



### D.4.3.1 Tourism Products Portfolio

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### D.4.3.1 Tourism Products Portfolio

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### D.4.3.1 Tourism Products Portfolio

#### Introduction

For each of the 10 destinations involved in the project and for the entire area covered with the unique EXCOVER brand have been identified the actual and potential tourism products and defined in the tourism products portfolio / TPP.

The tourism products portfolio includes:

- The tourist points of interest: intangible and tangible assets, key attractions.
- A summary description and main characteristics of the 5 tourism experiences envisaged in each involved territory.
- A series of information related to market trends.
- Market analysis on tourism experiences / products.
- Consumers' profiles for each tourism product useful in an optic of tourism marketing planning.
- Prioritisation: based on its competitive capacity and market attractiveness regarding each of FIVE identified potential tourism products (LONG list), each PP prioritised in its TPP TWO tourism products in terms of timescale (short term) and importance (high) – so-called “*SHORT list*”.

The design of these tourism products – experiences are the result of the various activities carried out in the project, and not an a priori definition, being the guiding criteria the need and will to valorise the distinctive tourism assets of each involved territory.

#### Methodology and definition for drafting a Tourism Product Portfolio

A **Tourism Product Portfolio** can be defined as the compilation of products and services offered by a tourism destination or organisation to the target markets.



A tourism product portfolio is comprised of all the tourism products which a destination / organization has. A tourism



### D.4.3.1 Tourism Products Portfolio

product portfolio may comprise of different **families** of products<sup>1</sup>, different product **classes**<sup>2</sup>, different product **lines**<sup>3</sup> and even single product **types**.

Within the EXCOVER project, the Tourism Products Portfolio is defined at tourism product **LINE** level, as all the research and analysis' regarding the qualifying items - specific tourist services, attractions, infrastructure, tourism experiences, value chain, market analysis, tourist packages, etc. - has been carried out at the level of product **LINE**.

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<sup>1</sup> The Product Family is a group of product classes that have certain functional coherence and that can satisfy a core need e.g., shoes (walking), creative tourism (culture).

<sup>2</sup> The Product Class represents a group of products that have similar functions and characteristics e.g., sports shoes, performance-based tourism.

<sup>3</sup> The Product Line includes closely related products that perform similar functions e.g., basketball shoes, street art-based tourism.



### **D.4.3.1 Tourism Products Portfolio: LP LIRA**

#### LP LIRA

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1. Main elements collected during WP3 / SWOT & Reputation Analysis and WP4.1 / Participatory Planning Processes for the identification of Points of Interests, outlining the potential for tourism experiences in the target area(s)



### D.4.3.1 Tourism Products Portfolio: LP LIRA

#### 1.1. Intangible assets

##### Gospić:

- **Autumn in Lika** - a traditional economic and cultural-artistic fair that reinforces a positive attitude towards preserving the tradition, customs, and cultural heritage of Lika region
- **GROCKS** - the name of the rock music scene that has been held in the atrium of the Cultural information centre since 2007
- **Mushroom hunting** – Lika has many varieties of mushrooms, including truffles
- **Sport fishing** – there are rivers in the city of Gospić where locals go fishing. It has been a popular sport there since 1927
- **Likos** - an adrenaline park located only 500 m from the center of Gospić
- **Ranch Vel'ki mlin** – ranch located in village Ribnik, near Gospić, offers horseback riding for recreational and therapeutic purposes
- **Open University Ante Starčević** - cultural, educational, informational and service institution founded by the City of Gospić. There are several activities within the university: majorettes, wind orchestra, folklore ensemble, amateur theater.

##### Lovinac:

- **Lika potato day** - a local manifestation traditionally held at the end of September where one can taste potato delicacies and buy various products from local family farms Perušić:
- **Dedi** - an organisation that preserves the local heritage and organises social events in Donji Kosinj, especially regarding carnival tradition
- **Stilanova Lika** - family distillery where one can taste various types of brandy produced by the Vlainić family
- **HKUD Perušić** - a folk ensemble founded in December 1948, in order to preserve and cherish folk tradition, dances and songs from the Lika region



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#### **1.2. Tangible assets**

