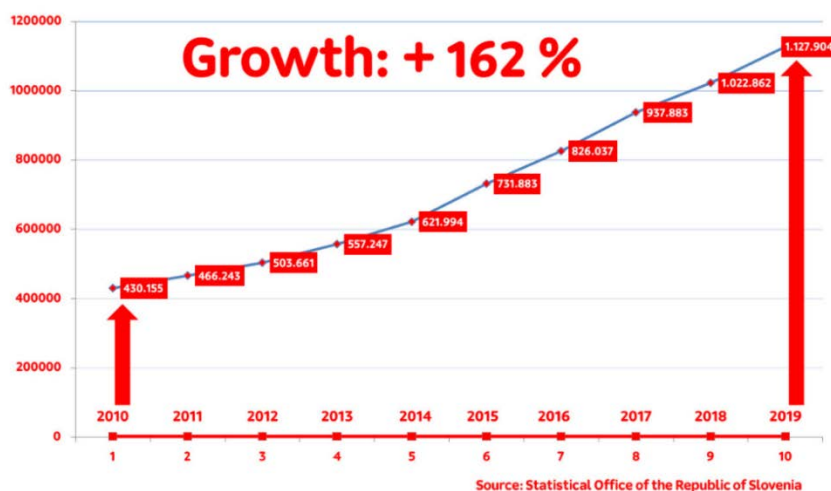


Figure 103: Tourist arrivals in Ljubljana 2010-2018 [Ljubljana Tourism]

Overnight stays in Ljubljana, 2010-2019

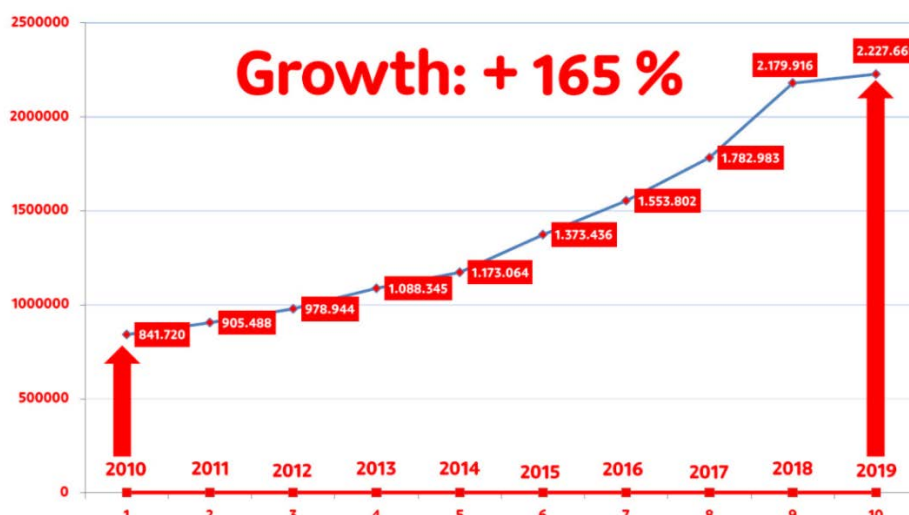


Figure 104: Overnight stays in Ljubljana 2010-2019 [Ljubljana Tourism]



Ljubljana traditionally attracts also domestic tourism as depicted in the following figure.

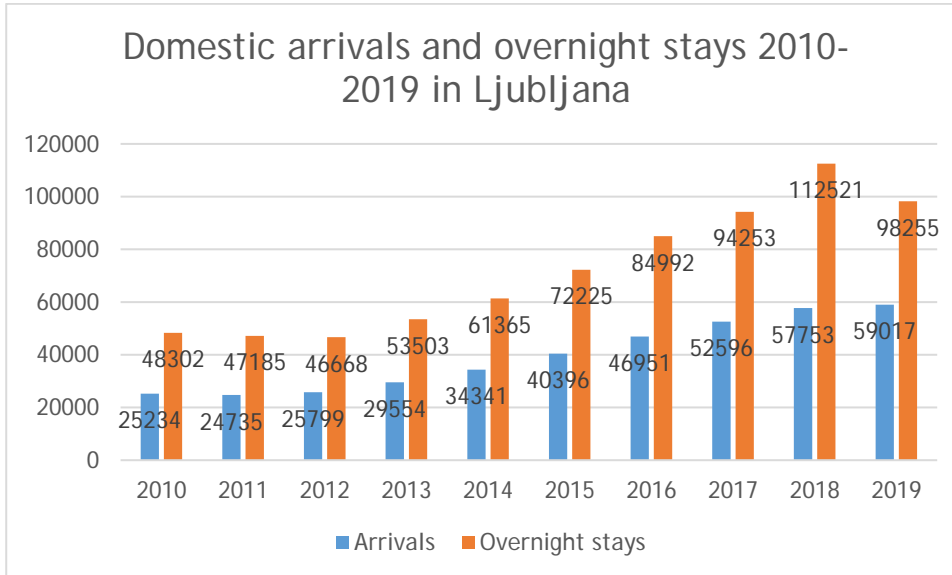


Figure 105: Domestic tourism in Ljubljana [Tourism Ljubljana]

Connectivity of Ljubljana

Ljubljana, the capital of Slovenia, lies between Vienna and Venice, not far away from the Adriatic Sea. Its city region has always lain at the intersection of important transport routes leading from northern Europe to the Adriatic Sea and from western to eastern Europe and further on to the Balkans and the Near East. Road connections have traditionally been good, while rail connections are very slow and noncompatible due to the old and poor infrastructure.

Ljubljana city buses, operated by the Ljubljanski potniški promet (LPP) public utility company, are great way if travelling through the city. The Urbana public transport card can be purchased. While more sustainable ways of travelling through the city is walking, since the centre of Ljubljana is relatively small and practically all main touristic points are reachable by walking. The BicikeLJ bicycle-sharing system gives an opportunity to hire bikes from self-service terminals located across the wider Ljubljana city centre. BicikeLJ bikes are particularly suitable for shorter, up to an hour-long rides as hire is free if is returned to the nearest docking station within an hour. Because cycling is a great way to explore Ljubljana, tourists and other visitors can hire bicycles as part of the Ljubljana Bike project. Bicycles, available from the Tourist Information Centre during the warm months, can be hired at very reasonable prices, plus you can get all the tourist information you need while picking up your bicycle. A specialty in sustainable travelling in Ljubljana is also Ljubljana's electric-powered vehicles referred to as Kavalirs (Gentle Helpers) which are a free city centre public transport option friendly both to people and the environment. Kavalirs, mainly intended for the transport of the elderly, mobility-impaired people, and visitors, run around the pedestrianized historical city centre at a speed slow enough to allow you to hail them anywhere on the street. Telephone ordering is also an option.



Railway passenger transport in Slovenia is growing every year with new investments in infrastructure and passenger trains it can grow a potential for tourists travelling to Slovenia by train and to visit places around Slovenia by train.

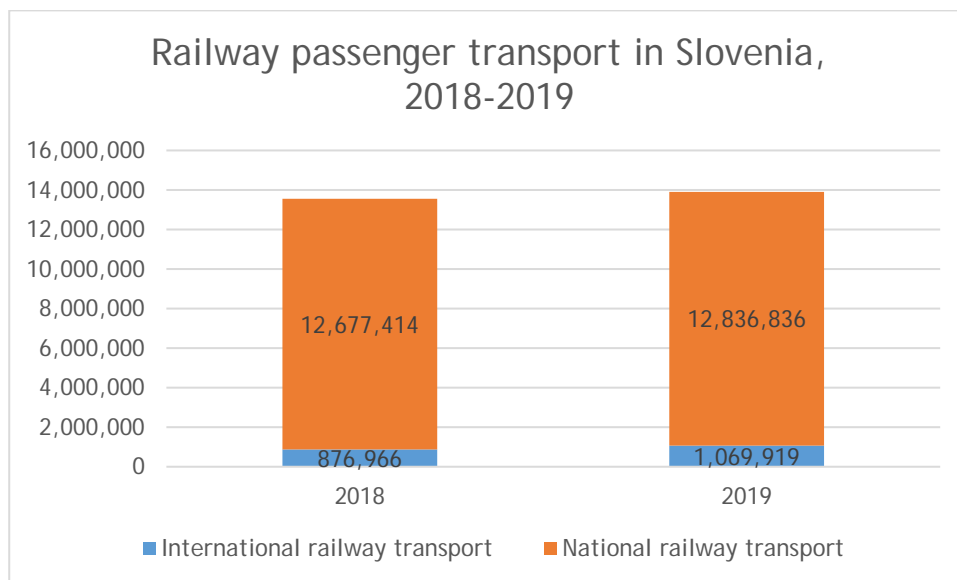


Figure 106: Railway transport in Slovenia [Slovenian Railways, Passenger Transport]

Not far from the city Ljubljana is Ljubljana Jože Pučnik Airport, the country's main airport.

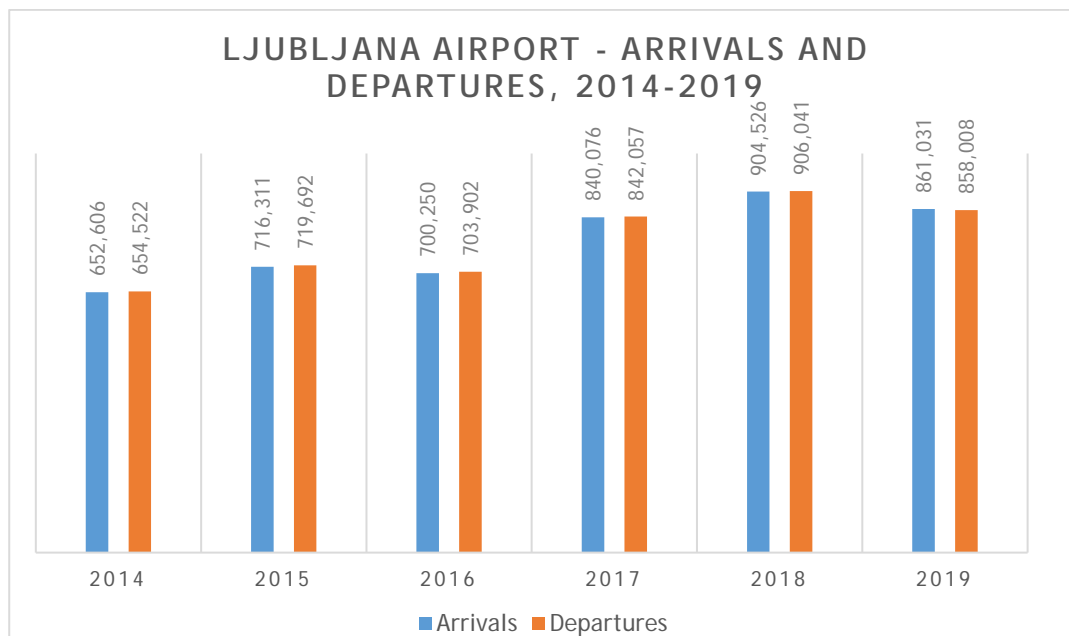


Figure 107: Traffic in Ljubljana airport 2014-2019 [Fraport Slovenia]



All the above tables show that Slovenia and Ljubljana are triggering more and more tourists every year. Ljubljana, the proud holder of the title European Green Capital 2016, is a world-leading destination in the sustainable tourism field. The development of sustainable tourism is Ljubljana Tourism's overarching focus. With its green image and sustainable development strategy, Ljubljana offers excellent opportunities for sustainable tourism. Ljubljana is developing as an attractive, green, environmentally friendly destination distinguished by a high quality of life both for citizens and for visitors to the city. Ljubljana presents many opportunities for tourism growth in the future.

2.5.3 Searching the tourism policy background and finding gaps and opportunities

The review of national, regional and local strategies and initiatives that took place in the context of Del. T1.1.1. 'The SUSTOURISMO context. Analysis of policy documents on sustainable tourism and transport in the ADRION area' had as a final goal to identify areas of interventions according to the already published and followed tourism strategy.

The review of the strategic documents revealed basic axes around which Ljubljana can concentrate. These axes are:

- The strategic vision for Slovenia is to be recognised as a global, green, boutique, five stars destination for demanding visitors.
- Introducing the Master Plans for the four new main macro-destinations are in development. Master Plans will focus on tourism education and training, stimulating green and innovative tourism products of SMEs and high-quality services development, enhancing digital promotion of the 35 lead destinations, and marketing clusters of similar destinations and geographically linked exceptional tourist experiences. The objective of the clusters is to strengthen the identity of particular destination and to achieve synergies both in development of the most representative destination products and services along with the more focused marketing communications and destination promotion.
- Investing in new and existing accommodation and related tourism infrastructure to increase competitiveness and raise quality.
- Strengthening land use planning to enable better inclusion of cultural and natural resources and appropriate tourism infrastructure construction planning.
- Supporting small tourism businesses to encourage entrepreneurship and enhance the quality of the tourism offer. Support to small businesses is focused on digital transformation; transition to a low carbon economy; and assistance with grant procurement to improve product quality and services.
- The Green Scheme of Slovenian Tourism (GSST) is a national tool and certification program for promoting sustainable tourism in Slovenia. The key strategic objective of



the scheme is to introduce sustainable models to Slovenian tourism, tourism service providers and destinations.

- Unique and attractive tourist products are being developed in the region, offering unique, easily accessible experiences and experiential explorations of the region, tailored to different audiences and the length of their visit.
- The region is a well-rounded geographical and tourist entity, with a common green story. A steadily increasing share of tourism stakeholders have proven (certificates) using a sustainable business system, local green chains, and sustainable mobility.
- New sustainable mobility systems have been introduced in the region to complement the mobility needs of the inhabitants of the region and are attractive to tourists.
- The region is presented visually and content in a modern and creative way and clearly communicates the most interesting contents and experiences. It is positioned as a region of easily accessible and authentic experiences that effectively motivates visitors to visit.
- A well-defined and well-established system of supportive environment at the regional level, which helps daily to meet the challenges and joint operation of the region, thereby delivering better results for both the municipality and the region.

Considering the above listed aims, the key element of the sustainable mobility and tourism is primarily providing suitable and appropriate cycling and pedestrian surfaces which contribute to the development of sustainable mobility and with it the improvement of air quality and better functional connectivity between different parts of the city; improvement of the living space quality in the urban environment; increasing traffic safety and consequentially the appeal of the space for citizens and visitors alike. Ljubljana has to upgrade integrated public transport system, to become more attracted for tourists.

2.5.4 Learning from best practices on tourism and mobility

In Deliverable T1.2.1 'State-of-the-art on sustainable tourism' RRA LUR and PIL identified many interesting points from the review of best practices, to name a few:

- **Rewarding sustainable tourist practices with certificates as a sign of sustainable service provision** for destinations and service providers (The Green Scheme of Slovenian Tourism (GSST) is a national tool and certification program for promoting sustainable tourism in Slovenia. The tool has been identified as a good practice by Interreg Europe CircIE project).
- **Smart integrated cards for sustainable destinations** have been introduced on some of the most prominent tourist sites in Slovenia, where tourists can pay for different types of services (culinary experiences, sports activities, parking, etc.) with only one card (Lake Bohinj, Valley Vrata, etc.).
- **Raising awareness for cultural and natural heritage through designing tourist attractive thematic learning paths** (Claustra Alpinium - 'Slovenia-Croatia' IPA cross-border



cooperation program; Marsh pixies trail to Mali plac, Ljubljana marshes - European Regional Development Fund.).

Though Ljubljana is already well established a tourist destination, its attractive and diverse hinterlands remain unknown to the average visitor. Building on the above experience tourist packages could be following:

- The capital is surrounded with rather unspoiled nature. Ljubljana marshes are one of the most attractive marshes sites in Europe, due to its rich natural and cultural diversity. This large area could be brought closer to tourists by providing them **unique guided thematic cycling routes**.
- Ljubljana is already equipped with **modern bicycle rental system**. To ensure tourists chose more sustainable ways of commuting, the system should be spread evenly throughout the green infrastructure that surrounds the capital.
- Slovenia is recognized as a culinary destination. When mapping out the thematic cycling routes renowned restaurants should be included to **promote the local cuisine**.

2.5.5 Learning from tourist surveys - the path forward as revealed by the tourists

The survey conducted for the case of Ljubljana during September-October 2020 had as a goal to identify the needs of tourists and relate them to existing or potential mobility services and provisions. The timing of the survey unfortunately was not the favourable for tourism as a result the sampling was not the most representative. The COVID-19 pandemic which has spread all over the world from the beginning of 2020, has adversely affected the tourist sector in Slovenia. 646 respondents took part in the survey, of which 420 foreign tourists (65.0 %) and 226 domestic tourists (35 %). The highest share of foreign tourists were Germans (44.0 %), followed by Italians (13.1 %), Austrians (6.2 %), French (6.2 %) and Serbs (2.9 %). Tourists were interviewed on train and bus stations, in the city center, near the main sights of the city, shopping malls, etc.

Focusing on the international tourists and trying to extract circumstances-independent needs (unaffected as possible by the pandemic), key takeaways from the survey are;

- In addition to Ljubljana, three quarters of foreign tourists intend to visit tourist areas outside Ljubljana and want information about attractions outside the city. The following is information on transportation and tourist services. 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.

2.5.6 Listening to tourism and mobility stakeholders - insights from the 1st Technical Round Table

In December, the 1st virtual SUSTOURISMO Round table was organized to gain insight into stakeholders needs and requirements. The chosen participants on the principle of representing 3 different aspects of sustainable tourism namely, a tourist service provider Ljubljana by Bike, public transport provider Slovenian Railways Passenger transport and the most important promotor of Slovenian tourism on national and international level Slovenian Tourist Board.

Through the virtual event, they shared following concerns and ideas for supporting sustainable tourism and mobility:

- Sustainable mobility improves the tourist experience, it enriches the offer and reduces environmental impact. However, this cannot be actualized without proper public transport. Many efforts on local, regional, and national level need to be done to overcome its inefficiency.
- Outdated infrastructure is also the main obstacle of the successful development of an integrated transport network in ADRION. Cross-border sustainable tourism should be promoted through cooperation of all transport and tourism actors and focus on providing the tourist with a seamless mobility service.
- They all welcomed SUSTOURISMO endeavours and some possibilities of cooperation with other ongoing EU projects were detected.
- Up-to-date adequate data is crucial for tourism. Tourist should be able to obtain all necessary travel and sightseeing data in one place, which should also reward sustainable traveling choices.

2.5.7 Combining finding in a SWOT analysis for the case of Ljubljana



Combining the insights of the above findings, the current subchapter concludes in a SWOT analysis for the SUSTOURISMO case of Ljubljana that serves and is mutually served by the objectives of the project; tourism and mobility hand by hand development.

Table 9: SWOT for Ljubljana in the context of SUSTOURISMO project

<p>Strengths</p> <ul style="list-style-type: none"> • Ljubljana has the only international airport in Slovenia and is therefore the main Slovenian hub. It is also an economic and cultural hub of Slovenia. • Ljubljana is an attractive and modern European capital with a diverse touristic offer. Before Covid-19 the tourism sector was growing steadily. • The city centre has been completely renovated in the last 15 years. • Ljubljana offers top culinary experiences, relaxation and is also a conference and congress city. • The history of Ljubljana dates to the Roman empire. Its rich historical development is reflected in appealing city centre. It is also where the most prominent states museums and galleries are. • 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Poor quality of railway infrastructure and other sustainable mobility infrastructure. • Poor and outdated public transport in need of a through renovation on infrastructural and organisational level. • Insufficient financial resources of the state for the promotion of sustainable tourism. • Several different tourism focuses, cultural and leisure strategies address a small area, conflict of interest. • Absence of strong collaboration between tourism and mobility industry key players. • Spatial and transport development in Slovenia are still urging for a paradigm shift from car-oriented mobility towards more sustainable means of transport.
<p>Opportunities</p> <ul style="list-style-type: none"> • Regional tourism needs a strong intervention in the restructuring and renewal of tourism infrastructure. • A growing tourist demand for natural and sustainable destinations. • Ljubljana hinterlands is rich with nature and cultural heritage and is the perfect destination for the on growing tourist demand for green sports destination. • Ljubljana has a well-developed network of cycling and walking 	<p>Threats</p> <ul style="list-style-type: none"> • Lack of sustainable transport services for tourists in the region. • Lack of sustainable tourist offers for visiting surroundings of capital Ljubljana. • The main attraction is the city centre which is becoming burdened by the large number of tourists. • Sites in the proximity of the Ljubljana centre are being overlooked and therefore stagnant in their development.



paths and has as the host of the Velo-city 2020 conference, the annual global cycling summit of the European Cyclists' Federation, due to the city's dedication to sustainable mobility, especially cycling.

- Cycling tourism is one of the fastest growing types of outdoor recreation and tourism nationwide.
- As outdoor products will be even more important than before due to the Covid-19 crisis, Slovenia defined Outdoor Tourism as leading promotional theme for 2022 and 2023.



2.5.8 Drafting of the SUSTOURISMO touristic package of Ljubljana

The tourist package schemes were drafted based on the results of the SWOT analysis and with the cooperation of the most relevant stakeholders, namely Slovenian Railways- Passengers Transport and LjubljanaByBike, who will also be actively involved in its implementation.

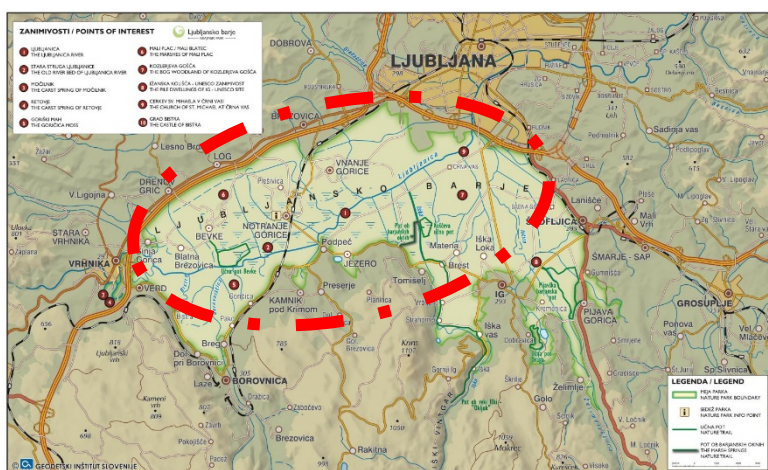


Figure 108: Ljubljana's pilot area in SUSTOURISMO: Ljubljansko Barje (Ljubljana marshes) are the largest Slovene and southernmost European wetlands

The pilot phase for Ljubljana refers to the provision of Sustainable Circle around Ljubljana Marshes - 2 cycling tours



The tourists will have an opportunity to experience Ljubljana hinterlands, Ljubljana Marshes the largest Slovene and southernmost European wetlands. It is an attractive site, less known to foreign tourists due to bad connectivity to Ljubljana. The marshes are 160 square kilometres large plain and as such ideal for promoting cycling and other forms of sustainable tourism.

There are only a few capital cities that have such a vast and special green space at their doorstep as the Ljubljana Marshes, which you can reach by bike or even on foot. The area is not only special for its beautiful nature, but also for its very rich history and archaeological heritage.

The two cycling tours are designed to allow tourists to experience all aspects of this incredible area, which is protected as a nature park. The Ljubljana Marshes, located in the Ljubljana Basin, cover an area of 163 km². The Ljubljanica River flows from several karst springs on the southern edge of the Ljubljana Marshes area. The river has cut its riverbed several metres deep, with a descent of only about 1 metre over its entire 20 km length, which is the reason why spring and autumn floods can cover up to half of the entire area of the Marshes. Floods are an annual phenomenon, and one of the main features of this part of Slovenia. The area also serves as a nesting site for 100 bird species, which is half of all the bird species in Slovenia.

Cycling takes place mainly on flat terrain, but the route can be enriched by climbing one of the hills surrounding the southern edge of the Marshes. There are countless paths through meadows, fields and forests, but they often lead only to privately owned meadows, or are blocked by one of the many canals built over the Marshes to make use of the land and to control flooding.

1) Long Cycling Tour - To the sources of the Ljubljanica River and along the southern slopes of the Ljubljana Marshes

The long Ljubljana Marshes Tour is a cycling treat for lovers of nature and hidden corners not far from the capital. The basic route runs along the entire southern edge of the Marshes, and is 46 or 54 km long (depending on the starting point), with additional kilometres accumulated by visiting interesting gorges or viewpoints along the way. In the spirit of sustainable mobility, cycling is combined with the train, as the Green Explorers take the train to their starting point, and then return to the capital.

2) Short Cycling Tour - From the city to the heart of the Ljubljana Marshes

The Short Ljubljana Marshes Tour is a unique combination of the natural beauty of the Ljubljana Marshes and a little bit of the hustle and bustle of the capital city. In the spirit of sustainable mobility, cycling in combination with a train or boat offers many attractions along the way. It is 28 km and 41 km long in two versions, both of which impress with their diverse terrain and views of the varied landscape.

Promotional materials, social media posts and information on websites of any tourist-visited websites will support touristic packages dissemination and advertisement.

Table 10: Interested stakeholders for supporting SUSTOURISMO goals in this phase

Organization	Notes (e.g. experience with the subject matter, cultural background, etc.)
--------------	--



1.	Slovenian Railways Passenger transport	Experience as Transport operator
2.	Slovenia Tourist Board	Experience in the tourism sector
3.	LjubljanaByBike	Experience in developing technological applications

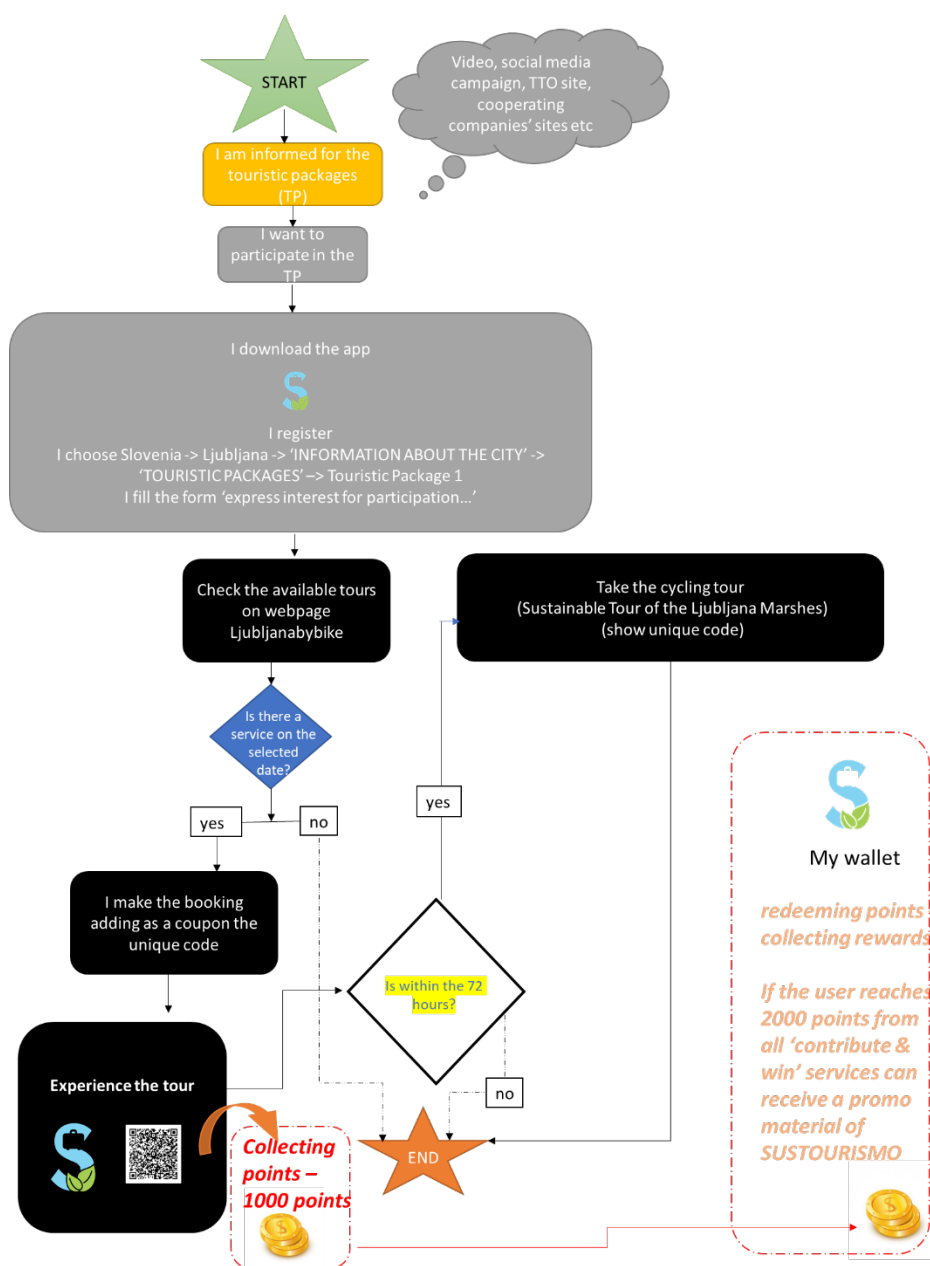


Figure 109: The flow diagram of the pilot of Ljubljana
151



2.6 The case of Zadar (Croatia)

2.6.1 The overview of Zadar city

In the framework of SUSTOURISMO project, City of Zadar Department of EU Funds is responsible for the pilot case of Zadar, Croatia - Figure 105 (Zadar is a city in Zadar County, Region of Northern Dalmatia in Croatia).



Figure 110: The pilot area of Zadar

The city of Zadar is the urban, cultural, economic, transportation and development centre of Zadar County. It is the fifth largest city in the Republic of Croatia and the third in the Adriatic (Croatian part of Adriatic), which makes it one of the important urban centres of the Adriatic region. The land area of the City of Zadar refers to an area of 194.02 km² and makes up 5.26% of the total area of Zadar County. A population of 75,082 in 2011 makes it the second-largest city of the region of Dalmatia and the fifth-largest city in the country. Because of its rich heritage, Zadar is today one of the most popular Croatian tourist destinations. In 2016 the Belgian portal *Europe's Best Destinations.com* named Zadar the "Best European Destination" after a three-week period of online voting involving more than 288,000 votes. UNESCO's World Heritage Site list included the fortified city of Zadar as part of Venetian Works of Defence between 15th and 17th centuries.

The continuous population of the city of Zadar begins in the period of strengthening the power of the Illyrian tribe Liburni (9th century BC), as evidenced by numerous archaeological excavations and found objects. The cultural heritage of Zadar and the region, from the earliest times to the recent past, is rich and very valuable. Remains from ancient antiquity, early Christianity and the early Middle Ages can be found in Zadar. The historic centre of Zadar is located on an elongated peninsula. The settlement of Liburna (Greek Idassa) in the 1st century BC becomes the Roman



colony of Iader. The ancient raster of the city has been preserved to this day. Many of Zadar's islands have a very valuable historical heritage, especially in the form of preserved old fortifications. The peripheral area of the city was previously occasionally inhabited (Stone Age period), but without continuity. The influences of Liburnian, Roman, Byzantine, Croatian, Venetian, French, Austrian and Italian culture that in certain historical periods influenced the city and created today's cultural identity of the city are very present.

The natural features of the area of the city of Zadar are determined by the Mediterranean climate (hot and dry summers, and mild and humid winters), indented coast, and clean and warm sea. Due to the proximity of national parks and nature parks and the islands of the Zadar archipelago, the city of Zadar is a destination for many visitors who enjoy the natural beauty. Protected parts of nature represent an important development resource and complement the cultural and tourist offer of the city, but also represent limitations that should be respected when planning the overall development. Thanks to its location, the city has an exceptional possibility of unhindered spatial expansion towards the hinterland, which makes up the area of Ravni kotari. The influence of Ravni kotari gives a specific "rural" character to the city periphery, which together with the islands of the Zadar archipelago in just a few kilometres makes a "transformation" from urban to rural. This results in the agricultural potential of the city, rural tourism and other economic activities characteristic of rural areas.

From independence and the Homeland War until today, Zadar is one of the cities in the Republic of Croatia with the highest rates of economic growth, which can be said to have successfully overcome the negative consequences of the war. However, the war caused irreversible damage and took away the strong "development years" of the city. At the same time, other cities in the region and neighbouring countries had the opportunity to develop unhindered or at least preserve their development potential. Despite everything, even today's negative world economic trends, Zadar is a city that is a county, regional and nationally important factor of development with exceptional potential for the future.

The great diversity of the city of Zadar represents, primarily, a significant resource basis for the development of Mediterranean-mountain agriculture, fishing and mariculture, and is especially important for the development of special interest tourism based on rural and active tourism. The economy of Zadar County is based on the activities of the tertiary sector, i.e. trade, manufacturing, maritime transport, construction, fisheries and agriculture, crafts and tourism. The city is becoming a central place for capital investments in the county and the wider region, so public transport and social infrastructure, residential and commercial buildings, various new shopping centres have been built, and there are significant investments in production. Today, very recognizable projects have been built that are slowly changing and shaping the economic and social image of the city such as SC Višnjik, Forum, hotels in Punta Skala, several hotels and hostels in the city centre, developing air traffic through Zadar Airport, and at the same time planning significant capital investments that the Zadar economy needs to raise to a higher level, such as: the port of Gaženica, the economic zone Crno, the project "Ravnice", etc. This period in the economic development of the city is characterized by above-average growth rates, although we should not forget that structural economic problems characteristic of the entire Croatian economy



(high unemployment, declining production, too small share of high technologies and knowledge components in entrepreneurship, negative foreign trade balance, etc.).

As for all countries, COVID-19 pandemic, has influenced hardly Zadar's economy, an influence that is vague enough when will disappear.

Zadar is located in the central Adriatic, in northern Dalmatia, equally distant from the northernmost and southernmost point of the Adriatic, which gives it an important geostrategic position and comparative advantage over other cities in the Adriatic region. Good transport connections to all forms of transport today are developed to a satisfactory level, which is an important prerequisite for further smooth development of the Zadar economy. The improvement of transport connections has been one of the most important strategic determinants of the city in the last 20 years, with significant national and local funds invested in the development of transport infrastructure. The existing **road network** in the Zadar County consists of dividing and transversal routes. The most important road routes are: Zagreb-Lika-Zadar-Split, Rijeka-Zadar-Split and Zadar-Benkovac-Knin. The construction of the A1 Zagreb-Split-Dubrovnik (Figure 106) motorway has enabled optimal connection of the city of Zadar and inclusion in European traffic corridors. It is an important generator of economic and demographic development.



Figure 111: The location of city of Zadar at the A1 Zagreb-Split-Dubrovnik motorway

The so-called "Lika" railway which connects the largest city centres of Dalmatia with central Croatia via Knin dominates the area of the city of Zadar. This line has the character of an auxiliary railway line, as well as the Knin-Zadar railway line. The technical condition of the railway is unsatisfactory, both due to war damage and their failure and maintenance, as well as due to many years of non-investment in development and modernization, and inadequate investment in maintaining functional capacity and maintenance. Thus, there is a large backlog in the maintenance and renovation of railways.

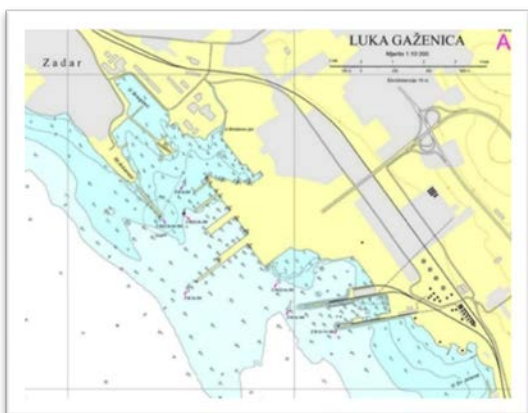


Figure 112: The Port of Gaženica

The passenger port of Zadar is of special international importance. The port of Zadar performs international, state and local maritime traffic functions, and is the second largest on the Croatian coast in terms of the number of transported passengers. In addition to the international ferry line to Ancona in Italy, ships also connect Zadar with islands of its archipelago from two ferry ports: one located in the town centre serving catamaran services and another one located in the suburb of Gaženica serving ferry and distant services. The advantages of the Port of Gaženica are the short distance from the city centre (3.5 kilometres), the proximity of the airport (10 kilometres), the railway and the quality traffic connection with the A1 Motorway and the network of other EU motorways. The Port of Gaženica meets multiple traffic requirements - island, coastal, international ferry traffic, passenger traffic on mega cruisers and cruisers and RO-RO traffic, with all the necessary infrastructure and accompanying upgrades.

