

# Comparative analysis investigating similar cases and previous experiences

## Pilot cases full description (the SWOT analysis and other relevant qualitative and quantitative data)

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## Summary

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## Abstract

PP1 – Municipality of Rovigo coordinated the activity through the elaboration of guidelines for the drafting of the comparative analysis and description of the pilot sites of the involved partners – PP3, PP4, PP5. In order to achieve the expected result, a set of indicators has been developed stemming from the European Tourism Indicator System (2016) and integrated with other relevant indicators, for a total of 40. The steps foreseen for the activity included the collection and assessment of data based on the selected indicators, the redefinition of a common identity for the pilot areas and the identification of target values based on the baseline information collected.

Each partner involved in the activity drafted the analysis of indicators to provide a complete description of the pilot areas of reference and included a comparative analysis in order to further assess the baseline for the Destination(s). The four analyses have been merged in the present document.

## PP1 – Municipality of Rovigo

### TOURISM VOLUME AND VALUE, INCLUDING SEASONALITY

#### TOURISM DESTINATION CAPACITIES

Two indicators have been used to describe the tourism capacity of the destination: the accommodation stock (available beds) and the number of tourist accommodation establishments. The source used for the collection of data is ISTAT, and the reference years are: 2017-2018 (last years of non-provisional data). Accommodation stock for 2017/2018: 31.529/29.833. Number of accommodation establishments for the years 2017/2018: 2.552/2.956. The decrease of available beds together with the increase in the number of accommodation establishments represents a negative factor in the overall capacity of the destination especially when coupled with the diversification trend of the tourist establishments (structures other than hotels). When non-productive accommodation establishments increase (Note: productive accommodation establishment = hotels and similar, capable of generating jobs and income in the destination area) there is no positive economic growth. This phenomenon is more evident when read in combination with the decrease of accommodation stocks. By breaking down the datum on accommodation establishments per type of establishment, it is possible to notice how the number of hotel structures increased of only two unites between 2017 and 2018, meaning that extra-hotel structures account for the best part of the accommodations increase.

The regional trend for the same period (2017/2018) is one of increase of both accommodation establishments (62945 – 72363) and available beds (750855 – 786183). Similarly to the province level, the increase in the number of accommodation establishments is strongly linked to the increase in the number of extra-hotel structures, confirming the ongoing development of different modalities of tourist accommodation.

The remaining hotel structures are undergoing specific changes towards a higher qualitative level and a contextual downsizing in terms of available beds. Moreover, another emerging characteristic of today's hotel permanence is the brevity of the stay.

#### TOURIST FLOWS

The indicators used to describe the tourist flow include the number of tourist overnight stays, the number of tourist stays during non-summer months (note: summer months = June, July, August, September), the number of arrivals (same-day visitors), the average length of the stay, the % variation in arrivals and stays with respect to the previous year, the concentration ratio of tourists per destination area.

Source: ISTAT data processing from the Statistics Office of Veneto Region, 2018-2019. Tourist overnight stays per year (and monthly average) 2018/2019: 1.523.337 (126.944,8)/1.563.501 (130.291,75).

Tourist overnight stays during non-summer months 2018/2019 (and % on the yearly number of stays): 284.221 (19% ca.)/246.862 (16% ca.). Data regarding the number of stays for the biennium, highlight an increase of stays of +2,64%. An analysis of stays during non-summer months shows the higher concentration of tourism in summer months in 2019 (84%), with respect to the previous year (81% ca.). Tourist arrivals 2018/2019 (and monthly average): 304.913 (25.409,42)/ 310.163 (25.846,9). The increase registered in the number of stays for the biennium is mirrored in the arrivals trend for the same period, with a percentage increase of +1,72% between 2018 and 2019.

Average length of the stay 2018/2019: 4,99 days/5,04 days. It is possible to observe a slight increase also in the average length of the stay.

In general, the overall performance of the Province appears in line with the 2018/2019 regional trend of arrivals and stays increase (arrivals 2018/2019: 19.563.348/20.194.655; stays 2018/2019: 69.229.092/71.236.629) of respectively +2,89% e +3,22%. The average length of the stay at the regional level is undergoing a slight decrease, contrary to the trend in Rovigo, and it is lower in absolute terms (3,52 days at the regional level).

The concentration ratio of tourists per destination area (datum from the 2018 tourist analysis of the Statistics Office of Veneto Region – ‘Study – Analysis of the Tourist System in Veneto: demand, supply, and economic, social and environmental impact’) describes the actual distance of the number of monthly arrivals from the perfect equidistributional condition, by assigning a value for tourist compound in a range that goes from 0 (= absence of seasonality) to 1 (maximum concentration). The last available datum for the province of Rovigo refers to the year 2017, but it can still be useful to describe the attractiveness of both seasons and compounds for the tourists of the destination area. In particular, the compound ‘seaside’ has a value of 0,70 province of Rovigo – indicative of an elevated seasonality of seaside tourism. The value of the concentration ratio for the ‘seaside’ compound of Rovigo is the highest one at the regional level (Venice: 0,63). With regard to the ‘art city’ compound, the value concentration for the province equals 0,23 – indicative of low seasonality and higher distribution of culturally-led arrivals throughout the year.

#### EMPLOYMENT IN TOURISM

The 2018 study of the Veneto Region on the tourism system offers an overview of the number of direct tourist-related professionals in the Region. In the province of Rovigo, a total of 104 professionals are registered in the provincial lists of tourism professions, divided in tourist chaperons (29), tourist guides (19), nature-environmental guides (47) and tourist animators (9). At the regional level, tourist

professionals registered in the lists account for 3003 in 2017; the overall regional number underlines the low representation of Rovigo as compared with the other Veneto provinces, especially in terms of tourist chaperons and guides.

## THE IMPACT OF DEVELOPMENT ON THE ENVIRONMENT AND COMMUNITIES

### ENVIRONMENTAL FOOTPRINT

The province includes a remarkable spread of parks and protected area, for a total surface of 466782ha divided in Regional Parks (Veneto Po Delta – 12592ha), Regional Reserves (Bocche di Po, 425 ha), Natura 2000 Network sites (Delta del Po, Dune di Donada e Contarina, Dune di Rosolina e Volto, Dune Fossili di Ariano Polesine, Fiume Adige tra Verona Est e Badia Polesine, Golena di Bergantino, Gorghi di Trecenta, Rotta di S. Martino, Vallona di Loreo) and UNESCO MAB Biosphere Reserves (Delta del Po and Po Grande - 139.398ha e 286.600ha).

The tourism rate is a complex indicator used to describe the tourist concentration in a specific area as well as its impact on the permanent residents (the indicator is calculated as the ratio between the stays and number of days of the specific period, on the yearly average permanent population \*1000). The indicator is calculated for both the year and the most crowded month (in this case data are available for the year 2017).

For the province of Rovigo (ISTAT data processing of the Statistics Office of Veneto Region), the yearly tourist ratio is 5,2 with a peak of 6,6 in the most crowded month of 2017. As compared with the tourist ratios of the other provinces, the value for Rovigo is significantly lower – signaling a limited impact in terms of tourists' density even though the average population density of the province is moderate itself (472,3 residents/square km).

Another relevant indicator to assess the environmental impact of tourism is the impact per person of the waste production. Data for 2017 (from the 2018 study of the Veneto Region on the tourism system) highlight an increase from 497 kg/resident to 506 kg/resident of annual waste production. The average impact of tourism can be measured as an increase in waste production of 1,5%, which is sensibly lower than the regional average of 3,7%.

### SOCIAL FOOTPRINT

To assess the social impact of tourism, the indicator used is the ratio between the number of companies/activities linked to the tourist sector and the total number of companies in the investigated area. The source for the collection of data has been the Communication and Statistics Office CCIAA

Venice Rovigo – processing data from Infocamere-Stockview. In the year of reference 2019, the total amount of activities connected to tourism is 2001 (sum of the number of activities of accommodation and catering services and activities of tour operators, booking and similar services), while the number of active companies on the territory of the province is 29302. The ratio between the two is 6,83% - indicative of the weight of the tourist sector on the entire productive system of the province.

## CONSERVATION AND VALORISATION OF CULTURAL HERITAGE

### CULTURAL TOURISM

Two indicators have been used to highlight the attractiveness of the cultural sites of the destination: the number of visitors to cultural sites and the amount of revenues generated by the heritage sites/attractions (from user fees, licenses, retail and merchandising). The source for the collection of data for both indicators is the 2018 survey of the Statistics Office of the Ministry of Cultural Activities and Heritage ('Visitors and revenues of State Museums, Monuments and Archaeological Areas per province'). For the year 2017 the number of visitors to (state) museums or similar institutes has been 18.317 (including both paying and non-paying visitors), for a total amount of generated revenues of 15546,50€. It is necessary to underline that these data refer exclusively to state structures (as the survey has been developed by the national Ministry). At the regional level the province is the second one in terms of visits to state museums/similar institutes, after Venice.

A 2017 analysis conducted by Unioncamere (Symbola) assesses the 'weight' of the culture sector of the province: the number of professionals employed in the sector is 4.200 and the added value (millions of €) generated is 192,8. At the national level the province is 85<sup>th</sup> in terms of added value and 63<sup>rd</sup> in employed in the culture sector.

### TERRITORIAL AUTHENTICITY

When referring to territorial authenticity, it is worth mentioning the presence of local culinary products, PGI and PDO labelled, such as: Insalata di Lusina - PGI, Cozze di Scardovari – PDO, Riso del Delta del Po – PGI, Aglio Bianco Polesano – PDO, Radicchio di Chioggia – PGI. (Source: Rovigo Info Città, available at: <https://www.rovigoinfocitta.it/rovigo/prodotti-tipici/>).