##### Gospić:

- **Village Bilaj** – a picturesque village on the Lika River with rich history
- placed only a few kilometres from Gospić
- **The Cathedral of the Annunciation of the Blessed Virgin Mary** – a cathedral located in the center of the city of Gospić
- **Murkovic mill** - an old mill on the river Novčica, one of the oldest building and a symbol of the city of Gospić
- **Park-forest Jasikovac** – area for picnic, walking and recreation
- **The birthplace of Ante Starčević** – a memorial house which became a multimedia center for all those whom Starčević inspired with his thoughts and deeds
- **The statue of Marta Vodarica** - a statue of a girl named "Martha", it is a symbol of Gospić
- **The statue of Nikola Tesla** - a monument to Nikola Tesla
- **The tower of Aga Senković** - located at the crossing over the river Novčica, today the oldest house in the city
- **Village Brušane** – a beautiful village near Gospić, there are 3 world-famous geological sites visited by many scientists -Kalvarija / Velnačka glavica, Paripov jarak and Košna vrelo
- **Watermill in Ribnik** – a wooden mill in village Lički Ribnik, according to sources, one of the oldest in Lika
- **Ranch Linden Tree** - an original American ranch in complete harmony with the environment

##### Lovinac:

- **Church of St. Michael** - the church in the Baroque style with a high bell tower
- **Church of St. Roch** – the church in the village Sveti Rok
- **Cultural Informative Centre – KIC** – a place used for different events – concerts, theatre shows, exhibitions, meetings, etc
- **Speleological objects** - the most famous cave is Debeljača which is the largest known speleological object in this area.
- **Spring of Wisdom** - located in village Sveti Rok. It was once used as a place where women did their laundry, took water for the household, watered the cattle and drank the water themselves on the way home.
- **Velebit** - the longest mountain and the largest protected area in Croatia. There are two national parks – Northern Velebit and Paklenica, whereas the entire mountain area is a Nature Park
- **Village Smokrić** - a beautiful village in Lovinac with an old well and an old bridge across the river Suvaja
- **Zduna Tower** - the tower built during the Ottoman Empire and rebuilt in 1744.





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In the ruins of the Zduna tower today one can see all the techniques of building houses in Lika.

#### Perušić

- **Inscribed Stone** - epigraphic monument originates from the period around 1st century BC, located near the settlement of Kosinjski Bakovac
- **Church of St. Vitus** - the inscription in the Church of Saint Vitus in Kosinj Bakovac is an important part of the Kosinj Glagolitic heritage
- **Kaluđerovac** - a village located under Metlača Hill, next to the Lika river, that is known for its pottery and interesting old rural architecture
- **Kalić Rock** - located in Kosinj Valley, Kalić Rock is a perfect place for hiking and climbing
- **Kosinj Valley** – it was once the centre of Croatian literacy which is why it has a significant place in Croatian culture and history
- **Marko Abyss** - the most significant abyss of the Lika river

### **1.3. Key attractions**

#### Gospić:

- **Bicycle trails** - In the area of the town of Gospić, there are eight bicycle trails, with a total length of 397 km, great for active tourism
- **The Nikola Tesla Memorial Center** – located in birth house of Nikola Tesla, the Center preserves the life and work of Nikola Tesla
- **The Lika Museum** – a museum taking care of all movable and immovable cultural heritage in the entire Lika area
- **Rivers** – the Novčica, the Bogdanica and the Lika River, swimming, fishing, and other sport activities
- **Vaganski peak** - highest peak of Velebit. it offers a beautiful view on all sides
- **Rizvan city** - adventure and excursion centre which offer many unique attractive and adventure activities for groups and individuals
- **Visočica** - 1615 m high peak on the mountain Velebit, it is one of the most beautiful lookouts on the entire Velebit

#### Lovinac:

- **Lake Sveti Rok** - ideal place for swimming and fishing
- **Master Road** – a masterpiece of 19th-century road construction and the first modern road that connected Dalmatia with continental Croatia across Velebit
- **Sveto brdo** – a 1751 m high, it is on the second place of the highest peaks on Velebit
- **Travić mill** – a mill from 19<sup>th</sup> century
- **Tulove grede** - a rocky ridge of limestone rocks, interesting for mountain climbers
- **Zir mountain** - 850 m high, interesting for hikers



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- **Cycling trails** - more than 750 km of trails in Lovinac area
- **Sports and recreational center Cvituša** - the visitors can have fun at the popular sledding run on the hill Cvituša

Perušić:

- **Tsar fir** - the largest known fir tree on Velebit and in Croatia, and one of the largest in Europe
- **Lake Kruščica** - the most popular artificial lake in the Municipality of Perušić
- **Old Town Perušić** - remains of an old fortress placed near the city centre of Perušić, built by the noble family Perušić
- **Church of the exhalation of St. Cross** - Gothic church with 9 altars built in 13th/14th century
- **Kosinj Bridge** - a 70-meter-long stone bridge that crosses the Lika river
- **Ćojluk** – located next to the Lika river, one of the most popular picnic places for the locals
- **Cave Park Grabovača** - the only cave park in Europe with 29 speleological objects, the most famous one is Cave Samograd
- **The Lika River** - the longest river in the region called Lika, interesting for fishing and kayaking
- **Kristian Kreković exhibition** - one of his collections has been stored at the Town Library of Perušić since 2015

#### **1.4. Intangible assets NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences**

Gospić:

- **The Day of the City of Gospić** – it is celebrated on July 22<sup>nd</sup> on the feast of St. Mary Magdalene, the patron saint of the city. As part of the celebration, a number of cultural, sports and musical events are held during June and July.

Gospić, Lovinac and Perušić:

- Local family farmers offering different products, e.g. cheese, jam, brandy, etc.



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#### 1.5. Tangible assets NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences

##### Gospić:

- **Baške Oštarije** – a village located on mountain Velebit, with many beautiful peaks, interesting for climbers
- **Chapel of St. Ivan Nepomuk** - a church located in the center of Gospić built by Czech soldiers in 1749.
- **Hiking trail Krčmar** - Krčmar is a hill above Smiljan 773 m high, the top is reached by hiking trail of the same name
- **Hiking trail Oštra** - Oštra is a peak near Gospić, 798 m high. The peak is reached by a hiking trail that starts from the village Podoštra
- **Educational trails** -there are five educational trails arranged in the town of Gospić: Veliki Žitnik-Dunjevac, Ćukinov put-Budački most, Derale-Lika river, Medak-Vrebac and an educational trail near the Krčmar hill in Smiljan.
- **Park Kolakovac** - located in the center of Gospić. There is a fountain built of natural speleothems from the cave Samograd.
- **Department of Teacher Studies in Gospić** – the building where Nikola Tesla went to school after he had moved with his family to Gospić
- Post office in Smiljan – exhibition of Tesla's personal belongings

##### Lovinac:

- **Village Vranik** - a village in Municipality of Lovinac, interesting to see are Kovačević tower and Chapel of St. Frances
- **Cvituša hill** – A small hill with a chapel of St. Anthony with a beautiful view on Lovinac, Sveti Rok and Zir, interesting historically because of the lapodes
- **Ledenac spring** – it is located on the Master road, on a way to Mali Alan, nice place for picnic and barbecue
- **Bakovac spring** - flows into the river Ričica, it is one of the most beautiful and deepest springs in the Lovinac area, where can be seen one of the oldest local restored mills in the Lovinac area
- **Hostel Sveti Rok** - situated in beautiful natural surrounding and provides pleasant and quiet atmosphere
- **NGO "Srce Velebita"** – organizes bike tours and races in Lovinac area

##### Perušić:

- **Church of the Holy Trinity** - a Gothic building located outside the settlement in Bukovac Perušićki, It is one of the rarely preserved buildings of the pre-Turkish period in the area of Lika.



### **D.4.3.1 Tourism Products Portfolio: LP LIRA**

1.6. Key attractions NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences

- Baške Oštarije
- Chapel of St. Ivan Nepomuk
- Hiking trail Krčmar and Oštra
- Park Kolakovac
- Cvituša hill

2. Summary description and main characteristics of the 5 tourism experiences envisaged in the involved territory

#### 2.1 Tourism experience 1 – The route of Nikola Tesla

Smiljan, a village near Gospić, where one of the world's greatest scientists was born. Believing that all answers could be found in nature, Nikola Tesla often drew inspiration for his discoveries from his childhood in Smiljan surroundings. Little is known that his life's work at the foot of Niagara Falls was inspired by playing near the stream Vaganac when he was a boy. This 2-day tourism experience aims at inviting visitors to explore social, cultural, economic and religious circumstances of Tesla's childhood and life in Lika from the second half of the 19<sup>th</sup> century to first half of the 20<sup>th</sup> century.