Zadar Airport is only 12 km away from the city of Zadar. Zadar Airport is located in Zemunik Donji near the conjunction of the Zagreb-Split highway (Zadar 2). The airport is a 4E category port and serves to meet the needs of passenger traffic, but it also has an increasing role in freight transport. With the planned runway extension, it will be able to accommodate the largest aircraft. It is well located in the area of northern Dalmatia, so that all the surrounding areas with a lot of built tourist capacity gravitate to it.

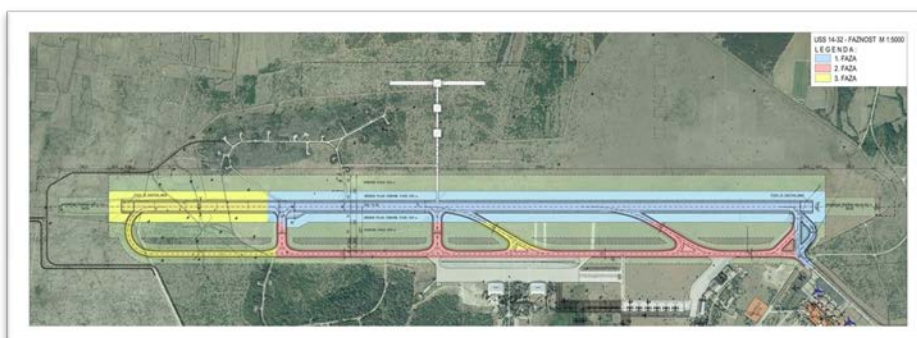




Figure 113: Zadar Airport runway extension project

Public transport in the city of Zadar consists of bus (Figure 109) and taxi transport, and well-known traditional city carriers or boatmen of Zadar (*barkajoli*). Boatmen of Zadar cannot be viewed as part of a regular, public, traffic network, but due to their cultural and traditional value, they certainly have great value for all Zadar residents.

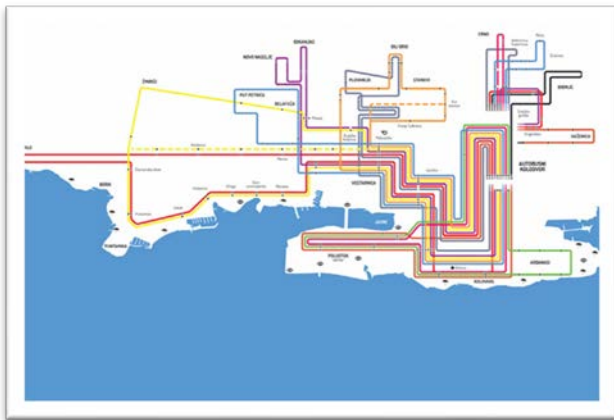


Figure 114: Zadar bus schedule

Lastly, the last years shared bikes and e-scooter companies have started offering services to Zadar's citizens and tourists (stations are found at many points around the city).

2.6.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Zadar

The current chapter discussed the tourism data for the Croatian SUSTOURISMO case up to 2020 when the outbreak of COVID-19 pandemic caused a harm effect on tourism and transport as well as in the majority of daily operations. In their *Sector Analysis for the tourism sector*, the Institute of Economics in Zagreb (2020) presented their main findings, according to which during the period from January to September 2020, compared to the same period in 2019, the number of tourist arrivals decreased by 62,4 percent and the number of overnight stays by 54,1 percent. A stronger decline in the number of arrivals was recorded among foreign tourists. Since the structure of tourist demand is still dominated by foreign guests with 81,1 percent of total tourist arrivals, it's important to emphasize that foreign exchange revenues from tourism in the first two quarters of 2020 recorded a strong year-on-year decline of 61,7 percent.

However, the tourism data presented within this chapter encompasses all three levels, not only national (Croatia), but also regional (Zadar County) and local (City metropolitan area) and have



been analysed in order to come up with insights and opportunities for the case of Zadar that represents the Croatian pilot case in SUSTOURISMO project.

- **National level**

As stated in various publications, such as Croatia Bureau of Statistics' *Statistical Reports*, or in Institute of Economics in Zagreb's *Sector Analysis* (2019) and Croatian National Bank's analyses published for the year of 2019, tourism is one of the most important sectors of the Croatian economy and a key pillar of economic growth. As hinted earlier, the role of tourism in overall economic development has been recognized also when considering implications that COVID-19 has had on decline of Croatian tourism in 2020 and, hence, on overall Croatian economy.

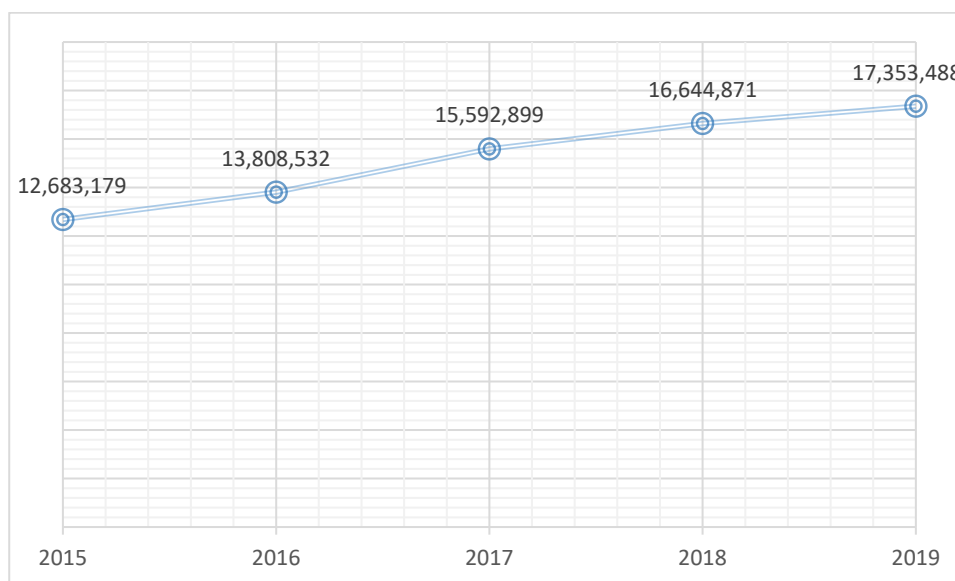


Figure 115: Total international arrivals in Croatia 2015-2019 [Source: Croatian Bureau of Statistics]

According to earlier mentioned Institute of Economics in Zagreb's *Sector Analysis* (2019), tourism GDP accounted for 11.4% of total GVA in 2016. Although there are no other "official" data regarding share in following years, according to sources from media, tourism GDP accounted for approximately 19.6% of total GVA in 2018, and therefore Croatia is among the most "dependent" tourist destinations in the world. When it comes to statistical monitoring of tourism, it is important to note that tourism is not defined as a separate category (area, section, group, activity or class) within the National Classification of Activities 2007, but is a set of different activities, which makes it difficult to assess its significance for the whole economy. When estimating the direct economic contribution of tourism to the national economy, the Tourism Satellite Account is used. The Tourism Satellite Account is an addition to the System of National Accounts (SNA) and is designed to allow for better integration of tourism statistics into national accounts statistics. In January of 2019, the Croatian Bureau of Statistics published for the first time the results of the calculation of the economic importance of tourism for the Croatian economy in accordance with



the methodology of the Tourism Satellite Account, making the Tourism Satellite Account part of the official statistics of the Republic of Croatia.

According to the Ministry of Tourism of Republic of Croatia's publication *Tourism in Figures: 2018* (2019), number of persons employed in hotels and restaurants amounted to 101 000 people in 2018, accounting for 7.3% of total employment in the country. Furthermore, tourism is an export champion in the Croatian economy. According to Institute of Economics in Zagreb's *Sector Analysis* (2019), total revenues in tourism from foreign guests in 2018 amounted to 9.5 billion euros, which is 541.6 million euros (6 %) more than the previous year. The structure of foreign exchange revenues from tourism is dominated by revenues from private trips (98%), while revenues from business trips of foreign guests make up only 2% of total foreign exchange revenues in tourism. Also, according to Croatia Bureau of Statistics' first release *Tourist arrivals and nights in 2019* (2020) in 2019 the upward trend of international tourist arrivals continued reaching the top number of 17.353.488 arrivals and 84.1 million nights, which is 4.3% more arrivals and 1.2% more nights than in 2018, thus giving to the country a revenue of approximately 9.5 billion euros (financial data available for the first 9 months).

Previously stated statistical release states that, from the point of view of outbound markets, the most foreign tourist arrivals and nights in 2019 were realised by tourists from Germany, as much as 2.9 million arrivals and 19.9 million nights (16.6% of the total realised foreign tourist arrivals and 23.7% of the total realised foreign tourist nights). These were followed by the nights realised by tourists from Slovenia (8.9%), Austria (8.4%), Poland (7.0%), Italy (6.1%), the Czech Republic (5.9%) and the United Kingdom (5.1%). Tourists from Germany recorded an increase in arrivals of 3.5%, but a slight decrease in nights of 0.2% in 2019 compared to 2018.

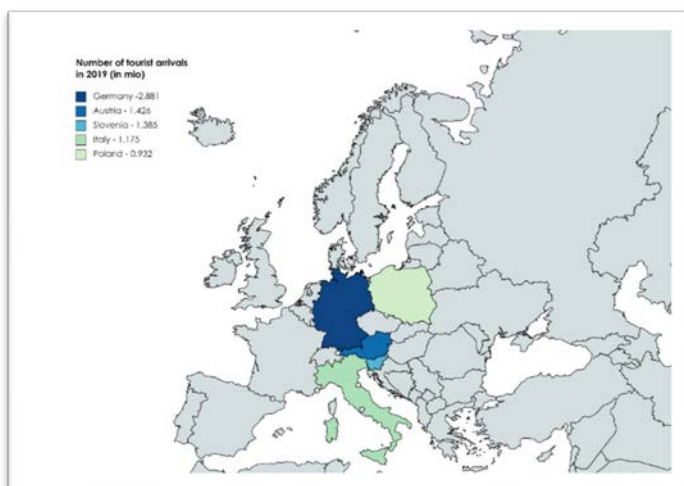


Figure 116: Top Origin Countries for Croatian International Tourism (top arrivals), 2019 [own elaboration of data from Croatian Bureau of Statistics]



The main origin countries that refer to the top 5 arrivals are Germany, Austria, Slovenia, Italy and Poland.

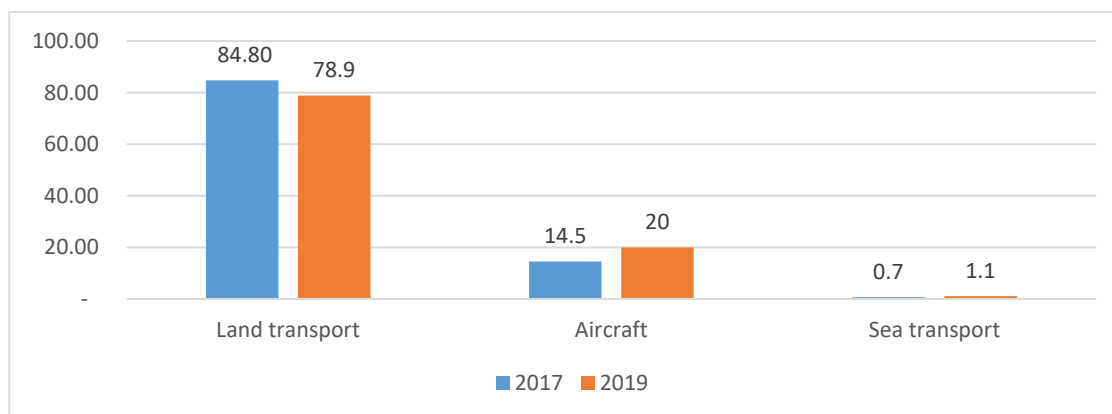


Figure 117: Mode of arrival in Croatia by type of transport, 2017 & 2019 data, expressed as a percentage [own elaboration of data from Institute for Tourism’s *Attitudes and expenditures of tourists in Croatia - TOMAS* surveys]

Given the proximity of the main emitting markets, road transport is the dominant way for tourists to come to Croatia - 71% of tourists in 2019 have arrived by car (including a car with a caravan and a camper). This is followed by air transport with 20% of tourists and bus transport (6%). Of the guests who arrived by plane, 40% used the services of low-cost airlines. Tourist arrivals in Croatia using “land” means of transport are still dominant, although the ratio is constantly changing in favour of air transport, while the number of arrivals by “sea” means of transport is stagnating. It could be expected that the share of the number of arrivals by air will continue to grow, among other things due to the growing affirmation of Croatia in the markets from which arrival by air, given the distance, is the optimal choice (Western European markets such as France and the UK Scandinavian countries, Benelux, etc., as well as long haul markets, such as the USA, Korea, China, etc.).

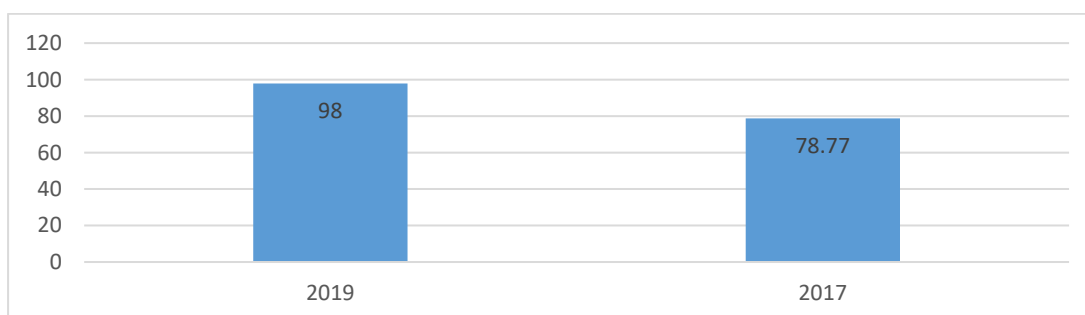


Figure 118: Average spending per overnight stay (in €), 2017 & 2019 data [own elaboration of data from Institute for Tourism’s *Attitudes and expenditures of tourists in Croatia - TOMAS* surveys]



The average daily consumption of tourists in Croatia during 2019 was almost € 98. According to the data available within Institute for Tourism's *Attitudes and expenditures of tourists in Croatia - TOMAS* surveys, in the structure of average daily expenditures, 54% referred to the service of accommodation with related food, 17% to the service of food and beverages outside the service of accommodation, and 29% to all other services.

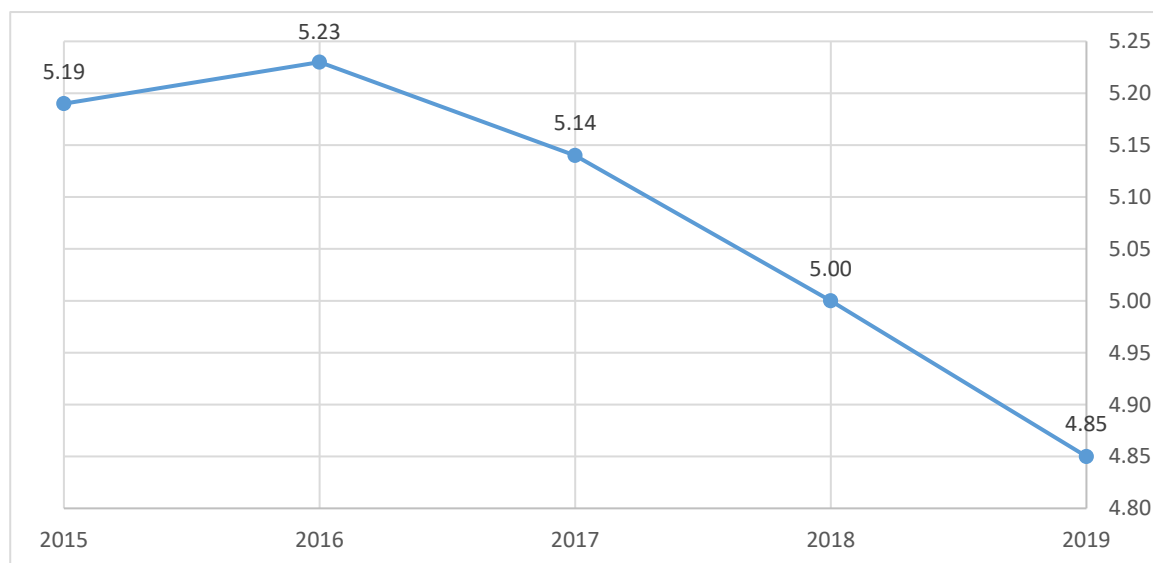


Figure 119: Average length of stay (days), 2015-2019 data [own elaboration of data from Institute for Tourism's *Attitudes and expenditures of tourists in Croatia - TOMAS* surveys]

According to the data available within Institute for Tourism's *Attitudes and expenditures of tourists in Croatia - TOMAS* surveys, the trend of increasing the share of shorter stays (4 to 7 nights) continues in 2019 and is dominant (45%) as well as the trend of decreasing the longest stays (15 and more nights).

Also, according to Croatia Bureau of Statistics' first release *Tourist arrivals and nights in 2019* (2020), domestic tourists realised 2.2 million arrivals and 7.1 million nights, which is an increase in tourist arrivals of 9.4% and in tourist nights of 9.6%, as compared to 2018. Domestic tourists spent the most nights in the City of Zagreb, Crikvenica, Mali Lošinj, Zadar and Vodice, which accounts for 19.2% of the total nights realised by domestic tourists.

- **Regional level**

Zadar County has become one of Croatia's most popular region for tourists, winning over international visitors and realizing 1.7 million arrivals (share of approximately 9% on a national level) and 10.9 million corresponding overnight stays (share of approximately 13% on a national level), which resulted in the fact that the mentioned county ranks fourth at the level of the entire Republic of Croatia, according to data provided by Ministry of Tourism and Sport of Republic of



Croatia (2020). Compared to the same period in 2018, numbers represent an increase of approximately 3% regarding arrivals and a similar increase (3%) regarding overnight stays. As depicted in the following two figures, the figures (arrivals and overnight stays) testify to an upward trend that is evident by observing the data available from the previous 5 years.

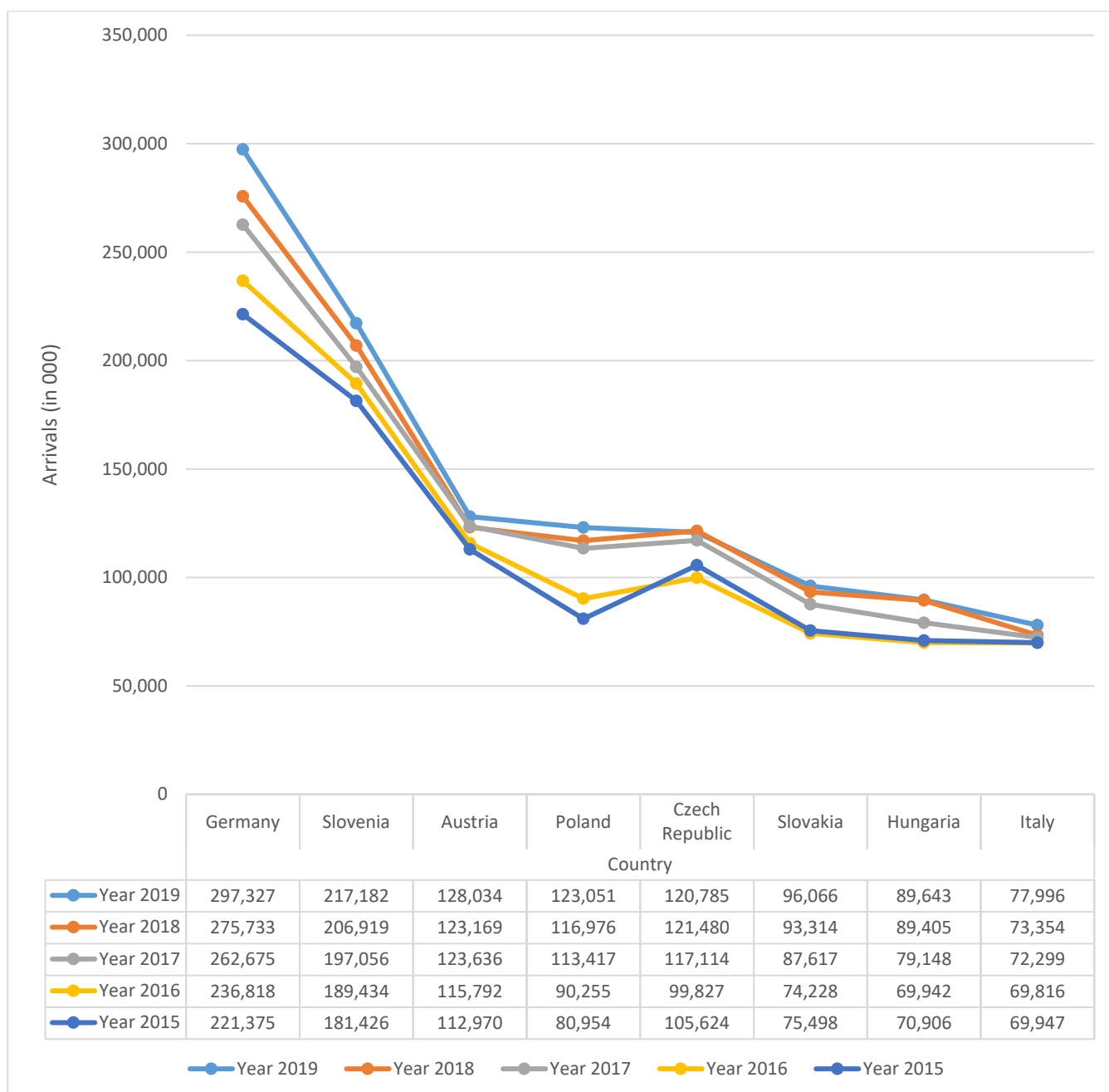


Figure 120: International arrivals in Zadar County [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]

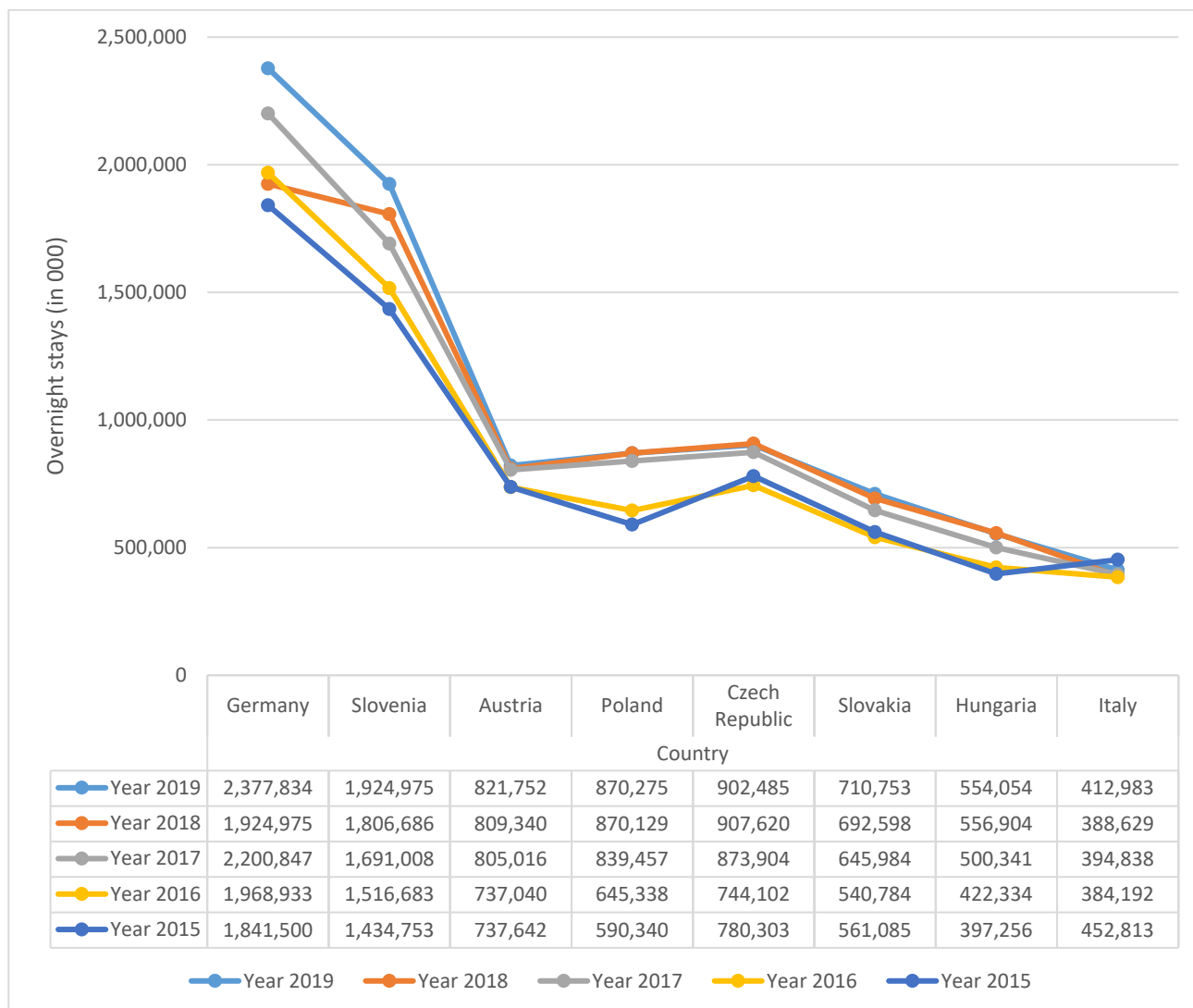


Figure 121: International overnight stays in Zadar County [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]

According to Institute for Tourism's *Attitudes and expenditures of tourists in Croatia - TOMAS* surveys for 2014, 2017 and 2019 shows that average spending per overnight stay (in €) has significantly increased recently. Figure below illustrates the statement by providing data for some of the most important outbound markets for Croatian tourism, as well as for overall average when it comes to spending per overnight stay (in €).

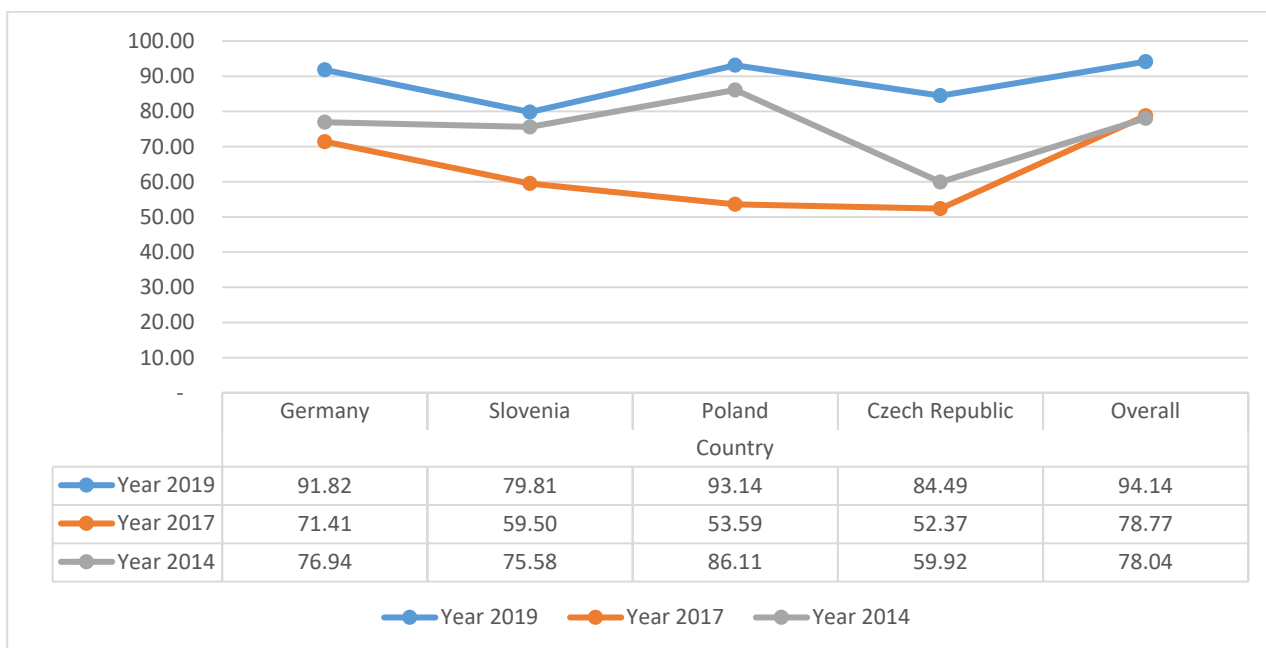


Figure 122: International average spending per overnight stay (in €) in Zadar County [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]

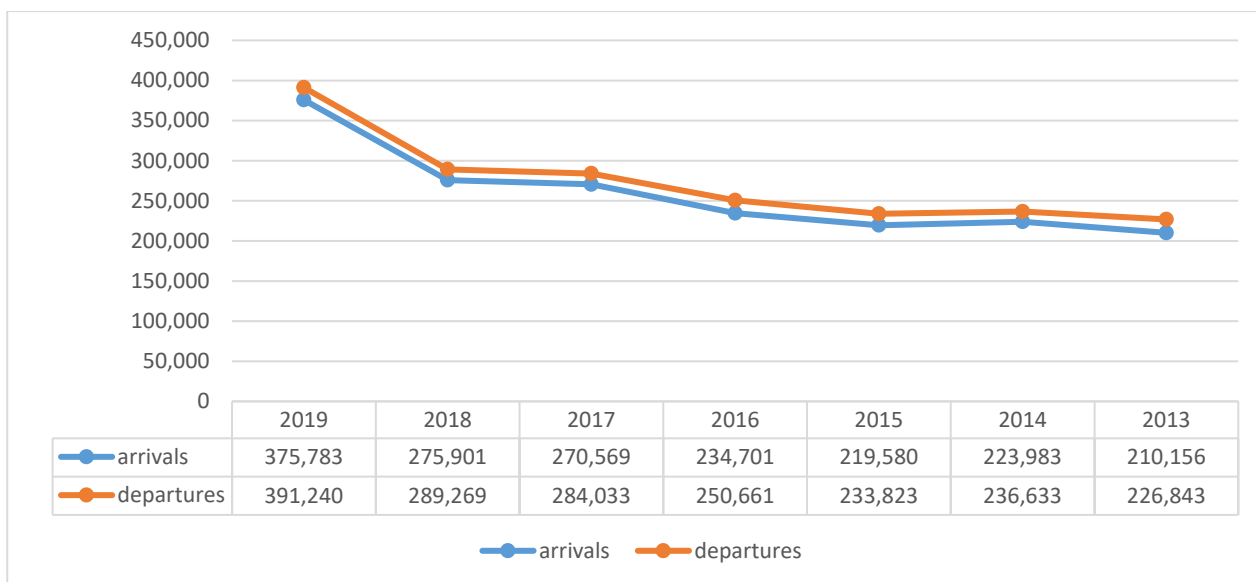


Figure 123: International passenger arrivals/departures at Zadar Airport [own elaboration of data from Zadar Airport's statistics]

Zadar airport is a small but modern airport located in Zemunik Donji. It is about 8 km far from the centre of Zadar and it represents a vital connection of northern Dalmatia and Lika to the rest of



Croatia and the World. As a part of this areas tourist infrastructure, Zadar airport is particularly important in the reception of tourists whose final destinations are the coast of northern Dalmatia. Zadar Airport has a distinctive importance for all tourist facilities in the area of Zadar and serves many connections at European level as depicted in the following figure.



Figure 124: Connectivity of Zadar Airport [Zadar Airport]

The port of Zadar is located on a peninsula in the centre of Zadar. It is one of the oldest, and until moving to the Port of Gaženica it was one of the busiest ports in the Republic of Croatia. The port of Zadar has always had a special significance for Zadar and its citizens. With the construction of the Port of Gaženica and the relocation of ferry traffic in 2019, the centre of Zadar is relieved of excessive traffic and congestion, and a much better reception of luxury cruise ships, yachts, tourist boats and other vessels has been enabled.

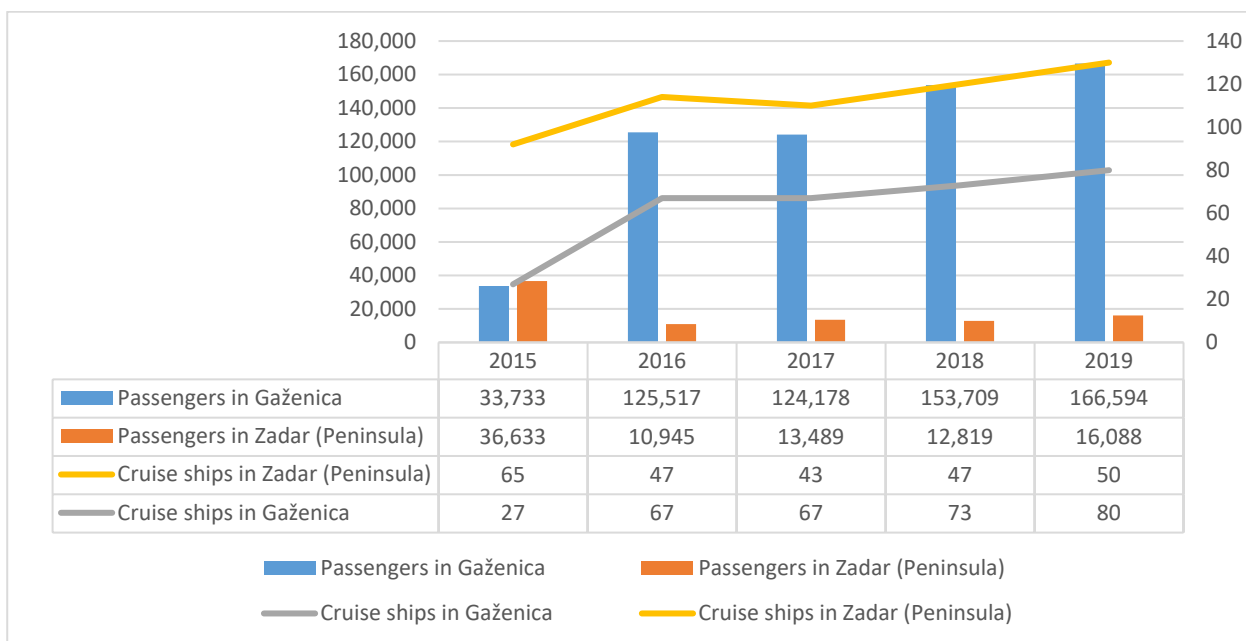


Figure 125: Number of passengers and cruise ships in Port of Zadar through years [Port Authority Zadar]

Regarding domestic tourism, the following figure depicts a rising trend prevailing in Zadar County throughout last 5 years.

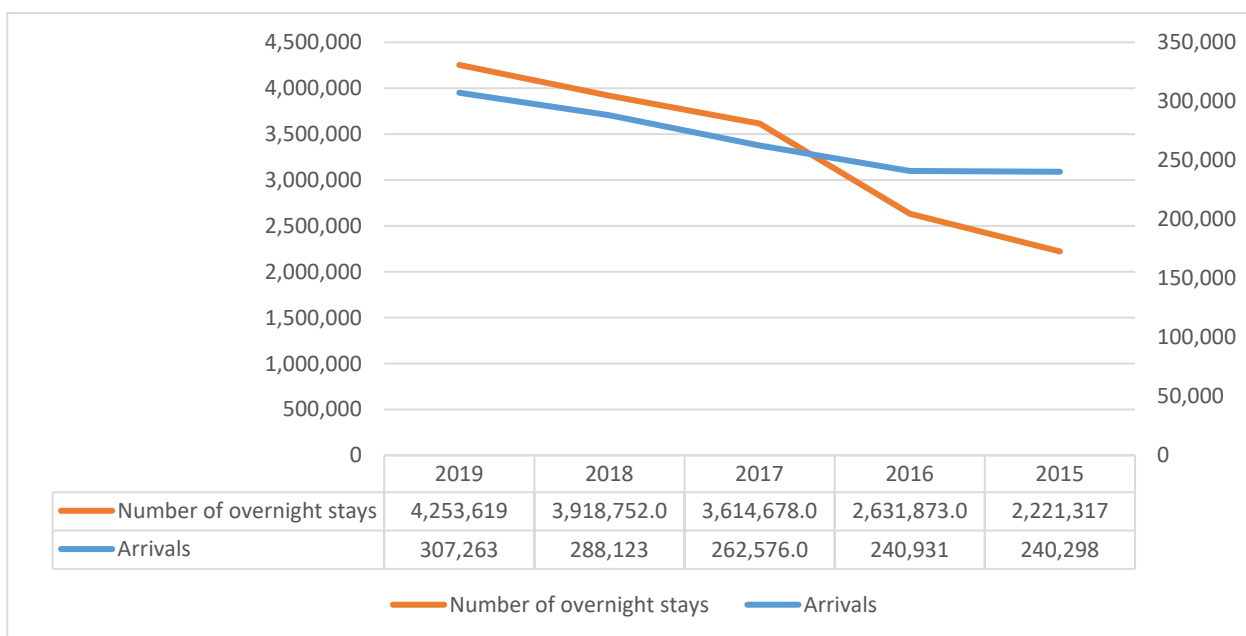


Figure 126: Domestic Tourism in Zadar County [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]



- **Metropolitan/City level**

Zadar, a city of exceptional 3000-year history and extremely valuable cultural heritage, bases its tourist development on rich historical and cultural attractions, as well as on the exceptional wealth of natural resources. The city surrounded by historic walls is a real treasure trove of archaeological and monumental treasures of the ancient, medieval and Renaissance periods as well as modern architectural achievements such as the Sea Organ and Greeting to the Sun. The indented coast and islands, the archipelago interesting to boaters and the mild Mediterranean climate are just some of the advantages of the city of Zadar. Culture and entertainment contribute to urban tourism, which is favoured by a unique atmosphere and an increasing number of manifestations and events. An increasingly important segment of tourism are guests on boat cruises that discover Zadar as an interesting destination.