## SITE-SPECIFIC INDICATORS

Project pilot sites: Campestrin archaeological area for the amber production – Grignano Polesine, Tourist and Cultural Centre of San Basilio (TCCSB) – Ariano nel Polesine, Museo dei Grandi Fiumi (MGF) – Rovigo, Fratta Polesine Archaeological Museum (FPAM), National Archeological Museum of Adria (NAMA).

Note: the Campestrin archeological area in Grignano Polesine is not currently structured as a museum facility, therefore data collected for the other pilot sites are not investigable for Campestrin.

Source: data have been registered for the 4 pilot sites through the use of questionnaires and subsequently processed in order to fit the site-specific indicators. The provided answers refer to the last year of complete data availability: the description of assets and facilities is updated to 2020, while data on the flow of visitors and on the organization of events are updated to 2019 (or to the previous three-year period when relevant).

## ASSETS, CAPABILITIES AND USERS

The first set of site-specific indicators describes the capacity of the structures, the level of interaction with the users and the assets available in the pilot sites. From the point of view of the overall site extension, the average surface occupied is of 19045,5 m<sup>2</sup> (maximum extension: NAMA - 56382 m<sup>2</sup>; minimum ext.: TCCSB - 1300m<sup>2</sup>). The indoor extension (exhibition area) presents a significantly lower variability from site to site, with an average surface of 1259,75 m<sup>2</sup>. The 4 pilot sites are open on average 58,7 hours a week; highest number of hours per week: NAMA – 77 hours; minimum: MGF – 28 hours. On average, the number of human resources employed full-time is 9.

Regarding the intensity and trend of the tourist flow, the yearly average of visitors in 2019 is 7889; NAMA registered the highest number with 11330 visitors, while the minimum between the 4 sites has been recorded for MGF, with 5896 visitors. The variation in the number of visitors for the three-year period (2017/2019) has been observable for NAMA and MGF; the trend for the two sites is very dissimilar, as MGF registers a significantly positive increase in the considered period (+ 9,57%), while NAMA followed a negative trend (7,09%). A different scenario is observable when limiting the analysis to the 2018/2019 biennium: decrease in the number of visits for MGF (-4,96%), and slight increase of visitors for NAMA (+0,51%).

From the point of view of visits concentration within the year (2019 – data observable for MGF, NAMA, FPAM), the second quarter is the peak quarter for NAMA (1479 visitors) and MGF (947 visitors), while the peak quarter for FPAM is the fourth one, with 870 visitors. The average of visits in the quarter of peak of the three museums is 1098. The third quarter is the period with the lowest numbers in terms of tourist flow for all the 3 museums, with an average of 345 visitors.

## FACILITIES AND EVENTS, PROMOTIONAL ACTIVITIES

The second set of site-specific indicators describes the presence of labs, applications/facilities and the organization of events of the 4 sites.

3 out of the 4 sites have tactile laboratories within their structures (MGF makes them available in relation to single events), while only FPAM provides its visitors with mobile applications for impaired people. Augmented Reality/Virtual Reality installations area available at the FPAM and QR code panels at the MGF.

With regard to the presence of an online platform for the promotion of the sites, 3 out of the 4 sites have an official website (TCCSB doesn't have one), which is updated whenever needed for MGF and regularly for NAMA and FPAM, that share the website with other museums of the GMD of Veneto. The website of NAMA and FPAM is available in an accessible format for other devices.

As for the organization of events within the site of competence in the year 2019, 2 out of 4 museums organized temporary shows and/or events. More specifically: MGF held 46 events, NAMA held 40/50 events in 2019.

## COLLABORATIONS, NETWORKS AND STAKEHOLDERS

The third set of indicators aims at investigating the involvement in networks and the participation of stakeholders for the project pilot sites, with reference to the last year of availability of data: 2019. The last two indicators accounting for the location of the sites in relation to public transport systems and to accommodation/catering services, describe the current (2020) accessibility of the sites.

3 out of 4 sites reached cooperation agreements with other cultural sites, for an average of 2 agreements.

3 out of 4 reached cooperation agreements with schools, training institutions and research centres for an average of 2,4 agreements. It is worth noting that TCCSB reached a cooperation agreement within the Interreg project VALUE for activities of public archaeology. 2 out of 4 sites reached at least a cooperation agreement with public bodies (NAMA and FPAM). 3/4 reached at least one cooperation agreement with enterprises and/or other private entities, with an average of 1,3 agreements.

From the standpoint of site accessibility, 3 out of 4 sites are connected to a public transport system within a 200m distance from the structure (the closest transport service to MGF is 50m away from the museum; the closest one to NAMA is at a 10m distance from the museum; the closest transport service to FPAM is 200m away from the site). TCCSB appears to be the least connected site, having the closest public transport service at 3500m from its structure. All sites are at walking distance (400m) from either

an accommodation establishment, a restaurant or both; NAMA counts up to 6 services of this type within its surroundings.

## PP3 – ESU Venice

### ANALYSIS OF INDICATORS

### SYNTHETIC FRAMEWORK

The pandemic caused by Covid 19 has in fact profoundly changed the reference framework that arises from the analysis of the indicators presented below. The collapse of the flow of visitors to Venice, the closure of schools, the current tools for containing the virus structure an unprecedented scenario, which is still largely in motion.

#### Trend of tourist presences in Italy

Serie storica 1956-2020\*. Valori assoluti in milioni



Fonte: Elaborazione Demoskopika su dati Istat.  
\*I valori relativi all'anno 2020 sono stimati.

Estimate of the level of contraction in tourism spending by region

Anno 2020. Valori assoluti in euro

Regione	Spesa turistica
Veneto	2.861.503.796
Lombardia	2.452.776.475
Toscana	2.259.130.618
Lazio	2.144.646.076
Emilia-Romagna	1.595.451.269
Trentino Alto Adige	1.306.484.909
Campania	972.305.060
Piemonte	690.994.341
Sicilia	689.214.677
Liguria	587.837.936
Puglia	529.440.747
Sardegna	367.200.362
Umbria	339.369.111
Marche	303.532.387
Friuli-Venezia Giulia	279.873.976
Calabria	227.854.758
Abruzzo	212.065.897
Valle d'Aosta	139.792.347
Basilicata	116.274.293
Molise	18.213.074
<b>ITALIA</b>	<b>18.093.962.110</b>

Fonte: Elaborazione su dati Demoskopika, Istat e Banca d'Italia.

The graphs reproduced above clearly indicate the trend of tourist presences, and the relative expenditure, in Italy at the time of Covid.

Before Covid, the tourist movement in Venice was in strong growth, even if the November waters triggered a significant negative trend. Another central element in the debate on Venetian tourism was the discussion on overtourism, and on Venice's ability to withstand or not a constantly growing number of tourists compared to the intrinsic fragility of the city itself. Nonetheless, it is still worthwhile to trace a synthetic analysis of the data produced below.

As far as the reference context is concerned, it is difficult to keep in mind a data that is useful for our analysis in this case. Hospitality was a constantly increasing item, with around 400,000 accommodations available and around 35,000 accommodation establishments up to 2018, but it represents an important basic data. The other items (tourist flow, employment in tourism, tourism rate, social imprint) will be subject to a profound change, of which it is not yet possible to define a fixed point.

On the other hand, the contents relating to the ecological footprint are good.

The considerable amount of green areas, possible places for proximity tourism, to which cultural destinations will certainly be added. Tramo of proximity, conscious tourism, have been identified among the main assets of the next future tourism.

For museums it is therefore essential to activate tools for the development of local tourism, and in this case, even if in different ways, the Altino and Torcello Museums could derive new energy from a closer, harmonious and collaborative relationship with the entrepreneurial realities more sensitive to the issues of sustainability and accessibility, and with the numerous and active local communities of reference in the area.

## ANALYTICAL FRAMEWORK

### VOLUME AND VALUE OF TOURISM

ACCOMMODATION [http://statistica.regione.veneto.it/banche\\_dati\\_igianato\\_turismo.jsp](http://statistica.regione.veneto.it/banche_dati_igianato_turismo.jsp)

The two indicators used to describe the accommodation capacity of the destination are: the availability of accommodation (beds) and the number of accommodation establishments in the area. The source used for the collection of data on the accommodation of the destination is ISTAT and the reference period is the two-year period 2017-2018 (last years with non-provisional data).

Availability of housing 2017/2018: 405.719 / 386.399

Number of accommodation establishments 2017/2018: 32,760– 34,854

The increase in the availability of beds together with the increase in the number of accommodation establishments is a positive indicator of accommodation if read in correspondence with the diversification trend of accommodation facilities (extra hotels), even if generally when non-productive accommodation facilities increase (Note: productive accommodation facilities = hotels, capable of generating jobs and induced in the surveyed area), there is no positive growth in economic terms.

The trend at a regional level for the same period (2017/2018) is an increase in both accommodation establishments (62945 - 72363) and available beds (750855 - 786183), but also in this case the increase in accommodation facilities is strongly linked to the increase in nonhotel facilities (decrease in hotel businesses in the two-year period).

With reference to tourism with stays in hotels, we note the permanence and sometimes the increase of structures of a higher quality level and a contextual downsizing of the number of beds. Furthermore, hotel tourism is characterized by a short stay.