1. The statue of Nikola Tesla (Gospić)
2. Museum of Lika
3. The Statue of Marta Vodarica
4. Department of Teacher Studies in Gospić - Tesla's school
5. Murković mill
6. The tower of aga Senković
7. Park forest Jasikovac – in 1900, the first tennis club in Croatia was founded there
8. Post office in Smiljan – exhibition of Tesla's personal belongings
9. Hiking trail Krčmar
10. The Nikola Tesla Memorial Center
11. Rizvan City – Escape room Nikola Tesla



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#### **2.2 Tourism experience 2 – Discover Gospić**

Gospić - a 2-day tour for individuals and groups with the aim of getting to know the historical and cultural heritage of Gospić and spend active holidays by hiking the nearby peaks.

1. Memorial home of Ante Starčević
2. Kolakovac park
3. Chapel of St. Ivan Nepomuk
4. Public Open University Ante Starčević
5. The Lika Museum
6. The statue of Marta Vodarica
7. The Cathedral of the Annunciation of the Blessed Virgin Mary
8. Murković mill – the river Novčica
9. Park-forest Jasikovac
10. Bilaj
11. Watermill in Ribnik
12. MC Nikola Tesla
13. Hiking trail Oštra/ Visočica
14. Brušane
15. Baške Oštarije – Kubus, Terezijana
16. Mushroom hunting



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#### **2.3 Tourism experience 3 – Discovering Lovinac – springs, peaks, and hidden villages**

Lovinac is a municipality of incredible natural beauty and numerous peaks to explore. Some of the most stunning peaks of the largest Croatian mountain Velebit are situated there. It is also a place full of water springs, small creeks and rivers around which one can roam while enjoying beautiful landscape. Visitors can explore this area by riding bicycle, walking or hiking in this 2-day tour.

1. Zir mountain
2. Speleological objects – cave Debeljača
3. Village Vranik
4. Village Piplica
5. Village Smokrić – Zduna tower
6. Church of St. Michael
7. Cultural informative center (KIC)
8. Travič mill
9. Cvituša hill
10. Rivers and creeks – the Ričica, the Opsenica, the Suvaja, the Banica
11. Lake Sveti Rok
12. Hostel Sveti Rok (traditional food)
13. Spring of wisdom (Vrilo mudrosti) and Church spring (Crkovno vrilo)
14. Church of St. Roch
15. Master Road
16. Tulove grede
17. Sveto brdo



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#### **2.4 Tourism experience 4 – Perušić, land of water and caves**



Surrounded by green hills and mountains, the area of the Municipality of Perušić is full of stunning caves and other elements of natural heritage, with the emerald Lika canyon taking everyone's breath away. Only 20km from the town of Perušić, one can discover picturesque Kosinj Valley, that once was the cradle of Croatian literacy.

This 2-day tour is designed for nature and culture lovers.

1. Kristian Kreković exhibition
2. Church of the Exaltation of the Saint Cross
3. Old Town Perušić / Turkish Tower / Gradina
4. Cave Park Grabovača
5. Čojluk – the river Lika
6. Kaluđerovac – old architecture
7. Kruščica lake
8. Stilanova Lika
9. Kosinj bridge
10. Kosinj valley – NGO Dedi
11. Tsar fir
12. Inscribed stone



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#### 2.5 Tourism experience 5 – Bike in Lika

##### Cycling

The Lika area is ideal for cycling. From macadam and mountain trails for adventurous cyclists, to paved trails suitable for families. The best way to explore and experience the natural beauty of Lika is just to ride a bike and hike in this 3-day tour. However, if one is not into cycling, the same tour can be done by car.

##### Lovinac

1. Village Sveti Rok - Church of Saint Roch
2. Spring of wisdom
3. Lake Sveti Rok
4. Cvituša hill – Lovinac
5. Village Piplica
6. Zir
7. Cave Debeljača
8. Lovinac

##### Gospić

1. Watermill in Ribnik
2. Ranch Vel'ki Mlin
3. Bilaj
4. Gospić
5. Smiljan – MC Nikola Tesla
6. Hiking trail Krčmar
7. Trnovac
8. Brušane
9. Rizvanuša