The program of measures and activities for the preparation of the tourist season each year adopts measures and activities that can contribute to better preparation and development of the tourist season by further raising the quality of the tourist offer, strengthening cooperation between public and private sector and positioning the city as an attractive tourist destination.

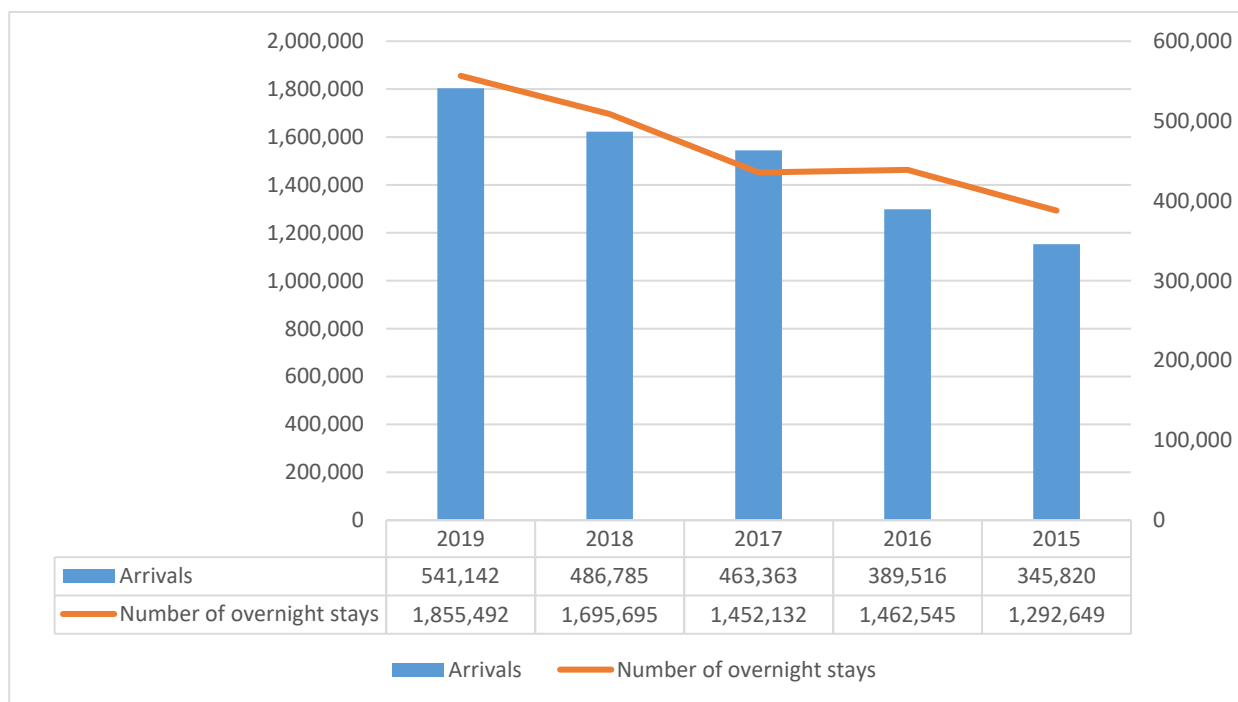


Figure 127: International tourist arrivals & overnight stays in Zadar [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia’s data]

Zadar traditionally captures also domestic tourism as depicted in the following figure.

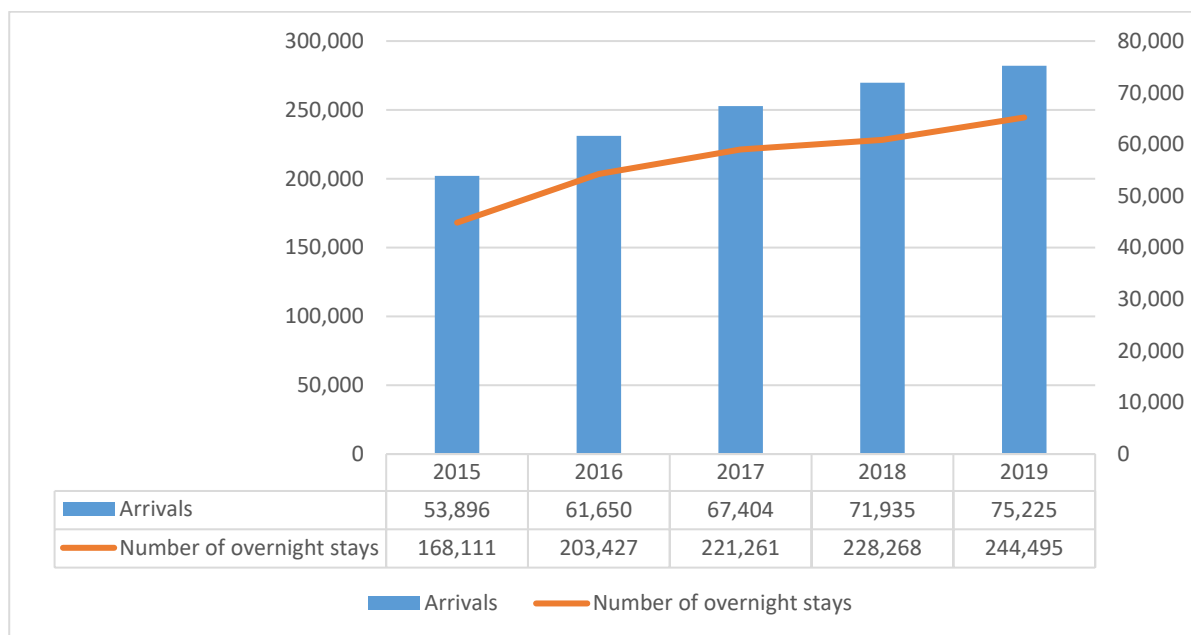


Figure 128: Domestic tourism in Zadar [own elaboration of data from Ministry of Tourism and Sport of Republic of Croatia's data]

As the fact that after the Homeland War tourism is one of the main drivers of economic development of Zadar County, and as it's possible to witness in these times of economic and health crisis, it is necessary to ensure its thorough planning. Therefore, in the last few years, sectoral planning documents have been prepared in the area of the city of Zadar in accordance with the relevant national, sectoral and county planning documents, which creates a quality basis for long-term sustainable tourism development, especially those special types of tourism. assumptions. Trends in tourism are changing. Guests are looking for new facilities, new destinations, new attractions. The city of Zadar and its surroundings, with their natural diversity, have a good foundation for the development of various types of tourism. A concept that offers only the sea and the sun has long been a thing of the past. New ideas and a new strategy are needed. These strategies and plans for tourism development will be discussed in the following chapters.

2.6.3 Searching the tourism policy background and finding gaps and opportunities

The review of national, regional and local strategies and initiatives that took place in the context of Del. T1.1.1. 'The SUSTOURISMO context. Analysis of policy documents on sustainable tourism and transport in the ADRION area' had as a final goal to identify areas of interventions according to the already published and followed tourism strategy.



The review of the strategic documents revealed basic axes around which Zadar can concentrate. These axes are:

- Improvement of the walking and cycling infrastructure:
 - Enlargement of the cycling network;
 - Reallocation of urban space;
 - Integration of the walking and cycling paths with the public transport network;
 - Improvement of the physical accessibility to the main touristic hotspots (beaches, promenade, etc.).
- Integrating shared mobility services with local public transport:
 - Journey planner & In-app payment;
 - Single access point ride-sharing services and rental operators;
 - Combining public transport with all other mobility services.
- Raising awareness among tourist operators:
 - Encourage the tourist sector to implement sustainable mobility measures with their guests, the business community, employees and the general public;
 - Stakeholder involvement: meetings, focus groups, co-creation, etc.
- New mobility & tourism app:
 - Real time information;
 - Travel planner with all sustainable mobility options (bus stations, bike rental stations, bike sharing stations, EV chargers);
 - Provides options for cycling, walking and hiking, including distance, level of difficulty and other useful information;
 - Provides information about physical accessibility to main touristic hotspots (beaches, etc.).

Due to the very high touristic peak, Zadar is facing major transport problems and needs to restrict accessibility mainly to the peninsula, but needs to improve the general transport structure at the same time. The existing construction and constant growth of newly built residential and especially residential and commercial buildings, commercial and business facilities, transport infrastructure facilities, road (highway), maritime (port Gaženica) and railway traffic (revitalization), new tourist facilities, with an increase in the number of newly registered vehicles resulting in a continuous increase in the load on existing city roads, resulting in an increase in traffic requirements with the consequences of frequent traffic jams. The above problem affects all citizens of the City of Zadar, which has about 70 thousand inhabitants, but also those of the surrounding towns and tourists. The consequences of the problem are general dissatisfaction of citizens and tourists due to frequent traffic jams and congestion, lack of bicycle paths, which has reduced traffic safety as well as noise and environmental pollution by exhaust gases.

The goal is to increase sustainable mobility at the level of the city of Zadar and to promote and implement actions such as promoting cycling, walking, electric vehicles, car-sharing concept, more frequent use of public transport, promoting sustainable mobility in schools, organizing public



events and other activities that enable citizens to be educated about local, national and European experiences in terms of products and services related to sustainable mobility.

2.6.4 Learning from best practices on tourism and mobility

Improving the sustainability of transport in tourist destinations is even more urgent now than before as the COVID-19 pandemic has badly disrupted both the transport sector and tourism industry, which are at the heart of the quality of life of residents, of a territory's productivity fabric and of tourists' experience too.

The state of art review on previous projects and ongoing innovative initiatives from across Europe that boost sustainable tourism development took place under Deliverable T1.2.1 'State-of-the-art on sustainable tourism' with a view to learn from the others and successfully transfer best examples to SUSTOURISMO cases. On the sample of city of Zadar some interesting points have been identified from the review of the best practices that are:

- **Support for local public administration in drafting low-carbon Transport and mobility plans** with measures dedicated to cruise-related passengers and freight flows, contributing to decongest the city traffic and to lower the production of greenhouse gases (project LOCATIONS);
- **Development of a cross-border network for the promotion of the accessible tourism destinations** within the project which goal has been to develop and promote a wide cross-border network of accessible tourist destinations with natural and cultural heritage in order to reduce reliance on seasonal tourism and promote social inclusion by sharing approaches and methods and by joint-promoting tourism services for disadvantaged people and for those with special accessibility needs (project TOURISM4ALL);
- **The development and update of the local Sustainable Urban Mobility Plans by the local authorities** as well as implementation of specific actions, such as: promotion of cycling, car sharing, sustainable mobility in schools (walking buses, awareness campaigns), family contests, public events (e.g. energy days/fairs, European mobility week) allowing citizens to learn about local, national and European experiences in terms of products and services related to sustainable mobility (project CITIZEN);
- **The implementation of a policy which awards or penalizes** transport operators on the basis of different factors (i.e. vehicle emissions and dimension, duration of the stay, trips frequency, utilized time window, use of new logistics services (LSs), etc. (project ASPIRE)
- **Increased efficiency of the transport system of the urban area of Zadar through employment of the new Intelligent Transport System** with the reconstructed road that enable more efficient traffic management, better information for drivers, optimization of traffic flows, integration of existing systems and prioritization of public and bicycle transport in the city of Zadar (project Development and implementation of intelligent



transport system and reconstruction of the road with the priority of public transport vehicles and the bike path in the City of Zadar)

As part of the MOBILITAS project, an integrated approach has been developed in order to analyse mobility data, SUMP documents, policy recommendations and IT solutions in the city of Zadar and its wider municipal area (Zadar County) Tourist destinations like Zadar often suffer from traffic congestions, especially during the peak summer season. In order to tackle this problem, Zadar has implemented cycle-road mapping combined to the upgrade of an existing smartphone App dedicated to promote cycling among both tourists and local population. As part of the LOCATIONS project, Low Carbon Transport Plans (LCTPs) support local public administrations in designing sustainable mobility solutions for cruise-related passengers and freight flows to preserve natural and cultural resources. LCTPs contribute to the ultimate goal of reducing the environmental footprint of the urban traffic generated by cruise ships (passengers, crew and logistics). Finally, within the Pro e-Bike project, co-funded by Intelligent Energy Europe Program, City of Zadar has developed the Action Plan for promotion electric bicycles and scooters for goods delivery and passenger transport, has marked 2 info days and has also got an electric scooter and electric bicycle for the needs of the city administration and one electric bicycle for the needs of home for adults. Within the project, City of Zadar has developed the Action plan to promote electric bicycles and scooters for goods delivery and passenger transport and has also got an electric scooter for the needs of the city administration.

The main challenges in the city of Zadar are rapid tourism growth and, at the same time, the sustainable mobility network that doesn't follow tourism development, insufficient local transport signalization (difficult for tourist to understand), lack of bicycle routes that connect main touristic points and underdeveloped and insufficient urban mobility infrastructure. Due to the fact that Zadar is facing increasing number of tourist visitors every year we are facing the problem of traffic jams, large amount of cars and buses entering the old city centre. Because of this we need to improve, develop and promote sustainable mobility network to reduce the number of vehicles which will lead to decrease of emission of CO²

2.6.5 Learning from tourist surveys - the path forward as revealed by the tourists

The survey conducted for the case of Zadar was conducted from 26th October till 31st December 2020. There were 298 tourists involved in the survey, from which 208 were domestic tourists and 90 international tourists. The main goal of the survey was to identify the needs of tourists and relate them to existing or potential mobility services and provisions. Unfortunately, the survey was conducted in a period which was not favorable for any tourism activities, due to the COVID-19 pandemic, as the majority outbound markets were in lockdown with very strict travel restrictions. The pandemic started in early spring 2020 and it has seriously affected the global tourism industry.

Therefore, the major limitation of the conducted research was that there was a limited number of international tourists in the destination, because of the lockdowns on the major outbound



markets, therefore a part of the research was conducted online. This caused limitations within socio-demographic characteristics of the tourist sample (because of the snowball sampling). Further, due to the GDPR regulation the accommodation facilities, tourist boards and others, the survey link could not be distributed through their databases. Also, due to the pandemic, domestic and international tourists have spent more overnights than average (before the pandemic) in the destination. So, all this affected not only the number, but also the characteristics of the survey sample.

Some of the main conclusions are:

- Due to the pandemic and the restrictions regarding the sampling of the tourists, for **domestic tourists** the main reason for visiting Zadar was **visiting friends and family, followed by sea and sun, sightseeing and business tourism**. Whereas most of the **foreign tourists** decided to visit Zadar because of **sightseeing opportunities**, followed by visiting friends and family, sea and sun and business tourism. Other research shows that Zadar is a “sun and sea” destination, but Zadar is also a very attractive cultural tourism destination with many attractions, as it has a 2000 years long history and a UNESCO protected heritage site.
- Both domestic and foreign tourists prefer using their private vehicles (car, motorbike, camper van, etc.) as their first choice for travelling within and outside Zadar. When choosing the mode of transport for travelling within the city, speed is the most important factor for almost half of domestic tourists. A significant share of domestic tourists also appreciates comfort, price and availability. For foreign tourists, comfort is the most important factor, followed by speed, attractiveness of the route and environmental friendliness. This brings to the conclusion that it is important to develop **a sustainable public transportation infrastructure, which will meet the needs of the local community and tourists in the destination, in order to be time efficient and comfortable**.
- Although the largest share of all tourists did not encounter any difficulties while travelling around the city. Domestic and foreign tourists emphasized a lack of appropriate infrastructure for alternative transports modes, heavy traffic and inadequate public transport services, as the main problems regarding transportation. Foreign tourists have also significantly had issues with lack of adequate connectivity between the city center and different travelling stations. This could be **a good basis for the development of alternative, more sustainable transport modes within and around the city**. Zadar is a relatively small city, which is suitable for alternative transport mode, which could **reduce heavy traffic, especially during high season and in areas where a lot of tourist accommodation facilities are built**.
- When talking about difficulties with travelling outside the city of Zadar, both domestic and foreign tourists that had issues during travelling outside Zadar have again emphasized issues with heavy traffic, but also a lack of adequate connectivity with public transport system between the city and the areas of interest. A significant share



of domestic tourists has also noted issues with lack of appropriate infrastructure for alternative transport modes and low public services quality. Additionally, a significant share of foreign tourists has noted lack of organized information provision. It is necessary to centralize information regarding different forms of transportation within and outside the city.

- A vast majority of all tourists would be willing to use a mobile application in order to get touristic information regarding the place of the visit. Regarding the kind of information, they would like to have access to through the mobile application, domestic tourists have in an equal share stated that they would like to have access to information regarding cultural sites and museums and events organized to take place during their staying, while foreign tourists are mostly interested in information regarding points of interest within the city. Although those are types of information that the largest share of respondents has chosen, they also show a significant interest towards other types of information listed. **An app could be a platform which could combine different tourist information to facilitate their stay in the destination.**
- **The strongest incentive for using a mobile application would be in the form of offers regarding HO.RE.CA. (hotels, restaurants and cafe-bar) for both domestic and foreign tourist.** Domestic tourist would be also motivated by discounts on cultural sites and museums. Rewards are a very strong motivation for the use of such an app, but the tourist would also like to have the **possibility to expressing their complaints regarding touristic and transports services through the mobile application.** So, it can be concluded that it has to have some elements of social media where the tourist can write down their reviews.
- Both groups mostly use their own bicycles in their places of residence with main purpose of it being recreation, but the majority of tourist never carry a bicycle with them on a holiday/travel. **More than half of all tourists would be willing to use a mobile application which would provide information about cycling in the city of Zadar.**
- More than half of domestic tourists never choose a holiday destination based on the possibility to use a bicycle within the destination and another significant share sometimes does that. **Almost half of foreign tourists sometimes chooses a holiday destination based on this factor,** but also a significant share of them never do.
- All tourist express the **highest average rate of satisfaction with elements of the transport system in Zadar and Zadar County for the regulation and quality of bicycle traffic (average 3.2).** The lowest average satisfaction rate was noted for domestic tourist is the regulation and quality of shipping traffic (average 2.4) and for foreign tourists the regulation and quality of pedestrian traffic (average 2.2). **These results show that the city of Zadar has to act regarding some basic bicycle infrastructure to make the city more bike-friendly.**



- **Just under half of domestic tourists think that Zadar is a destination that is suitable for using a bicycle. Around two-thirds of domestic tourists also find that Zadar is a bike-friendly destination.**
- In regards to domestic tourists, an equal highest average rate of satisfaction with elements of Zadar and Zadar County as a bike-friendly destination (average 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. For foreign tourists, an equal highest average satisfaction rate (average 3.1) was noted for connection of bicycle paths and routes and availability of bicycle parking spaces. **The possibility to rent bicycles has scored the lowest average satisfaction rate (average 2.6) both by domestic and foreign tourist.**
- A significant share of domestic (almost half of the examinees) and around two-thirds of foreign tourists has not rented a bicycle to use like a mode of transport in Zadar and Zadar County during their last visit. Out of domestic tourists that have used a bicycle on their last stay in Zadar or would use them in the future, the largest share would use it for the purpose of recreation. The largest share of foreign tourists would use it for sightseeing of various cultural and natural attractions. Regarding the average amounts that they would pay, the majority of domestic tourists state that they would be willing to pay 6 - 10 € to rent a bicycle per day, while most of foreign tourists would be willing to pay 1 - 5 €. **Average price that the domestic tourist would be willing to pay (3.77 €) is somewhat higher than the average price the foreign tourists would be willing to pay (5.85 €).** This could be a quite good indication regarding future bike-sharing and bike renting activities in the city.
- **Just under half of domestic and just over half of foreign tourists would be willing to use a bicycle during their next visit to Zadar and Zadar County. Additionally, just under half of domestic tourists do not know if they would be willing to recommend Zadar as a bike-friendly destination to their family, friends and relatives, while almost half of foreign tourists would be willing to do so.**

These findings show that Zadar has a lot of possibilities to strengthen its position as a sustainable tourism destination regarding transportation within and outside the city, especially regarding bicycle infrastructure. Some of the key findings lead to the conclusion there is a strong need for an information platform in the form of an application, which would present all the necessary information for tourists, but also for locals.

2.6.6 Listening to tourism and mobility stakeholders - insights from the 1st Technical Round Table

The round table started with a presentation that introduced the participants with SUSTOURISMO project, project partners, activities and all for purpose of involving key stakeholders in the



project. A discussion ensued in which participants gave their feed on their previous experience with tourists and the projects they encountered.

The conclusions from the first round table are primarily related to the need for comprehensive information that can help tourists when arriving in the City of Zadar. Participants commented on the results of a survey of tourists with questionnaires conducted by the University of Zadar. It is necessary to involve as many key stakeholders as possible in the project in order to provide tourists with a unique tourism experience. There is an interest of key stakeholders in networking, as synergies can certainly achieve better tourism results. They are interested in developing of touristic packages that would be offered to tourists (lower ticket prices for visiting various attractions, lower meal prices, bicycle rental discounts, etc.)

It was pointed out that the biggest challenge for the future is how to design a quality and innovative tourist offer that will include all key stakeholders and that will provide visitors with a pleasant tourist experience.

The main problem remains how to get tourists interested in using the mobile application even after they return to their place of residence.

The round table aimed to present the SUSTOURISMO project, identify key participants, strengthen cooperation with interested key stakeholders, and see how the challenges of sustainable development and mobility in the City of Zadar can be addressed. In order to achieve the goals of the project, it was necessary to include key participants in the discussion of local tourism needs, ie tourism packages and the SUSTOURISMO application, in the reward system, to start discussions about the cooperation scheme, etc.

2.6.7 Combining finding in a SWOT analysis for the case of Zadar



<p><u>Threats</u></p> <ul style="list-style-type: none"> • Global trends that lead to loss of identity of a “small city” • Lack of tourists because of the global situation • Lack of quality management without vision of the future 	<p><u>Opportunities</u></p> <ul style="list-style-type: none"> • Better connection of tourism and other sectors • Good possibilities for the prolongation of touristic season • Specialization of touristic offer • Orientation to younger population 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> • Seasonality (short tourist season) • Insufficient usage of potentials and capacities because of the weak coordination of local stakeholders • No strategy or concept for existing touristic attractions and resources • Lack of bike lanes 	<p><u>Strengths</u></p> <ul style="list-style-type: none"> • Well known tourist destination • Long tourist tradition • Natural and cultural resources • UNESCO sites • Good traffic position and connectivity • Rich touristic offer during the season
---	--	---	---

Figure 129: SWOT for Zadar

2.6.8 Drafting of the SUSTOURISMO touristic packages of Zadar

The pilot phase for Zadar refers to the provision of the combination of walking and bicycle tour as two options and walking the UNESCO protected walls as third Touristic package.

As for the touristic package one and two, the walking part is the same, but the bicycle tour is different so tourist can choose which one they will use. Third package is has only walking part.

Walking tour includes sightseeing of the entire city centre starting from the Nova vrata which are the main entrance to to old city and Zadar peninsula and climb the stairs to the promenade (UNESCO Protected City Walls Of Zadar - Bedemi zadarskih pobuna). Here tourists can visit Museum of). After the visit to the museum, walk the entire length of the promenade. Visit to Small Arsenal and to Church and Monastery of St Francis and Treasury of the Franciscan Monastery. Continue to walk to The Sea Organ and The Greeting to the Sun. Continue walking along the Zadar Seafront - Riva until you get to the Forum/ Church of St Donat/ Church and Monastery of St Mary, visit to Archaeological Museum, Cathedral of Saint Anastasia and climb the bell tower. Continue walking the street Kalelarga till you get to the People's Square. Continue walking through the Queen Elizabeth Kotromanić Street, visit to Rector's Palace/ Church of St Simeon and then visit Five Wells Square and Queen Jelena Madijevka Park.



After this tourists can take bike on the station next to the University of Zadar, see Foša and continue to Kolovare beach where there are different facilities for children, and where you can enjoy sea and sun and relax.

If they don't want to stay on the beach and they want to get some more recreation, users can continue to ride a bike, partly along the coast till they get to sports and recreation centre "Višnjik". There are different sport facilities for young and adults and they can experience the real sports day and end the bike ride with some more recreation.

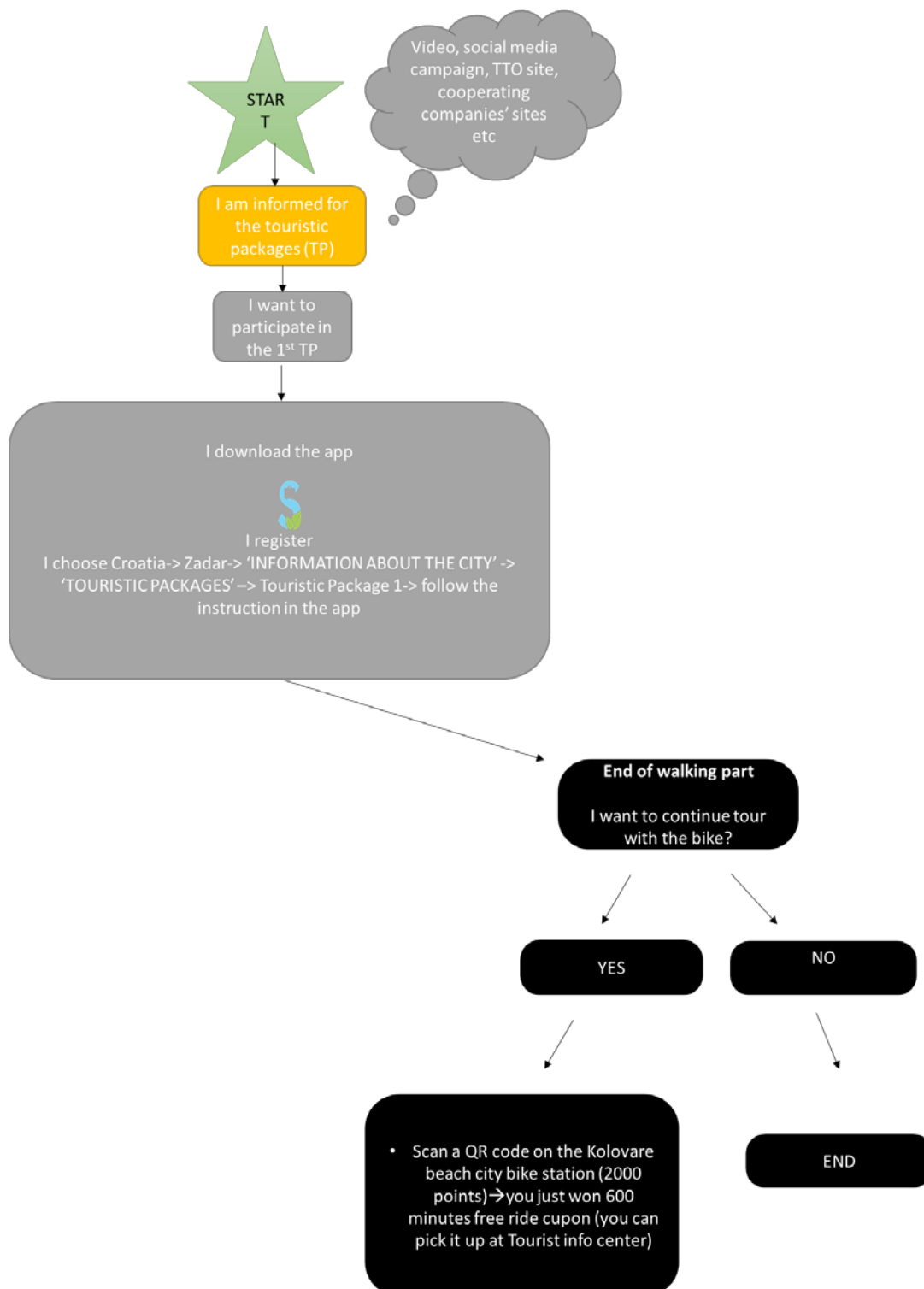


Figure 130: Flow diagram for Zadar TP1

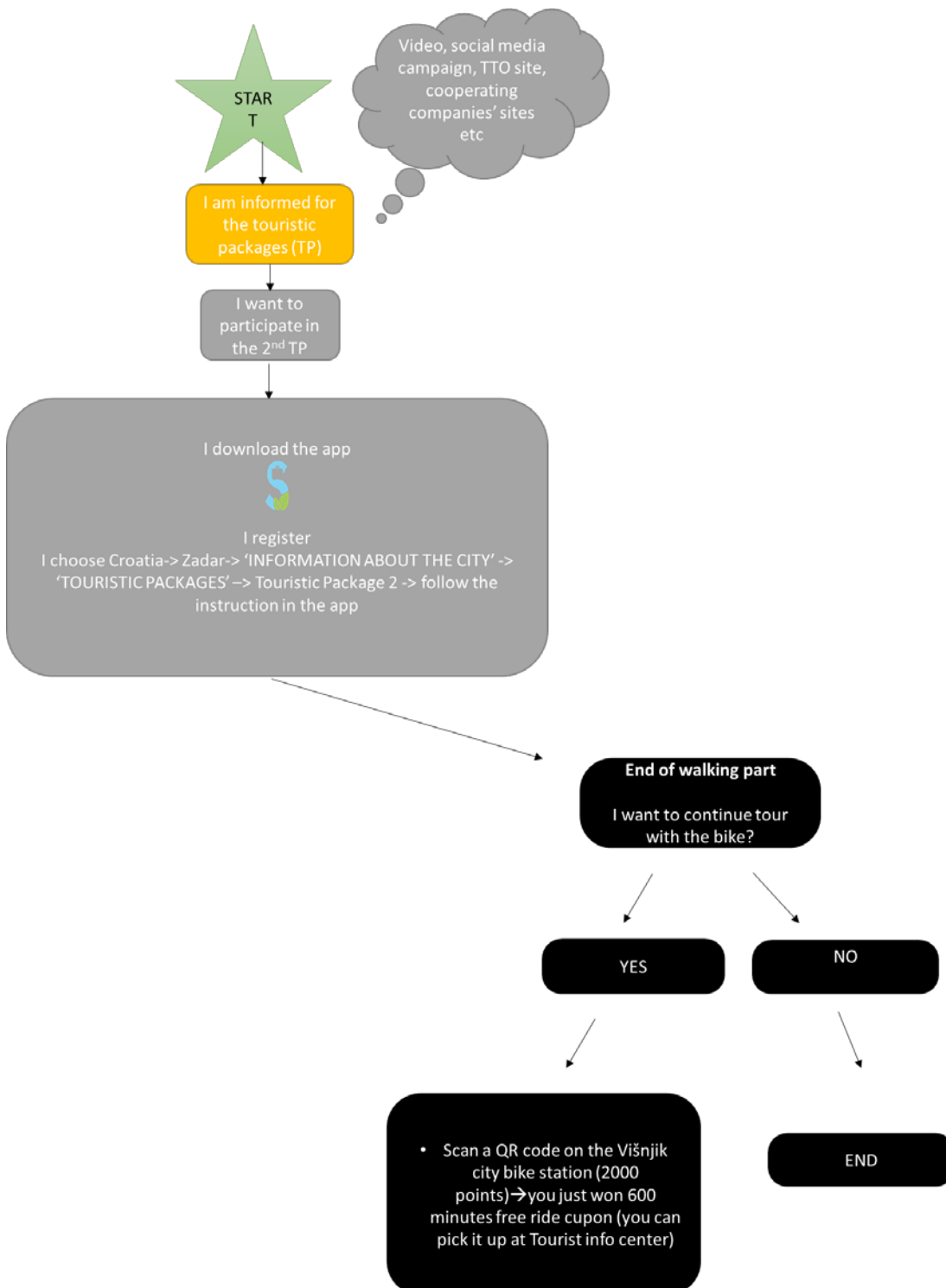


Figure 131: Flow diagram for Zadar TP2



Third package includes walking tour alongside UNESCO protected walls of Zadar. Zadar was once the largest city-fortress in the Republic of Venice and its City Walls were an important part of an elaborate defence system. The City Walls of Zadar, together with the other five components of the Venetian Works of Defence of the 16th and 17th century, located in today's Croatia, Italy and Montenegro, joined UNESCO's World Heritage List in 2017 as an outstanding monument of the modern maritime fortification scheme.

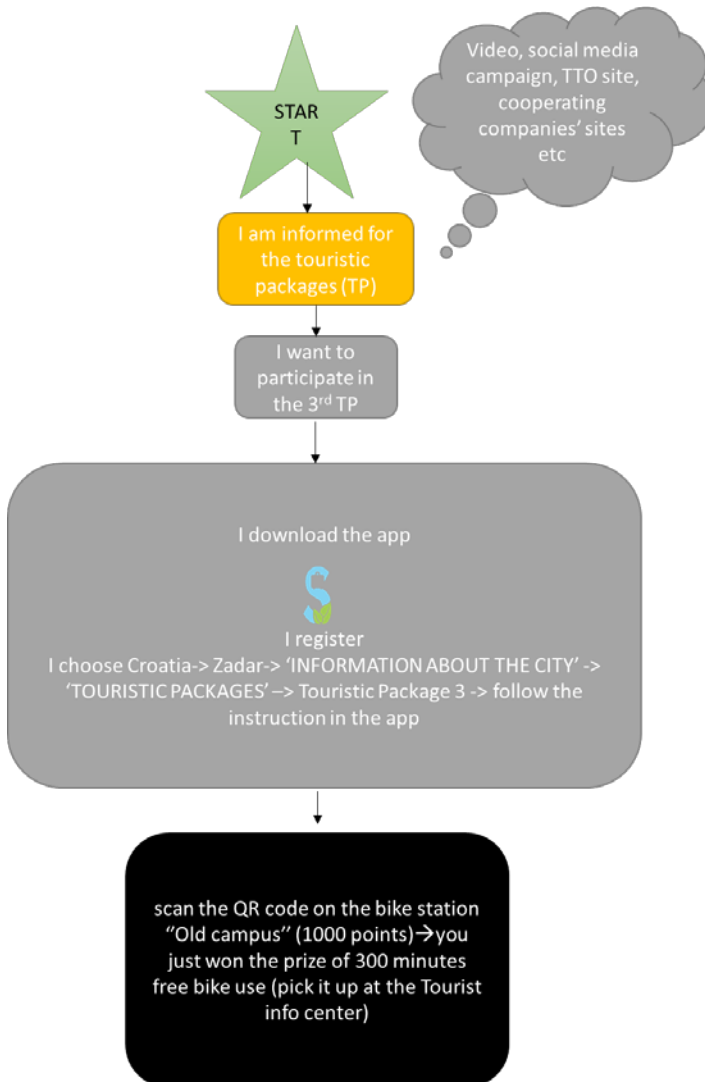


Figure 132: Flow diagram for Zadar TP3

The promotion of the app and touristic packages will be under the University of Zadar on field, if the situation with the Covid - 19 allows it. We will also cooperate with Zadar Tourist Board, and try to involve other city departments and local stakeholders connected with the tourism and mobility.



2.7 The case of Tivat (Montenegro)

2.7.1 The overview of Tivat

Tivat is located in the central part of the Bay of Kotor in Montenegro, at 42° 26' north latitude and 18° 42' east longitude. Tivat has a population of 14,031 inhabitants. About 73% of the population live in urban areas and 27% in rural areas. The majority of the population is concentrated in the city center and the coast, so the spatial distribution of the population is unfavorable, as there is great pressure on the narrow coastal zone, while the spaces in the hinterland are empty. Tivat is one of the smallest municipalities on the Montenegrin coast, but with great tourist and economic importance for the whole country (Figure 128).



Figure 133: The pilot area of Tivat
180



Tivat is well-connected with its closer and wider environment and with European countries by air, road, and sea. Tivat has a relatively good road and communal infrastructure that was adequate for the needs of the municipality before the tourism boom. Currently, the overall and especially communal infrastructure does not meet the needs of a municipality that wants to position itself as a year-round destination. On the other side, Tivat has the prerequisites for good international air connectivity because it has an international airport (Airport Tivat), while its location on the coast offers wide possibilities for maritime transport and connections.