#### TOURIST FLOW

The indicators used to describe the tourist flow in the province of Venice are: number of total presences (and monthly average), presences in the non-summer months (note: summer months = June, July, August, September), number of arrivals, duration average stay, percentage change in presences and arrivals compared to the previous year, tourist concentration ratio.

The source used for the collection of data relating to the tourist flow is the Statistics Office of the Veneto Region (ISTAT data processing) for the two-year period 2018-2019.

<http://statistica.regione.veneto.it/>

Total attendance (number of tourist nights) for the year 2018, and monthly average: 36,628,413 (monthly average: 3,052,367).

[http://statistica.regione.veneto.it/banche\\_dati\\_igianato\\_turismo.jsp?scheda=b2](http://statistica.regione.veneto.it/banche_dati_igianato_turismo.jsp?scheda=b2)

Total attendance (number of tourist nights) for the year 2019, and monthly average: 37,951,808 (monthly average: 3,162,650).

Appearances in the non-summer months, 2018: 11.009.602.

Appearances in the non-summer months, 2019: 10,539,120.

The data relating to the number of presences (tourist overnight stays) for the two-year period 2018/2019 indicate an increase in presences equal to + 2.64%. An analysis of attendance in the non-summer months shows the higher concentration in 2019 of attendance in the summer period (84%), compared to the previous year (81%).

Total arrivals in 2018, and monthly average: 9,677,150 (monthly average: 806,429)

Total arrivals in 2019, and monthly average: 9,979,780 (monthly average: 831,648)

The increase recorded in the number of admissions for the two-year period considered is also reflected in the trend of arrivals for the same period, with an increase between 2018 and 2019 equal to + 3.2%.

Length of stay 2018 (presences / arrivals): 3.78 days.

Duration of stay 2019: 3.80 days.

In general, the performance of the province of Venice appears to be better than the 2018/2019 regional trend of increase in arrivals and presences (2018/2019 arrivals: 19.563.348/20.194.655; 2018/2019 attendances: 69.229.092 / 71.236. 629), respectively + 2.89% and + 3.22%.

The concentration ratio of tourist arrivals by area (data obtained from the 2018 tourism report of the Statistics Office of the Veneto Region - 'Study - Analysis of the Veneto tourism system: demand, supply, impact economic, social and environmental '), describes the effective distance of the number of monthly arrivals from the perfect equality distribution, assigning a value for each district ranging from 0 (= absence of seasonality) to 1 (maximum concentration).

#### EMPLOYMENT IN TOURISM

The data relating to the number of members in the provincial lists of tourism professions, with reference to the year 2017 ('Study - Analysis of the Veneto tourism system: demand, supply, economic, social and environmental impact', Statistics Office of the Veneto Region, November 2018) records a total of 1,154 professional figures including tour leaders (815), tour guides (248), naturalistic-environmental guides (81) and tourist entertainers (10). In total, the professional figures related to tourism and registered in the regional lists are 3003 in 2017; the total figure highlights the considerable representation of the province of Venice compared to the other provinces.

#### ECOLOGICAL FOOTPRINT

The considerable extension of parks and protected areas in the province of Venice is highlighted with a total of 146,655 divided as follows: Regional Parks (River Sile - 4,159 ha), Regional Reserves (Bosco Nordio 114 ha), 32 Natura 2000 Network Sites, n. 4 other protected areas.

<http://www.parks.it/regione.veneto/index.php?prov=VE>

#### TOURIST RATE

<http://statistica.regione.veneto.it/>

Tourism rate is a complex indicator that indicates the tourist concentration of a locality and its weight on the resident population (configured as the ratio between attendance and number of days in a given period, on the average resident population per year \* 1000); it is calculated in the busiest year and month (data in this case available for 2017). For the City of Venice, without the Lido (data from the Statistics Office of the Veneto Region - ISTAT data processing), the rate was 126.4 in the year 2017 with a peak of 160.3 in the busiest month. Compared to the tourism rates of the other Venetian provinces, the figure for Venice is significantly higher with a significant impact in terms of tourist density also in relation to a resident population density which is per se contained (706.3 inhabitants / sq km).

Another significant indicator of the ecological impact of tourism is the per capita incidence on production of urban waste. The figure for 2018, from ARPAV data, indicates a value for the province of Venice of 573 kg / inhabitant. per year (RU equivalent from tourist incidence), the highest value in Veneto.

#### SITE-SPECIFIC INDICATORS

Pilot project sites: National Museum and Archaeological Area of Altino, Museum of Torcello.

#### ASSETS, CAPACITIES AND USERS

The first set of site-specific indicators describes the capacity of the facilities, the level of interaction with users and the assets available to the pilot sites.

From the point of view of total extension, the National Museum and Archaeological Area of Altino is 5 hectares and 2,000 square meters, the Torcello Museum of 1,945 square meters.

The extension of the internal area of the National Museum and Archaeological Area of Altino is 2,000 square meters, of the Museo di Torcello of 405 square meters.

Opening hours of the sites:

- National Museum and Archaeological Area of Altino (in the presence of a Covid emergency): Tuesday, Wednesday, Thursday, Friday: 8:30 am - 2:30 pm, Saturday, Sunday: 2:30 pm - 7:30 pm, closed on Mondays. Hours per week: 34
- Torcello Museum (in the presence of a Covid emergency): winter hours (November / February): from Tuesday to Sunday: 10.00-17.00; summer opening hours (March / October): from Tuesday to Sunday: 10.30-17.30. Hours per week: 42.

Intensity and trend of visitor flow:

- ✓ National Museum and Archaeological Area of Altino:
- ✓ Visits in the last two years: 2018: 9,700, 2019: 11,333
- ✓ Visitors per month of the last available year, 2019:
  - January 342
  - February 835
  - March 1730
  - April 1493
  - May 1709
  - June 876
  - July 436
  - August 528

- September 1106
- October 1049
- November 608
- December 378

The peak of admissions occurred during the first Sundays of the month, in 2019 with free admission. Furthermore, in March 2019, a whole week with free admission was promoted and in fact it is the month during which the most attendance was registered.

A large part of the museum's public is made up of school classes, once again non-paying.

- ✓ Torcello Museum:
- ✓ Visits in the last three years: year 2017: 13.330 2018: 12.228, year 2019: 12.105

o 2019:

- January 361
- February 356
- March 1540
- April 1539
- May 2252
- June 1263
- July 591
- August 1417
- September 1726
- October 1930
- November 450
- December 498

#### STRUCTURES AND EVENTS, PROMOTIONAL ACTIVITIES

The second set of site-specific indicators describes the presence of laboratories, applications / installations, the organization of events at the 2 sites.

In the National Museum and Archaeological Area of Altino there are currently tactile laboratories, there are no mobile applications for people with disabilities, nor possible experiences with augmented reality and virtual reality; there are no information panels with QR code.

It is not possible to use wi-fi in the structure. The connection works poorly and there are large areas in the museum where the phone does not pick up. The proximity of the airport and the obsolescence of the ducts severely limit the development of the network. At present, any multimedia device must be thought off-line or with an internal transmitter.

The web page is under construction, and will be optimized for multiple platforms (mobile phones, tablet).

As for the shows and temporary events, the Covid experience has changed the normal arrangements, so we refer to the programming for the month of September 2020, which sees the Summer Centers activated, then 6 events inside the Museum, 2 online events and 3 off-museum events.

In the Torcello Museum there are currently no tactile laboratories, there are no mobile applications for people with disabilities, there are no information panels with a QR code; experiences with augmented reality and virtual reality are possible.

The web page is active (<http://www.museoditorcello.cittametropolitan.ve.it>), the update is on average weekly for the part relating to news and events - for information and service data the revision is carried out where changes are made or new implementations. The web page is not optimized for multiple platforms (mobile phones, tablets, etc.).

As for the shows and temporary events in the last year, the Torcello Museum has organized 16 events (days with free admission and guided thematic tours / itineraries); 1 round table, 1 temporary exhibition.

#### COLLABORATIONS, NETWORKS AND STAKEHOLDERS

The third set of site-specific indicators aims to investigate the inclusion in the network and the involvement of stakeholders by the project sites, with reference to the last year of data availability - 2019. The last two indicators refer specifically to transport / reception services in the direct vicinity of the sites, thus describing their accessibility.

The National Museum and Archaeological Area of Altino has reached cooperation agreements with other cultural sites; in particular, cumulative tickets are active with other ministerial sites (Concordia Sagittaria, Caorle); Agreements are in progress with the Torcello Museum.

The structure has reached cooperation agreements in the last year with schools, training institutes or research centers, in particular with a school for school-work alternation and with 2 universities with excavation concessions; the structure has not reached cooperation agreements in the last year with public bodies, or with companies or other private bodies.

The closest public transport service is just outside the Museum. However, it is an extra-urban bus that connects the Mestre and Venice stations with San Donà di Piave. There is no public connection with the reference Municipality, Quarto d'Altino.

There are 2 restaurants and no hotels within 400 meters of the Museum.

The Torcello Museum has reached cooperation agreements with other cultural sites; in particular, cumulative tickets are active with other ministerial sites (Concordia Sagittaria, Caorle).

Agreements are in progress with the Torcello Museum.

The structure has reached cooperation agreements: an agreement has been in place for many years with the Diocese of Venice for ticketing services and cumulative tickets for visits to the Museum, Basilica and Bell Tower of Torcello; with the University of Padua, with the Ca 'Foscari University of Venice, with CORILA. The structure has not reached cooperation agreements in the last year with public bodies, or with companies or other private bodies.