##### Perušić

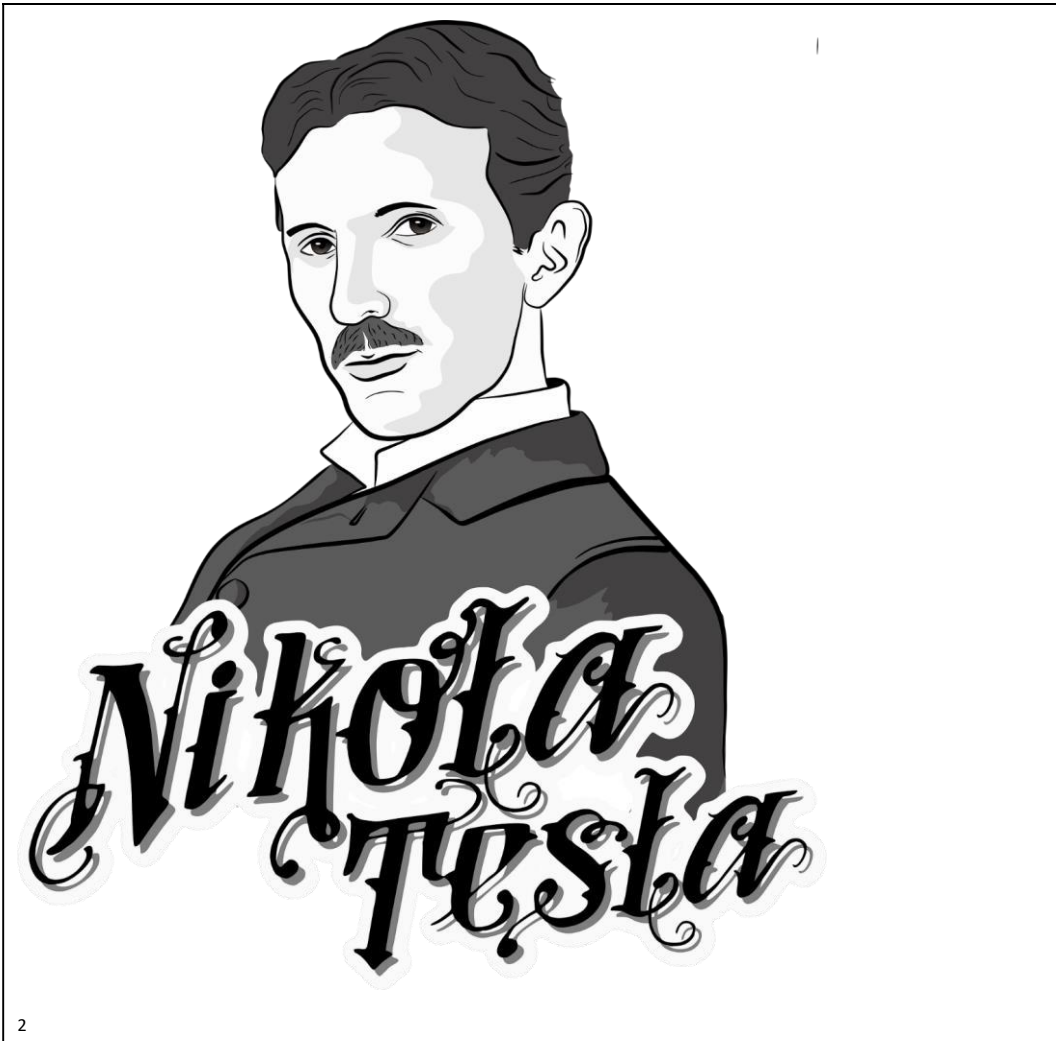
1. Gospić
2. Veliki Žitnik
3. Kaluđerovac
4. Cave park Grabovača
5. Perušić
6. Kosinj – Kosinj bridge, Gornji Kosinj, Donji Kosinj





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#### 3. Market analysis on tourism experiences / products: CULTURAL HERITAGE TOURISM BASED ON A HISTORICAL FIGURE



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#### Main characteristics of the product line

The Cultural Heritage Tourism (or just heritage tourism) is a branch of tourism oriented towards the cultural heritage of the location where tourism is occurring. The National Trust for Historic Preservation in the United States defines heritage tourism as “traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past” and “heritage tourism can include cultural,

<sup>4</sup> Illustration taken from <https://pixabay.com/illustrations/nikola-tesla-nikolas-tesla-energy-2083901/>, visited 10th December 2021



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historic and natural resources<sup>5</sup>.” Other than that, cultural heritage also expresses either intangible or tangible cultural heritage.

Cultural heritage tourism is important for different reasons; it has a positive economic and social impact, it establishes and reinforces identity, it helps preserve the cultural heritage, and culture is used as a means to facilitate harmony and understanding among people. It also supports culture and helps renew tourism.