Tivat has a typical Mediterranean climate, with mild but rainy winters and clear and warm summers. The average annual temperature is 15°C. This is the sunniest town in Boka Kotorska with 2446.2 sunny hours during the year. Rainfall in Tivat is exclusively in the form of rain, while other forms of precipitation are very rare here. The average annual rainfall is 1,755 mm. Rainfall is most characteristic of the cold season. Such climatic conditions enabled Tivat to be suitable for both summer and winter tourism, as well as for different modes of mobility, starting from simple walking to more sophisticated e-biking, etc.

Tivat is located in the central part of the Bay of Kotor, on the southwestern slopes of the hill Vrmac (765m). The opposite is the Bay of Tivat, which is also the largest of the four bays in the Bay of Kotor. The Bay of Tivat with the archipelago Krtoli and Lustica peninsula on the west side makes the coast of Tivat beautiful and attractive. Along the coast of Tivat, there are small attractive harbors, bays, and numerous beaches. The Municipality of Tivat covers an area of 46 km², of which about 5 km² overlooks the open sea. It is located at 42 ° 26´ north latitude and 18°42´ east longitude.

Today, Tivat is a modern Mediterranean city oriented towards the development of tourism and complementary industries (Figure 129). Since 2007, MTRZ "Sava Kovacevic", created based on the Austro-Hungarian naval base, went through a transformation. Today, a large yacht marina with a luxury resort and all the associated facilities, Porto Montenegro is located in that area. Luštica Bay, another large investment project, is shaping the Tivat part of the Luštica peninsula, where a town is being built on a once deserted part of the coast. Tivat is connected to the whole world, via sea but also by air, thanks to the local international airport.

Also, 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. Tivat is a city of sports. More than 40 active sports clubs and the construction of new sports facilities will influence the development of sports tourism.

Tivat is adorned with numerous hotels of the highest category, restaurants, and cafes of the most diverse offers, private accommodation that can satisfy even the most demanding guest, numerous facilities, natural oases... but it is also adorned by its people who make it the warm welcoming international destination that Tivat is today. Tivat is one of the smallest but also the most developed Montenegrin municipalities. It presents a symbiosis of modern buildings and traditional unique ambient units. It is a combination of new and old, customs and rich traditions of the local

population and the cosmopolitan spirit of people from all over the world, who choose Tivat for life and vacation.

According to the last census from 2011, Tivat has 14,031 inhabitants, while the 2003 census recorded 13,422 inhabitants. In Tivat municipality, there were 72.1% of inhabitants in urban settlements, 27.5 in coastal settlements, and 0.4% in rural settlements.



Figure 134: Tivat Centre

The main demographic problems of Tivat municipality are:

- Extensive pressure from immigrants, especially on urban and coastal settlements and the immediate hinterland, has led to the formation of agglomerations and caused overpopulation, which is very pronounced in the coastal area.
- Despite a significant influx of population through immigration, there are very low or even negative rates of natural population growth in rural settlements in the wider hinterland, which harms the reconstruction of the working population of the population, resulting in labor shortages in these settlements;
- Rural settlements without inhabitants, as is the case with ambient entities that follow the decades-long trend of population displacement.

The majority of the population is concentrated in the city center and the coast, so the spatial distribution of the population is unfavorable, 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 sustainable economic and tourism development of Tivat for the future.

In a relatively short time, Tivat has become a significantly developed tourist city. An impulsive and permanent 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. Tourism has become an integral part of the city, which requires a shift in a tourist policy perspective. Key economic challenges are linked with the following issues: a shift from managing tourism in the municipality to managing a tourist municipality and making it compatible with other needs of the municipality. Besides, the competitiveness of Tivat destination needs to be considered using criteria of sustainability and responsibility. It needs to be done in a comprehensive, contextualized way, adopting equal territorial development and including mutual relation between tourism and municipality.

The municipality of Tivat is considered as one of the most developed in Montenegro, which has a constant increase in population and has the highest average salaries (net EUR 613) compared to the average salary in Montenegro (ca 500 euro) and the unemployment rate is among the lowest in Montenegro. The economy of Tivat municipality is based on the micro, small and medium-sized enterprises sector, with micro and small enterprises accounting for 99.25% of the total economic entities. The movement of the number of active economic entities by size class indicates an increase in the number of entities based on the increase in the number of small enterprises, while in the same period the number of medium-sized enterprises decreased. Growth in the number of companies in the period 2012-2016. was recorded in almost all sectors of activity. The increase in participation in individual sectors of activity is the result of a larger increase in the number of economic entities than in other sectors.

2.7.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Tivat

- National level

Tourism in Montenegro is directly contributing over 11% of GDP, while total contribution is estimated to be over 21% of GDP. The total number of tourist arrivals in 2019 was 2 645 217, while the total number of overnights was 14 455 920. In 2019, tourists realised 20.0% more arrivals compared to 2018, while the number of realised overnight stays increased by 11.8%. Overnight stays of foreign tourists represent 96.4%, while domestic tourists represent 3.6% of all overnight stays. Concerning the structure of overnight stays of foreign tourist, in 2019, most of them were realised by tourists from Russian Federation (24.9%), Serbia (21.4%), Bosnia and Herzegovina (8.5%), Kosovo (5.4%), Germany (4.6%), Ukraine (3.3%), France (3.1%) and United Kingdom (3.0%). Tourists from other countries realised 25.8% of overnight stays. Concerning the structure of overnight stays by type of resort, in 2019, most of them were realised in seaside resorts (94.9%), capital (2.1%), mountain resorts (1.8%), and other tourist resorts (1.2%). A key characteristic of Montenegrin tourism are the dominant concentration of tourist in the coastal area followed by



seasonal concentrations in summer months, focus on regional markets, the key product is still “3S”, while experiencing a steady increase of arrivals in the last decade (2009-2019). Average spending per trip per person is estimated to 438 euro, while average spending per overnights stay is 78,9 euro (<https://www.monstat.org/eng/page.php?id=43&pageid=43>).

Table 11: International tourist arrivals, overnights and average spending in Montenegro in 2019

Origin country	Arrivals (in mil)	Revenues (mil. euro)	Number of overnight stays	Average spending per trip per person (in €)	Average spending per overnight stay (in €)	Average length of stay (days)
Russia	384,689	n/a	3,470,593	n/a	n/a	9
Serbia	402,866	n/a	2,988,690	n/a	n/a	7
Germany	163,877	n/a	643,651	n/a	n/a	4
Bosnia and Herzegovina	203,766	n/a	1,185,972	n/a	n/a	6
France	90,083	n/a	436,526	n/a	n/a	5
UK	80,876	n/a	422,978	n/a	n/a	5
Others	1,183,468	n/a	4,785,128	n/a	n/a	4
Totals	2,509,625	1,100,000,000	13,933,538	438	78.9	5.6

In terms of nautical tourism, in 2019, a total of 4 775 foreign vessels for entertainment, sport, or recreation entered the internal sea waters of Montenegro which indicates an increase of 1.4% in comparison with 2018. Of the total, 4 211 vessels arrived by sea and 564 vessels were transported by land. By type of foreign vessels for entertainment, sport, or recreation in the internal sea waters of Montenegro, there was the largest number of arrivals of sailboats (39.9%), motor yachts (33.7%), and other vessels (26.4%). The number of persons who arrived on these vessels in 2019 was 28 562, which is an increase of 3.2% in comparison with 2018. By citizenship, the largest number of arrived persons on these vessels was from Great Britain (10.8%), the USA (5.7%), Croatia (5.7%), Italy (4.9%), Germany (4.2%), France (3.9%) and other countries (64.8%). In the context of this report, nautical tourism and sea transport is in increase and represents an important mobility option as well as increasing significant tourism products for Montenegro and Tivat. The municipality of Tivat has on its territory two big marina complexes, Porto Montenegro and Luštica Bay, followed by many smaller facilities and objects. More data available at: <https://www.monstat.org/eng/page.php?id=455&pageid=455>.

In the area of the cruising industry, in 2019, foreign vessels realised 490 cruises in Montenegro. A total of 649 038 passengers arrived during these cruises. In comparison with 2018, the number of cruises increased by 15.6%, while the number of passengers on these cruises increased by 28.2%. By flag of vessels, the structure of foreign vessels on cruise entered internal sea waters of Montenegro in 2019 was the following: Malta (25.1%), Bahamas (23.1%), Panama (16.1%), Belgium (7.3%), Croatia (5.9%), Italy (5.9%), Bermuda (4.9%), Netherlands (2.9%), etc. most of the arrivals



has been realized in Kotor Port. Due to its vicinity to Tivat, this industry represents a booming segment for shore excursion development in the Tivat area (e.g. Gornja Lastva, Luštica Bay, Salina, Porto Montenegro, etc.). More data available at <https://www.monstat.org/eng/page.php?id=500&pageid=43>.

- City level

In terms of tourism development, about 5% of tourists arrivals to Montenegro stay in Tivat and induce 7% of all tourist overnights in Montenegro.

Table 12: Total tourist arrivals and overnights in Tivat in 2015-2019

Municipality of Tivat	Arrivals	Arrivals per transport mode	Revenues	Number of overnight stays	Average spending per trip (in €)	Average spending per overnight stay (in €)	Average length of stay (days)
2019	160,980.0	NA	NA	1,167,101.0	n/a	n/a	7.2
2018	123,289.0	NA	NA	926,574.0	n/a	n/a	7.5
2017	96,384.0	NA	NA	869,542.0	600.9	75.1	9.0
2016	74,361.0	NA	NA	733,542.0	n/a	n/a	9.8
2015	67,464.0	NA	NA	678,224.0	n/a	n/a	10.0

Table 13: Tourist arrivals and overnights in Montenegro and Tivat in 2018

	Foreign	Domestic	Total	Structure	Foreign overnights	Domestic overnights	Total	Structure
	-1	-2	(3)=(1)+(2)	(3) u %	-1	-2	(3)=(1)+(2)	(3) u %
In total	2,076,803	128,053	2,204,856	100.0	12,443,810	486,524	12,930,334	100.0
Tivat	117,091	6,198	123,289	5.6	909,435	17,139	926,574	7.2
% Tivat	5.64%	4.84%	5.59%	5.60%	7.31%	3.52%	7.17%	7.20%

In terms of accommodation offers, Tivat has a well-developed and diversified product. A key weakness is recognized in the limited number of hotel beds compared to the total number of private accommodation.



COLLECTIVE ACCOMMODATION - HOTELS						
TYPE OF ACCOMMODATION UNIT	*****	****	***	**	IN TOTAL	
	HOTELS	4	8	5	2	19
Number of beds	380	599	178	421	1 578	

OTHER COLLECTIVE ACCOMMODATION			
TYPE OF ACCOMMODATION UNIT	Star rating	Number of objects	Number of beds
Camp	*	1	40
Mobile home camping site	/	2	30
Resort	/	1	50
Hostel	/	1	22
TOTAL BEDS			142

PRIVATE ACCOMMODATION (Provision of household accommodation services - up to 20 beds)						
TYPE OF ACCOMMODATION UNIT	*****	****	***	**	*	IN TOTAL
ROOMS	/	42	178	262	114	596
No. of beds	/	86	419	614	265	1384
APARTMENTS	4	278	286	197	26	791
No. of beds	12	806	797	526	72	2213
RENTAL HOUSE.	1	9	5	/	1	16
No. of beds	10	75	36	/	10	131
APARTMENTS	No. of apartments - 83					288
TOTAL BEARINGS						4016

PRIVATE ACCOMMODATION - apartment blocks (over 20 beds)					
TYPE OF ACCOMMODATION UNIT	****	***	**	*	IN TOTAL
APARTMENTS	141	37	/	5	183
No. of beds	391	86	/	10	487

Figure 135: Tourist accommodation structure in Tivat in 2018

In terms of tourism and mobility, Tivat is well-connected with its closer and wider environment and with European countries by air, road, and sea. More precisely, Tivat has the prerequisites for good connectivity because it has an international airport. However, the quality and extent of these connections are not satisfactory today. For example, maritime traffic is developing, the main road (Adriatic Highway or Jadranska magistrala) is not of high quality because the highway flow is insufficient for the present day, air traffic is limited to the time of day because the airport equipment needed for night traffic is still not completed.



In the last 10 years, Tivat has received brand new facilities that accompany new services provided to tourists. Airport passenger volume grew from 570,000 a year in 2008 to over 1.2 million in 2018, a double increase in volume. Airport infrastructure is a competitive advantage for the city as they include increasing the capacity to attract tourists but also an investment. Nevertheless, despite the newly built terminal, the airport is becoming a bottleneck for the development of quality tourism in the municipality of Tivat. The large marinas located in Porto Montenegro and Lustica bay also affect increasing the competitiveness of the Tivat municipality, especially for guests with high payment power. On the other side, great traffic jams which are happening during the summer tourist season are threatening the brand of the city as a prestigious tourist destination. However, the use of infrastructure also has environmental problems as they cause negative effects. There are a large number of studies around the world that highlight this and try to make tourism a more sustainable activity while raising tourists' environmental awareness. Environmental protection is increasingly influencing demand for the destination. These changes, with the application of regulations and certificates, have led to changes in the tourism sector's offer in terms of efficient use of resources and reduction of negative impacts.

Public transport of passengers in the municipality of Tivat is done by buses, taxis, and sporadically by maritime transportation. Public bus lines are connected to the main artery of the traffic network in Tivat, 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.

When it comes to bicycle traffic, there are bicycle paths at the central city streets, which are integrated into the street infrastructure, while in the surrounding streets, bicycle traffic takes place on the road. The exception is the roads built in the recent period where the bike paths were built separately from the road. The complex development problem of modern cities requires careful consideration, planning, and development of innovative approaches in creating answers in the field of transport. The local government is making special efforts to develop sustainable urban mobility in the city and is recognized as such by both state and European institutions dealing with the subject area.

Tivat Airport is located approximately 2.5 km south of the city center. Equipped to welcome tourists arriving by regular and charter flights from all over the world (Paris, Prague, Berlin, Hanover, Rome, Moscow ...) to Tivat and the Montenegrin coast. In terms of airport traffic, strong passenger growth is evident in recent years. Table below shows that the number of passengers at Tivat airport has a constant increase in the last 5 years. This is because Montenegro and Tivat have become popular tourist destinations, with tax and other types of incentives that have supported foreign direct investment, mainly in the construction and tourism industries.

Table 14: Total number of passengers at Tivat Airport in 2015-2019

	2019	2018	2017	2016	2015
Passengers	1,367,282	1,245,999	1,129,720	981,552	895,006



arrivals	684,203	623,543	565,005	491,973	448,050
departures	683,079	622,456	564,715	489,579	446,956

The annual growth rate of passengers shows an adequate increase in the number of -passengers at Tivat Airport. According to the latest information, the tender for the preparation of Tivat Airport for the night landing has been completed and the project is expected to be completed by the end of 2021. Night flights are especially important for the major international markets and mean new infrastructure projects that will generate new revenue for both the Airports and the tourism industry. Besides, new, quality jobs will be created in Tivat.

Maritime transport. Tivat does not have direct lines with/to Italy, however, the port in Bar is 65 km away, and provides regular maritime transport to and from Bari, Italy. The spacious 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, or as some would refer to it just Marina Montenegro, is considered to be one of the best marinas in the Mediterranean. Many passionate boat owners and captains decided to choose berthing & mooring options due to the advantages of our services and marina location itself. Also, Luštica Bay's marina is the first to be built in Montenegro in the recent period. It is set to become a pinnacle of flawless design and first-class facilities, thanks to Orascom Development's extensive experience in such infrastructural projects.

Key strategic economic partners in Tivat are Porto Montenegro and Luštica Development. Investment in the Porto Montenegro project was the rebirth of Tivat and it has positioned Montenegro on the world map of tourist destinations. Therefore, it represents an important partner for the municipality of Tivat in terms of direct and strong communication regarding the implementation of economic development policy. The company recently announced that, if their predictions fulfill, they will invest an additional 500 million EUR into the project in the next 15 years, considering that right now, one-quarter of the potential of the location of former Arsenal is being used. Additionally, potential plans of Porto Montenegro about the integration of Tivat and all of Boka in their offer is encouraging, so that new categories of tourists may be attracted to the whole territory of Boka. Activities conducted by Porto Montenegro in terms of diversification of their offer and creating a new and unique feeling for their visitors are to a large degree important for creating special-interests tourism, which is one of the main goals of the strategy. Porto Montenegro can be a support to Tivat municipality in terms of building a brand and conducting activities that will contribute to the positioning of Tivat as a prestigious destination. Another big investor present on Tivat territory is the company Luštica Development, with the Government of Montenegro holding 10% of the shares. Also, considering the importance of this investment for the total tourist offer of both Tivat and Montenegro, special attention is desirable towards investors in terms of support to their activities which are realized by planned dynamics and legislation. Additionally, through developing a special form of tourism - golf tourism, this investor can be of great impact on the promotion of sport tourism in Tivat, which is one of the important forms of tourism that Tivat needs to develop in the following period.



Besides mentioned huge investment projects, Tivat is also focused on environmental issues. In this context, natural reservation Tivatska Solila should be especially emphasized. Because of the importance for the survival of flora which can rarely be found nowadays on 800km long east coast of the Adriatic sea, as well as because it is habitat for numerous endangered species of amphibians, reptiles, and birds, Solila are protected as special floristic-faunistic reservation in 2007, first of that kind on Montenegro coast and first protected area on the coast after 1968, when a big number of beaches was protected. Solila is the Emerald habitat of the Bern convention and an Area of international importance for the life of birds in Montenegro.

Finally, to ensure the long-term success of the destination of Tivat, keeping its uniqueness, promoting new experiences, and transforming tourism into an activity with added value, obligations towards sustainability of the destination have to be clearly defined and, the most important of all, applied through concrete proposals for action. Five criteria establish a desirable framework of action for public policies of tourism: sustainability of destination, responsibility in managing, right allocation of resources and newly created value, logical connection between population and tourist economy, as well as innovation.

2.7.3 Searching the tourism policy background and finding gaps and opportunities

The review of the strategic documents revealed basic opportunities around which Tivat can concentrate, such as:

- Montenegro is a destination with all-year-round tourism, with picturesque landscapes and protected biodiversity. Its brand name and statement “Montenegro - Wild Beauty” is not only justified by offering its visitors a look of the unmatched pristine nature. It equally offers diversity and high quality aimed to meet the demands of each visitor. Montenegro boasts diverse high-quality hotels, resorts, and other accommodation facilities. They are all internationally competitive and specialized in their target niche in line with the prevailing market trends.
- Apart from remarkable beaches, Montenegro is known for its unique national parks and nature parks, and an extensive network of panoramic roads for visitors coming by cars, and a network of wilderness hiking and biking trails. This network covers the whole country offering to visitors a unique experience and offers to the local population opportunities for additional income generation.
- The sophisticated nautical, health and wellness facilities, winter sports, and golf entice high-yield guests and strengthen its international reputation. The diversified products, high standards, training, and service quality, offered at still competitive prices have greatly increased employment, personal income and living standards. At the same time, the strategy of consistent quality will reduce the strain in July and August. Montenegro is oriented towards up-scale markets with strictly protected natural and cultural features guaranteeing the appeal of the country in the future and the preservation of resources for



future generations. More data available in Montenegro tourism development strategy to 2020 (<http://www.mrt.gov.me/rubrike/planska-dokumentacija>).

- In terms of tourism development, Tivat is included in Cluster 3: Boka Kotorska Bay. Cluster 3 is a high-yield destination for all-year-round individual and package tourism. The accommodation sector is represented by top hotels and small family hotels at a 3-5-star quality standard. A DEG development scheme has been drawn up for the Boka Kotorska with thoroughly planned pilot projects for different target groups. The region is aligned solely to touristic requirements and needs.
- The focus of Tivat is on nautical - yachting tourism, health with light fitness activities, demanding but also challenging sports such as sailing, diving, rowing, mountain biking and hiking, cultural programs, events, and festivals. Biking and hiking trails will be developed from Herceg Novi, Kotor, Tivat, and Budva into the hinterland and onto the Luštica peninsula to extend the season.
- In terms of mobility, according to strategy, the easy accessibility of a destination counts as one of the key success factors for its tourism sector, 'easy' meaning fast, convenient and cheap. Visitors from the neighboring markets can reach Montenegro, even by road, relatively easily in a day. With minor deficits, the road and train connections to Belgrade are acceptable. Projects are underway to improve transport links further (Bar-Boljari motorway, a section of the Adriatic-Ionian highway). More details at <http://www.mrt.gov.me/rubrike/planska-dokumentacija>

Key gaps in Tivat are linked with the complex urban development problem of modern cities that requires careful consideration, planning, and development of innovative approaches in creating answers in the field of transport and infrastructure. The local government is making special efforts to develop sustainable urban mobility in the city.

2.7.4 Learning from best practices on tourism and mobility

Municipality of Tivat identified some interesting points from the review of the best practices, that are as follows:

- Sustainable planning of physical/virtual settings and valorization and preservation of natural/cultural heritage, in which positive and memorable experiences are more likely to emerge, leading to positive outcomes, such as tourist loyalty (ADRION 5 SENSES);
- Improvement of long term competitiveness of the Adriatic-Ionian area by enhancing innovation capacity in sustainable tourism (FOSTINNO);
- Valorisation of panoramic routes in Montenegro (PANORAMSKE RUTE - NTO);

Building on the above experience and taking into account the inherent characteristics of Tivat, the first mapping of the city's strong points that could be combined under touristic packages can



be the opportunity to implement well-designed guided thematic walks, providing tourists the opportunity to visit specific points of interest of the city on foot, or by bicycle. Furthermore, gastronomy, local culture, and local communities have to be included in integral and sustainable tourism development. Its gastronomy can lead to the creation of guided tours passing from specific points of interest combining workshops related to the area's local cuisine. Further improvement in the context of sustainable mobility has to be created, primarily a modern bicycle/e-bike/ rental system together with solar boat public lines. Apart from opportunities, key needs to be tackled have to be pointed out: limited involvement of local community; Limited financial and innovative (ICT) capacity of local entrepreneurs, and limited interest of local stakeholders to cooperate.

2.7.5 Learning from tourist surveys - the path forward as revealed by the tourists

The research period was 01/11/2020 to 15/01/2021 due to COVID. The key research methodology included a field survey supplemented by an online survey due to COVID circumstances. Questioners were collected on previously defined locations, significant for the project activities, such as the City center and Porto Montenegro, Solila, and Luštica Bay. Online questionnaires were distributed in-situ to interested visitors (e.g. via Viber) and via available e-mail database (Tourism Organisation of Tivat; Faculty of Tourism and Hotel Management). Sample size was 305 visitors (66% foreign + 33% domestic). The main limitations of the research are linked with the serious lack of visitors from important European destinations due to the COVID crisis.

The survey identified tourists' needs and related them to existing or potential services and provisions:

- Guided/organized city tours using different mobility modes;
- Expressed Interest in e-boat tours inside the Bay;
- Solila birdwatching tours using different mobility modes;
- Improvement of public transport (e.g. bus) and supplemented by alternative and more environmentally friendly mobility modes (walking, tuk-tuk, E-biking, E-boat) outside the city (e.g. Luštica Bay, Vrmac and Solila).
- An integrated app offering touristic information while giving the floor to tourists for expressing their ideas and complaints is an interesting provision.

2.7.6 Listening to tourism and mobility stakeholders - insights from the 1st Technical Round Table

The 1st RT identified stakeholders' beliefs regarding sustainable tourism growth via sustainable mobility:

- Mobility is recognized as the focal point in tourism and destination development. Unfortunately, many attractions with bad traffic connections could not be developed. Also,



safety issues are important especially in the context of biking along main roads, especially during the main season.

- Alternative modes of transportation have to be taken into consideration. But, great potential is recognized in water transport in Boka Bay, which can solve safety and traffic issues, especially during the season. In the context of water transport, there is a lack of support from local authorities and government for the permissions for boat stations and high expenses at some stations/ports (e.g. Pine in Tivat).
- Mobility modes must be sustainable. Tivat is going to be certified as a green destination so unsustainable options are not welcome. Also, there is a need for new experiences and the most attractive packages are those that promote active living and local authentic attractions.
- An interactive app is necessary for Tivat. Although hotels are developing something similar for themselves, this app is an interesting concept. Local tourism organizations will support app and projects with data and information. The app is necessary, especially when most of the tourism business is created and booked online.
- Similar views have colleagues from travel agency businesses, that offer a diversity of transportation and leisure activities, such as quads, bikes, canoes, SUPs, etc. They already have good cooperation with stakeholders involved in those packages, but with others as well.
- Finally, international cooperation is an important issue, especially in the context of regional products and integration of thematic experiences. The app can help to integrate and link similar attraction on a regional level and promote it to potential tourists.

2.7.7 Combining finding in a SWOT analysis for the case of Tivat

Combining the insights of the above findings, the current subchapter concludes in a SWOT analysis for the SUSTOURISMO case of Tivat that serves and is mutually served by the objectives of the project; tourism and mobility hand by hand development.

Table 15: SWOT for Tivat in the context of SUSTOURISMO project

Strengths	Weaknesses
<ul style="list-style-type: none"> • The strategic geographical location in Boka Bay • The proximity of tourist markets • Preserved nature and potential Green Destination status • Rich and diverse cultural and historical heritage • Gastronomy • Tradition in tourism • Multiculturalism 	<ul style="list-style-type: none"> • High seasonality • Uneven distribution of tourism demand • Slow adoption of new technologies • Lack of quality of the workforce • Relatively high unemployment rate • Aging population • Cooperation between stakeholders • Low level of knowledge about ICT innovations



<ul style="list-style-type: none"> • Existence of the tourism strategic documents • The existence of good green practices • Participation in the EU projects that focus on innovations 	<ul style="list-style-type: none"> • Lack of innovations and incentives for innovations • Lack of creativity stimulation • Legal and legislative frameworks
<p>Opportunities</p> <ul style="list-style-type: none"> • Growing tourism demand • New technologies • The experience economy and special interest tourism • New markets • Transport development • Strengthening regional, national and local cooperation • EU funds 	<p>Threats</p> <ul style="list-style-type: none"> • Growing competition • Overtourism • Environmental degradation • Climate change • Insufficient financial resources • Socio-political stability • Migration • Natural disasters

2.7.8 Drafting of the SUSTOURISMO touristic packages of Tivat

In the context of this project, the Municipality of Tivat, in cooperation with Tourist Organization Tivat, has designed an interesting program in the form of three potential tourist packages.

The pilot objectives will be improving the attractiveness of the mentioned attractions as well as their connectivity inside the wider Tivat area. The pilot action will focus on defining tourist's needs from Tivat city center to Salinas, Luštica Bay, and Gornja Lastva by different modes of mobility (e.g. bike, e-bike, tuk-tuk, walking). Key local players will design actions and packages in order to promote sustainable tourism and more specifically high-quality environmental standards in touristic areas. These actions and packages will include the SUSTOURISMO app, embedment potentials of the SUSTOURISMO app in current existing popular and well-promoted apps, rewards for tourists that will boost the app(s) downloads and use, and finally new touristic packages. The final results of the pilot project will be a reconceptualization of existing tourists offer in the mentioned areas with a focus on sustainable tourism and mobility development.

The procedure of stakeholders' engagement is rather dynamic, thus during the trial phase, private companies or local authorities that might be interested to participate somehow in the pilot's implementation will not be excluded, on the contrary, they will be strongly supported to act so. Memorandums of Understanding will be signed among Tivat Municipality and the actively involved stakeholders.

For engaging tourists in the touristic packages participation and the SUSTOURISMO app use, rewards will be given therefore the role of the interested stakeholders is extended also to the provision of further offers to tourists.

In brief the TPs for Tivat are:



Tour 1-1: Vrmac&Gornja Lastva Hiking Tour - For all lovers of untouched nature and hiking, this tour to the top of the Vrmac ridge is ideal for you. Vrmac is a hill above the Bay of Boka, overlooking the coastal towns Tivat and Kotor. It is an extension of Mount Lovćen, and its highest peak is St. Ilija which is 785 meters high. Don't worry if you are not a well-trained hiker because the tour is suitable for all ages and fitness levels. It is easy to follow and you will be able to fully enjoy the magnificent views from the top on the entire Bay of Kotor, as well as the surrounding mountain peaks. Organiser: BOKA WAVES DMC, Peraška 2, Tivat 85320; <https://bokawaves.me/en/excursions/>; info@bokawaves.me; T. +382 32 662 686; +382 69 369 799; +382 69 049 554;

Tour 1-2: Vrmac Breeze Hiking Tour - If you want to visit the most beautiful regions during your stay in Tivat and experience unforgettable experiences, to discover a whole range of feelings unknown to you, exploring, discovering, enjoying the beautiful views of the Tivat-Kotor Bay, do not miss this attractive climb tour over the hill Vrmac. Vrmac besides the amazing views over Kotor and Tivat is offering much more - amazing nature, various medicinal herbs, and a wealth of tangible and intangible cultural heritage. Organiser: SIP TRAVEL Tivat, City Center, Tivat 85320; <https://siptravel.me/en/excursion/>; siptravel.tivat@gmail.com; T. +382 67 670 090

Tour 1-3: SUP&Cycle Tivat - Conquer the water by SUP, then hit the pavement on two wheels. Two unique perspectives - one awesome day out. Your self-guided adventure begins at Movida Beach with a quick safety briefing and instructions on how to navigate your way across the bay and into Porto Montenegro. We'll then meet you on the other side, collect your SUPs and set you up for a cruisy ride along the peninsula into Kotor. Take one of our Hybrid Bike for a spin or ask us about the new Giant E-Bikes. Organiser: MONTENEGRO PLUS, Movida Beach, Tivat 85320; www.montenegroplus.me; info@montenegroplus.me; T. +382 69 190 190

Tour 1-4. E-bike Boka Bay - See Everything - "Short on time? This is half-day excursion soaks up Kotor's most picturesque spots. From the Old Town of Kotor to the glamorous yacht-filled Porto Montenegro, you'll experience the full scope of Montenegro. We begin in Kotor with a quick safety briefing and introduction to the E-Bikes, then we set off along the coast towards Tivat. We cruise through the seaside villages of Muo, Prancj, and Stoliv, enjoying stunning views of the Montenegrin Mountain range that frames the landscape. Giant E-Bikes make the tour, even the uphill, all fun, and zero stress. Our experienced guides will take you off the beaten path, avoiding most of the large roads while showing you all the idiosyncrasies of Tivat/Kotor Peninsula. Organiser: MONTENEGRO PLUS, Movida Beach, Tivat 85320; www.montenegroplus.me; info@montenegroplus.me; T. +382 69 190 190

Tour 1-5: Tuk Tuk Tours - Boka Bay/Magical Sunset/Customized tours - Tuk Tuk Montenegro is the brand of Montenegro Destinations, tour operator with big experience in organizing tours throughout the Montenegrin coast. We service more than 30.000 guests yearly on different excursions, of which some are our exclusive product and offer. From 2018 we have introduced a brand-new offer in Montenegro - tours with Tuk Tuk vehicles. Tuk tuk is an open, three-wheeled vehicle of eye-catching design, originated from Thailand, and now is popular worldwide. Auto-rickshaw, or tuk tuk is a great way for tourists to experience and feel the destination, traveling slowly and silently, being in the open and absorbing the views, sounds and smells from the outside.



They get better connected with the surroundings comparing to driving in a car or a bus. Organiser: MONTENEGRO DESTINATIONS DMC, Donja Lastva BB, Tivat 85320, <https://tuktukmontenegro.com>; marketing@mdestination.net; info@tuktukmontenegro.com; T. +382 69 225 052; 382 69 255 022

Tour 1-6: Bella Boka: Sustainable Water Transport Line Tivat-Perast-Herceg Novi - Bella Boka boats are made for enjoying and recognising the necessity of using solar energy towards environmental protection, lowering the costs of maintenance. Electric boats eliminate shaking, rattling and the stench of fuel, allowing the passengers to breathe deeply, enjoy conversation, and this environmentally friendly experience with more pleasure. BELLA BOKA, Pine Marina, Tivat 85320; www.bellaboka.me; info@bellaboka.me; T. +38267835967; 38269540771

Tour 2-1: Hiking Solila - Luštica - This is a tour that opens all the human and subtlest senses. Full of beautiful corners and unusual lookouts on all sides around you, so this tour does not go without a camera. The fascinating view of the Bay of Tivat will leave you breathless. Solila, the sweet and salty oasis of peace that you must visit, is especially attractive to ornithologists, but regardless of whether you are interested in birds, this place should be visited because it is a unique oasis of untouched nature. Organiser: SIP TRAVEL Tivat, City Center, Tivat 85320; <https://siptravel.me/en/excursion/>; siptravel.tivat@gmail.com; T. +382 67 670 090

Tour 2-2: SUP Solila & St. Marko - his slow-paced paddle in the Bay of Kotor is ideal for those trying SUP for the first time and includes an introductory lesson (for SUP). From Movida Beach, we head towards Solila Nature Reserve, home to a number of protected species of flora and fauna. Paddle onward past the Island of Flowers before exploring Sveti Marko Isl. Explore the island's monatory, Gospa Od Milosrda, before paddling back to our launch spot. Organiser: MONTENEGRO PLUS, Movida Beach, Tivat 85320; www.montenegroplus.me; info@montenegroplus.me; T. +382 69 190 190

Tour 3-1: From Teodo to Tivat & In Between - Walking tour that links all important highlights of city center (Porto Montenegro, Park, Pine, Maritime Heritage Museum). Organiser: Local guide: Miloš Radović; <https://guided-tours.me/>; info.mrtraveler@gmail.com; T. +382 69 460 905

- The tourist that participates in the 1st package, can also enjoy in 2nd tour organised by the same DMC to further explore the city.
- The time frame for participation in Tivat SUSTOURISMO touristic package No1: The tourist that participates in, this first for the case of Tivat, SUSTOURISMO touristic package can experience both services within two days - i.e. in the rational of an integrated card valid for 48 hours with two services, each one provided once.

The procedure for participating/booking, the role of cooperating actors and the points collection through the app

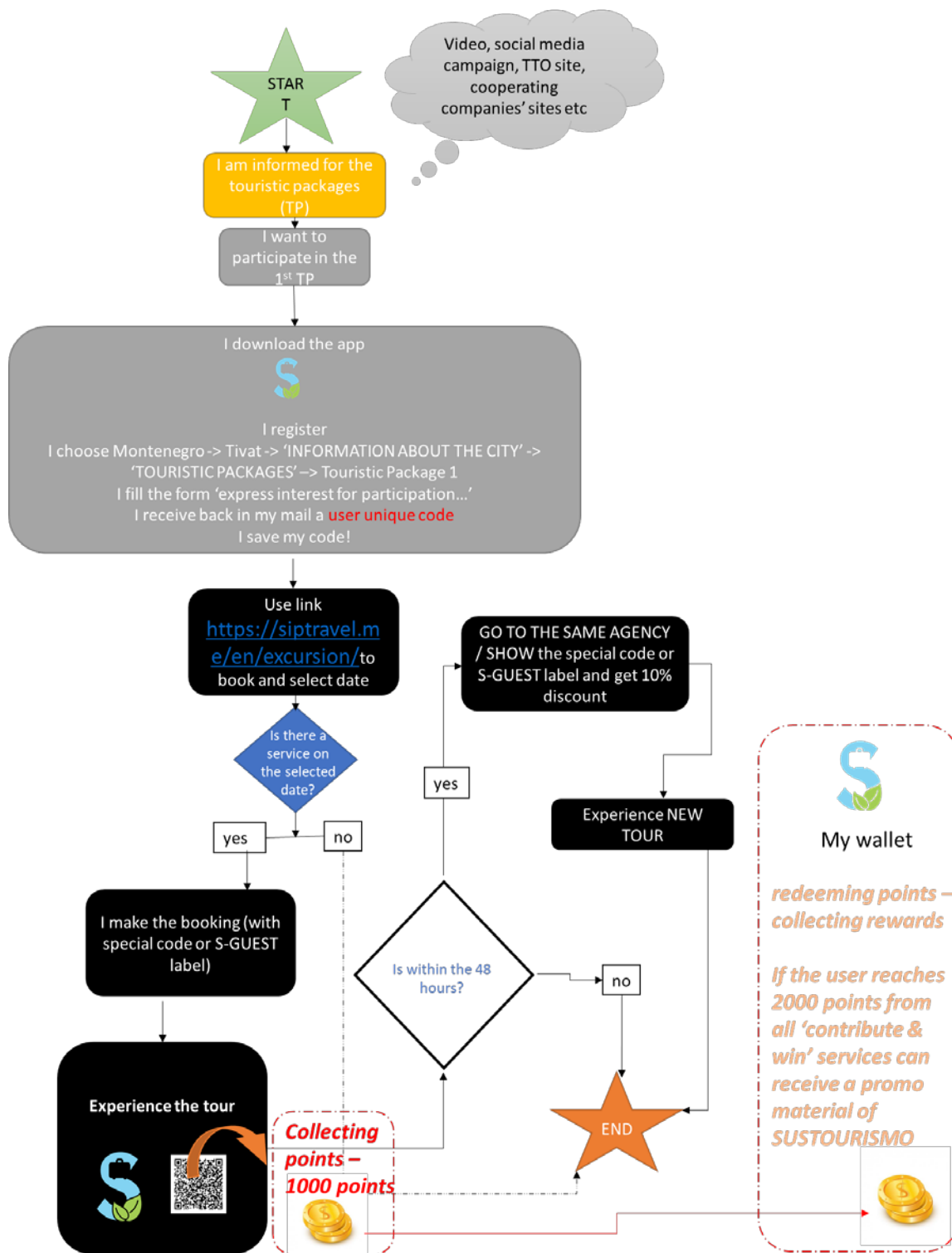


Figure 136: Example flow diagram for the 1st TP of Tivat



References:

1. Intereg Adrion Programme, <https://www.adrioninterreg.eu/>
2. Monstat, Nautical Tourism Data, <https://www.monstat.org/eng/page.php?id=43&pageid=43>.
3. Monstat, Tourism Data, <https://www.monstat.org/eng/page.php?id=455&pageid=455>
4. Montenegro Tourism Development Strategy, <http://www.mrt.gov.me/rubrike/planska-dokumentacija>
5. Strategic Development Plan of Tivat Municipality 2019-2022.
6. Tourism Development Strategy of Tivat Municipality 2020-2024.