The nearest public transport service is approximately 700 meters from the Museum

There are 5 restaurants on the island of Torcello; the receptivity counts the Cipriani inn and 2 B&Bs and some tourist rentals.

#### S.W.O.T. ANALYSIS

National Archaeological Museum and archaeological area of Altino

#### PREMISE

The framework for a comprehensive SWOT analysis is currently still very mobile. Part of the following analysis was carried out, as well as through the data taken from the questionnaire of the "Historic" sites, also from conversations held remotely with the manager of the museum structure.

#### STRENGTHS

In pre-Covid times, the number of visitors has grown. The Altino complex is within a circuit of cycle paths: it is close to the Sile cycle path, there is a project to create a link between the cycle path and the archaeological area.

Itinerary project: the landing of Altino, a boat leaves from the Museum that goes around the islands, including the island of Torcello. The same itinerary can be thought of by rowing.

The two itineraries represent an already sustainable way of traveling: slow, it allows you to appreciate the northern lagoon; have a day or more to enter the landscape, an added value that must be greatly developed in the proposal

Possibility of triggering a participatory process; from this point of view, the experience of ethnographic museums and ethno-anthropological demos is useful.

The current pandemic situation allows us to enhance the development of local tourism.

The facility has a visitor mailing list.

There are tactile laboratories.

Good relations with the entrepreneurial fabric, especially with a network of small entrepreneurs (local hoteliers, shops)

#### POINTS OF WEAKNESS

It is not possible to communicate the buried city, which justifies the presence of the museum and the archaeological areas.

In general, lack of communication.

Little energy for the communication of the site by the public administrations.

Lack of a visitor mailing list.

#### OPPORTUNITIES

It must be communicated that the Archaeological Park can be reached by already existing cycle paths.

Much attention was paid to the relationship with the local community.

Practices of inclusiveness have been strengthened: offering the museum experience to those with various types of difficulties, but also making the place accessible to those who do not know it exists.

Ratification of the Faro Convention as a process to bring the local community closer to the contents of the Museum.

In 2021, the 1700th anniversary of the foundation of Venice falls, and several initiatives will be activated, which will also concern the Torcello Museum, which houses several materials referable to Altino.

#### THREATS

##### COVID-19

No relationship of affection on the part of the local community for the new Museum, they were more linked to the old Antiquarium.

Little energy for the communication of the site by the public administrations.

Little or no wi-fi and telephone coverage. At present, any multimedia device must be thought off-line or with an internal transmitter.

#### S.W.O.T. ANALYSIS

Torcello Museum

#### PREMISE

The framework for a comprehensive SWOT analysis is currently still very mobile. Part of the following analysis was carried out, as well as through the data taken from the questionnaire of the "Historic" sites, also from conversations held remotely with the manager of the museum structure.

#### STRENGTHS

One of the places of destination of Venetian tourism.

Itinerary project: the landing of Altino, a boat leaves from the Museum that goes around the islands, including the island of Torcello. The same itinerary can be thought of by rowing.

The water circuit is essential, especially through small groups and slow times.

The community, numerically limited, but which represents a basin of memory; it is an absolutely rooted and particular community, and can be emphasized in the story, in the experience of the island.

#### POINTS OF WEAKNESS

The tourist visits are very fast and mainly focused on the basilica, compared to the museum.

Little involvement of local entrepreneurs.

#### OPPORTUNITIES

The investee company that co-manages the site could collect visitor emails and addresses.

For Torcello, one of the key words is "proximity: development of tourist-cultural products designed for small numbers in a situation of slow use.

Enhancement of environmental qualities, especially in terms of open spaces, which with the context - Covid will acquire further significance.

Ratification of the Faro Convention as a process to bring the local community closer to the contents of the Museum.

In 2021, the 1700th anniversary of the foundation of Venice falls, and the administration is asked to present projects; for the Torcello Museum it is an important opportunity, it is considered the Mother of Venice. To create a further link, in the Museum of Torcello several materials referable to Altino are kept.

#### THREATS

COVID-19

Marginality with respect to links.

## PP4 – Municipality of Medulin

### GENERAL INFORMATION

- The Municipality of Medulin occupies the extreme southern part of the Istrian Peninsula, an area where the protected areas of the Kamenjak Peninsula stand out, which in terms of attraction is one of the most important areas of Southern Istria and Istria County in general;
- Settlements and population of the Municipality are distributed mainly in its northwestern part and towards the city of Pula, while the largest Medulin is located on the eastern coast of the Istrian peninsula;
- The area is dominated by a humid subtropical climate with little influence of the Mediterranean climate, which is more typical for Dalmatia;
- Climatic conditions and sea temperature movements ensure the season of sun and sea products between June and September with occasional cold breakthroughs (especially in September), but also usually favorable periods in part of October;
- Medulin is a demographically propulsive municipality that has recorded a continuous demographic increase from 1971 onwards, especially between 1991 and 2001, when the population almost doubled;
- The population of Medulin is on average older than the national and county average, and the most numerous groups are 60-64 years and 55-59 years of age. The share of young people is slightly lower, and the share of children slightly higher than the national and county average;
- The population of Medulin is more educated compared to the national and county average with 24% of the population with completed professional and university studies (the share at the national and county level is 16%).

### GEOGRAPHICAL FEATURES

- The municipality of Medulin belongs to the entire region of the South Istrian plateau. In the area of the Municipality, several elevations stand out that do not exceed an altitude of 100 meters. The highest parts of the Municipality are located in the settlements of Premantura (Gomila - 76 meters) and Banjole (Teraško brdo - 69 meters);
- Submerged karst relief and limestone soil characteristic of the southern coast of Istria, shapes the area of Medulin. In terms of relief, pedology and geomorphology, Medulin is one of the largest and lowest coastal areas, the so-called Poreč-Pula slabs;

- The soil of Medulin is characterized by red soil which is characteristic of the Istrian coast and together with its position, climate and relief favors plantations of high-quality black grapes and other fruits and vegetables (the area is the so-called "Red Istria"). Redheads retain moisture unevenly, and are poor in nitrogen and phosphorus, which is compensated in agriculture by soaking and fertilizing;
- The remains of a settlement built of dry stone on a hill and surrounded by concentric circles show that the area has been inhabited since prehistoric times;
- In the area of the Municipality of Medulin, the stratigraphic systems of the Lower and Upper Cretaceous, mostly of limestone, stand out. The Lower Cretaceous covers a smaller part of the Municipality, namely parts of the settlements of Pješćana Uvala, Vinkuran, Valbonaša and Vintijan;
- Other parts of the Municipality are built of Upper Cretaceous limestone. From the engineering-geological aspect, the municipality belongs to the broken limestone complex, which is characterized by large cracks with mechanical decay and karst processes;
- The stability of this complex is great, which allows tourist construction, taking into account the possibility of caverns and cavities;
- In contrast, cracking and cracking allows water to flow underground, creating complete water permeability. These exogeomorphological processes significantly increase the ecological risks in the sea and the coast of the Municipality of Medulin.
- The length of the Medulin coast, including the associated islands, is 68.1 kilometers, which is the longest coastline among Istrian towns and municipalities after the city of Pula (Institute for Physical Planning of the Istrian County, 2016);
- In general, the eastern part, which includes the area from Lokvica Bay and the border with Ližnjan Municipality to Cape Kamenjak, is more suitable for bathing tourism and coastal recreation than the western part (from Cape Kamenjak to the border with Pula);
- For better evaluation of the coast of the Municipality of Medulin in accordance with the concept of sustainable tourism development, it is necessary to conduct monitoring and determine all types of reception capacity of the coast in order to manage tourism development in the future.

## TRAFFIC

- Road access is still highly dominant for tourism and according to the TOMAS 2019 survey, more than 90% of tourists come to Istria by road, although this percentage was declining by 2019;
- The municipality of Medulin is connected to the network of national, and still European, highways by the Istrian Y (motorways A8 and A9). The construction of the full profile of the A8 motorway (Matulji-Kanfana) is being completed and the Cerovlje - Učka Tunnel section is expected to be completed by summer 2021, ie the full section profile from the Učka to Matulji tunnel by 2023;

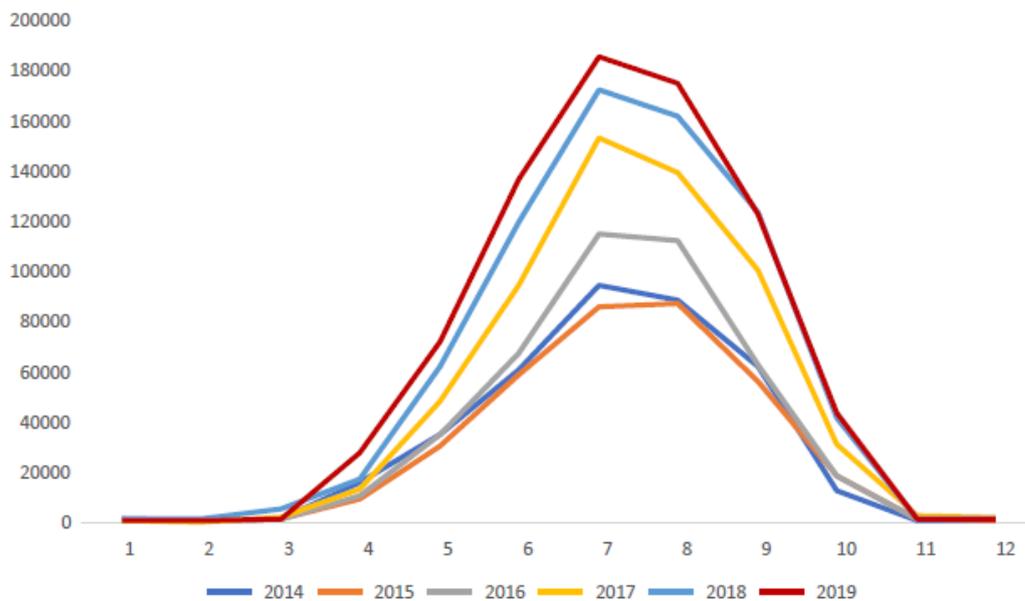


- Southern Istria has relatively affordable accommodation towards the markets of Central and Western Europe, about 8 million people live 5-hour drive from Southern Istria, and over 50 million people live 10-hour drive, and these figures will be further raised by the completion remaining sections of motorways;
- According to HAC statistics, 1.18 million vehicles were recorded at the Pula junction in the summer season in 2017, and 1.26 million vehicles in 2018 (an increase of about 8%);