Tourism product line “The route of Nikola Tesla” is designed in a way that unites historic, cultural and natural heritage. By visiting this route, tourists will see the most significant places that inspired Tesla during his career, including his birthplace. In addition, they will visit the natural heritage of this area, which also has historical significance.

According to the definition adopted by the UNWTO General Assembly, at its 22nd session (2017), cultural tourism, of which heritage tourism is one part, implies “A type of tourism activity in which the visitor’s essential motivation is to learn, discover, experience and consume the tangible and intangible cultural attractions/products in a tourism destination. These attractions/products relate to a set of distinctive material, intellectual, spiritual and emotional features of a society that encompasses arts and architecture, historical and cultural heritage, culinary heritage, literature, music, creative industries and the living cultures with their lifestyles, value systems, beliefs and traditions<sup>6</sup>”.

Cultural tourism refers to travel with the intent of experiencing and learning about the culture of a country or region. The cultural tourism market can be divided into two major groups. Tourists whose primary travel motivation is culture related only make up about 5-10% of all cultural tourists. These tourists are eager to learn, discover or experience local culture. For the majority of cultural tourists, however,

their primary motivation is not related to culture at all. They simply like to visit cultural attractions or enjoy culture as one of the activities they undertake to complement their trip.<sup>7</sup>

#### 3.1. Sub-products – describe the main aspects that differentiate the sub product from the main product

##### **Built heritage<sup>8</sup>**

Built heritage consists of all aspects of the man-made historic environment such as houses, factories, commercial buildings, places of worship, cemeteries, monuments and built infrastructure such as roads, railways and bridges; physically created places such as gardens, mining sites and stock route; and other places of historical significance such as archaeological sites.

As a part of built heritage, Gospić area offers a variety of historic sites that preserve and show the history of life in Lika. From the remains of the oldest building in Gospić called The tower of Aga Senković to Murković

<sup>5</sup> Heritage Tourism | Advisory Council on Historic Preservation (achp.gov) visited 2nd December 2021

<sup>6</sup> <https://www.unwto.org/tourism-and-culture> , visited 2nd December 2021

<sup>7</sup> The European market potential for cultural tourism, <https://www.cbi.eu/marketinformation/tourism/cultural-tourism/market-potential> , visited 2nd December 2021

<sup>8</sup> What is Built Heritage? « Modern Heritage Matters, visited 2<sup>nd</sup> December 2021



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mill, both built on the river Novčica, as well as The Statue of Marta Vodarica, a woman carrying water on her head, these all witness the significant role that water played in the lives of people of Gospić and nearby villages. There is also The Museum of Lika, located in the old city centre of Gospić that takes care of all movable and immovable cultural heritage of the entire Lika area. Related to Nikola Tesla, his huge statue can be found in Gospić, while his birth house and its surroundings in Smiljan have been turned into Nikola Tesla Memorial Centre, which receives tens of thousands of visitors a year.

#### Intangible cultural heritage<sup>9</sup>

According to UNESCO: “cultural heritage does not end at monuments and collections of objects. It also includes traditions or living expressions inherited from our ancestors and passed on to our descendants, such as oral traditions, performing arts, social practices, rituals, festive events, knowledge and practices concerning nature and the universe or the knowledge and skills to produce traditional crafts.

While fragile, intangible cultural heritage is an important factor in maintaining cultural diversity in the face of growing globalization. An understanding of the intangible cultural heritage of different communities helps with intercultural dialogue and encourages mutual respect for other ways of life.

The importance of intangible cultural heritage is not the cultural manifestation itself but rather the wealth of knowledge and skills that is transmitted through it from one generation to the next.”

Intangible cultural heritage of Gospić area is often inseparable from built heritage and should be observed as a whole. For example, the significance of water is not only seen in the buildings but also in traditional skills and crafts that were necessary for people to survive in the past, such as milling or shaping cloth into a ring that women would use to carry heavy loads on their heads. At The Museum of Lika, the visitors can also get acquainted with intangible cultural heritage, whereas Nikola Tesla Memorial Centre is a great place to find out more about the life and work of Nikola Tesla, who, according to the locals, is the most significant historical figure from Lika.