2.8 The case of Berat (Albania)

2.8.1 The overview of Berat

Berat is located in south-central Albania, 120 km south of the capital, Tirana. It is the administrative centre of Berat Region situated in south-central Albania, approximately 120 kilometres from the capital of Tirana. The region of Berat is populated by around 100.000 inhabitants, covering an area of 380.21 km². Berat is one of two **designated ancient museum cities in Albania**.

Lying on the bank of the Osum River, Berat has been permanently inhabited for close to 2,500 years by Illyrian, Roman, Byzantine, Bulgarian, European medieval, and Ottoman and Albanian civilizations. During the 17th century Berat was the largest city in Albania and the country's main economic centre, with noteworthy development of handicrafts and trade. The town bears witness to the peaceful culture and religious coexistence between Christians and Muslims during the Ottoman period. It is a unique town with a wealth of buildings of the highest architectural and historical interest. Recognizing these values, in July 2008, the town was inscribed on the UNESCO World Heritage List.

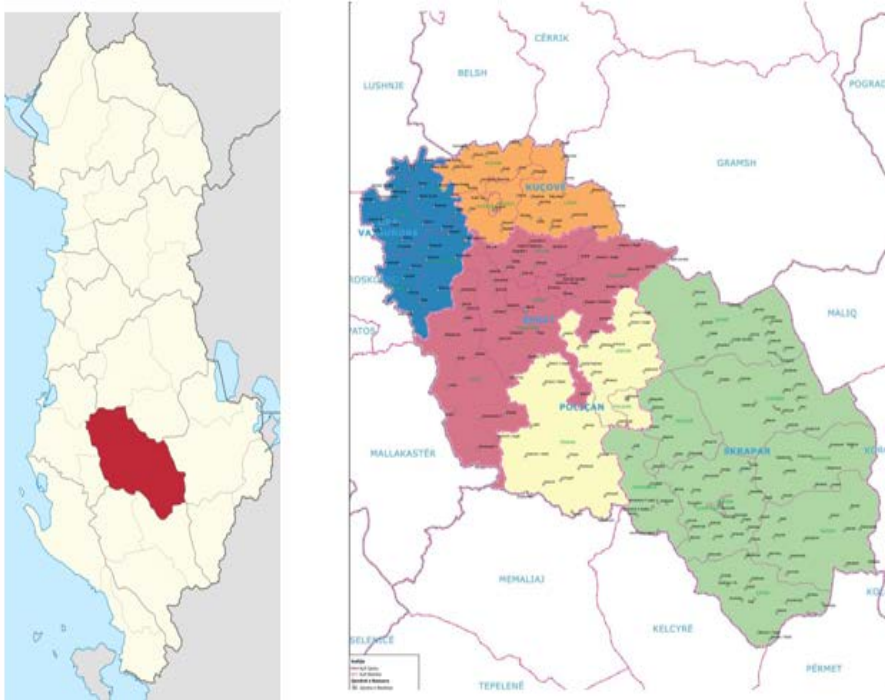


Figure 137: (on the left) The map of Albania and (on the right) the Region of Berat shown in red

The rich historical, cultural, ethnographic, architectural and natural heritage values of the town constitute a firm base for sustainable tourism development. In turn, sustainable development of tourism has the potential to contribute to the economic, social and environmental development of the region.

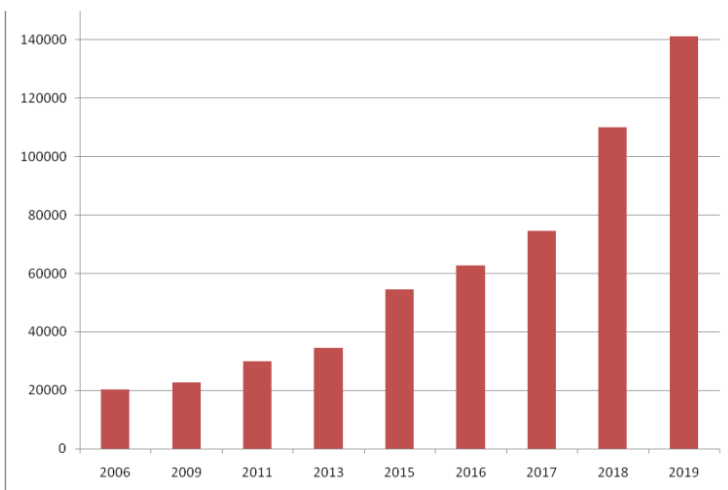


Figure 138: number of visitors in the city of Berat from 2006 to 2019



Berat is already attracting an increasing number of visitors from Albania and abroad, particularly since its World Heritage listing. The sensitive development of tourism is identified as a priority objective in Berat's Strategic Plan for the Social and Economic Development, while the need to develop in accordance with the outstanding universal value, integrity and authenticity of the town is recognized in the ICOMOS evaluation of the town for World Heritage inscription.

Growth, competitiveness, and economic cohesion

The economic situation in Berat Region measured by Gross Domestic Product per capita is slightly larger than the national average. Berat is a region focused on development through **tourism, agriculture and trade.**

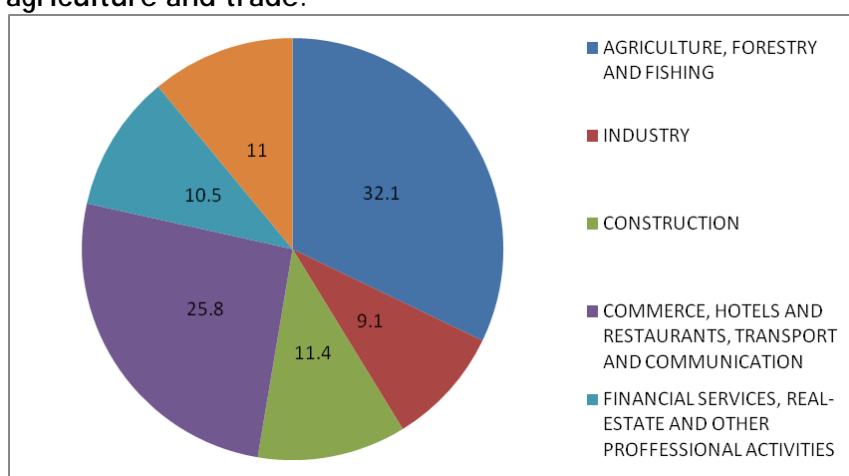


Figure 139: Economic sectors - shares in % (2019)

The structure of economy in terms of the number of enterprises shows dominance of the commerce sector, hotels and restaurants, followed by clothing, construction, food-processing and other processing industries at smaller rates.

Berat's economy and growth relies strongly on the touristic sector, making it a good candidate for projects that are aiming to implement and reinforce more sustainable touristic development strategies. The sector's contribution to the economy is projected to grow significantly over the next 10 years, and taking into account this upward trend, it is projected that by 2028 the direct and indirect effect of the tourism sector will reach approximately 1/3 of Albania's total GDP. For this reason, it is important to develop and implement a tourism strategy that revolves around sustainability principles, environmental protection and cultural / historical heritage preservation.

Mobility in Berat

The Land Administration and Management Project (LAMP II) (OWHC - Organization of World Heritage Cities, 2012) aims at preparing urban plans and developing control regulations and infrastructure capital investment programs for four cities in southern Albania, one of which is the



city of Berat. In the context of a national decentralization process and municipal capacity building policy, it has been concluded that urban planning, land management and development control must be improved on a country level. Berat is expected to witness a notable increase of its current population by 2030, thus require basic foundations for urban development to maintain the city's heritage and cultural values, improve the city's accessibility and mobility, and contribute to sustainable tourism models.

Berat is a city located inland, with good accessibility and connectivity with the other main regions of Albania. Berat is located approximately 100 km from the capital Tirana, 69 km from Elbasan, 90 km from Durrës, 47 km from Fier, 105 km from Vlora, 181 km from Gjirokastra, 192 km from Shkodra and 188 km from Korca. The municipality of Berat is well-connected with the other municipalities of the region. The distance to Kuçova is 17 km, to Poliçan is 25 km, and to Skrapar is 65 km.

There are 812 km of roads in the municipality of Berat, and approximately 30% of them are asphalted roads. A brief analysis shows that the *most common type of road category are scenery / landscape roads*, especially in the hills surrounding the city of Berat. This infrastructure holds a hidden potential for further touristic development.

However, *no railway roads have been developed in the region of Berat*. The railway system in Albania is old and rarely used for touristic purposes.

Public transportation in the city of Berat is made up of approximately 30 buses which run through the entire city every 9-15 minutes, and 23 bus stations, with approximately 500-1000 meters distance from one another.

According to a census of 2013, approximately 62% of the working force of Berat commute to work by bicycle or foot, 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 redirected its attention and resources towards green transportation modes such as bicycles and bicycle lines. Currently, only the centre of city has a dedicated bike line, approximately 2 km long, with the objective to extend it throughout the entire city.

Berat as the pilot city for SUSTOURISMO

One of the reasons why the region of Berat was selected as a study area is attributed to its strong cultural and historical heritage. More specifically, the old town has been characterized as a UNESCO World Heritage site, due to it being "a rare example of an architectural character typical of the Ottoman period". Secondly, Berat was declared a Museum City in 1961 by the Government of Albania. Berat hosts several museums and cultural artefacts of unique value, making the city attractive for local as well as foreign tourists. There are 108 cultural monuments in the city, and in the Mangalem district are located museums of extraordinary architecture. The Castle district has many cultural objects, including the Onufri Museum since 1961. Lastly, the Gorice district - another museum complex of architectural importance, belongs to the natural and historical wealth



of the city that attracts local and foreign visitors (Map) (UNESCO).

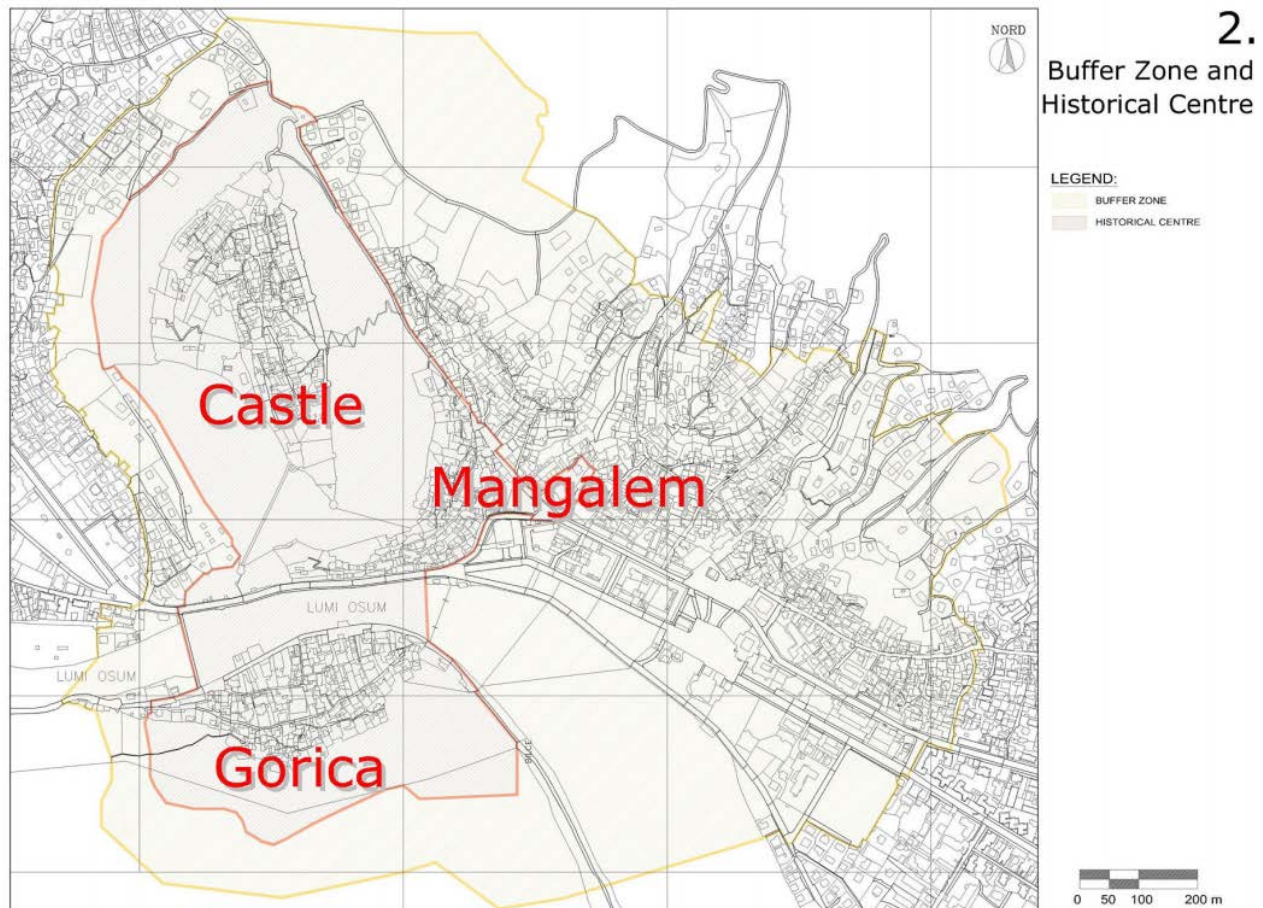


Figure 140: Buffer Zone and Historical Centre, Berat UNESCO, 2008

Another reason Berat was chosen for the SUSTOURISMO project is its rich natural and environmental resources, which are of regional and national importance (Map). The city has a mountainous and hilly relief with the highest peaks of Tomori mountain (2.416m) and Shpiragu mountain (1.218 m) which in combination with the Osumi valley create a scenic landscape in the town (UNESCO). Some of the region's natural and environmental resources include the Mountain Tomorri National Park, which is the largest protected wildlife and outdoor recreation area. Another important natural element are the Cascades of Bogove - found near the village of Bogova, and they are the region's primarily source of fresh drinking water. Furthermore, the canyons of Osumi offer evidence of the area's geological history, providing several hiking trails and recreational areas (UNESCO).

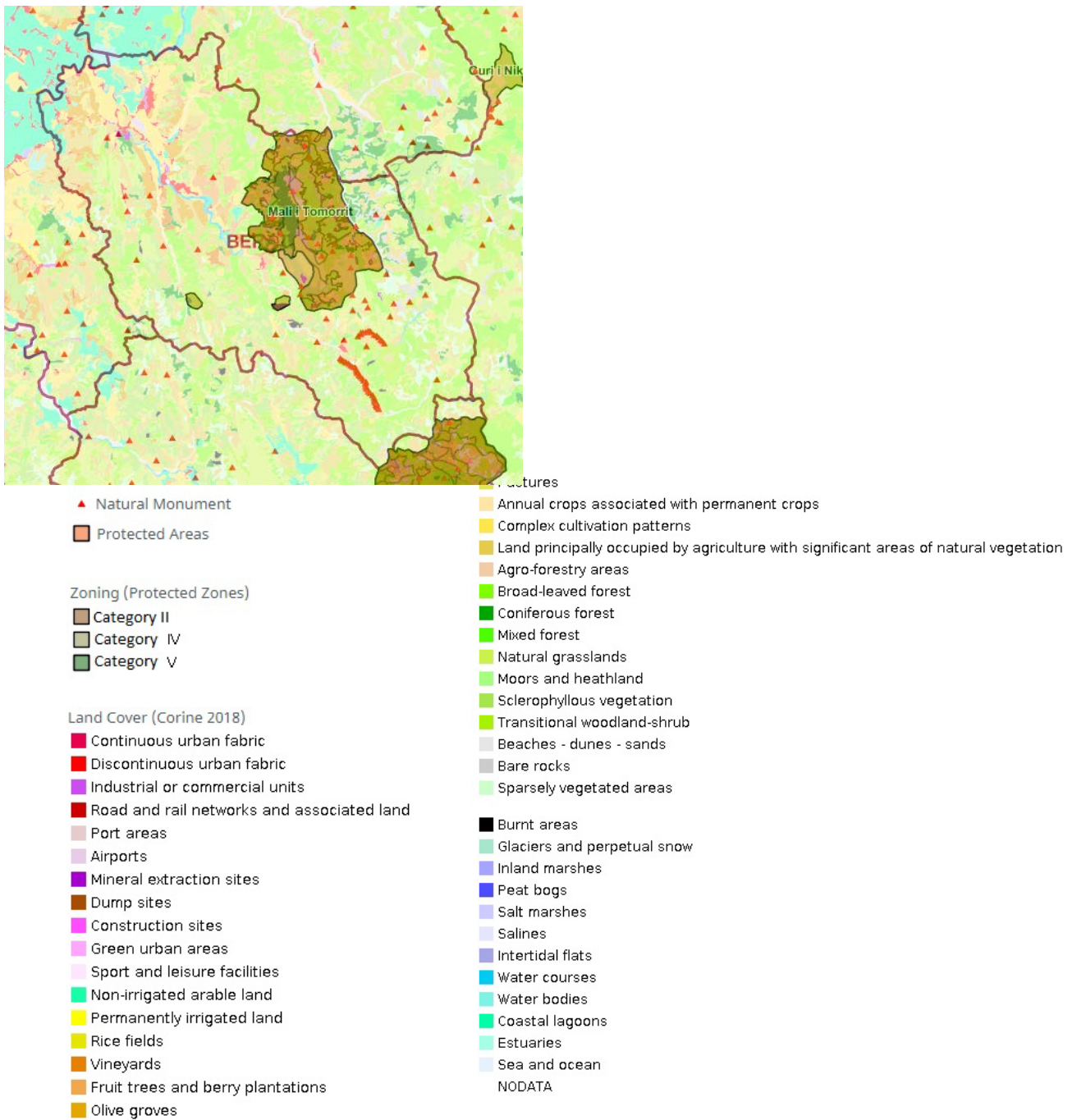


Figure 141: Land Use & Protected Areas Map, (Geoportal ASIG, n.d.)

Lastly, Berat would benefit greatly from such a project, due to its potential for developing and implementing sustainable mobility solutions. The region’s road infrastructure holds a hidden



potential for further touristic development. Public transportation in the city of Berat is made up of buses. The municipality of Berat has redirected its attention and resources towards green transportation modes such as bicycles and bicycle lines. Currently, only the centre of city has a dedicated bike line, with the objective to extend it throughout the entire city. In the region of Berat, tourism prompts improvements in mobility infrastructure. Berat being an ancient city, with rich history and culture, it has always attracted tourists and visitors. Nevertheless, the poor mobility services and damaged infrastructure have reduced the number of potential tourists. For this reason, sustainable tourism development will prompt the improvement of mobility services, as the latter is a pre-condition and requirement of good quality tourism. Consequently, investments, improvements and developments in mobility and transportation infrastructure can contribute greatly to the development of the region's touristic sector.

2.8.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Berat

This section presents relevant data and information for the Albanian SUSTOURISMO case. Data is collected on three different levels, i.e., national, regional, and local, and is analyzed in the context of the pilot cases of the SUSTOURISMO project. The Covid-19 pandemic affected greatly the tourism sector, making 2020 an odd year in terms of tourism development. For that reason, the presented information does not include the year 2020 - as thorough analysis for the direct effect of the pandemic in the sector are still under work.

Tourism at a national level

Tourism is increasingly crystallizing as one of the main engines of the country's economic development. According to the Economic Impact Report of 2018 of the World Travel and Tourism Council¹ (WTTC), along 2017, the tourism sector recorded a direct contribution of \$ 1.12bn, accounting for about 8.5% of the Gross Domestic Product (GDP) while including indirect multiplier effects, total contribution is almost three times higher than \$ 3.47 billion, accounting for about 26.2% of the GDP, positioning this sector as one of the main contributors to the development of the national economy.

Meanwhile, the sector's contribution to the economy is projected to grow significantly over the next 10 years, with the tourism sector expected to account for only 8.8% of the GDP in the next 2-3 years, while by 2028, the sector may reach 9.3% of the GDP. Thus, taking into account this upward trend, it is projected that by 2028 the direct and indirect effect of the tourism sector will reach approximately 1/3 of Albania's total GDP.

Also, in terms of employment, currently the tourism sector employs about 7.7% of the total labor force in Albania, while by 2028 this number is projected to grow to 8.8%. Referring to the same report of the World Council on Travel and Tourism (WTTC), investments in this sector accounted for about 7.5% of all investments in the country, while by 2028 this figure is projected to rise to 8.2%.

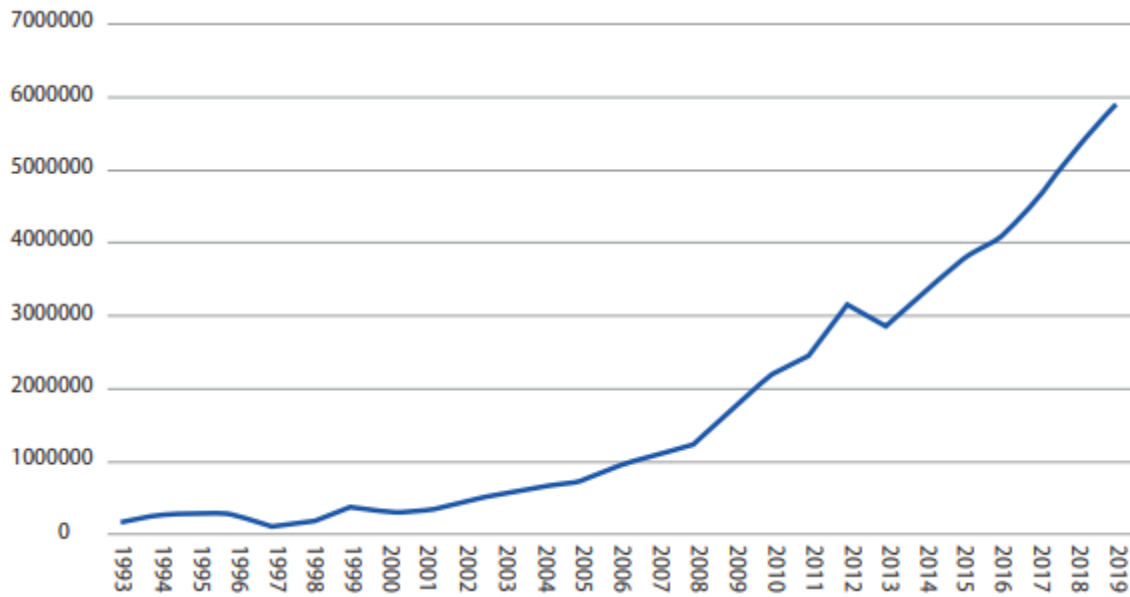


Figure 142: Tourists number in Albania from 1993 to 2019. Source: Institute of Statistics and World Bank



Figure 143: Statistics regarding tourism in Albania



As shown in Figure 137, the number of tourists in Albania has shown a *continuous* notable increase the past decades. Europe is the main source of tourists visiting Albania taking up a volume of about 92.4% of all tourists, which reflects that the access larger than 3 hours from one destination to another is still an important factor for the influx of travelers for tourism purposes. However, recently tourists from the United States of America, or Asia, and especially China, have shown a significant increasing interest, thus indirectly encouraging the development of other tourism sub-sectors, especially the historical and cultural tourism. Figure 138 provides an overall view of the main statistics related to tourism in Albania. As one can observe, Albania is visited mainly by tourists from the Balkans region and Western Europe. The month of August is the most visited month, which corresponds to summer vacations. Albania is a well known destination for wonderful beaches and coasts. The main transportation mode used is by land (i.e., touristic buses, private cars, etc).

Figure 139 provides some additional information regarding tourists that enter Albania. As noted, visitors from neighboring countries such as Kosovo, North Macedonia, but also Greece and Italy account for the largest share of tourists in Albania.

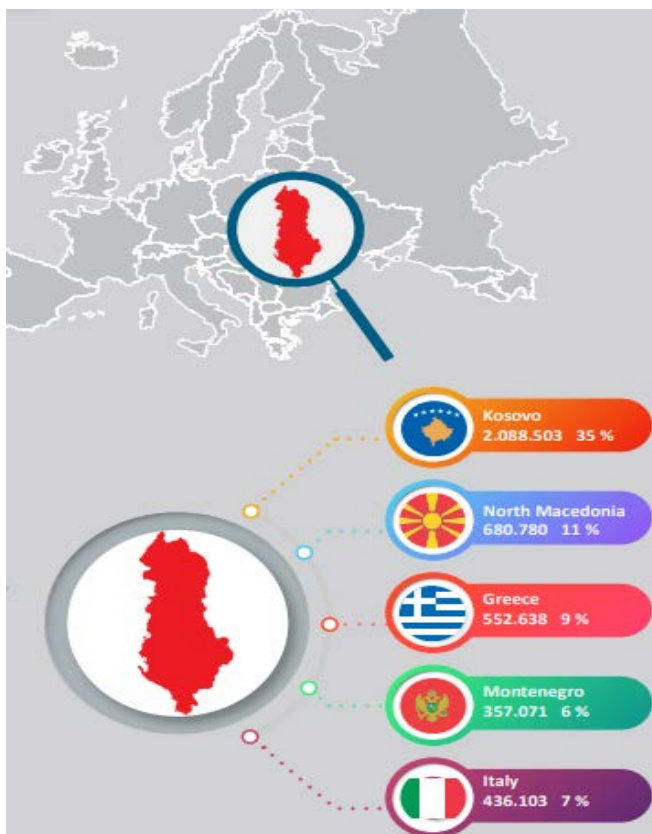


Figure 144: Countries with the largest number of tourists in Albania



However, compared to other Mediterranean countries, the development of tourism in Albania is still far from the potential represented by the country's natural, historical and cultural assets. Infrastructure, accommodation capacities, quality of services, the tourism offer and product are all factors that have somewhat inhibited the sustainable and consistent development of tourism in Albania, leaving room for uncontrolled and chaotic development that has actually kept this industry in operation, but endangering its sustainability in the long run

An analysis of arrivals by transportation mode shows that a dominating majority of tourists (82%) enter the country by land, followed by 11% who enter Albania by air and only 7% arrive in the country by sea. The results could be explained by the fact that, as shown in Figure 139, Albania is mostly visited by neighbouring countries, part of the Balkans regions. The increase in tourists from Asia and North America in the last years, can increase, though by a small degree, the usage of airplanes as a transportation mode.

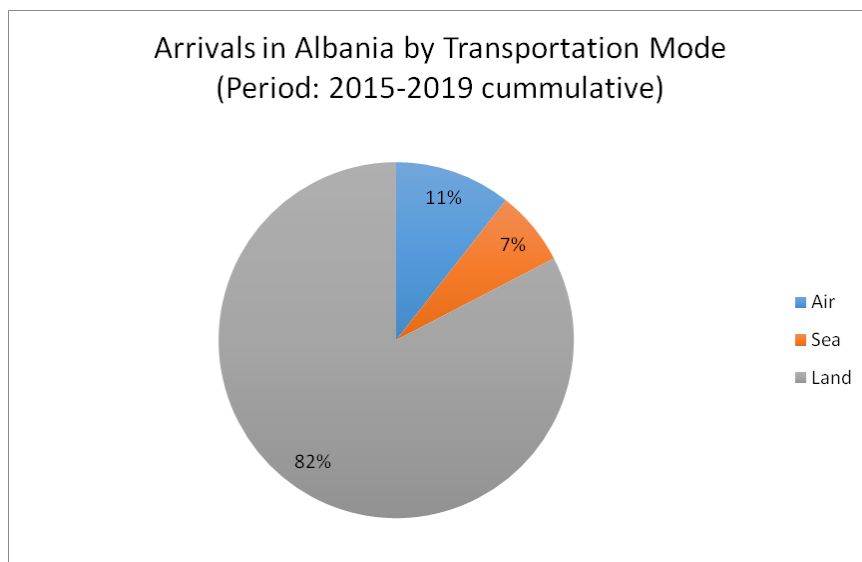


Figure 145: Arrivals in Albania by transportation mode for the years 2015 - 2019 (cumulative). Source: Institute of Statistics and own analysis



Transport by land has been the most preferred transportation mode for international citizen arriving in Albania for the past years, as can be clearly observed in Figure 141. One can also note a slight increase in the usage of air and sea transport, which, partly, results from the overall increase of tourists arriving in the country.

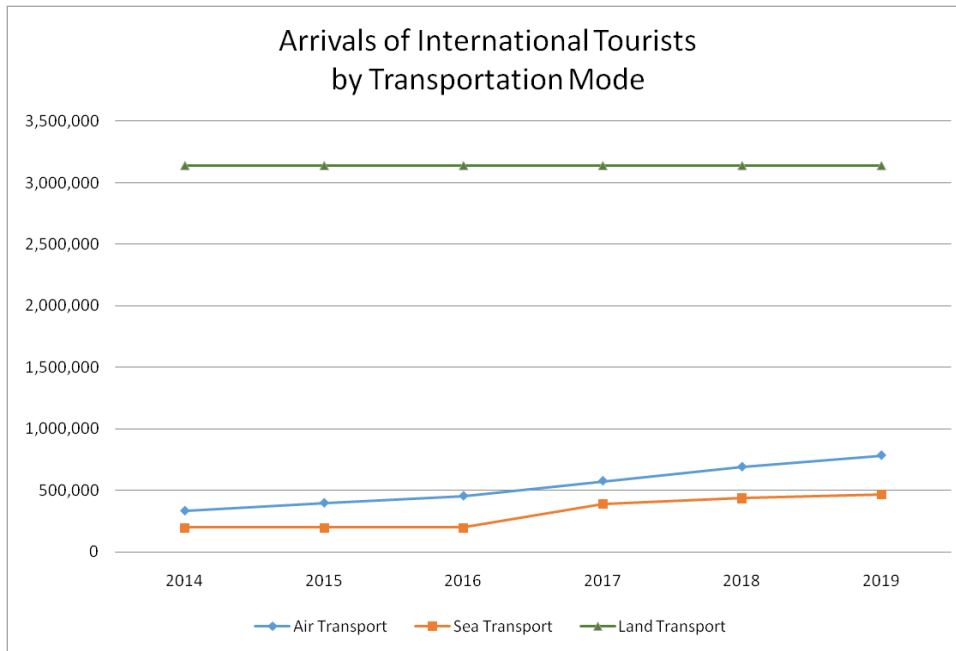


Figure 146: Arrival of international tourists in Albania according the transportation mode used from 2014 to 2019

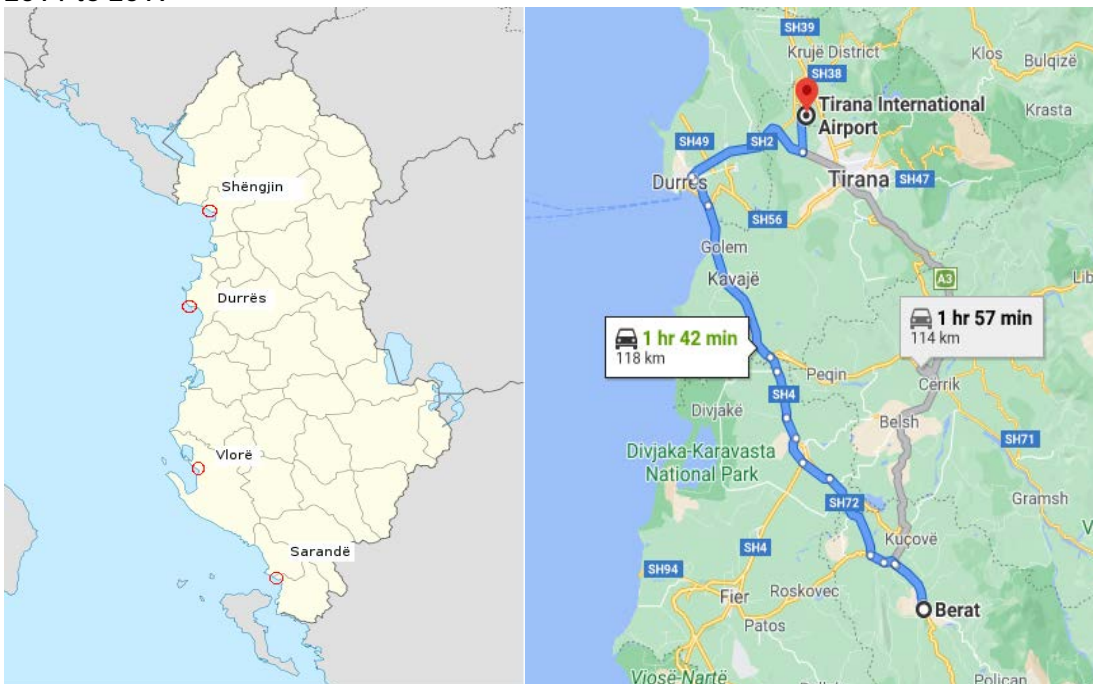


Figure 147: (on the left) the road from Berat to Tirana International Airport according to Google Maps



(on the right): the ports of Albania

The city of Berat is connected through the major ports of entering the country by land, being in a distance of approximately 120 km by the Tirana International Airport, and a distance of respectively 90km and 105km from the ports of Durrës and Vlora. Figure 142 presents a view of such connections.

Within the city of Berat, currently, the only public transport mode is by bus. Though improvements have been made in the past decade, the public transportation systems still needs to be enhanced in terms of the quality of services that are provided, especially in the context of tourism development. Only a small part of the city centre is covered by bike lines, making it difficult for the extensive usage of bikes within the city. Efforts are being made by local authorities in order to create a bike network that would favour such green alternative transportation modes.

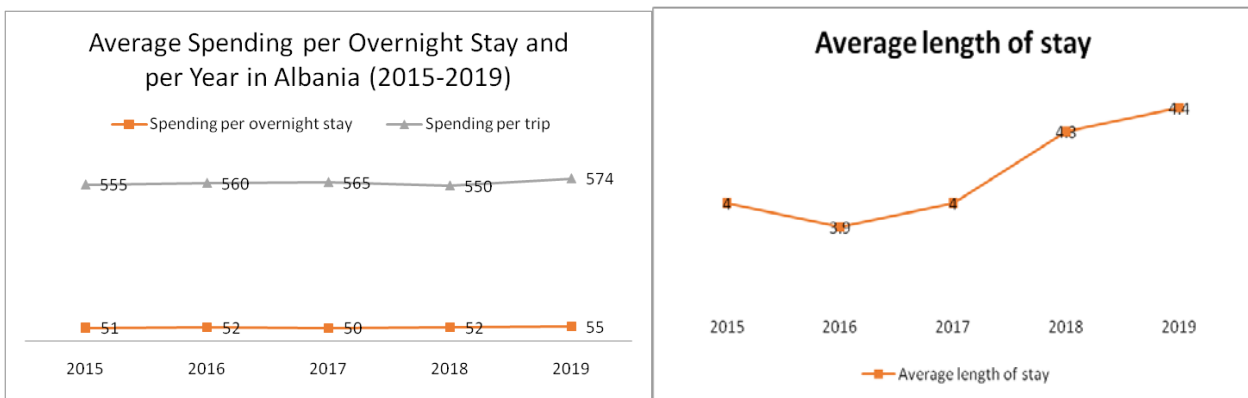


Figure 148: (on the left) Average spending per overnight stay and per year in Albania for the period 2015-2019 (on the right): Average length of stay in Albania for the period 2015 - 2019 Source: Institute of Statistics and own analysis

In the following, it is presented an analysis of the average spending of tourists in Albania is stable during the analyzed period (years 2015 - 2019) both for the overnight stay, but also for the spending per trip, as one can observe in Figure 144. The average spending per overnight stay is between 51 and 55 Euros for the analyzed period. During this period, the average length of stay of tourists in Albania has slightly increased from 4 nights on average in 2015, to 4.4 nights on average in 2019.