## AIR TRAFFIC

- Pula Airport recorded significant growth in the period from 2014, more than doubling the number of passengers to 775 thousand in 2019;

### Seasonality of passenger traffic at Pula Airport 2014 – 2019



- Seasonal line coverage included almost all EU countries and Russia, with the best coverage of German and British destinations;
- Growth and a generally more favorable position related to Air Transport can be observed in the fact that the share of passengers who came to Istria by plane according to TOMAS summer 2017 and TOMAS 2019 surveys increased from 7.5% to almost 9% in two years;

### SEA TRAFFIC

- Maritime property in the area of the Municipality of Medulin stretches from the border with the Municipality of Ližnjan in the east to the border with the City of Pula in the west. The maritime domain in the mainland includes the coastal part of the cadastral municipalities: K.O. Medulin, K.O. Premantura, K.O. Pomer and K.O. Pula and the coastal part of the island: Bodulaš, Finera, Ceja, Pomerski školjić, Premanturski školjić, Trumbuja, Šekovac, Albanež, Porer, Fenoliga, Frašker and Fraškeric.
- In the area of the Municipality of Medulin there are a relatively large number of ports and harbors: Medulin, anchorage Vinkuranska vala, Sports Port "Kula" on Klementovica in Medulin, Runke port, ACI Pomer, Polje port and Porto Volme;

- The port of Medulin has almost 568 berths, of which 181 are nautical while 387 are communal berths. The nautical part of the port of Medulin includes 127 coastal berths and 54 berths at anchor, while the communal part of the port includes 363 coastal berths and 24 berths at anchor;
- The port of Runke has 71 berths, of which 18 are nautical berths at anchor, and 53 berths are communal berths, of which 1 is at anchor while the other berths are coastal. The coastal strip of the port of Runke consists of communal berths intended for smaller vessels with low draft. These are mostly pasara up to 6 meters. The nautical part consists of 18 buoys where the depth varies from 1 to 3 m;
- Anchorage Vinkuranska vala with a capacity of 100 berths in the sea is part of a public port intended for mooring vessels on a buoy under the jurisdiction of the Port of Pula. In the port of Polje, the boats of the locals are moored.
- The Port of Polje contains 30 municipal berths, 14 coastal berths and 16 berths at the anchorage. It is intended for vessels up to 6-7 meters that have low draft. The port is managed by the concessionaire - Buža d.o.o. Beginning of the concession: 01.07.2011, end of the concession: 30.06.2031;
- In the deepest part of the Medulin Bay, the ACI marina Pomer is located. In 2016, a complete capital venture in the marina was completed. The old buildings of the summer marina were removed and a completely new land part was built. The marina has 294 berths in the sea and 30 places to accommodate vessels on land. The berths are equipped with water and electricity connections;
- Marina Porto Volme is a private port located in the area of Volme, near the bay Mušoga. Porto Volme offers 180 wet berths and 50 dry berths, boat crane service, 0-24 marina and boat monitoring and personalized services.

## RESOURCE BASIS FOR TOURISM

### NATURAL HERITAGE

### BEACHES

- The long coastline (68.1 km) and the attractiveness of the coast make the beaches in the Municipality of Medulin an important attraction for the entire area of Southern Istria;
- According to the Regional Program of Beach Development and Management of the County of Istria from 2015, the following beaches are in the area of the Municipality with associated capacities:

List of beaches in the municipality of Medulin						
	Beach	Type of beach	Theme	Orientation beach area (m <sup>2</sup> )	Minimum space per bather (m <sup>2</sup> )	Receiving capacity
1	Pješćana uvala - plaža	Arranged - urban	Beach for families with children	5.250	8	656
2	Pješćana uvala - Lukobran	Arranged - urban	Entertainment for young people	2.000	5	400
3	Pješćana uvala - umirovljenička plaža	Arranged - urban	Sports and recreational facilities	1.200	5	240
4	Vinkuran - plaža Vela kava	Natural - rural	Romantic beach	1.500	15	100
5	Vinkuran - lučica	Natural - rural	Romantic beach	800	15	53
6	Banjole - Kaštanjež	Arranged - local	Beach for families with children	800	8	100
7	Banjole - plaža Indije	Arranged - tourist beach complex	Beach resort	2.100	10	210
8	Banjole - uvala Centinera I	Arranged - local	Sports and recreational facilities	2.000	5	400
9	Banjole - Centinera II	Arranged - local	Beach for families with children	2.050	8	256
10	Banjole - uvala pod Lijon	Arranged - local	Sports and recreational facilities	2.000	5	400
11	Banjole - plaža Volme	Arranged - local	Beach for families with children	800	8	100
12	Banjole - Bumbište	Arranged - local	Beach for families with children	10.000	8	1.250
13	Kamenjak - plaže Donjeg Kamenjaka	Natural - remote	Eco beach	30.000	20	1.500
14	Medulin - Šćuza	Arranged - local	Beach with sports and recreational facilities	3.000	5	600
15	Medulin - otok Ceja	Natural - remote	Eco beach	15.000	20	750
16	Premantura - plaža Stupice	Arranged - tourist beach complex	Beach resort	2.500	10	250
17	Premantura - plaža Runke	Arranged - tourist beach complex	Beach resort	2.500	10	250
18	Pomer - plaža Pomer	Arranged - local	Beach for families with children	1.600	8	200
19	Pomer - Muća	Natural - rural	Surfers beach / party beach	2.400	10	240
20	Medulin - Mukaiba	Natural - rural	Romantic beach	2.000	15	133

21	Medulin - Markovi brigi - Škrabe	Arranged - local	Beach for families with children	3.600	8	450
22	Medulin - Mala Pineta	Arranged - tourist beach complex	Beach resort	2.500	10	250
23	Medulin - Puntica	Arranged - local	Sports and recreational facilities	1.500	5	300
24	AC Medulin - Kašteja	Arranged - tourist beach complex	Beach resort	1.600	10	160
25	Bijeca	Arranged - local	Beach for families with children	10.000	8	1.250
26	Plaža ispred hotela Belvedere	Arranged - tourist beach complex	Resort beach - hotel beach	1.163	10	116
27	Pošesi	Arranged - local	Beach for families with children	800	8	100
28	Kažela I	Arranged - local	Beach for families with children	2.000	8	250
29	Kažela II	Arranged - tourist beach complex	Beach resort	3.200	10	320
30	Kažela III	Arranged - local	Nude beach	4.000	8	500
	<b>UKUPNO</b>			<b>119.863</b>	<b>283</b>	<b>11.784</b>

- Beaches in the west of the municipality (from Pješćana uvala to Premantura) are of various configurations, in the area of Kamenjak and Medulin archipelago natural rocky beaches predominate, while in the eastern part of the municipality beaches are most suitable for mass bathing tourism and sea recreation;

- The current assessment of the capacity of the municipality's beaches is seriously disproportionate to the accommodation capacity of the municipality, even if we ignore the fact that beaches in the municipality (especially those in Kamenjak) attract a significant number of visitors daily from surrounding municipalities and cities;

#### NATURE PROTECTED AREAS

- There are 9 protected natural values in the Municipality of Medulin. Four of them are protected under the Nature Protection Act (OG 80/13). Others are classified as part of the Natura 2000 ecological network;

- PI Kamenjak manages the above-sea part of the ecological network - Pomeranian Bay and Medulin Bay. JU Kamenjak has more jurisdiction over the maritime part while Natura Histrica has more jurisdiction over the coastal part;

- The most valuable parts of the landscape of the Municipality of Medulin are protected natural areas, namely the significant landscape of Donji Kamenjak and the Medulin archipelago and the significant landscape of Gornji Kamenjak and the park-forests of Soline and Kašteja. These four areas together occupy 28.9% of the area of the Municipality, making Medulin the leader among the cities and municipalities of the Istria County;

- The area of significant landscape of Donji Kamenjak and Medulin archipelago covers 4.4 km<sup>2</sup>, and stretches from the line of Prisagi bay to the southern part of Močila bay on Kamenjak, including all islands and shoals of the Medulin archipelago, and the coastal area of Medulin Bay from Medulin to Cape Marle;
- A special natural value in the area of Donji Kamenjak is the seabed with rare species, among which the noble perca (*Pinna nobilis*), premantura crab (*Maja squinado*) and the population of bottlenose dolphins (*Tursiops truncatus*) stand out, which according to research from 2014 numbers 230 individuals;
- Tourist offer of Kamenjak includes several bars on the beaches, bicycle paths, family farms, sports center, windsurf station, eco center "House of Nature Kamenjak" (Premantura) and the possibility of individual or group guided visits / education;
- JU Kamenjak is predominantly financed by the collection of vehicles entering the park between May and September, and in 2019 slightly less than 190,000 vehicles entered, while in 2020 there was a drop of 28% and slightly more 147,000 vehicles were recorded;
- The plans of JU Kamenjak go in the direction of further development of transport infrastructure (including ecological solutions for passenger transport within the park area), long-term limitation of the number of vehicles, development of a new interpretation center in the nature park and branding and marketing plan;
- Kašteja Forest Park (area 0.38 km<sup>2</sup>) is located on the peninsula of the same name, which is covered by the forest culture of Aleppo pine (*Pinus halepensis* Mill.) And black pine (*Pinus nigra* Arnold) of special visual and microclimatic values;
- Soline Forest Park (area 0.26 km<sup>2</sup>) covers the area of Soline Hill near Vinkuran, which is a very well-developed dense macchia, in places developed to the stage of holm oak (*As. Orno-Quercetum ilicis*).