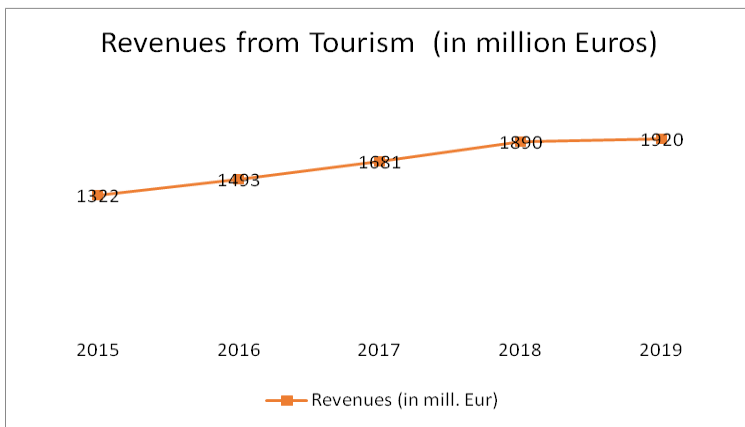


Figure 149: Revenues (in million Euros) from the touristic sector for the period 2015 - 2019. Source: Institute of Statistics and own analysis

The increase in the average number of nights that tourists spend in Albania may come as a result of the enhancement of the touristic offer and services, which accounts for larger revenues from the touristic sector. A further diversification of the touristic offer, combined with improved infrastructure, services and a shift towards sustainable and green initiatives are often seen as key factors contributing to the further development of tourism in Albania.

Tourism at a regional level

The region of Berat, comprised of 5 municipalities, is a well known touristic destination in Albania.

Tourism development has been focused on three key areas, namely:

- *Cultural tourism* - Berat is promoted as an international center of cultural heritage (the traditional neighborhoods of Mangalem, Gorica and Castle , the National Museum of Icons Onufri and other galleries, museums, churches and mosques
- *Adventurous tourism* - The natural monuments of the region lie mainly towards southeast. The most notable are the hills of Gorica, Osumi Canyons, Tomori mountain with its National Park.
- *Agro-tourism* - agro touristic destinations have seen a notable increase in the past years taking advantage of the beautiful landscapes, organic foods and a rich culture in production of wine.

The city of Berat is currently the driving force for tourism development in the region. Nearby agro-touristic destinations have been notably developed in the past year. The region also offers good opportunities for sport and adventurous tourism, such as hiking, rafting and paragliding, especially in the Tomori mountain national park and the Osumi canyons.



Unfortunately, there are no accurate estimations that measure the number of tourists entering the region - especially since the region of Berat is an inland region and most visitors enter into it by private cars or touristic buses. Nevertheless, considering the analysis of local and regional authorities, it is believed that the other municipalities (beside Berat) receive a very small, even statistically irrelevant, number of unique tourists, i.e., tourists that visit any of these cities *without* visiting Berat. Therefore, the analysis that follows can be considered more accurate.

Tourism at a local level

Berat is inscribed in the World Heritage List of UNESCO in 8th of July 2008 as “a rare example of an architectural character typical of the Ottoman period”. Berat was declared a Museum City in 1961 by the Government of Albania. The old city centre consists of three parts: Kalaja (on the castle hill), Mangalem (at the foot of the castle hill) and Gorica (on the left bank of the Osum). It has a wealth of beautiful buildings of high architectural and historical interest. The pine forests above the city, on the slopes of the towering Tomorr mountains, provide a backdrop of appropriate grandeur. The Osumi river has cut a 915-metre deep gorge through the limestone rock on the west side of the valley to form a precipitous natural fortress, around which the town was built on several river terraces.

The town is one of the oldest in Albania, with a fortress-settlement- the Castle, having existed since at least the 4th century BC with a continuous life until nowadays. Berat is a remarkable scenic town, with beautiful buildings of high architectural and historical interest.

The rich historical, cultural, ethnographic, architectural and natural heritage values of the town constitute a firm base for tourism development. In turn, sustainable development of tourism has the potential to contribute to the economic, social and environmental development of the region. Berat is already attracting an increasing number of visitors from Albania and abroad, particularly since its World Heritage listing. The sensitive development of sustainable tourism is identified as a key priority objective in the region.

The number of tourists, both international and domestic, has increased rapidly in the past years, as can also be observed from the data shown in Figure 145. Note that, considering that Berat is an inland city (without an entry gate), it is difficult to retrieve very accurate statistics. The data presented below measure the number of tourists that have visited the castle of Berat (monitored through the ticketing system). This information is often used as an estimation of the number of tourists in the city. In any case, it is important to observe the increasing trend of tourists' arrivals.

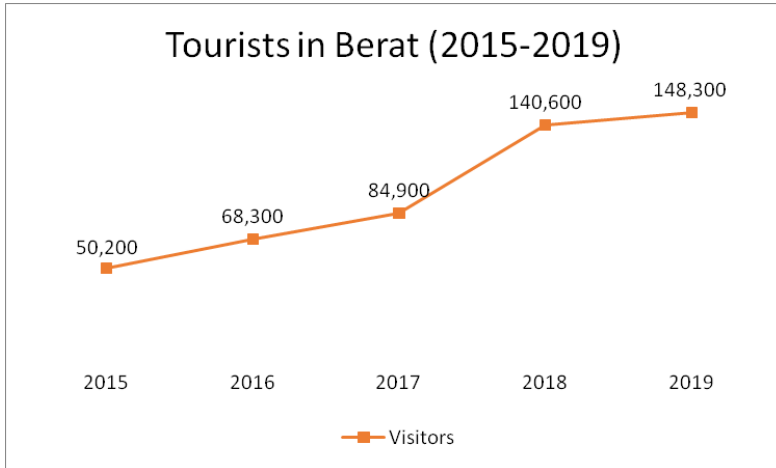


Figure 150: Number of tourists (both international and domestic) in the city of Berat for the period 2015 - 2019, Source: Regional Directorate of Culture and own analysis

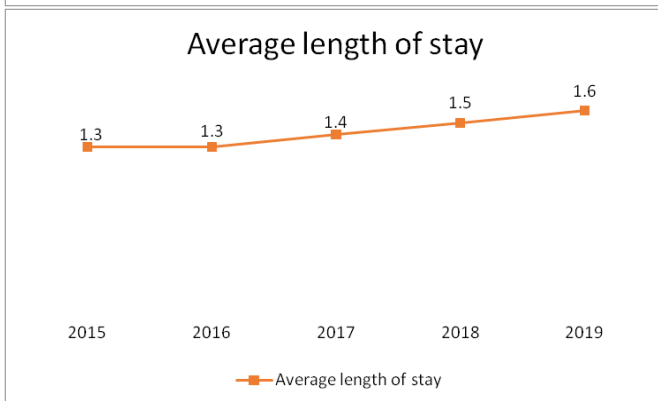
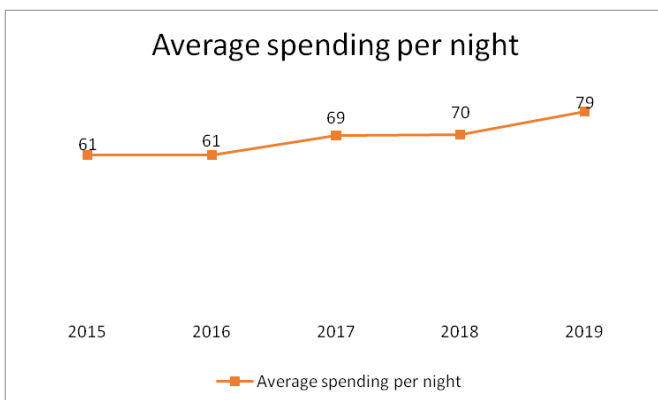


Figure 151: (on the left) Average spending per overnight stay and per year in Berat for the period 2015-2019, (on the right): Average length of stay in Albania for the period 2015 - 2019 Source: Institute of Statistics and own analysis



The average length of stay in Berat, though generally stable, has noted a slight increase from 1.3 days on average in 2015 to 1.6 days on average in 2019. A similar trend is also observed in the average spending per night which ranges from 61 to 79 Eur. Note that this data is an estimation of the municipality of Berat according to own polls and analysis.

As a conclusion, we can observe that Albania, but also the region and city of Berat in particular have a high potential for growth in the touristic sector. A shift of focus towards sustainable and green initiatives, in addition to a diversification of touristic offer and enhancement of services, can yield higher revenues and a touristic growth. Engagement of the local community and key stakeholders are considered as crucial pre-requisites for the successful development of sustainable tourism.

2.8.3 Searching the tourism policy background and finding gaps and opportunities

This section includes main findings as derived from national and regional policies review (Del. T1.1.1) regarding the promotion of sustainable tourism via sustainable mobility in the project's participating countries. Analysis of policy documents on sustainable tourism and transport in the ADRION area' aims to identify areas of interventions according to the already published work and following the tourism strategy.

The country has rich historical, cultural, ethnographic, architectural and natural resources, constituting the Region as a firm base for the development of tourism. For this reason, sustainable development tourism models can potentially contribute to the environmental, social and economic development of the region of Berat. This will require concentrated efforts in the preservation and presentation of the region's cultural, natural and historical heritage, as the region remains at early stages of establishing its profile as a high-quality touristic destination, on a national as well as international level (Municipality of Berat, 2011-2021).

The National Strategy for Development and Integration (NSDI) 2007-2013 focuses on Albania's progress towards integration into the European Union and aims at incorporating the Millennium Development Goals (MDGs). Part of the strategy includes the development and implementation of a new, comprehensive and integrated model of Spatial Planning, which will increase and promote the sustainable development and the tourism sector. The vision of the strategy for the tourism sector in Albania is: *"for Albania to be recognized as a safe tourism destination of high value, which is characterized by a unique variety of natural and cultural beauties of world class, in a small geographical space, managed in a responsible environmental and social way, easily reached from the European tourism markets* (Republic of Albania Council of Ministers, 2008). The Strategy's priorities and policies include: (1) sun and beach tourism in the long term, (2) special interest tourism (ecotourism, environmental tourism, cultural tourism), and (3) business and conference tourism, in the short to medium term. The sector's strategic priorities are the following:



- Awareness and marketing to develop domestic tourism
- Product development and diversification concentrated on the discovery of Albania through its nature and culture
- Investments in nature areas and culture
- Human resource management
- Business climate
- Data and information management
- Territorial planning, through regulatory plans, urban studies, infrastructure investments in port facilities or waste management

Berat has developed The Berat Tourism Strategy and Action Plan (TSAP), outlining the Municipality's commitment to develop and improve the tourism sector, during the years 2011-2021. The sets the vision and priority of Berat to become a quality touristic destination developed on the principles of sustainable development. The Plan identifies four key strategic areas:

1. Product development & quality improvement
2. Access & infrastructure
3. Marketing & promotion
4. Human resources & destination management

The Ministry of Tourism and Environment of the Republic of Albania has developed a National Strategy for Sustainable Tourism Development, 2019-2023 (Ministry of Tourism and Environment). The strategy's vision is statement is: *"Albania, as a hospitable, attractive and authentic destination, for sustainable development of country's economic, natural and social potentials"*, and highlights the main challenges of the tourism sector as the following:

- Providing access to tourist destinations, improving destination infrastructure and promoting tourism infrastructure development (ports, airports, internal public transport)
- Regulation, standardization and certification of accommodation facilities and other tourism services
- Promoting an integrated tourism product and improving the country's image
- Establishing an efficient system of continuous professional training of human resources engages in tourism

Moreover, the strategy has outlines four strategic goals, to realize the vision of this strategy. These include:

1. Creation of new development industries and clusters, as well as consolidation of the tourism offer and creation of new products
2. Increasing the added value and impact of the sector on the economy and employment
3. Development of new products and services in tourism, as well as improvement of their quality



4. Improving the image of the country and promoting authentic local products

The Municipality of Berat has developed a Strategic Plan for Economic Development 2005-2010 (Municipality of Berat, 2006), with the vision: *"Berat, the Noble City with Noble Hearts, will be a municipality thriving on sustainable economic development, with consolidation of its agribusiness and handicrafts, and a family tourism centre focused on its unique history and culture.* Moreover, the plan outlines three goals:

1. Development in the Berat region of agribusiness and the respective SMEs through appropriate utilisation of the potential in production, processing and marketing
2. Tourism development for Berat through utilisation of its unique cultural and historical heritage
3. Development of the urban environment of Berat in compliance with contemporary parameters and in harmony with specific features of the city

2.8.4 Learning from best practices on tourism and mobility

This section includes main findings as derived from good practices review (Del. 1.2.1).

There are several key lessons/findings that can be derived from a review of good practices related to sustainable tourism through sustainable mobility interventions. These can be quite location-specific, which is why they need to be closely associated with the three pilot actions and touristic packages that have been developed in the context of the SUSTOURISMO project, for the city of Berat.

Looking at relevant completed and ongoing projects can provide information, best-practices and lessons that can be implemented or avoided in the context of the SUSTOURISMO project.

One example is the TACTICAL²⁴ - TOURISM PROJECT, implemented in the entire Greece-Albania cross-border (CB) area, as part of the IPA CBC Interreg Greece - Albania 2014 - 2020 programme. The project intends to unify all the Regions of the CB area through the creation of a network of bodies that can materialize policies and actions aimed at preserving the cultural and natural resources for touristic development. The project brings together all the UNESCO protected cities in the CB region (Corfu, Gjirokaster and Berat), thus creating a cluster along with the city of Kastoria. The project provides a significant example for the SUSTOURISMO project, showcasing how cross-border regional authorities can cooperate and support touristic development through the creation of the necessary infrastructure and basis for tourism to flourish.

Similarly, the Tourism 4ALL project, part of the Interreg - IPA CBC Greece - Albania, aims to support the tourist sector in the CB area, to optimize the offered tourist services and create new,

²⁴Targeted ACTions for the preservation, rehabilitation and promotion of historical, Cultural and natural assets encouraging TOURISM



improved tourist products, accessible for new target groups. The project aims to support the sustainable development of heritage tourism in the CB area, and to establish the region as an international destination for accessible tourism, particularly for people with disabilities and / or with reduced mobility (Interreg - IPA CBC Greece - Albania, n.d.). This project can provide input for the SUSTOURISMO project, which aims to increase the sustainability of the tourism sector in Berat. When talking about sustainable tourism, it is important to plan and develop a form of tourism that is accessible to all members of society, especially vulnerable population groups.

Another project that can serve as a good practice is the SUITS project, developed by CIVITAS. The SUITS project shares best practices and develops material to enable small and medium-sized cities to increase their capacity to finance and implement sustainable transport measures or Sustainable Urban Mobility Plans (SUMP), which support mobility transformation. The project included three (3) Pilot - workshops that took place in Birmingham, Kalamaria and Turin (CIVITAS, n.d.). This project can provide relevant information regarding sustainable mobility solutions and practices in small and medium-sized cities. In the context of the SUSTOURISMO project, it would be beneficial derive solutions for sustainable mobility, to improve accessibility and transportation, thus improve the tourism sector.

More inspiration for sustainable tourism practices can be derived from the city of Ljubljana, where the city centre is closed to cars. To reduce air pollution and improve the pedestrian experience for visitors and residents, the city centre of Ljubljana has been transformed into a car-free zone for over 10 years. It should be noted that in order to maintain the accessibility of the area, the elderly, people with disabilities, and mothers with infants are still allowed to enter the city centre with a vehicle. These more vulnerable population groups are also eligible for free rides throughout the area with electric taxis. Buses and bicycles are still permitted to enter the city centre, as they do not contribute significantly to air pollution. There are underground car parks outside the city centre of Ljubljana, which allow residents and tourist to reach their destination (the city centre), but to only enter it using more sustainable and environmentally friendly modes of transport, such as bicycles, buses or by foot. As a result of this car-free policy, traffic in Ljubljana has decreased by 12% since 2011 and black carbon concentrations have been lowered by 70% (Scholz & Friends Agenda Berlin GmbH European Office, 2019).

The project e-Nature part of the IPA CBC Interreg Greece - Albania 2014 - 2020 programme is a project aiming to sustain and develop eco-tourism, while developing a mobile application used for bike reservations. This project can be connected to SUSTOURISMO, pilot action 2 in particular, as they both promote sustainable, eco-friendly tourism and rely on the usage of bike trails and mobile applications.

Another example is #DynaMob 2.0 - Dynamic MOBILITization 2.0, part of the Interreg IPA CBC Italy - Albania - Montenegro programme, promotes the use of environmentally friendly forms of transport in the Programme area, focusing on electric car sharing and bike sharing. The project intends to improve public infrastructure and eco-services for road transportation in the municipality areas, introduce eco-innovative technologies in traditional transport with low impact, promote a network between municipalities and public administrations for policies peer-review, and increase citizens' awareness about smart and green mobility. The project can be connected



to SUSTOURISMO, since both aim to promote sustainable, eco-friendly tourism and rely on the usage of bike trails for increasing sensibility in the community and for promoting common objectives.

Comparably, the Nexto app - designed by Slovenian developers, is a storytelling app with the goal to engage tourists and improve sightseeing experiences. The application combines audio guides with features such as puzzles, riddles, and the collection of items by scanning objects with your smart phone. Nexto creates game-like learning experiences through a virtual reality. The application contains interactive maps that assist tourists / visitors in discovering Ljubljana's "hidden gems" (Scholz & Friends Agenda Berlin GmbH European Office, 2019). This project can provide insights for the SUSTOURISMO project, particularly for pilot actions 1 and 3, which are focused on enhancing tourism experiences in the city and the surround areas, through a mobile application.

Similarly, the Ljubljana Urbana Smart Card is a system that was implemented in the Slovenian city, which encourages people to use public transport by simplifying the "switch" between different modes of transportation. Users of the Urbana Smart Card have access to Park+Ride (P+R) facilities, city buses and the bike-sharing system Bicikelj (Scholz & Friends Agenda Berlin GmbH European Office, 2019). The card additionally offers free admission to more than 20 tourist attractions, free guided city tours, free funicular ride to the city's castle, and other benefits. This has led to over 500.000 people use the Urbana Smart Card. This is a smart combination of practices that improve mobility and accessibility within a city, and the provision of benefits for tourists and visitor. This project clearly indicates the connection between sustainable mobility and tourism.

Another project is the Eco Touristic Trails - Castle of Gorica developed by the Municipality of Berat. The project aims to rehabilitate the area around the Castle of Gorica, particularly the slippery zones along the trail. The project relates to SUSTOURISMO as both focus on the development of sustainable tourism and mobility services such as the usage of bike trails for pleasure, sport, and other types of activities.

Lastly, the project "Virtual tour on the "Onufri" and "Ethnographic" museum", was developed with funds of the Ministry of Culture. The Virtual Tour of the "Onufri and Ethnographic" museum project applies information technology systems to offer a 3D virtual tour on the premises of the museum. This project can be related to the SUSTOURISMO application and the virtual tour, which increases the visitor's / tourist's experience and guide them towards important cultural and historic landmarks in the region.

2.8.5 Learning from tourist surveys - the path forward as revealed by the tourists

The surveys conducted for the case of Berat included 300 questionnaires, which were distributed to visitors and tourists arriving in the city of Berat. In particular, 210 surveys were distributed among international tourists, while the remaining one to domestic tourists. The surveys - completed by December 2020 - aim to identify the main tourists' needs and requirements, while exploring through a series of 45 questions several aspects of the visitor's experiences in the city.



The period on which the surveys were conducted was highly impacted by the Covid-19 pandemic. Berat experienced a much lower than usual touristic season, considering that most borders were closed. The survey was conducted by integrating online questionnaires to personal encounters and interviews done also with the help of touristic destinations and organizations such as museums, hotels and tour operators.

Below are presented the main findings.

- **Berat is a desired destination in Albania visited by a considerable number of tourist of different nationalities who stay in the city for 1-2 days**

The collected data show that the city of Berat is a well-received destination of tourists regardless of age (since 18 up until to over 80) who come from over 20 different countries (mostly from Europe, but also a notable number from Asia and North America). A large majority of tourists (over 70%) stay in Berat for 1-2 days and over half of them (57%) visit the city for the first time.

- **Berat attracts tourists mainly for sightseeing**

Most tourists (63%) express that their main reason for visiting the city is sightseeing the numerous cultural and historical monuments of the Berat. The old city center composed of the picturesque neighborhoods of Gorica and Mangalem, in addition to the city's castle are the main points of destinations, as these areas include many important museums and religious monuments. A relatively important number of tourists, especially domestic ones, arrive in the city with the main purpose of visiting family and/or their friends. A potential for growth is observed in tourists interesting in sport tourism, gastronomy, and religious tourism.

- **Most tourists arrive in the city by private cars or touristic buses**

Considering that Berat is an inland city, most international tourists (especially those from Asia, America, and Western Europe) arrive in the country by airplane. A smaller amount living in neighboring countries arrive by ship (when possible) or car/touristic buses for neighboring countries. Most of domestic tourist use private cars as well. When asked about the reasons behind their choices, tourists list "*most comfortable, faster way, lower cost, safest way*" as their most common responses. Within the city, tourists mostly walk to their desired destinations - considering also the proximity of main points of interest with one another. Some prefer to use their private cars or touristic buses, especially if trips outside the city are planned.

Sustainable mobility transportation modes such as bicycles, though a preferred alternative, are only fairly used. The reason for that is mainly because the city does not offer a bike network connecting the main points of interest. The current bike lines run only through the city center.



A dominating majority of tourists express a general satisfaction with their choices of transportation modes.

- **Most common difficulties that tourists experience include a lack of integrated tourism and transport information, in addition to lack of infrastructure for alternative transport**
The collected data show that tourists have concerns regarding several gaps and difficulties that they have encountered in their trip within and outside the city. The most common problems are:
 - Lack of organized integrated tourism - transport information provision (stable kiosks and electronic services/mobile apps)
 - Lack of appropriate infrastructure for alternative transport modes (e.g. pedestrian paths, bicycle paths, bike-sharing systems)
 - Lack of adequate connectivity between the city center and the airport or/and the port or/and the main bus station

- **Tourists are highly interested for using a mobile application during their visit**
Almost 9 in 10 tourists are in favor of using an integrated mobile application which offers touristic information about main points of interests and transportation modes, while offering them the possibility to express their ideas and/or complaints. Most tourists would use such a mobile application for information regarding main points of interest, cultural sites and museums, and tourists services related to hotel accommodation and gastronomy. Other notable usages include also information on transportation modes and thematic routes within and outside the city. Tourists think that they will use the application more in case they would be rewarded about that. The most preferred rewards include discounts at hotels and restaurant, in addition to discounts to museum and cultural sites.

The mobile application is most preferred by younger generations. Its implementation could be of good use considering that the city's touristic offers and services lack similar applications that can help to move towards digitalization and enhancement of tourists' experience.

- **A large majority of tourists are in favor of participating in organized walking tours with a professional tour guide in the city center, but also outside the city**
A dominating majority of 83% of tourists are in favor of participating in organized walking tours within the historic centre of Berat with a professional touristic guide. Only 5% of participants are opposed to the idea. Tourist have a higher preferation for a 3-hour walking tour including the city's castle alongside with the famous Mangalem and Gorica quarters in comparison to a 2 hour walking tour including only the castle of the city. They would be willing to pay, on average, approximately up to 5 Eur for such tours.



- **An important majority of tourists are interested to participate in organized bicycle tours**

Almost 6 in 10 participants in our survey are in favor of participating in organized biking tours with a professional touristic guide. As it can be expected, a deeper analysis of data shows that tourists up to 50 years old are more in favor to such option. Such preference declines as the age of the tourist increases. Tourists would be willing to pay, on average, approximately up to 5 Eur for such tours. The most preferred biking tour scenario is the alternative which proposes a biking tour through the entire city - selected by 45% of participants, and followed by a biking tour in the castle - selected by 19% of participants, and a biking tour in the surrounding areas (Roshnik's village) - selected by 8% of participants.

- **Tourists are generally undecided about the usage of an integrated touristic card**

When asked if they were interested to use an integrated touristic card (pre-paid card for free access to specific touristic and transport services), tourists were in general undecided, though slightly in favor of such card. 4 in 10 participants responded in favor, with the rest being either opposed or undecided.

Such card, if implemented, needs to be more carefully revised in order to include the main features that tourists generally prefer. A reason explaining the results might be the fact that most tourists generally stay in the city for 1 to 2 days, and therefore do not see the integrated card as a necessity

2.8.6 Listening to tourism and mobility stakeholders - insights from the 1st Technical Round Table

Supplementary with the needs and the requirements described in del. T.1.3.1, some key findings are also presented below, based on the 1st Round Table with stakeholders that took place in 29/10/2020 in Berat.

The main objectives of the round table is to present the project (goal, objective, activities) among important local tourism and transport stakeholders; to identify, discuss and address the main needs of the community and stakeholders for the development of sustainable tourism and mobility; and to strengthen the cooperation with stakeholders in tackling these challenges, in the context of the project.

Discussions were focused on common questions related to the SUSTOURISMO project and to local questions related to the pilot development. Participants were able to cross-reference ideas and share their expertise on the above-mentioned issues. Below are summarized the key findings of the round table discussions.

i) Several technical and political elements need to be considered for a successful implementation of the pilots.



Participants agree that the single most important element that needs to be considered for the successful implementation of the project and its activities, including the pilots, is the *cooperation of different stakeholders*. Challenges will be presented when the implementation of pilots will take place. RCB must find a common understanding with other public institutions such as the Municipality of Berat, the Ministry of Tourism and Environment, and the Ministry of Culture in order to ensure a sound legal framework upon which to work regarding the pilot implementation. The most pressing issue is the definition and implementation of the '*reward schemes*', which require collaboration with numerous public and private actors in order to take place. Participants also urged the inclusion of the community as a key factor for the successful implementation of the project.

ii) Sustainable tourism and sustainable mobility are closely connected to one-another

Sustainable tourism development is seen by the round table participants as closely connected to the development of sustainable mobility. An integrated approach is considered an effective manner of promoting the region's sustainable development. Participants highlight the importance of having more *dedicated bike lanes* as a key infrastructural element that will promote sustainable mobility and tourism in Berat. Moreover, they consider the involvement of younger generations as a crucial contributor for the improvement of the current situation.

iii) An integrated mobile application that provides information to tourists is a well-received idea

The participants of the round table agree that an integrated mobile application that provides tourists with information while collecting data can be a very interesting and innovative approach that impacts the development of sustainable tourism in the region. They highlight the importance of the application to reach potential tourists, and to provide institutions with relevant data upon which to build future policies and actions. Participants also require expanding the scope of the application to include a variety of information that relates to not only touristic sightseeing destinations, but also provides information about artisans, bars, restaurants and other leisure time activities. The mobile application is considered as a significant tool that can be even more helpful during the pandemic. It can serve as a virtual tour guide showing the main points of interest in the city.

iv) The Covid-19 pandemic will have an impact on the development of the tourism sector. Stakeholders must act to address it in a principled manner

All participants agree that the Covid-19 pandemic will have a notable impact on the development of tourism. They consider the tourism sector to be one of the most affected sectors because of the pandemic. Nevertheless, they agree that these challenges must be addressed in an effective and principled manner, arguing that only countries that will take the better actions will be the ones to reap the benefits in the longer term. To that end, participants agree that stakeholders should focus on: i) increasing the number of domestic tourists, ii) provide new innovative tourism offers by diversifying the touristic products, iii) improve the quality of service, and iv) make use of technology.



v) *The SUSTOURISMO project and pilots can be promoted effectively through a variety of communication tools while ensuring stakeholders' cooperation and synergies with other projects.*

A successful promotion and implementation of the project and its related activities, especially regarding the pilots, requires a close and effective collaboration between different stakeholders. Furthermore, all means of communication (such as: project activities, social media, websites, newspapers, local channels, and others) should be used to reach interested parties. Participants of the round table also urge to focus on a qualitative representation of the project and offered products, and not merely a quantitative one. They also consider the involvement of the community as a key and crucial aspect that determines the success of a project.

Joint ventures are required in order to amplify the impact of the project, especially by establishing synergies with other stakeholders that are implementing (or have implemented) other projects with similar objectives. The municipality of Berat has few projects related to the development of sustainable tourism that aim an increase in the usage of bikes.

vi) *Strengths/Opportunities and Weaknesses/Risks related to the development of pilots*

Participants identify the following strengths and opportunities related to the pilots' development

- Focus on sustainable tourism and mobility development
- Integrated and diversified touristic offer
- Focus on revitalizing the cultural heritage and the identity of the city
- Integration of activities on the historic city center, as well as the surrounding areas
- Involvement of different stakeholders
- Integration of technological tools with traditional means of promoting tourism development
- Minimizing carbon footprints through the promotion of sustainable mobility activities
- Promotion of a healthier lifestyle

Participants identify the following weaknesses and risks related to the pilots' development

- The Covid-19 pandemic will have a clear impact on the development of the pilots
- The ability to engage necessary stakeholders
- Lack of all necessary infrastructure, especially related to bike lanes
- The need for a strong and appropriate legal basis to make the 'reward schemes' functional
- The ability to engage the community
- The ability to engage all the needed volunteers
- The ability to publicize and make the project known to all interested parties
- There is only one licensed paragliding instructor in Berat

The most appropriate incentives to promote sustainable tourism and mobility behaviors

Participants agree that the most appropriate incentives to promote sustainable tourism and mobility behaviors are the following:



- Discounts at museums and other important cultural sites
- Discounts at hotels, bars and restaurants
- Discounts on public transportation
- Discounts at the usage of rented bikes
- Discounts in the form of free souvenirs from an artisan
- Discounts at sporting and other recreational activities

An integrated touristic card can be an effective tool in sustainable tourism development

Participants agree that if developed in a proper manner, an integrated touristic card can be another important step toward the modernization and enhancement of tourism development in the region. It can serve to lengthen the time that tourists spend in the city, while providing another tool that helps diversify the touristic offer. Nevertheless, participants see several risks related to such an approach, especially in terms of identifying and applying the necessary legal basis/framework that is needed to make the touristic card effective. Participants consider the collaboration of stakeholders as crucial in the efforts of developing and implementing an integrated touristic card.

2.8.7 Combining finding in a SWOT analysis for the case of Berat

Table 16: SWOT for Berat

Strengths	Weaknesses
<ul style="list-style-type: none"> - Rich cultural, historical, religious, and natural heritage - Berat is one of the two designated <i>museums cities</i> in Albania and a UNESCO world heritage site - Berat is visited by a large number of tourists from numerous countries of the world, including Asia, and North America - The city contains several museums in the historic area, two of them are important national museums - Increasing family, historical and cultural touristic sector - City of Berat is at the centre of the Region - Proximity to Mount Tomorri. Osumi canyons and other natural monuments 	<ul style="list-style-type: none"> - Slow decentralization process - Tourism-based businesses exploit the city's historical and architectural heritage - Tourism capacities and the services provided do not create the necessary environment for lengthening the duration of stay of tourists - Lack of an integrated touristic offer that would contribute also to the length of stay of tourists - Absent or low collaboration between stakeholders in the tourism sector with the ones from the mobility sector - Lack of an integrated and effective long term urban plan for the city - Increasing trend of private vehicle use considering also the fact that Berat is an inland city and does not provide



<ul style="list-style-type: none"> - Large number of agribusinesses, mainly based on local agriculture products - Berat is rich in gastronomy and culinary tradition. Local business are enhancing the tradition to a higher level - Handcraft production is an important sector of economy with high potential of development in future - Existing national road network provides ease of access of the Berat region to national highways, airport(s) and seaports - Short distances with neighbouring cities and regions - Municipality with relatively high percentage of population with a certain level of education, which yields to valuable asset for the labour market - Mild Mediterranean climate. Berat is one of the most sunny cities in Albania - Including the surrounding green areas, the green space per capita is 20-25m² - Limited sources of air pollution (mostly traffic and construction) - Effective response to urban environmental concerns (waste) 	<ul style="list-style-type: none"> - many other alternative transportation modes - Lack of rail network - 1.2 m²/capita of green spaces (city of Berat) - Fair presence of entertainment options. - Limited offer of cultural events - Lack of movie theatres in the city - Underdeveloped civil society in the city <ul style="list-style-type: none"> - low number of active local NGOs - Fair capacity of businesses to expand and invest in areas with development potential - Low number of start-ups and technology-related development
<p>Opportunities</p>	<p>Threats</p>
<ul style="list-style-type: none"> - For the last decade, Berat has enjoyed a growing rate of tourists' arrivals. - Proximity to ports of Vlora and Durrës and the international airport at Tirana - An notable increase attention towards sustainable tourism development both at local, regional, and national level - Reconstruction of houses in the old city centre and their transformations to hotels and hostels - The development of an effective tourism marketing plan - Collaboration between important stakeholders, both private and public - There is a will to move towards digitalization and enhancement of services 	<ul style="list-style-type: none"> - Specialists migrating from the city and moving to Tirana or abroad - Emigrating population - Lack of an integrated and clear development vision focused on the key priorities of the region - Poor infrastructure for the development of alternative transportation modes - Negative effects imposed by the Covid-19 pandemic being spread on multiple levels such as tourists arrivals, local economy, a general sense of uncertainty, lack of investment, etc. - Competitive environment in national and international level



	<ul style="list-style-type: none"> - Difficulties to engage the local community on sustainable tourism and mobility initiatives
<p>Source: (Municipality of Berat; Agenda Institute & Olof Palme International Center, 2008), Region's own analysis</p>	

2.8.8 Drafting of the SUSTOURISMO touristic packages of Berat

The SUSTOURISMO packages for the case of Berat are being drafted after a careful analysis of the touristic potential of the city integrated with the specific interests and insights of stakeholders, as discussed above. In that regard, the pilot phase for Berat refers to the provision of the following two touristic packages;



Figure 152: Berat's pilot area in SUSTOURISMO

The first touristic package aims to explore and experience the city on foot or by bicycle, while the second touristic package offers tourists the opportunity to experience nature and adventurous sports. In more detail, the touristic packages are described below.

I. Touristic Package A: Exploring the city on foot or by bicycle

This package will offer tourists the opportunity to experience the rich history and culture of Berat through organized *walking* or *bicycle* tours, focused mainly within the historical city centre and



the castle of the city. These tours will offer tourist the possibility to know the 24-century long history, culture, art, tradition and to experience the city in all its dimensions. The goal of this action is to increase cooperation with tour agencies / guides / hotels, reinforce a bike sharing system in the Municipality of Berat, and special offers and opportunities. In that context, collaboration with professional tour guide would be made possible in order to accompany tourists to the main points of interests, including sightseeing, visits at museums and religious monuments, in addition to experiencing the daily living with specific agreements with traditional restaurants and bars giving tourists the opportunity to get familiarized with the city's rich gastronomy. In addition, tourists will be offered the opportunity to visit the works of a skilled artisan doing refined craft work.

'Discover 24 centuries of history, culture and tradition through a walking tour full of curiosity while further exploring the city by bike or scooter!'

Cooperating hotels: Hotel Gega, Grand White City Hotel, White City Hotel, Portik Hotel, Kantina Alpeta

Combination of services	Operators / companies that accepted to offer the services during the testing phase	Duration
1) A guided walking tour	1001 Albanian Adventures (https://www.instagram.com/1001albanianadventures/)	3h
2) A bike or a scooter ride	Bikes and Scooters in the city centre	1h

Short description of the provided services

Berat: Historic City Walking-Tour

Highlights

Explore the Castle of Berat, the biggest castle in Albania

Visit Berat's beautiful world heritage sites, including Mangalem and Gorica

Travel back in time in the Medieval Center

Marvel at the Byzantine wonders inside the Onufri Museum

Full description

The tour will start at the **Gorica Bridge**, a seven-arched stone landmark with a view of Gorica's quartier where the architecture is beguiling and the streets equally precipitous. The tourist(s) will walk towards the ancient quarter of **Mangalem**, which fans out under the



castle's wing. Houses inch up the hillside all vying for a precious slice of Berat's view. Walking in spiraling stone streets and alleys tourists will visit the **iconic Medieval Center**, where they will gaze upon the beautiful **King Mosque**, one of the oldest mosques in Albania, and the **Halveti Tekke** monument. Traveling back in time will be possible as tourists stroll through the meandering streets, learn more about the architecture of this "town of a thousand windows" and discover about the relationship between Albania's religious groups.

The tour will continue towards the city's famous castle by stopping first at **National Ethnographic Museum**, one of the grandest houses in the city. Tourists can dive into history and tradition as the museum contains original furniture and a number of household objects, wooden cases, chimneys and a well.

Tourists will then climb up to the magnificent **Castle of Berat** and marvel at the fort and witness the monuments and treasures inside. Within its walls, tourists will find a vast citadel complex comprised of stone streets, houses and Byzantine churches mixed in with ruins from various epochs. Apart from the walls and ramparts themselves, key points of interest within Berat Castle include the 14th-century **Church of Saint Trinity**, the **Church of Saint Michael** and the **Church of Saint Mary of Blachernae** and the remnants of the old acropolis, including a **subterranean water cistern**.

The walking tour will be finished by exploring Byzantine art and iconography in the **Onufri Museum**, located inside the walls of the Dormition of St. Mary Cathedral, a three-naved Byzantine basilica settled inside the castle walls including in a gallery-style a sizeable collection of Orthodox icons, and paintings.

The 'overview' of the city by bike or e-scooter

The tourist that participates in the 1st package, can also enjoy a 1h ride (bike or e-scooter) to further explore the city.

The time frame for participation in Berat's SUSTOURISMO touristic package No1

The tourist that participates in, this first for the case of Berat, SUSTOURISMO touristic package can experience both services within two days, each one provided once.

The procedure for participating/booking, the role of cooperating actors and the points collection through the app

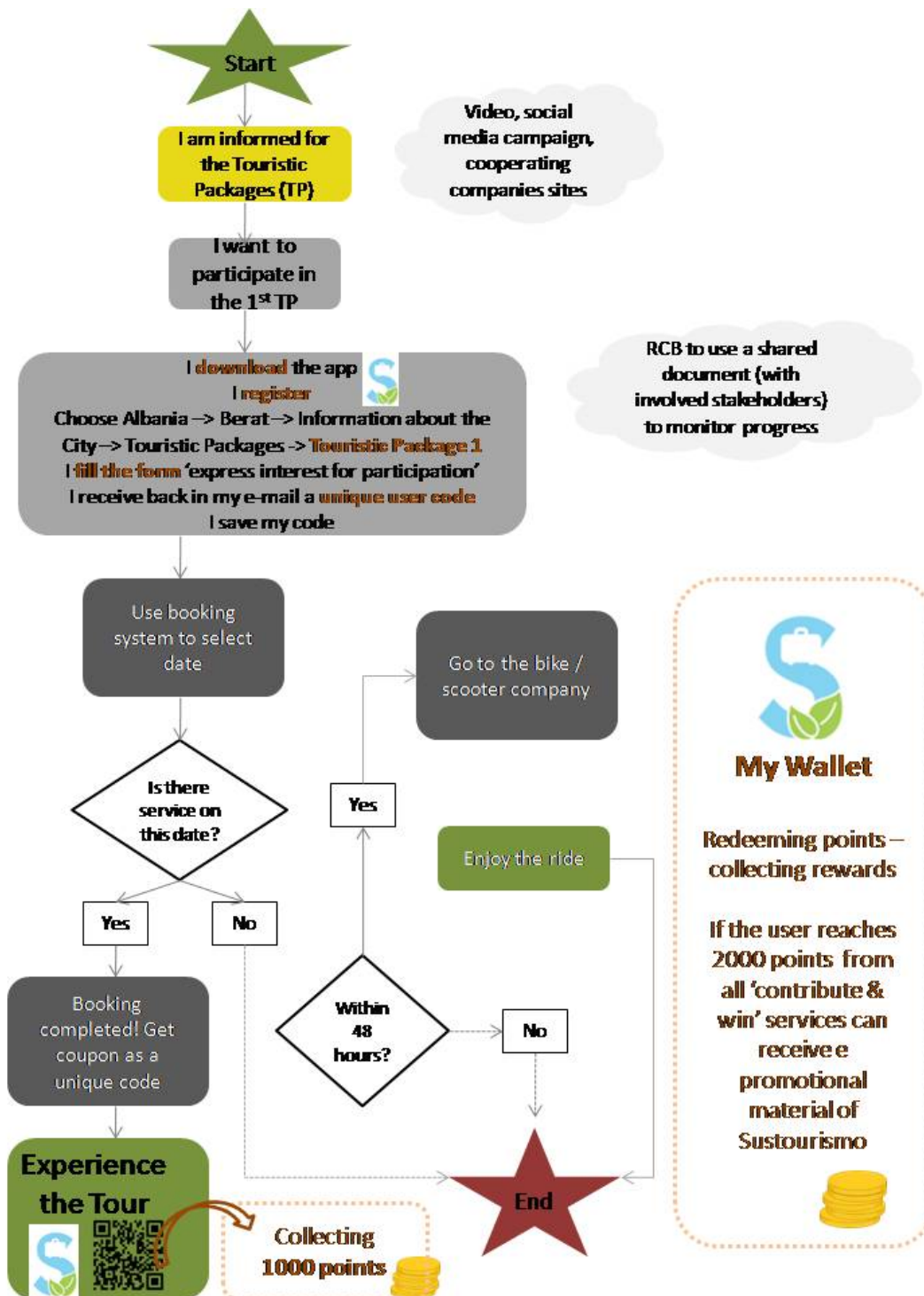


Figure 153: Flow diagram for Berat's TP1



II. Touristic Package B: 'Experience tourism, artisan local products, food and wine tasting'

Cooperating hotels: Hotel Gega, Grand White City Hotel, White City Hotel, Portik Hotel, Kantina Alpeta

Combination of services	Operators / companies that accepted to offer the services during the testing phase	Duration
1) A guided walking tour	1001 Albanian Adventures (https://www.instagram.com/1001albanianadventures/)	1 h
2) Wine tasting and agro-tourism visit	Alpeta Winery (http://alpetawinery.com)	3 h
3) Free coffee	Gimi Coffe House	Free time

Short description of the provided services

The tourism, food and wine tasting experience

The tourist(s) will have the opportunity to experience living like a local, while exploring the picturesque view of the city, drinking high quality coffee in the city centre, and tasting wine in a famous winery the Roshnik's near-by village. As the tourists walk with an experienced guide, passing by the famous stone streets and alleys gazing at the famous architectural landscapes of the UNESCO protected areas of Mangalem and Gorica, they can enjoy a coffee in **Kafe Gimi**, one of the most famous bars in the main boulevard. Near-by, tourists have the chance to view **artisanal products** displaying charactersitic Albanian refined works on wood, stone and other materials.

Tourists will then be guided towards Alpeta winery, located 12 km away in the Roshnik's village. The tour in the winery will offer a walk through the vineyards and the fields, and then visit the 300 year old house of a famous family in there, Qyperlinj, a family which held important governmental post during the Ottoman Empire era. A visit will follow in the premises of the **Alpeta winery** to get introduced to the process of wine making and taste different types of wines and the two types of raki as well, the white and brown one. Tourists will be able to accompany wine tasting with some nice dried figs, cheeses and other local products, and if wanted, can also enjoy the local traditional food too.

A return trip will bring tourists back to their point of departure

The time frame for participation in Berat's SUSTOURISMO touristic package No2



The tourist that participates in this second SUSTOURISMO touristic package for the case of Berat can experience all services within two days

The procedure for participating/booking, the role of cooperating actors and the points collection through the app

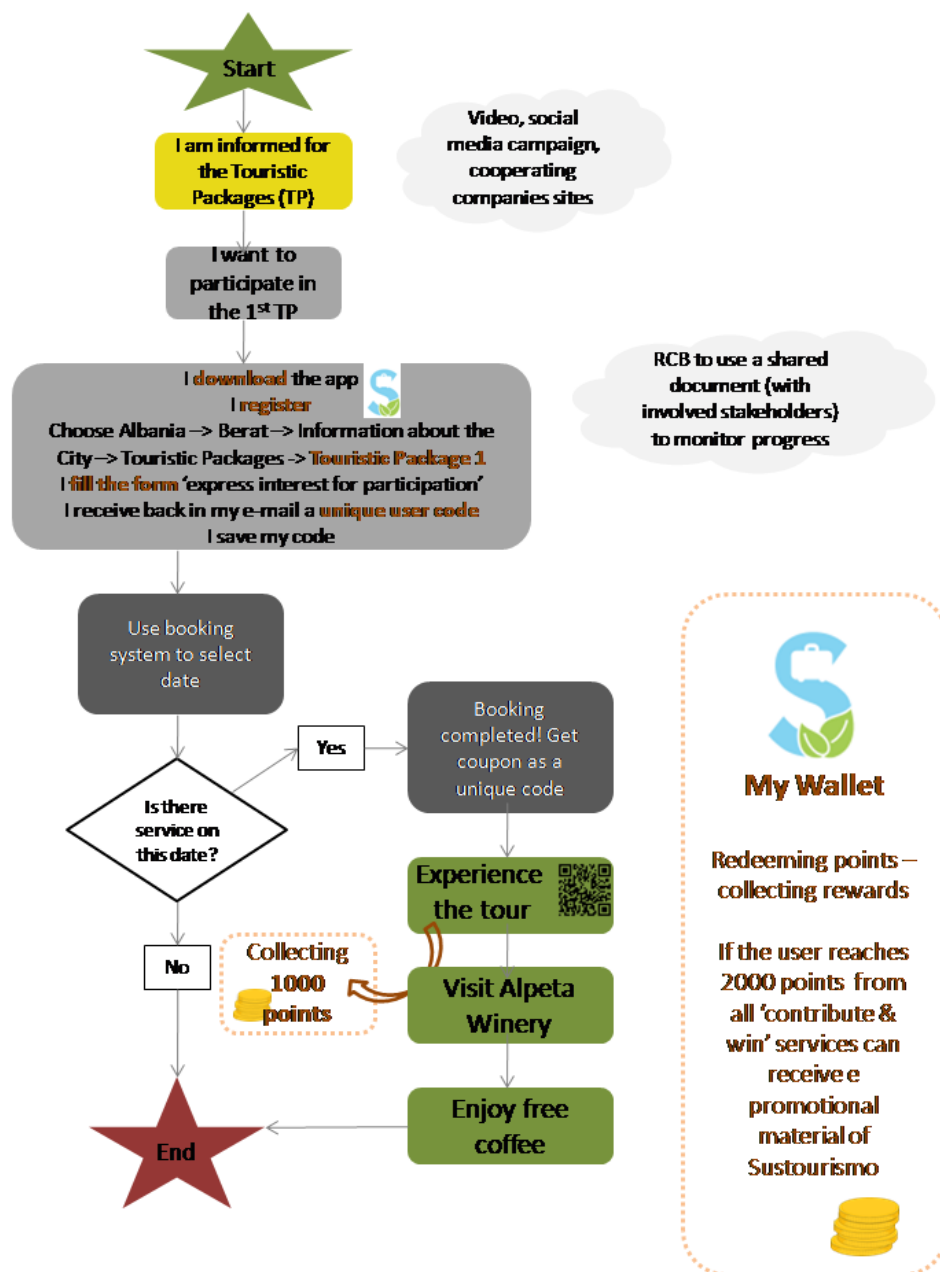


Figure 154: Flow diagram for Berat's TP2



More:

In this context, in order to make possible the development and implementation of such touristic packages, R.C.B is working actively to develop a database of stakeholders which includes a pool of relevant interested parties that will be engaged throughout the project. Relevant stakeholders include: municipalities of the region, with regional / national agencies, Ministries and national agencies, tour operators and tour guides, sport associations, small businesses, agro-tourism enterprises, business support organizations, the general public and especially younger generations. Table below provides a summary of the key stakeholders

Table 17: Interested stakeholders for supporting SUSTOURISMO goals

	Organization	Notes (e.g. experience with the subject matter, cultural background, etc.)
1.	Municipality of Berat	Experience in developing and implementing policies that affect numerous areas such as tourism, transport, etc
2.	Regional Directorate of Culture	Experience in the cultural and touristic sector
3.	Tourism Association	Experience in the tourism sector
4.	Artisan Center	Experience in the tourism sector, focusing on handcrafts
5.	Public Buses Service Providers	Experience in the mobility sector
6.	Albanian Rafting Group	Experience in tourism (adventurous sports, guided tours)
7	Air Club Albania (Paragliding)	Experience in tourism (adventurous sports)
8	Private Hotels	Service providers in the tourism sector
9	Private agro-tourism destinations, bars&restaurants	Service providers in the tourism sector
10	Private tour operators	Experience in tourism (guided tours)

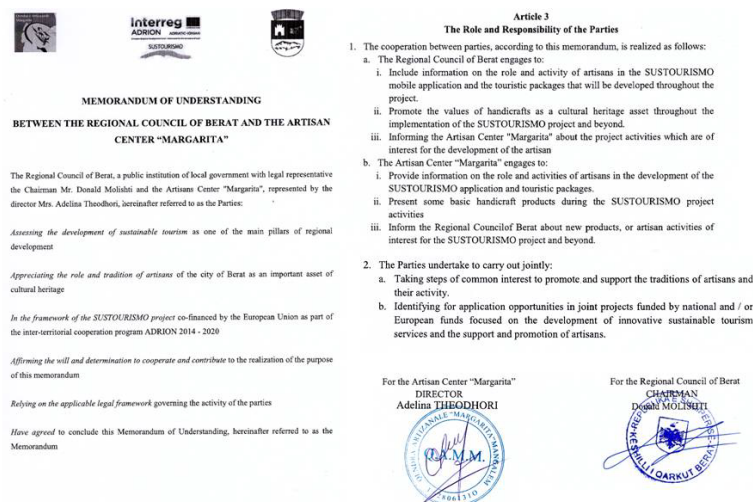


Figure 155: Part of the text of the Memorandum of Agreement signed between the Regional Council of Berat the Artisan Centre "Margarita"

The collaboration with the above mentioned stakeholders, and others, are crucial to the successful



implementation of the designed touristic packages. R.C.B is in the process of formalizing agreements with many stakeholders. For instance, a Memorandum of Agreement was signed with the artisan centre “Margarita” to ensure the collaboration with artisans during the implementation of the project. Figure 150 highlights such agreement.

Similarly, R.C.B aims to formalize agreements with other important stakeholders and engage them during the testing phase and the implementation of the project in many different areas of particular interest for them. For instance

- Hotels and agro touristic destinations will inform their visitors about the SUSTOURISMO packages through the displaying and sharing of leaflets and other promotional materials.
- Public institutions such as the Municipality and Regional Directorate of Culture will share information and seek for active opportunities to be engaged in the special offers, such as: possibilities of discounted prices for entering the museums
- The tourism organization and tour guide agencies will offer professional thematic guides and offer their services during the testing phase
- The Albanian Rafting Group and Air Club Albania will offer their services for adventurous sports
- The aim is to design special offers with agro touristic destinations, traditional bars and restaurants in order to create opportunities for enjoying the city during the leisure time.

The whole process of engaging stakeholders during the testing phase, and more generally, during the implementation of the project is not at all exclusive. On the contrary, it is the key objective of R.C.B. to include as many stakeholders as possible. All the information will be updated regularly on our official website and other active means of communication will be employed in order to achieve as greater engagement as possible.

In that context, the promotion of the SUSTOURISMO project is an important aspect that must take place throughout the project. This will be done through social media channels (Facebook, LinkedIn), and the project’s official website. There are several videos being developed to promote the project and its contribution to the development of a more sustainable tourism model. Moreover, cooperation with stakeholders and bodies active in the tourism sector will further amplify the impact and outreach of the project.

The project has defined a set of expected results that ought to follow the implementation and completion of the project. These include the exploration of tourists’ needs, and the use of their touristic footprints in order to improve several plans that reflect the needs and patterns of the industry. The goal of the project is to promote and advance green and sustainable tourism models, which will result in the minimization of the carbon footprint and emissions caused by the tourist industry. The project will additionally increase the visibility and attractiveness of several touristic landscapes and attractions in the city and wider region of Berat. The aim is to improve their visibility and attract more visitors, while increasing their protection and preservation. Moreover, less “popular” and known locations will be brought to the surface and be highlighted as additional



touristic products of high-quality. By improving the accessibility of various locations, and involving a broader spectrum of visitors, including younger generations, will further contribute to the growth of the sector. Moreover, through the promotion of healthier lifestyles, and the highlighting of green and sustainable initiatives, the goal is to reduce costs, while increasing the competitiveness, attractiveness and sustainability of the tourism sector.

2.9 The case of Belgrade (Serbia)

2.9.1 The overview of Belgrade

The City of Belgrade is the capital city of the Republic of Serbia with over 1.6 million inhabitants. As such Belgrade is the capital of Serbian culture, education and science. Belgrade has theatres, cinemas, museums, concert halls and other cultural facilities. The largest concentration of institutions in the field of science and art of national importance is located here. Belgrade's cultural and historical heritage is wide-ranging and represents the wealth of the Serbian capital.

Belgrade is a city that has a number of parks that complement urban content and make green oases both in the heart of the city and in its immediate vicinity. 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 a real pleasure for both residents and all those who visit Belgrade. In the immediate vicinity of the city center is the river lake "Ada Ciganlija", one of the favourite sports and recreational places in Belgrade. The experience of the so-called Belgrade sea is completed with various sports and relaxation facilities.

In addition to the above, Belgrade is also the center of various events from nightlife, restaurants, concerts, festivals, and other similar events. Also, anyone who visits Belgrade can do a shopping tour.

Concerning transport Belgrade represents first-class traffic importance, as a significant road and railway hub, as well as an international river and airport and a telecommunications center. Belgrade has the status of a special territorial unit in Serbia, which has its own autonomous city administration. Its territory is divided into 17 municipalities, which have their own local authorities.

(Source: <http://www.begrad.rs/lat/upoznajte-beograd/>)

The following figure shows the state roads located in the Belgrade region. The most important is the state road marked A1, it is the highway from the state border with Hungary (border crossing Horgos), through Novi Sad, Belgrade, Nis, Vranje to the state border with Macedonia (border crossing Presevo). This category of road in the part of the capital is a Belgrade bypass. The part of the highway that passes through Belgrade itself is marked in purple.

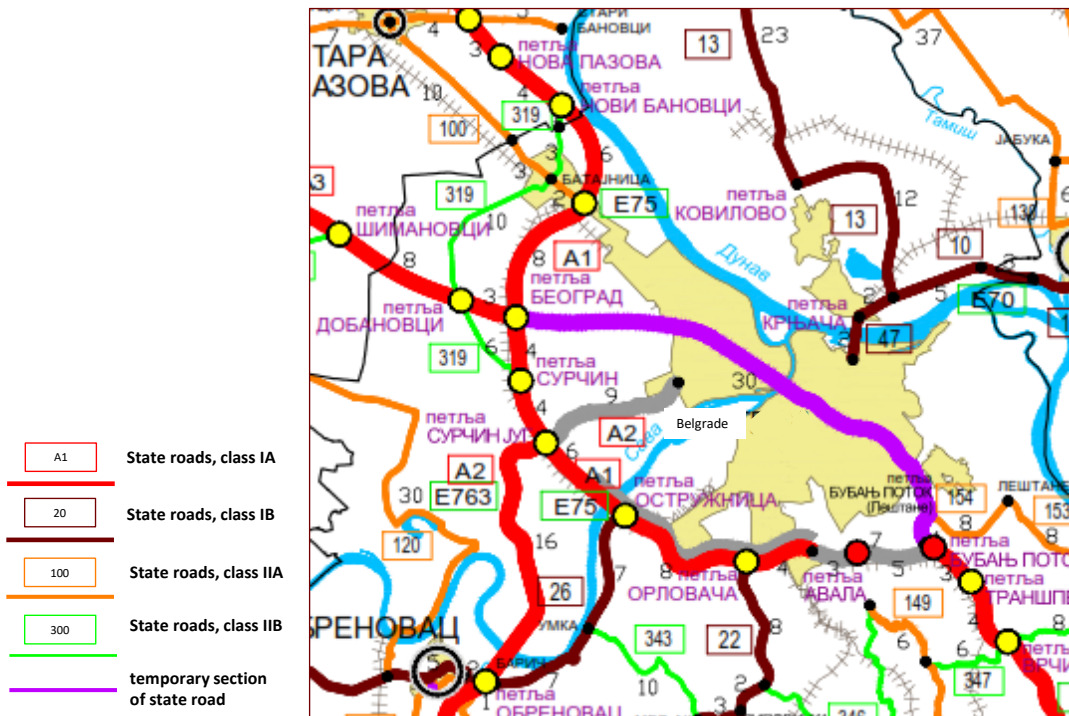


Figure 156: State roads, Area Belgrade (Source: Public Enterprise Roads of Serbia website https://www.putevi-srbije.rs/images/pdf/referentni-sistem/Karta_drzavnih_puteva.pdf)

Railway traffic in Belgrade takes place within the BG train, which is integrated into the urban public passenger transport in Belgrade. Intercity and international railway traffic also takes place from Belgrade. The larger railway stations in Belgrade are: Belgrade Center (Prokupačka bb), Vuk's Monument (Ruzveltova bb), Rakovica (Patrijarha Dimitrija bb), New Belgrade, (Antifašističke borbe bb), Zemun, (Cvijičeva 1).

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, 2,779,000 passengers were transported, 10% more than in the previous year. In addition to renting cars and taxis, the city itself can be reached by using some of the public transport lines (bus number 72 and 607).

The public transport network in Belgrade consists of bus, trolleybus and tram lines. According to the data from 2018, the total number of bus lines was 85, trolleybus 7, tram 12 (according to the website of Urban Public Transport Enterprise "Belgrade" <https://gsp.rs/statistika.aspx>).

According to the same source, the length of the network of bus transport lines is 1313.2 km, trolleybus 55.8 km, and tram 132.02 km (data for 2018). There are over 2500 public transport stops.



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, the positive trends on the labour market continued, at the level of the Belgrade region. According to the Statistical Yearbook of Serbia the number of employees in the Belgrade region in 2019 was 742,122 (Statistical Yearbook, Belgrade 2020, Statistical Office of the Republic of Serbia, ISSN 0354-4206, <https://publikacije.stat.gov.rs/G2020/Pdf/G20202053.pdf>). The average salary in the Belgrade region in September 2019 was € 783.92.

2.9.2 Learning by the numbers and facts; tourism data and connectivity level for the case of Belgrade

In the Republic of Serbia, in the period from 2009 to 2018, the lowest number of both tourist arrivals and overnight stays were recorded in 2014. From 2014 to 2018, tourists' arrivals and overnight stays grew from year to year. However, given that tourism is one of the sectors most affected by the Covid-19 pandemic, it is to be expected that the number of tourists and the number of overnight stays will decrease significantly in 2020, especially foreign ones.

The total number of tourists in 2018 amounted to slightly less than 3431 thousand and was higher by 11.17% compared to the previous year. The share of domestic and foreign tourists was almost the same. Specifically, there were 1720 thousand domestic tourists, which is 8.27% more than in 2017, while the number of foreign tourists who visited Serbia was 14.25% higher than in 2017 and amounted to 1711 thousand.

In 2018, the realized number of overnight stays of all tourists who used accommodation capacities amounted to 9336 thousand and was higher by 12.14% compared to the previous year. Domestic and foreign tourists realized 5678 thousand and 3658 thousand overnight stays in 2018 respectively. Compared to 2017, the domestic tourists recorded an increase of 10.26%, while the number of overnight stays of the foreign tourists increased by 15.20%.

In Belgrade, the total number of tourists in 2018 was 1161 thousand. The number of domestic tourists was 189 thousand, while the number of foreign tourists who visited Belgrade amounted to 972 thousand.

The realized number of all tourists' nights in Belgrade was 2.48 million. The number of overnight stays of foreign tourists amounted to 2.01 million, while the number of overnight stays of domestic tourists amounted to 0,47 million of nights.

Tourist data at national level

The largest number of foreign tourists who visited the Republic of Serbia in 2018 were tourists from Bosnia and Herzegovina (121 thousand arrivals, 263 thousand nights), China (102 thousand arrivals, 179 thousand nights), Bulgaria (100 thousand arrivals, 168 thousand nights), Turkey (97 thousand arrivals, 175 thousand nights) and Croatia (94 thousand arrivals, 177 thousand nights).

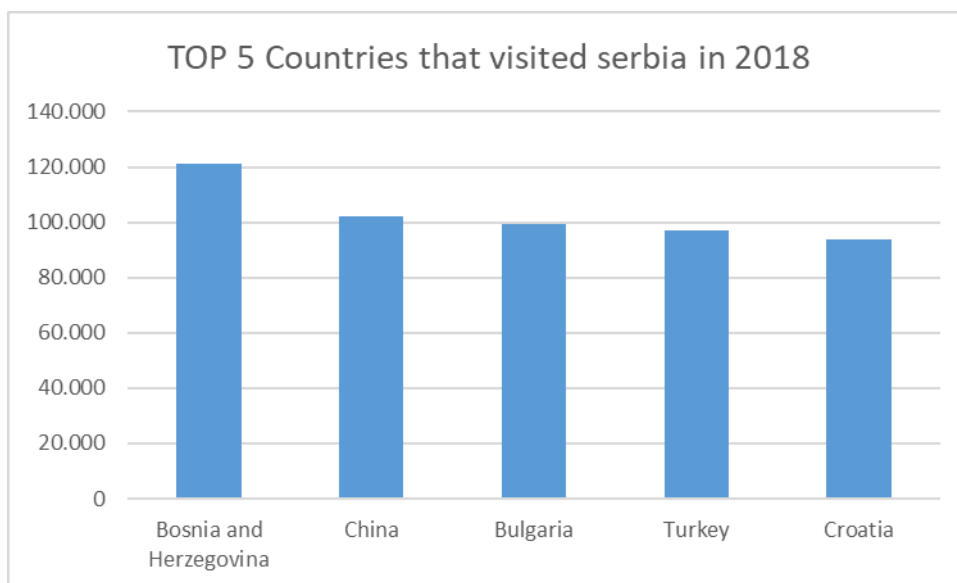


Figure 157: Top 5 Origin Countries for Serbian International Tourism (top arrivals), 2018 (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019)

Slovenia (87 thousand arrivals, 157 thousand nights), Greece (71 thousand arrivals, 129 thousand nights) and Montenegro (82 thousand arrivals, 209 thousand nights) also recorded significant number of foreign tourists who visited the Republic of Serbia in 2018.

The total number of overnight stays of tourists from the countries that visit Serbia the most is shown in the following figure. That number is increasing from year to year and in 2018 it was 1.576.485 overnight stays.

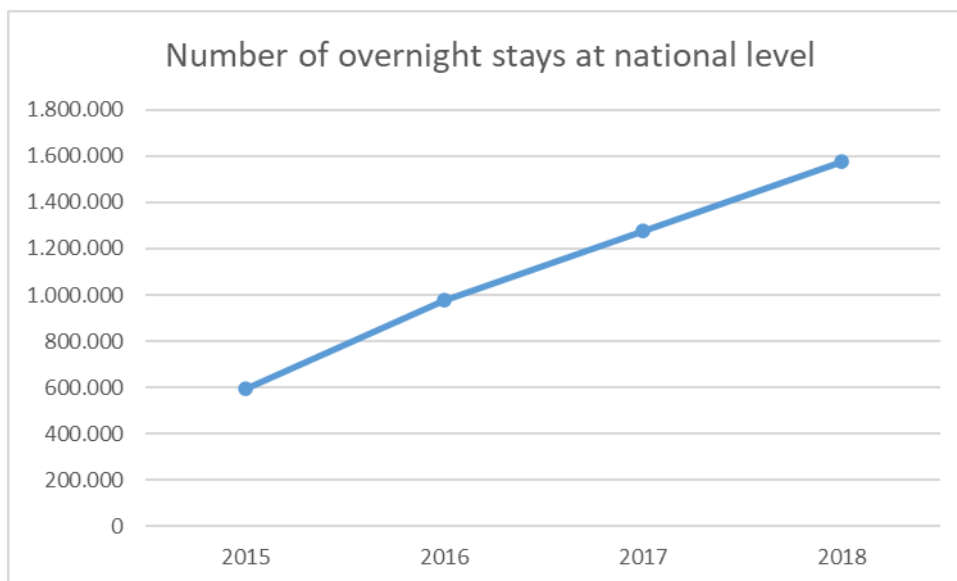




Figure 158: Number of over night stays of tourist from countries that visit Serbia the most (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019)

Number of domestic tourists at national level is also increasing from year to year. Available data from 2015 to 2018 are shown at following figure. In 2015 there was 1.304.944 domestic tourists in Serbia, and in 2018 1.720.008. It is most likely that during 2020, there was a significant increase in domestic tourism. Due to the COVID19 pandemic, it was possible to travel only to certain countries. So, many citizens of Serbia spent their holidays in their country. We still have to wait for the official data.

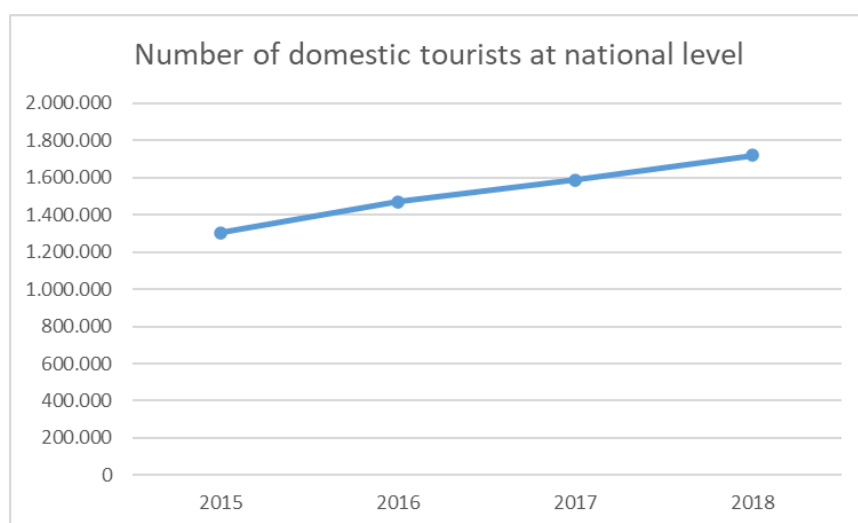


Figure 159: Number of domestic tourists at national level, from 2015 to 2018 (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019)

Tourist data at city metropolital area

Number of arrivals of foreign tourists in Belgrade in 2014 was 597.765. Over the years this number has increased to 2018 at 971.942 and certainly had a growing trend.

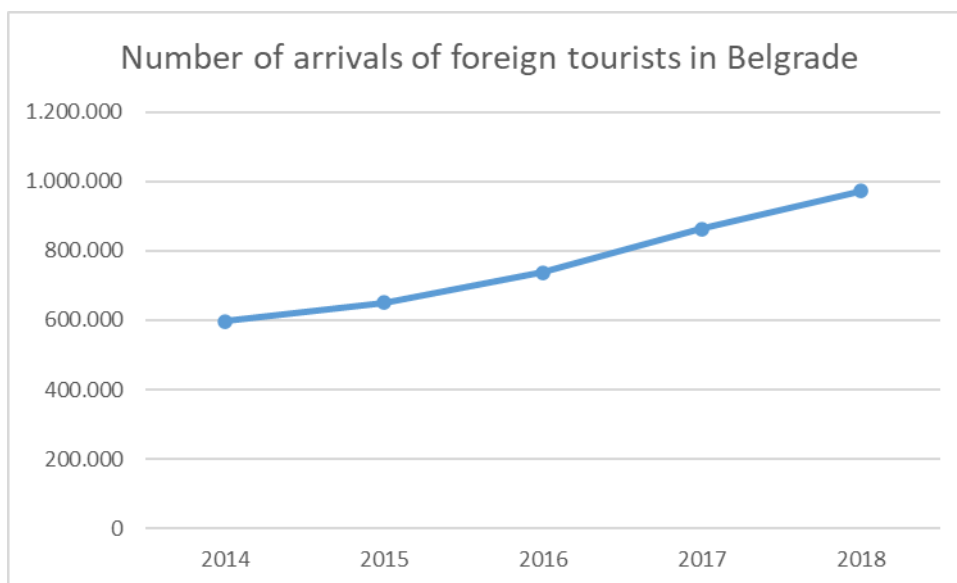


Figure 160: Number of arrivals of foreign tourists in Belgrade, from 2014 to 2018 (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019)

Regarding the domestic tourist in Belgrade, it could be said that Belgrade is significant tourist destination for citizens of Serbia. This can be seen by the number of visitors that is growing from year to year (Figure 156). Unlike domestic tourism in Serbia, which experienced growth in 2020, tourism in Belgrade (according to unofficial data) has dropped significantly. To confirm these allegations we will have to wait for the official data.

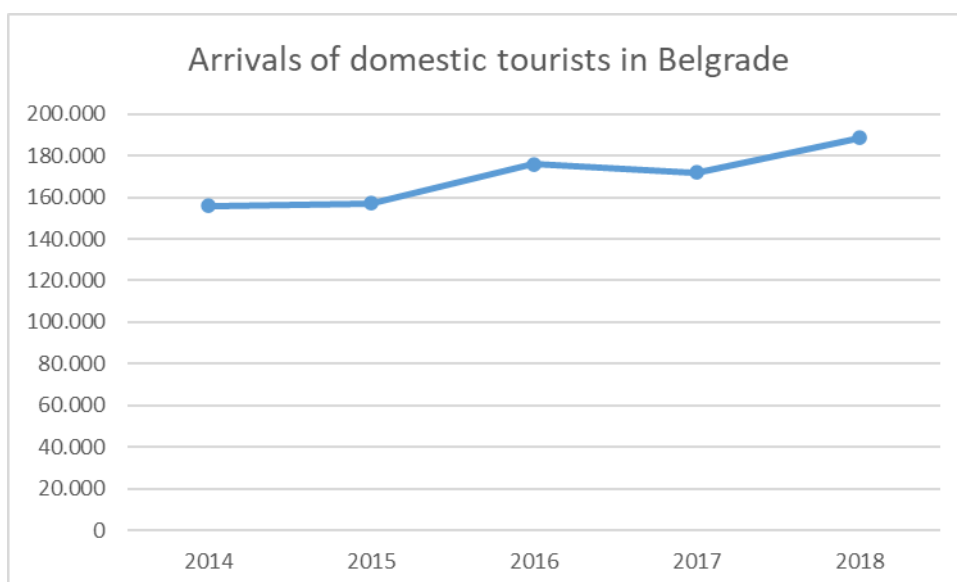


Figure 161: Arrivals of domestic tourists in Belgrade, from 2014 to 2018 (Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019)



(Source: Statistical Office of the Republic of Serbia. Statistical yearbook, Belgrade 2019. <https://publikacije.stat.gov.rs/G2019/Pdf/G20192052.pdf>)

2.9.3 Searching the tourism policy background and finding gaps and opportunities

There are several documents that provide the basis for the formation of the pilot. Some main findings from national and regional are pointed out and listed in the text below.

The document in which it is stated Belgrade Region role in tourism promotion is City of Belgrade Development Strategy, Strategic goals, priorities and measures of sustainability development by 2021, City Administration of the City of Belgrade Secretariat for Economy. In this document, the following stand out:

- Promotion of the city of Belgrade as an attractive regional, European and non-European one tourist destinations with a unique brand;
- Co-financing of programs and projects of congress, event, cultural and rural tourism;
- Improving the overall tourist offer;
- Improving the program of using new information technologies in tourism;
- Development and implementation of tourist signalization projects on the territory of the city Belgrade;
- Improvement and promotion of tourist zones and ambient units and creating new ones;
- Reconstruction of underground spaces in Belgrade;
- Modernization and enrichment of the souvenir program of the city of Belgrade.

(Source: City of Belgrade Development Strategy, Strategic goals, priorities and measures of sustainability development by 2021 https://www.beograd.rs/images/file/8482b593767213b8926a3fc6988eca50_1021365819.pdf)

According to the City of Belgrade Development Strategy (that is another document on which can be relayed) the use of new smart technologies, the use of renewable energy sources and the promotion of healthy living habits are the permanent commitments of the City. With the city's development strategy, Belgrade confirms and continues to build its identity based on dynamic river descent, support for sustainable mobility and a change in the transport hierarchy that favours pedestrians, cyclists and public transport.

"Belgrade's Sustainable Urban Mobility Plan" is one more document that could be relied on - the main goals are to improve the quality of life by reducing the negative impacts of traffic on the environment, improving the transport network and improving public transport services, establishing good links between different modes of transport, accessibility and accessibility for more citizens, and promoting non-motorized modes of transport. It is an innovative way of



planning the city's transport and urban system that meets, in a sustainable way, primarily the needs of the people. The goals of such transport system planning are accessibility to the destination and services, increase of traffic safety, reduction of greenhouse effects and consumption of fossil fuels, increase of attractiveness of city contents, increase of quality of life, healthier environment and reduced harmful impact on citizens' health.