## CULTURAL AND HISTORICAL HERITAGE



- Remains of material heritage indicate the prehistoric population of the area, and we mean the archaeological sites of the Neolithic (Vižula peninsula and Vrčevan hill), and the Bronze and Iron Ages (Cape Kašteja and Vrčevan);
- The Vižula building complex dates from the 1st to the 6th century and is an exceptional site built using the drywall technique. Remains of Roman mansions have been found in this area;
- In 2019, the archeological site of Vižula with attractive cultural-tourist and educational contents with the following components of the project was valorized with funds from EU funds:
  - o 3d interpretation of underwater and terrestrial archeological heritage, preserved and constructed parts of terrestrial sites, educational educational-scientific film about Vižula, montage stage in the quarry, educational boards, ancient garden, archeological school, tactile model of archeological park adapted for visually impaired and blind people disability and movable archaeological sites);
  - o Education of tourist guides;
  - o logo, website, promotional material about the park, marketing campaign.
- The Cavae Romanae quarry in Vinkuran is the place where the Romans extracted the necessary stone blocks to build the Pula Arena. After the cessation of its exploitation, the space was transformed into a center of culture and sports that contains two summer stages with a total of 2,000 seats, a stone museum as well as an area for stone climbing and biking. The space has been in operation for mostly concert events in recent years;
- Windmills from the 19th century have the potential for valorization, and one of them is Malin, whose name in the Istrian dialect means "windmill", is and is a symbol of Medulin. The wind-powered mill on the

Medulin waterfront is unique in the Mediterranean, and was built in 1872 by brothers Ivan and Andrea Pošić. Malin was then revitalized and opened in 2016;

- On the main road to Pula there is a cave on the hill Gradina where objects from the period from the 1st century BC were found. to the 3rd century AD These are prehistoric iron axes and objects from ancient times (amphorae, utensils, bone objects, oil lamps);
- One of the largest forts in Istria was discovered on Vintijan Hill, about which there are still no defined conclusions from the aspect of the ethnicity of the inhabitants of the Bronze Age;
- In the area of Banjole, on the hill Bumbište, tumuli, grave sites from the prehistory and the Bronze Age were discovered. Remains of Romans have also been found in this area, including Roman villas (Paltana Bay) and spas that are not valorized for tourism, as well as tumuli. The municipality of Medulin has arranged a promenade nearby, in the area from Portić Bay to Bumbište;
- The islet of Fenoliga is significant for the location of dinosaur footprints that lived in this area 80-90 million years ago. These are bipedal three-toed dinosaurs, carnivores, and four-legged sauropod dinosaurs;
- In the 12th century, a defensive tower was built on the main square of Medulin, which has now been converted into a residential building;
- The Porer lighthouse from 1833 expresses the typical Austro-Hungarian architecture of that period;
- Among the sacral objects stand out:
  - o Church of Our Lady of Health located on the east side of the central square of Medulin. The interior preserves frescoes and Glagolitic graffiti from the 15th century, and one of the most valuable buildings within the cultural heritage is the Renaissance-Baroque statue of the Mother of God with a child and reliefs on the retable;
  - o Church of St. Agnes dates from 1893, and is adorned with a basilica with three naves and an apse, and two bell towers. Inside the walls is a silver-plated processional cross from the 15th century and is a valuable element of material heritage.
  - o Church of St. Lawrence from 1632 is located in the central square of Premantura, and near this church there is an old bread oven from the 18th century;
  - o Other important sacral buildings are the church of St. Foške which is located outside the place, the church of St. Anthony, and the church of St. James and St. Petra.

## OTHER RESOURCES AND ATTRACTIONS

- In the last ten years, Medulin has established itself as a destination for sports, especially football, preparations, and this has become the second tourist product of the Municipality. Sports infrastructure includes:

- 8 football fields;
- 1 4-lane athletics track and 4 athletic pitches;
- about 14 km of cross-country track for runners
- about 9 tennis courts.

- In the area of the Municipality there are 6 bicycle routes and 3 walking routes (Gornji Kamenjak trail no. 303, Donji Kamenjak Orchid Trail no. 304 and Bumbište trail no. 301).

- Adrenaline park Medulin, located in the area of oak forest and meadow, covers an area of 12,000 m<sup>2</sup> and there is a bar within the park. The park includes a "high polygon" on trees, ZIP-LINE set up along almost the entire park, a "giant swing" at 12m high, ZORB football, a playground and equipment for paintball and archery, and buggy and quad vehicles;

- Jangalooz Pomer Adventure Park with 5 trails at a height of 1.5 m to 10 m, 53 obstacles, over 370 m zip line, trampoline park, 10 m rock climbing and Quick jump with a jump of 12 m;

- Tourists of the Medulin region have two amusement parks on offer, ie one that is divided into two areas - a family park and an amusement park. Both are located next to each other, directly on the famous sandy beach Bijeca, in front of the main entrance to the camp Medulin on the peninsula.

- In the area of the Municipality, there is a Street view overview via Google Maps with more than 120km of covered streets.

## EVENTS

- The map of events in the area of the Municipality is very rich, but mostly not concentrated on the main season;

- The Tourist Board of the Municipality of Medulin spends significant funds (almost 30% of original revenues in 2019) on the development and support of events, where a small part of funds is placed through tenders where the main criterion is the number of guests whose main motive is coming to the Municipality;

- Despite favorable trends, there are still insufficiently recognized events that have the power to attract large numbers of visitors to the destination;
- In the last few years, there has been a stronger emphasis on gastronomic events (LAGUR Od mora do stola, Hook & Cook, Istra Gourmet), affirmation of the Cavae Romanae concert space (Cavae Roamanae festival), promotion of sports products (Medulin and Arena Cup), active and adrenaline tourism (Kamenjak Rocky Trails) and a series of music events in the main season on various topics (Medulin Concert Summer, Medulin Summer Party, Banjole Energy, Premantura Energy, Adria summer party, Beer party, Craft beer Festival, etc.).

#### TOURIST OFFER OF MEDULIN MUNICIPALITY

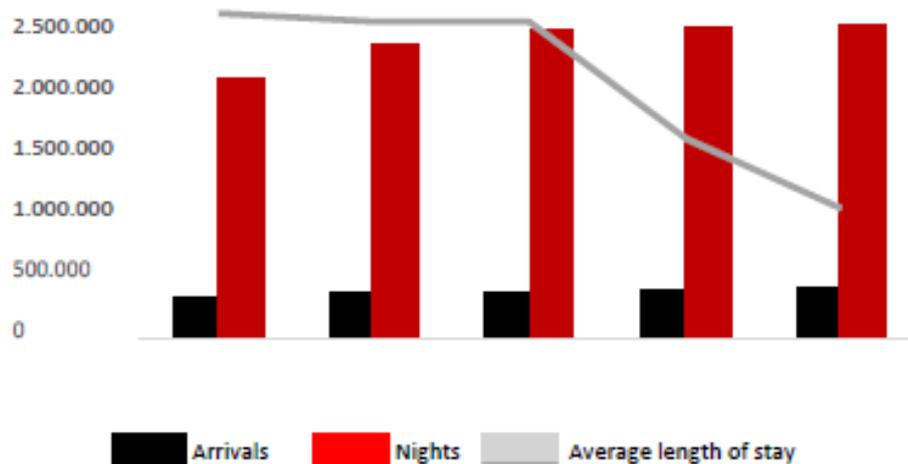
Number of beds in commercial accommodation in the municipality of Medulin by basic types in the period between 2011 and 2020:

	2011.	2016.	2018.	2020.	Average annual rate growth 2011. - 2020.
Hotels	2.696	3.222	2.346	2.318	-1,7%
Camps	17.514	17.209	17.355	16.301	-0,8%
Household facilities and other accommodation	13.483	17.080	20.584	23.155	6,2%
<b>Total</b>	<b>33.693</b>	<b>37.511</b>	<b>40.285</b>	<b>41.774</b>	<b>2,4%</b>

- According to the eVisitor system for 2020, the accommodation offer of the Municipality of Medulin includes 4,975 accommodation facilities, 14,519 accommodation units and almost 53,000 beds. Of these, 41,774 beds are in commercial accommodation, and noncommercial accommodation accounts for a high 21% of the total accommodation contingent;
- The structure of accommodation in the Municipality of Medulin is dominated by camps and private accommodation, which together make up more than 80% of the share;
- In the last 10 years, the categories of private and other accommodation have grown by 72%, growing by an average of 6.2% per year. Although this is a strong increase, it is still smaller than in some Istrian, and especially Dalmatian destinations;
- Hotel accommodation is in a continuous and slow quantitative decline with increasing quality and in the Municipality of Medulin more than 60% of total capacity (beds) is at the level of 4 \*;

- Large hotels in the Municipality have been reconstructed, which leads to an increase in quality, but also a reduction in the number of units (increasing rooms in the same size of the total area), and new hotel projects apply only to smaller facilities that do not significantly affect the overall accommodation structure;
- This trend is significantly slower in camping accommodation and still more than 93% of camping capacity is at the 2 \* level. Due to significantly higher camping capacities compared to hotels, in the final sum 82% of collective accommodation capacities are at the level of 2 \*;
- However, the same situation should change in the next period according to the announcements of the leading hotel and camping company, which is already raising 30% of its camping capacity to the level of 4 \* for the 2022 season;
- Slightly less than half of the total accommodation is in the area of Medulin, about a quarter in Premantura and 17% in Banjole. In the area of these three settlements there is a total of 88% of the total accommodation of the Municipality.