(Source: website of the City of Belgrade http://bgsaobračaj.rs/uploads/files/%D0%9F%D0%9E%D0%A3%D0%9C/POUM%20BG_nacrt_Zavrsni%20Izvestaj_web_compressed.pdf)

2.9.4 Learning from best practices on tourism and mobility

A significant number of projects related to sustainable tourism and/or mobility have been implemented in Serbia. Main findings regarding good practices review are pointed out in the following text.

Some of the significant projects that can be linked to the formation of pilots are projects related to sustainable transport and sustainable urban mobility. Such projects are "Support to Sustainable Transport in the City of Belgrade", "Sustainable Urban Mobility in Serbian Cities and Municipalities", TRACE H2020, etc.

We would like to single out the TRACE project. The TRACE project as a result gave the following applications: Positive Drive, The Traffic Snake Game, Biklio and TAToo - the Tracking Analysis Tool.

Positive Drive is an existing mobility behaviour change tool. Positive Drive is based on "doing and rewarding the right transport choice". It uses only positive nudges (coaching, prizes, social status, achievements, etc).

The Traffic Snake Game encourages primary school pupils to travel more sustainably to school. TRACE developed a Traffic Snake Game tracking app, to digitalise the campaign and therefore improve the campaign's ambitions and impact.

Biklio is a mobile application that creates a network of recognition and benefits to bicycle users, linking them to local businesses and the cycling community for the good of their city, encourages citizens to ride their bikes near checkpoints positioned at urban local shops, assigning a score (cycle-and-score scheme) to each participant to reward him. TRACE created an open paradigm to promote the involvement of local businesses as checkpoint providers, making it more appealing to join for both citizens as well as local businesses.

TAToo - the Tracking Analysis Tool - transforms GPS cycling and walking data into meaningful indicators on the local mobility network.

Needs to be tackled for the implementation of attractive touristic packages:

- Great use of cars



- Acceptance of a “new” way of moving
- Lack of coordination among the different stakeholders
- Better connections among city centre to green and recreational areas in the city
- Promotion alternative way of movement to tourists
- Not enough sustainable transport services for tourists
- Sustainable transport services for tourists that exist are not enough promoted.

During the formation of the pilot, the experiences of some of the mentioned projects were considered. So that tourists are appropriately stimulated to use alternative ways of touring the city and to be rewarded for that. Also, what needs to be addressed based on the experiences of the TRACE project is that the app must be quite simple and intuitive to use, otherwise users will be discouraged and will stop using the app quickly.

2.9.5 Learning from tourist surveys - the path forward as revealed by the tourists

The survey conducted for the case of Belgrade involved 404 tourists that had visited Belgrade from October until 31/12/2020, of which 284 foreign and 120 domestic tourists. Female and Male respondents aged 18 and above. The implementation of the survey was difficult due to COVID-19, also for the same reasons the number of tourists in Belgrade was significantly reduced, which was an aggravating circumstance in the implementation of the survey.

The survey identified tourists’ needs and related them to existing or potential services and provisions:

- **Organized walking and bicycle tours within Belgrade** that tourists would be interested to participate in. Especially tours within the city center.
- **The development of a touristic card** highly interest tourists which would make it easier to tour the city.
- **Interest in use an integrated app** offering touristic information which would allow them to have the information they need to tour the city in one place.

2.9.6 Listening to tourism and mobility stakeholders - insights from the 1st Technical Round Table

The round table brought together stakeholders whose participation is significant for the successful implementation of the project. Discussion in which all participants of the round table actively participated led to certain observations and conclusions. Their experience in the given areas is certainly invaluable. Most are familiar with projects of a similar nature in both Belgrade and Serbia. What is one of the main findings and results is the established cooperation with all participants.



The conclusions are primarily related to the importance of such project, that it is necessary to promote as much as possible an alternative way of touring the city in Belgrade. Since some of these ways of touring already exist, we should point out as much as possible, and one of the ways is to form such an application as SUSTOURISMO. It would be good to have all the information needed for tourists at the same place is one of the final conclusions.

2.9.7 Combining finding in a SWOT analysis for the case of Belgrade

Combining the insights of the above findings, the current subchapter concludes in a SWOT analysis for the SUSTOURISMO case of Belgrade that serves and is mutually served by the objectives of the project; tourism and mobility hand by hand development.

Table 18: SWOT for Belgrade in the context of SUSTOURISMO project

<p>Strengths</p> <ul style="list-style-type: none"> • Geo-strategic position of Belgrade (intersection of European Corridors VII and X, existence of "Nikola Tesla" airport). • Two of three EuroVelo cycling routes (EuroVelo 6 and EuroVelo 11). • Rich cultural and historical heritage • Hospitality and openness of people • Well-known traditional and international events. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Lack of a unique brand of the city of Belgrade • Excess of cars and traffics congestion • Insufficient tourism marketing • Insufficient utilization of resources and potentials of peripheral municipalities
<p>Opportunities</p> <ul style="list-style-type: none"> • Favourable macroeconomic environment and prospects in the country • Great interest of foreign investors in Serbia • Tourist potentials of rivers (The Danube and the Sava) • Opening of new flights to Belgrade and increasing the number of low-cost airlines landing at Belgrade Airport • Increasing the number of hotels in international hotel chains 	<p>Threats</p> <ul style="list-style-type: none"> • Coronavirus pandemic • Slowing down of economies and recessions of some countries • Possibility of political tensions in the Balkans • Quickened innovations at the national marketing of the surrounding countries

- Changes in the habits and motivations of tourists on the global market

2.9.8 Drafting of the SUSTOURISMO touristic packages of Belgrade

The question is to what extent it will be possible to realize pilots due to the situation caused by COVID-19, measures that are being implemented (such as the ban on gatherings) etc.

After considering possible options related to sustainable tourism and mobility that can be implemented in Belgrade, the decision was on options that will promote walking tours of the city and the use of bicycles as an alternative mode of transport. One of the tours would be walking tour in the center of the city, where could be seen significant cultural monuments, museums, Orthodox temples etc. Walking tour of the city begins with Republic Square, sightseeing of the Palace "Albania", Terazije Square with the famous hotel "Moscow", the National Parliament, the Assembly of Belgrade and the Presidency, Tasmajdan Park, St. Mark's Church, Russian Orthodox Church, Faculty of Law, Nikola Tesla Museum and beautiful Vracar Street to Slavija Square, the National Library of Serbia and the famous Temple of Saint Sava.

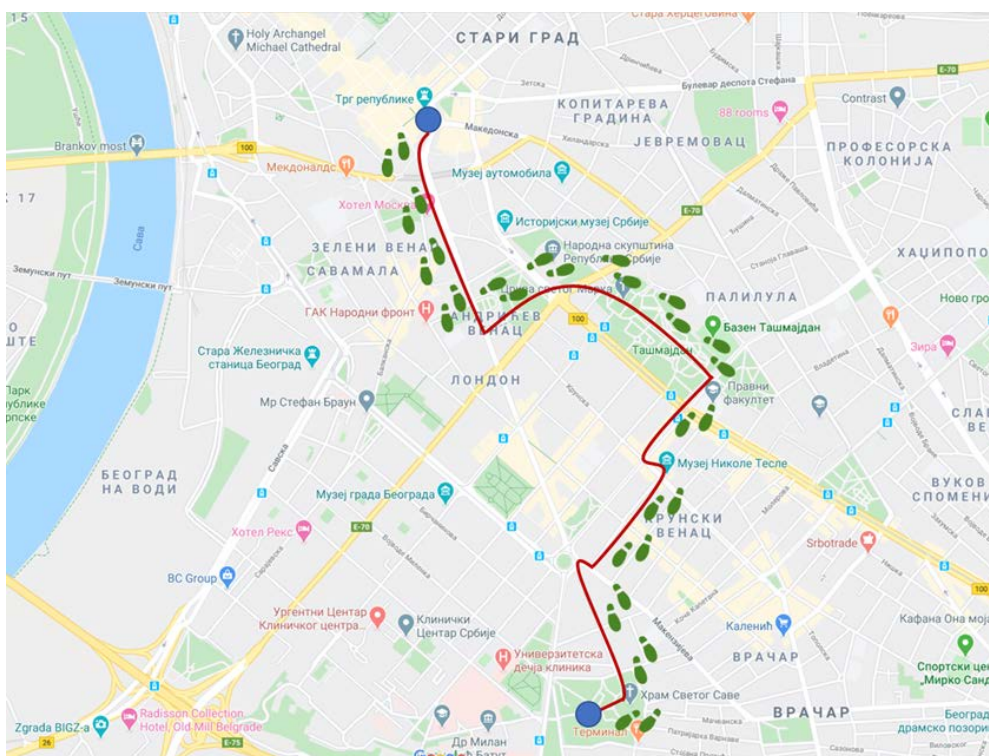


Figure 162: Walking tour in Belgrade (google maps background used, picture further elaborated by FTTE)



Insufficiently used potential of touring the city by bicycle by tourists, especially along the path that goes besides the Danube and Sava rivers, would certainly be emphasized.

The pilot is expected to cover in terms of sustainable tourism via sustainable mobility a sustainable way of visiting the sights of the city.

Pilot's contribution to sustainable tourism and sustainable mobility development of the region is that the basic experiences of the city of Belgrade provide guidelines on how to develop sustainable tourism based on the experience and results obtained by the project.

More detailed:

1st SUSTOURISMO touristic package of Belgrade - 'FREE WALKING TOUR IN THE CENTER OF BELGRADE'

Combination of services	Operators / companies that accepted to offer the services during the testing phase	Duration
1) A guided walking tour	Belgrade walking tour Balkan roads d.o.o. (http://www.belgradewalkingtours.com/)	2,5h

Short description of the provided services

We offer two walking tours within the tourist package 1, which are realized on different days of the week. Depending on which tour is more attractive to them or the day that suits them, tourists can choose one of the offered walking tours.

Free Downtown Walking Tour

Professional guides will tell tourists secrets and funny stories about Belgrade that they could not hear on other tours. We will show to tourists all attractions and places of interest in a funny and interesting way of sightseeing: The Republic Square, the National theatre and the National museum, Bohemian Quarter (Skadarlija), the oldest part of Belgrade with Ottoman heritage, the oldest residential house and museum of Serbian language, the only mosque in the city, Zoo, Kalemegdan park, Belgrade fortress, „Victor“ the most famous symbol of Belgrade, the confluence of the Sava and the Danube rivers, Saborna church, cafe „?“ and Knez Mihailova street.

No need to book it just show up at the meeting point 5 minutes earlier every Tuesday, Thursday, Saturday & Sunday @ 11am during the whole year.

Free 20th century tour



Get to know history and architecture of turbulent period in Serbian development. See the Republic Square, the Albania palace, Terazije square with famous Hotel Moscow, National parliament, Belgrade city assembly and presidency, Tasmajdan park, the Saint Marko church, Russian Orthodox church, Radio-Television of Serbia - 1999 NATO bombing memorial, the monuments "Why?" and "We were just children", the Faculty of Law. We will pass by Nikola Tesla Museum and walk through beautiful Vračar streets to Slavija square, National library of Serbia and glorious Saint Sava temple.

No need to book it just show up at the meeting point 5 minutes earlier every Monday, Wednesday & Friday @ 10.30 am during the whole year.

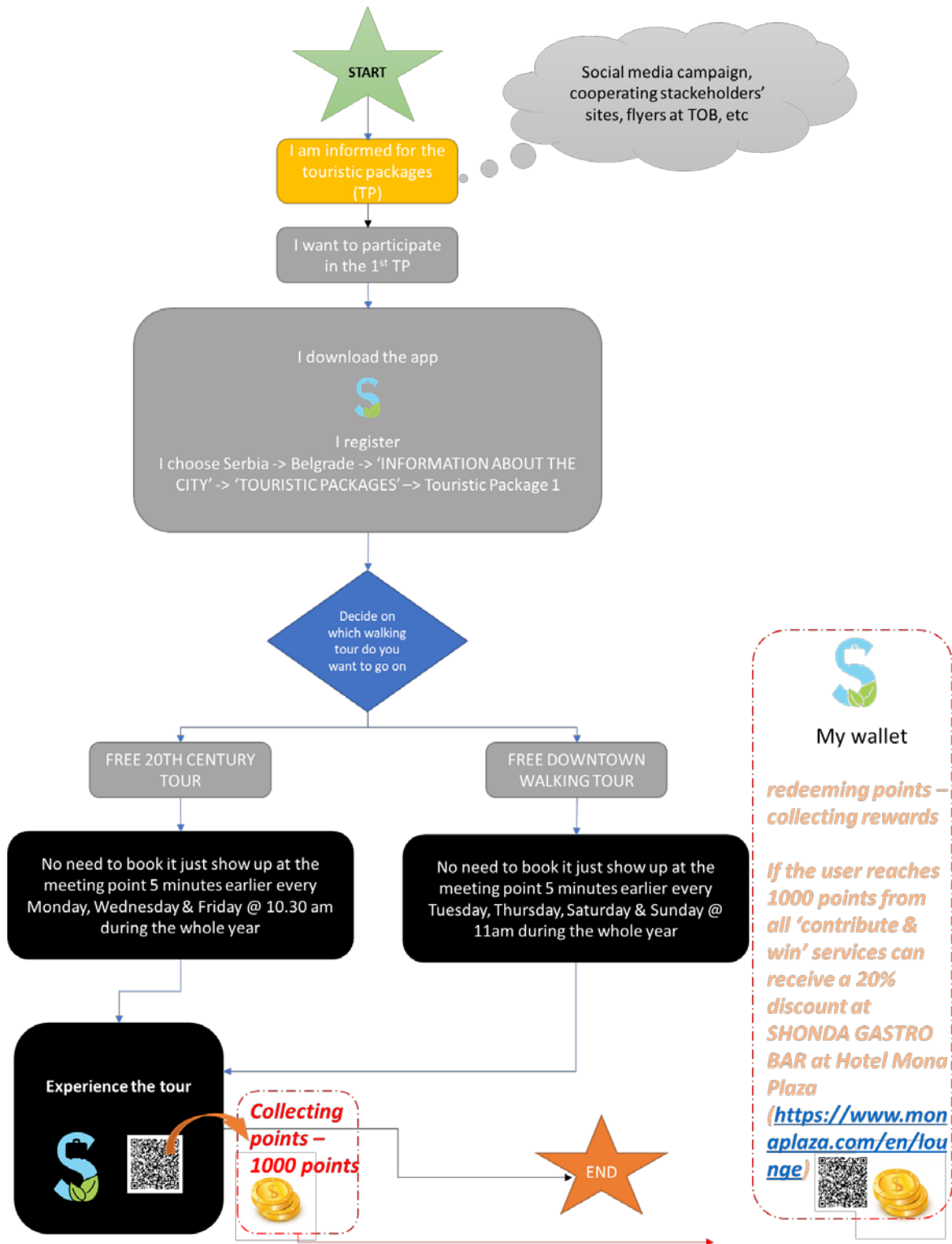


Figure 163: Flow diagram for Belgrade TP1



2nd SUSTOURISMO touristic package of Belgrade - 'Riverside Tour'

Combination of services	Operators / companies that accepted to offer the services during the testing phase	Duration
1) A guided bike tour	Note Differently ltd iBikeBelgrade (https://ibikebelgrade.com/bike-tours-belgrade/daily-tours/riverside-tour/)	3-4h

Short description of the provided services

Riverside Tour

The tourist(s) will have the opportunity to see those parts of Belgrade that will not easily find by themselves and ride past communist architecture before taking a break at the Ada Ciganlija beach. In case the weather is cold or too hot, there will be stop at the fishermen's town of Zemun instead of Ada Ciganlija. First stop and starting point is at iBikeBelgrade shop at Karadjordjeva 11, "Staro Sajmiste", "SIV", "Hotel Yugoslavia", "Genex Tower", Ada Ciganlija, Belgrade Waterfront Project. Many times, what is most interesting is not the same as what is the most beautiful. This for sure is true for one part of Belgrade history. This tour visits the communist part of the city, New Belgrade. Tourist(s) will hear how recently Belgrade was the capital of a country that does not exist anymore, how it survived 3 months of bombings in 1999 and tourist(s) will see some impressive concrete buildings. After that, they can relax at the beach and feel far away from the city buzz. The stories, like on all tours, are told in a fun and interesting way without getting boring.

The tour will take about 4 hours and finishes at the iBikeBelgrade shop at Karadjordjeva 11. The ride is mostly on bike-paths, so safe and easy and do-able for everybody who is used to riding a bike.

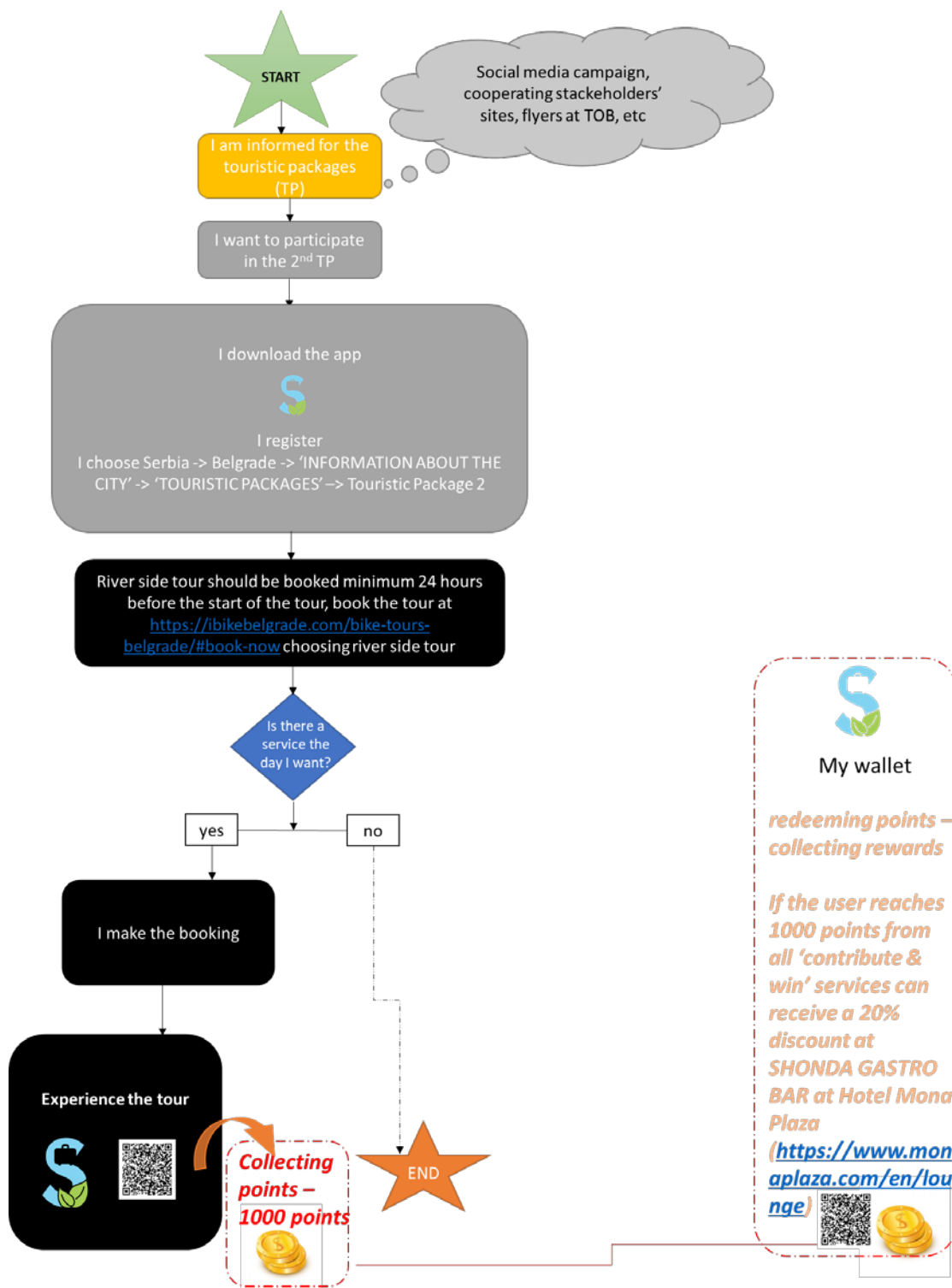


Figure 164: Flow diagram for Belgrade TP2



3 Building technological solutions for promoting SUSTOURISMO targets; the SUSTOURISMO app

Undoubtedly, ICT exploitation and mobile apps promotion have become one of the most vital aspects for the travel and tourism industry - it is indeed a trend and in parallel an additional convenience to the travellers' experience of 'Industry 4.0 Technologies' (<https://adamodigital.com/blog/how-do-the-travel-and-tourism-industry-change-as-the-born-of-mobile-apps/>) The fact that travel apps are the seventh most downloaded mobile applications (<https://www.mindinventory.com/blog/advantages-of-having-mobile-apps-for-your-travel-and-tourism-business/>), essentially amplifies all the more the latest trend of developing and promoting such applications for achieving sustainable tourism growth through sustainable mobility. Basic benefits of mobile apps for the travel tourism industry are:

- (for tourists) **Tourism information** is easily accessible - using a smartphone, the traditional guideline books and paper notebooks are replaced with mass e-information. Personalized information can also be provided through dedicated sites/apps.
- (for tourists) **Services** can be easily **booked** through apps and all respective documents (tickets, vouchers, reservations etc) can be stored in the smartphone.
- (for businesses) **Advertising** management software can be used to catch tourists' attention and generate growth for relevant industries / (for tourists) **personalized services and offers** cover individual needs.
- (for businesses and local communities) **Data** for preferences and needs are collected through apps and web-platforms (crowdsourcing) that can add on **better decision making** in tourism. At industry level, the data can reveal needs for **new tailored services that can increase revenues** - **new collaboration schemes** are also created with a common view to gain from the increase of demand

In this framework and trying to serve the scopes of the project - support shift to sustainable mobility options when visiting a place and enhance the participatory tourism&mobility planning approach, the SUSTOURISMO app is developed building on the most relevant abovementioned uses. The SUSTOURISMO app services objective (Android and iOS) is twofold. From the one side there is the informative dimension of the app, through which the end users (tourists) are provided with a single point information regarding their staying in each pilot case. From the other side, there is an awareness raising effort towards sustainability; promotion of sustainable touristic packages (joint provision of services that support sustainability, i.e. promotion of active transport) and rewarding schemes for responsible choices (i.e. walking more - winning more / steps calculator). In brief, the SUSTOURISMO app offers the following opportunities



- i) For tourists: one-stop shop tourism information provision to plan and organize trips in the areas of visit while simultaneously promoting the use of alternative transport modes
- ii) For tourists and authorities: an interaction point where tourists can provide assessments and complaints for the services in the area of visit (offering 'voice' to them and making them part of tourism planning). The data to be collected from the other side will be a valuable input on sustainable tourism - mobility planning procedure and
- iii) For tourists and for the area of visit: the app tries to raise awareness towards the use of sustainable mobility options in the places of visit that benefits from the one side the area itself while from the other side supports the creation of responsible behaviours in general.

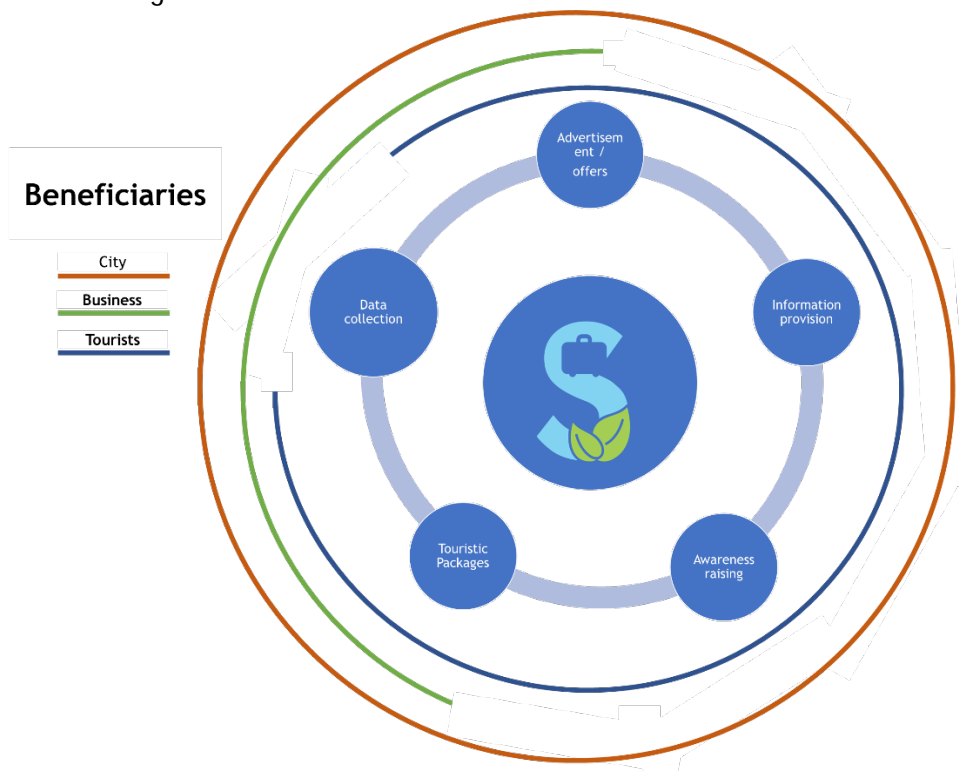


Figure 165: SUSTOURISMO app and benefiting effect

The provided services are included in two distinguished categories:

A) Information about the city

Through this service the end user will receive information regarding points of interest both in the centre and outside the city, as well as on how to reach a point of interest using sustainable transport modes (bicycle, Bus Transport system, Sea transport system, walking). Indicatively, the thematic sections the service will include are:



Points of interest

1. Art and Culture (e.g. monuments and archaeological sites, museums and art galleries, cultural and historic buildings, religious Sites, etc)
2. Areas of Touristic Interest
3. Markets (e.g. shopping centres, flea markets)
4. Available transport modes (e.g. bus, bicycle sharing system, sea transport, etc.)

The user by activating the GPS function on his/her mobile phone, will be able to get information regarding the nearest points of interest, on an interactive map in order to select and get information about the specific point of interest as well as on how to reach it by using the transport modes available in the area.

Touristic Packages

The end user will get informed about the touristic packages each city offers to visitors in order to select the most appropriate for his/her case (developed in the framework of the SUSTOURISMO project). The packages are case-specific.

Events Calendar

The end user will be able to get informed by a list view and select through the appropriate categorization (e.g. museums, theatres, cultural sites, etc.) the events take place during his/her staying. Each event could be accompanied by a detailed description and photographic material.

Weather

The end user will be able to get informed about the weather conditions in the visiting area, in order to schedule or re schedule all his/her touristic activities.

Information about the city single point provision, comes at a time when environmental concerns asks for travel solutions re-evaluation, thus digital changes are deemed more than necessary for the evolution of new travel patterns and behavioural change towards sustainable transport modes, respecting therefore a city's history and culture. The ultimate scope of this service, beyond the provision of tourism related information regarding the visiting area, is to raise tourists' awareness while also to familiarize them with e.g. the culture, heritage and customs of a destination enhancing the likelihood of making sustainable in-trip choices through the provision of the relevant information (for example how to reach specific points of interest by using the available sustainable transport modes of the city). Achieving even a minor behavioral shift towards sustainable modes of transport will also enhance air quality and overall sustainability of visited cities, one of the ultimate goals of the project.

B) Contribute and win

Trip's recording & evaluation functionality



The service aims to collect data related to tourists' trips in each pilot case, providing to the visitor the possibility to declare a specific trip/route followed, filling in the below information

- Origin point: trip's starting point
- Destination point: trip's ending point (point of interest, hotel, etc)
- Transport mode used for the trip
- Reason for selecting the specific transport mode
- Trip day (day, month and year)
- Start and end time of trip

After declaring the trip, the tourist will be asked to assess the trip (overall satisfaction) and add structured comments when the level of satisfaction is not the highest one.

Under this service, each pilot city will have the opportunity to collect useful data regarding the existing provided transport services. The analysis of data collected, can be then used by Public Authorities, transport and tourism planners and transport operators for upgrading the provided services and also attract new investments for the promotion (mainly mobility investments) of alternative trip options in a more sustainable way. In addition, the analysis of the information for origins and destinations of tourists' trips (points of interest, places of interest) will shape an overall image regarding the mostly visited places and the less 'popular' areas, which in turn will allow, from one side the better destination management and from the other side can unlock thoughts on the uptake of actions for revitalization and regeneration of low tourist interest areas.

Participation in SUSTOURISMO touristic packages functionality

The service provides the user the opportunity to participate in the co-created (at cases level) SUSTOURISMO touristic packages (full description details are provided in service 1), collecting points which in turn can redeem through specific rewards and offers. For all the app's services the user will use, points will automatically be collected in a personalized digital wallet. As part of the points' collection system, the service will also provide to the user an integrated QR code system which he will be able to use during his participation in the "touristic packages".

One of the project's bets is to ensure both the best possible exploitation of the application and the promotion of touristic packages. Under this service an adequate participation of tourists in the provided touristic packages is expected to be achieved through the reward system, leading to one of the main app's targets. At the same time, the engagement of tourists in a sustainable path will transform them into active agents of change as they will be trained in making responsible travel choices, decreasing therefore the tourism carbon footprint, one of the project's objectives.

The provision of attractive offers from one side will enhance the tourists' satisfaction, while from the other side it will create strong collaborative networks among the public and the private sector (rewards/offers will be finalized through the creation of cooperative schemes between each pilot case and respective public or private bodies directly involved in mobility and tourism activities within the area).



Proposals and complaints functionality

The service aims to encourage tourists to write down and propose solutions for the provided tourism and mobility services found not to be satisfied enough during their staying in the pilot area. Through a predefined list, the user will be able to select the relevant category (e.g. cultural sites, transport modes, etc.) and declare his/her complaint through the selection of specific proposals (predefined drop-down menu), while he/she will also be able to describe the complaint in more detail using a free text box.

An integrated app giving the floor to tourists to express their ideas and complaints, seems as an interesting service provision especially for younger people. Under the app's crowdsourcing dimension tourists' needs will be captured leading to acceptable and attractive proposals for interventions, while specific gaps regarding the provision of both tourism and transport services will be covered. The tourists' engagement in tourism planning (in combination with transport planning) as estimated will 'train' decision makers to better tackle environmental limits to growth and face climate change challenges linked to tourism.

Counting steps functionality

This service aims to encourage tourists to visit the main points of interest of each pilot case by promoting walking. Through this service, the tourist's steps will be tracked during a trip. The user, having activated the GPS function will declare the trip's start/end through a start/end button. The system will count the tourist's steps throughout the trip, while at the end the user will be informed for the exact number of his/her steps and collect the relevant points (*the more the counted steps, the higher the reward/points*).

This service promotes 'slow tourism' growth (walking trips for leisure) acting as an instrument for sharing and protecting the cultural and historical heritage of each visiting city. Tourists are motivated to walk the city, boosting

4 Sum up

The SUSTOURISMO touristic packages, the combined offers to areas' tourists, were built having in mind the vision of achieving sustainable tourism through the promotion of sustainable mobility options. As depicted in the following table, walking and cycling tours, for sightseeing and get familiarized with the SUSTOURISMO areas, are placed in the heart of the packages. There are also pilots supporting the use of public transport (Ravenna, Aquileia - Grado, Ljubljana and Thessaloniki 2nd TP) that is indeed the backbone of a wide sustainable transport network (long leg of travel by public transport, last leg by walking and cycling).



Table 19: Key services included in the first year of SUSTOURISMO testing phase & cooperation schemes supporting provision

	CASE	Touristic Package No	Guided walking tour	Self guided walking tour proposal	Guided cycling tour	Self guided cycling tour proposal	other	Accompanying components of the TP	Cooperating companies / stakeholders (name & type)
1	Thessaloniki	TP1	free			free ride			1) Ammon express (tour guide company) 2) City Bike (bike rental company)
2	Thessaloniki	TP2	free					1) Traditional ferries transportation (free) 2) Beach bar - free umbrella and coffee	1) Ammon express (tour guide company) 2) Karavaki Thessaloniki Cruises 3) Beach bar Wet Red Rose
3	Igoumenitsa	TP1	paid			free ride			Athanasia Keramary (tour guide)
4	Preveza	TP1	paid			free (for 1hour)			1) Athanasia Keramary (tour guide) 2) TSIRIS BIKES (bike rental shop - 10% discount)
5	Ravenna	TP1						Integrated PuT tickets (bus and trains)	1) IAT Ufficio Turismo Ravenna (Ravenna tourist office) 2) Start Romagna Spa infopoint (Ravenna public transport company)



6	Aquileia - Grado	TP1							<p>1) Local Public Transport TPL FVG S.c.a.r.l.</p> <p>2) Aquileia Foundation</p> <p>3) Autonomous Region Friuli Venezia Giulia (FVG) - Department for Infrastructures and Territory</p> <p>4) Regional Directorate - Museums of the Friuli Venezia Giulia Region</p>
7	Ljubljana	TP1			free ride				<p>1) Ljubljana by bike (cycling tour guide company)</p> <p>2) Slovenian Railways-Passenger Transport</p>
8	Zadar	TP1				free ride		600 mintutes coupon free	City of Zadar public bike sharing system
9	Zadar	TP2				free ride		600 mintutes coupon free	City of Zadar public bike sharing system
10	Zadar	TP3				free ride		300 mintutes coupon free	City of Zadar public bike sharing system
11	Tivat	TP1					according to the selected subtour; TUK, SUP, kayak, hiking, solar boat tours		Boka Waves DMC, Sip Travel Tivat, Montenegro Plus, Montenegro Destinations DMC (tour operators)
12	Tivat	TP2					according to the selected subtour; hiking, SUP		Sip Travel Tivat, Montenegro Plus (tour operators)
13	Tivat	TP3	with price						Boka Waves DMC (tour operator)



14	Berat	TP1					scooter option instead of bike	1001 Albanian Adventures
15	Berat	TP2					* wine tasting * coffee	1001 Albanian Adventures Artisans Center "Margarita"
16	Belgrade	TP1	free					Balkan roads ltd (tour guide company)
17	Belgrade	TP2			with price			Note Differently ltd (bicycles tour guide and rent bike company)

Accompanying services, as entrance in museums, gastronomy or sea & sun experiences, recreation etc. are included in many of the SUSTOURISMO touristic packages in order to offer to tourists further attractive elements. Furthermore, other than winning points once selecting to participate in a TP (this applies for all TPs), additional interesting gamification aspects are included in some case (i.e. Ravenna case where, per each museum and monument visited, further points are offered creating a city treasure hunt for tourists with cultural aspects and dimensions).



ANNEX A

MoUs/LoS signed per case

The MoUs signed in the framework of SUSTOURISMO project

1. **The case of Thessaloniki, Region of Central Macedonia, GR**
MoU signed among CERTH and
 - Thessaloniki Tourism Organization
 - AMMON EXPRESS (the tour guide company involved in the TPs)
 - City Bike (bike renting company)
 - Karavaki Thessaloniki Cruises
2. **The case of Igoumenitsa and Preveza, Epirus, GR**
MoU signed among PED and
 - Municipality of Igoumenitsa
 - Chamber of Commerce Thesprotia
 - Trade Association of Igoumenitsa
 - Federation of Tourist Accommodation & Companies of Alternative Tourism of Epirus "THE XENIOS ZEUS"
 - Chamber of Preveza
 - New Preveza Hoteliers Association
3. **The case of Ravenna, Region Emilia Romagna, IT**
LoS signed among ITL and
 - Start Romagna S.p.A (transport company)
4. **The case of Aquileia - Grado, Friuli Venezia Giulia, IT**
Letters of Support signed among CEI and
 - Promoturismo FVG (DMO)
 - Region FVG (department for infrastructures and territory)
 - Italian Ministry of Culture (Regional department FVG for museums)
 - TPL FVG (regional public transport operator)
 - Aquileia Foundation
5. **The case of Ljubljana, SL**
MoU signed among RDA/PIL and
 - Slovenian Railways
 - Watermelon Ljubljana by Bike
6. **The case of Zadar, HR**
MoU signed among Zadar and
 - Liburnija d.o.o (public city transport)
 - Zadar Tourism Board
7. **The case of Tivat, ME**
MoU signed among Tivat and
 - Tourism Organization of Tivat
 - Bella Boka Sustainable Water Transport
 - BOCA WAVES (tour company)



-
- Montenegro Destinations (agency with the aim to serve the needs of Yachts and Cruise)
 - Company Montenegro +
 - Company SIP Travel (tourist agency)
- 8. The case of Berat, AL**
MoU signed among RCB and
- Artisans Center "Margarita"
- 9. The case of Belgrade, RS**
MoU signed among FTTE and
- City of Belgrade, City Administration of Belgrade, Secretariat for Public Transport
 - Tourism Organization of Belgrade
 - Hotel Mona Plaza