#### TOURIST DEMAND OF MEDULIN MUNICIPALITY



- In 2019, a total of 428,000 tourist arrivals and slightly less than 2.8 million overnight stays were realized in the Municipality of Medulin. This type of tourist traffic (as well as the size of the accommodation contingent) ranks the Municipality of Medulin among the 10 leading tourist destinations in Croatia;

- The share of commercial accommodation in tourist traffic is expected to be higher than in accommodation due to higher occupancy of commercial capacities, so it is in commercial accommodation in 2019 accounted for more than 92% of total tourist traffic - 417 thousand arrivals and 2.58 million overnight stays;
- Overnight stays in the period from 2015 to 2019 grew by an average of 4.8%, and arrivals by 6.6% per year. However, the majority of growth was achieved by 2017;
- Before the COVID 19 pandemic, tourist traffic was approaching a stagnation phase, especially in the segment of overnight stays, which grew by less than 0.5% per year between 2017 and 2019, while the annual growth of pre-pandemic arrivals remained at 2.8%;
- The average duration of stays is decreasing and in 2019 it was reduced to below 6.2 days. There are significant differences in the average duration of stay, so hotel guests stay on average 4.6 days, camp guests 6.4 days, and private accommodation 7.1 days;
- Occupancy of accommodation capacities of the Municipality of Medulin lags behind the total occupancy of Southern Istria, and especially the Istrian County. This is primarily the result of relatively low occupancy of private accommodation capacity;
- Camps and hotels also have significantly lower occupancy compared to the county average, but still higher than the average of Southern Istria, but for hotel accommodation these deviations are smaller.
- The seasonality of tourist traffic in the area of the Municipality of Medulin is similar to that in the area of Southern Istria and is more pronounced in relation to the County of Istria with 90.3% of overnight stays realized between June and September. The seasonality of private accommodation is particularly pronounced, accounting for 70% of total overnight stays in July and August, and 95% between June and September;
- Like the rest of Istria, the seasonality curve is surprisingly inclined towards the spring months compared to autumn, given the climatic conditions (especially the suitability of the sea for swimming). The municipality of Medulin realizes only 1.5% of total overnight stays in the period from October to December;
- Combining data on seasonality and occupancy, it can be concluded that the full season in Medulin lasts an average of 61 days, and that in private accommodation only 52 days;
- Until the COVID 19 pandemic, the structure of the main tourist markets of the Municipality of Medulin was relatively stable with Germany as by far the strongest market with about a quarter of the total number of overnight stays. They are followed by Austria, Slovenia and Italy (13-14% of overnight stays

each), while the fifth market was the Czech Republic with 5% of overnight stays. The top 5 markets together accounted for about 70%, which speaks in favor of relatively high market concentration;

- In terms of market structure, the pandemic 2020 season showed high loyalty of the German and Slovenian markets compared to the Austrian and Italian ones. The Czech Republic retained and Poland increased its stake in 2020;
- In 2020, the Municipality of Medulin realized about half of the total with 1.33 million overnight stays and 40% of overnight stays in commercial accommodation from 2019;
- Hotels were at 25% of 2019, campsites at 41% and private accommodation at 55%;
- With these results, the Municipality of Medulin is slightly above the Istrian and significantly above the average of the Croatian coast in terms of the realization of the 2020 season.

## PP5 – Municipality of Murter-Kornati

### INTRODUCTION

Pilot site Colentum is placed in Municipality of Murter – Kornati (Murter Island). The Municipality has total surface of 81 km<sup>2</sup> with a population of 2044<sup>1</sup>.

### TOURISM VOLUME AND VALUE, INCLUDING SEASONALITY

#### TOURISM DESTINATION CAPACITIES

In municipality of Murter- Kornati there are 5542 accommodation beds. Regarding tourist accommodation establishments there are total of 654 (including camp sites).

Since 2020 was highly distracted by COVID19 pandemic, referent year for assessment of tourism activities is **2019**.

Total number of overnight stays was 297.401 with a monthly average of 4783. Comparing to 2018. it is 2,45% increase. The highest number of overnight stays is in July and August. Number of tourist overnight stays during non-summer months (January – May; September – December) is 3.560 per month. Average length of stay is 6,95 while number of same day visitors per month 3.566.

Number of arrivals in 2019. was 42.794 which is 5,06% more then previous year (40.731).

Numbers of overnight stays and arrivals per month are listed in a Table 1.

Concentration ratio of tourist arrivals for destination area ( $R = \text{absolute average difference between peak concentration and absence of seasonality}/2$ ) is 56.754.

Table 1. Number of tourist overnight stays and tourist arrivals in 2019. (Source: eVisitor)

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<sup>1</sup> Official Census in 2011.

Month	Number of tourist overnight stays	Tourist arrivals
January	95	23
February	133	36
March	298	120
April	2.435	826
May	6.607	1.306
June	35.382	6.445
July	105.889	14.239
August	113.413	14.956
September	29.185	4.100
October	3.702	694
November	179	31
December	83	18
<b>TOTAL</b>	<b>297.401</b>	<b>42.794</b>

Tourism rate [*tourist presence in the considered period/n. days of the considered period*]/average resident population for the considered year \* 1000] for August/2019 is **167,11**.

#### EMPLOYMENT IN TOURISM

Only official data on employment in tourism in the Municipality of Murter – Kornati is available for 2011. According to those data, the highest number of employed people comes from accommodation and catering services (126/526 - 21,14% of employed people)<sup>2</sup>.

#### THE IMPACT OF DEVELOPMENT ON THE ENVIRONMENT AND COMMUNITIES

##### ENVIRONMENTAL FOOTPRINT

##### NATURA2000

The pilot site is placed in SCI **HR2001050 Murter**. The site of 1772.2955 ha is important for conservation of coastal rocks with endemic *Limonium* species, two types of halophytic vegetation and mediterranean grasslands as follows:

1210 Annual vegetation of drift lines

1240 Vegetated sea cliffs of the Mediterranean coasts with endemic *Limonium* spp

<sup>2</sup> Strateški plan razvoja općine Murter – Kornati 2016. – 2021. Jelić konzalting, 2015

1420 Mediterranean and thermo-Atlantic halophilous scrubs (*Sarcocornetea fruticosi*)

6220 Pseudo-steppe with grasses and annuals of the Thero-Brachypodietea

Other NATURA 2000 sites in vicinity of Murter:

#### **HR3000445 Murterski kanal**

*The site includes marine area on the southern side of Murter channel, between Višnja bay and Obinuš veliki cape on the mainland and Kamenčina cape on Murter island and Dražemanski veliki islet. The islets Ljutač, Dorovnik and Školjić, located on the north to the marine part of the site are also included in the site. The maximum depth is about 66 m.*

#### **HR3000419 J.Molat-Dugi-Kornat-Murter-Pašman-Ugljan- Rivanj- Sestrunj-Molat**

1349 *Tursiops truncatus*

1170 Reefs

8330 Submerged or partially submerged sea caves

#### **PROTECTED AREAS**

In administrative borders of Municipality of Murter-Kornati there is Kornati National Park as part of Kornati Archipelago while in its vicinity Vrana Lake Nature Park.

#### **Kornati National park**

The Kornati archipelago, as a separate and singular island group situated where the Šibenik and Zadar islands meet, stretches over an area of approximately 320 km<sup>2</sup> and includes 149 land, permanently or occasionally above-sea units. Four chains of islands, classified into two groups, are situated from Balabra to Samograd in a total length of 35 km or 19 NM (between Dugi otok and the Žirje Isles) and from Mana to Gangarol in a width of 13 km or 7 NM (between the open Adriatic and Pašman, Vrgada and Murter):

- The Upper Kornati (Gornji Kornati) – the Sit and Žut island chains with a total of 51 land units,

The south-western coastline of Murter Island is predominantly steep slopes divided by many sandy coves. The island has lots of rocky beaches, as well as several sandy ones. Primary vegetation of the island of Murter is *As. Quercion ilicis*. Since olm oak forests have been destroyed in the past, degradation stages of maquis are present (mainly *As. Myrto – Quercetum ilicis*, but also *Fraxino orni – Quercetum ilicis* and *Ostryo – Quercetum ilicis*). *As. Oleo – Ceratonion* with *Pistacio lentisci phoeniceae* and *Querco ilicis – Pinetum halepensis* communities are developed on shielded position and on the slopes of the south to

southwest exposed positions. Pseudo-steppe with grasses and annuals of the Thero-Brachypodietea are prevailing grassland type. On heavily degraded slopes on north As. Stipo – *Salvietum officinalis* is developed. The most valuable vegetation develops on various habitats close to the sea - Mediterranean and thermo-Atlantic halophilous scrubs (*Sarcocornetea fruticosi*). On rocks close to the sea As. *Plantagini* – *Limonietum cancellati* is developed.

The Lower Kornati (Donji Kornati) – the Kornati and open sea or Piškera island chain with a total of 98 land units.

Kornati National Park encompasses the majority of the Lower Kornati, while the Upper Kornati are protected under the important landscape category and are under the management of the Public Institution for the Management of Protected Natural Values of Šibenik-Knin County.

Kornati National Park and the entire Kornati Islands can be characterised as an area rich in very important marine communities that enjoy a high level of conservation thanks to many years of protection and as an area of valuable land flora and fauna elements. Man has had a significant impact on the Kornati Islands, however, and his coexistence with nature is reflected in modest but impressive buildings.

List of NATURA2000 species and habitats in Kornati National Park are SCI HR4000001 Kornati National Park and SPA HR1000035 NP Kornati i PP Telašćica.

**Number of visitors:** cca 150 000 per year.

**Note:** Significant number of visitors comes via Murter both by organized excursion boats or with an individual, own or rented, boats. 5

### VRANA LAKE Park of nature

This largest freshwater lake in Croatia, as well as the rest of the region, has a turbulent and noble history. Once the multiply larger morass, through heroic self-sacrifice and perseverance of noble Borelli, was turned into a picturesque lake - a Nature Park. With its countless old backwaters, today it is the great Pakoško field, a land of agriculture that has fed this land. Some legends say that in the depths of the lake sleeps a terrible dragon, but what is not a legend is the Ornithological Reserve, the natural habitat of water birds. On sunny winter days approximately 100,000 birds splash on the water, enjoying the mild climate and abundance of food. The abundance of fish and fishing on large fish is everyday life on Vrana Lake. It is not rare to catch a monster up to 200 kg, mostly catfish.

## WASTE PRODUCTION

According to Waste Management Plan 2017. – 2022. total amount of collected communal waste in 2016. was 1682,76 t. The significant amount of waste comes from tourist who generated 743,68 t - 2,05 kg/person or 1 kg/night<sup>3</sup> (in 2016)<sup>3</sup>.

## THE CONSERVATION AND VALORISATION OF CULTURAL HERITAGE

### CULTURAL TOURISM

From 2012 on, many educational activities were held in the Colentum Archaeological site with a contribution in development of cultural tourism.

The Colentum Archaeological site is free-entrance area on 15-minute distance from a Murter Centre and available for visitation throughout the year the year. The number of visitors is not known since there is no monitoring infrastructure installed.

Besides Colentum Archaeological site, a huge potential for development of cultural tourism has valorisation of the military complex on a plateau on the **Raduč** hill.

The construction of a military complex is built during the rule of the Austro-Hungarian monarchy. It consists of a command building, a reconnaissance tower, the ruins of several smaller buildings (an officer's home, a kitchen and a warehouse, an armoury, a barracks and sanitary facilities) and a three-tunnel system began. The tunnels end with two coastal artillery battles and a machine gun nest. In 1931, during the time of the Kingdom of Serbia, Croatia and Slovenia, the construction of tunnels which were drilled with dynamite and large hammers (pistons) began.

Tunnels are today popular touristic destination for everybody who is spending their time on Murter. Tunnels are in complete darkness and whoever is planning going there needs to take a flashlight or any other good source of light. Around 20% of the tunnels are inaccessible, since the deepest parts were accessible only by ladders.

There are the projects called INSULARIUM and AMPHORARIUM which are planned to be implemented in the hopefully near future by local Municipality Murter-Kornati. INSULARIUM which will be the island visitor and development center is planned on the top of hill Raduč. AMPHORARIUM is a touristic, visitor center which will coordinate all visitor activities of Municipality Murter-Kornati.

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<sup>3</sup> Šibenik-Knin County Waste Management Plan

The most important cultural events are Latin Sail Regatta Latinsko idro and Carneval – Murterske bake.

**Latin Sail Regatta – Latinsko idro** is regatta of wooden boats with Lateen Sail enriched with a rich cultural, educational and entertainment programme, including different workshops, presentations, lectures and exhibitions that demonstrate seafaring skills.

The Murter Regatta “Latinsko Idro” is organised every year on the day of the Patron Saint Michael in honour of their ancestors, to preserve this tradition and heritage.

**Carneval - Murterske bake** dates back 130 years and is one of the few carnival processions with a constantly growing number of participants, who often outdo themselves when creating their costumes. There are at least 30 organised groups participating in the processions, and the number of spectators is higher than 5,000.

There is no direct revenue generated in above-mentioned sites and attractions and organization is based on a voluntary work of local organisation, with a support of local and national authority.

The only museum on the island of Murter is **Museum of Wooden Shipbuilding**<sup>4</sup> located in the village of Betina in a neighbouring Municipality (Tisno). It is dedicated to shipbuilding skills of Betina gajeta<sup>5</sup> since Betina is one of few remaining centres of small wooden shipbuilding on the Croatian Adriatic.

## LOCAL PRODUCTS

The offer of local products includes olive oil, Kornati sage honey, natural herbal products (balsams, hydrolats), handcrafts in textile, production of picturebooks and educational games.

In order to promote those producers, Tourism board of Murter-Kornati has started a campaign “Local product for Local Feeling” (*Lokalni proizvod za lokalni doživljaj*).

## LOCAL COUSINE

Murter is a gastro destination. There more than twenty restaurants in the area. The gastronomy is based on a Mediterranean cousine made with local ingredients (herbs, olive oil...).

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<sup>4</sup> <https://www.mbdb.hr/en/betina-museum-of-wooden-shipbuilding/>

<sup>5</sup> Gajeta - 5 to 8 meters long wooden boat, 2 to 2,6 m wide, with the sail as the elementary navigation asset. 7

There are some projects like TASTES FORM AND AMHORA which are connecting contemporary gastro scene with rich gastro history of the ancient Colentum. We predict bright future of this movement which seek inspiration from ancient history.

#### SITE SPECIFIC INDICATORS

Overall site extension = **20 ha with no indoor part.**

Opening time (yearly average hours per week) – **free entrance zone with no regulation.**

Employed human resources in full-time equivalents - **0**

Yearly number of visitors – **n/a**

Average % change in yearly number of visits during last 3 years – **n/a**

Visitors per month in higher peak quarter – **n/a**

Visitors per month in lowest peak quarter – **n/a**

#### FACILITIES AND EVENTS, PROMOTIONAL ACTIVITIES

Tactile laboratories – **does not exist**

Mobile applications for impaired people - **does not exist**

AR/VR installations - **does not exist**

Explanatory panels with QR codes – **4 educational panels.**

Monthly number of new contents uploaded in the website in last 3 months – **2.**

The website is available in an accessible format (Y/N/partly) – **colentum.info.**

Number of temporary shows and events held within the site during last year – **10.**

2019: - ***Night of Colentum (2012. – 2020.)***

Event - *Gladiator fights, drama performances, and crowds in costumes under the lights of torches constitute this spectacle that successfully managed to bring Murter back to the period of once powerful Roman town of Colentum, at least for a night.*

#### COLLABORATIONS, NETWORKS AND STAKEHOLDER

Cooperation agreement(s) in place during the year with other Cultural Sites and Heritages

**No official agreement signed although there is strong cooperation with City Museum Šibenik.**

Cooperation agreement(s) in place during the year with Schools, Training institutions and Research Centres

**No official agreement signed.**

Cooperation agreement(s) in place during the year with public bodies

**No official agreement signed although there is cooperation with Tourism Board Murter – Kornati.**

Cooperation agreement(s) in place during the year with companies and other private organisations

**No official agreement signed although there is close cooperation with NGO Argonauta.**

Distance for the nearest public transport service (m) – **cca 500 m**

Number of hotels and restaurants around the site, within walking distance (diameter 400 m)

**In a 400 m distance there is Marina and 2 restaurants.**

#### LIST of project and activities held in Colentum Archaeological Site:

- *“Colentum” international archeological camp 2012 – 2015.*

It was conceived as a combination of research, lectures, and creative workshops, gathering experts in archaeology, underwater archaeology, professors and students of local and international universities. The camp included fieldwork both on land and underwater areas, lectures on reference topics, various tasks, consolidation of the Colentum archaeological site, visit to the local archaeological sites, and similar activities. The academic value of the camp was 3 ECTS points.

- ***“Let’s renew our dry-stone walls”*** educational workshops took place in 2013 and 2014 in collaboration with Kornati National Park, and Vransko Jezero Nature Park. During the implementation of the project, two educational workshops on dry-stone wall renewal, and a workshop on writing a common Action plan for the systematic dry-stone wall renewal of the Murter region were held as well.
- ***“Revival of local traditional practices of sustainable use of resources of the island of Murter and its natural region”*** aiming at renewal of ancient fortifications of the Liburnian town of Colentum. The topic of this workshop was the encouragement of spreading the knowledge on traditional craft of dry-stone wall building through volunteering.
- ***Team building activities*** (e.g. In autumn 2016, ICT Company Iskon)
- ***Eco Heritage Task Force*** is a Croatian Heritage Foundation’s project aimed at young Croatian descendants. The aim of the project is to introduce them to natural and cultural heritage, and the ways of their preservation. Thanks to the project, young emigrants visited Murter in 2013.