#### Natural heritage<sup>10</sup>

According to UNESCO’s Institute for Statistics, “natural heritage refers to natural features, geological and physiographical formations and delineated areas that constitute the habitat of threatened species of animals and plants and natural sites of value from the point of view of science, conservation or natural beauty. It includes private and publically protected natural areas, zoos, aquaria and botanical gardens, natural habitat, marine ecosystems, sanctuaries, reservoirs etc.”

Next to cultural heritage, this product also offers rich natural heritage that has historical significance. Number one is the longest and one of the most important Croatian mountains called Velebit that one needs to cross to go from Lika to the south of Croatia and the seaside. There are two national parks and one nature park on Velebit and when arriving to Gospić, one will be stunned with the view on its breathtaking landscapes. There are also other natural places that played a significant role in the local history, such as the Park Forest Jasikovac. Tennis courts were built in Jasikovac at the beginning of the 20th century, where the oldest tennis club in Croatia, the city tennis club "Gospić 1900", was founded.

<sup>9</sup> What is Intangible Cultural Heritage? - intangible heritage - Culture Sector - UNESCO, , visited 2<sup>nd</sup> December 2021

<sup>10</sup> Natural heritage | UNESCO UIS, visited 2<sup>nd</sup> December 2021



### D.4.3.1 Tourism Products Portfolio: LP LIRA

#### 3.2. General description

##### *Demographic description of tourist*

The socio-economic profile of heritage tourists has been widely studied in the social sciences, since the information provided by these studies is very useful for tourist actors to efficiently manage a site's attractions.

Gender is one of the variables studied within the socioeconomic profile of tourists. Numerous studies highlight the importance of this variable in reference both to how to attract visitors, and to the experiences they have in a particular destination. Results vary with some authors stating that women show greater preference for cultural destinations (Vong and Ung 2012; Nguyen and Cheung 2014; Remoaldo et al. 2014; Ramires, Bradao and Sousa 2018), while the opposite is indicated in other empirical studies (Correia, Kozak and Ferradeira 2013; Antón, Camarero and Laguna-García 2017; Chen and Huang 2018; Adie and Hall 2017)<sup>11</sup>.

Opposing evidence can also be found regarding another of sociodemographic variable in these studies: age. Empirical evidence allows one to identify different age groups in terms of their level of interest with the cultural heritage of the destination. For instance, Chen and Huang (2018) identify those between 21 and 35 years of age as the most interested in heritage tourism; Antón et al. (2017), ages between 30 and 44 years; Remoaldo et al. (2014), ages ranging from 26 to 45 years; Huh, Uysal and McCleary (2006), ages ranging from 38 to 47 years; while Correia et al. (2013) and Ramires et al. (2018) establish an age over 45 years.

There is a more generalized consensus among the different researchers regarding academic formation that establishes that tourists who have completed a university education are those with greater interest in destinations of great patrimonial and cultural wealth (Silberberg 1995; Huh et al. 2006; Correia et al. 2013; Remoaldo et al. 2014; Antón et al. 2017; Ramires et al. 2018; Adie and Hall 2017). However, academic literature also recognizes students as another well represented group (Chen and Huang 2018).

Regarding tourists' income level, the evidence suggests that visitors who come to cultural destinations have medium to high-income levels (Chen and Huang 2018; Antón et al. 2017; Ramires et al. 2018). Obviously, this result is related to the level of training common in these visitors (Huh et al. 2006; Correia et al. 2013; Bright and Carter 2016; Chen and Huang 2018; Antón et al. 2017; Ramires et al. 2018).

##### *Main markets of origin*

Geographical point of view - both international and domestic markets

Germany is the largest European source market in terms of market size, followed by the United Kingdom, Italy, France, the Netherlands and Spain.

##### Germany

Germany is by far the most significant European market for cultural tourism. In 2018, 109 million German tourists went abroad for a holiday. Half of them went on holiday for cultural reasons, resulting in an estimated amount of 54 million holiday makers. Of the six countries listed, German tourist spent the most on outbound travel. The personal expenditure of outbound German tourists was also much bigger.

<sup>11</sup> Tourism and Hospitality Management, Vol. 26, No. 1, pp. 115-132, 2020 Menor-Campos, A., Fuentes Jiménez, P.A., Romero-Montoya, M.E., López-Guzmán, T.: SEGMENTATION AND SOCIODEMOGRAPHIC PROFILE OF HERITAGE TOURIST



### D.4.3.1 Tourism Products Portfolio: LP LIRA

#### United Kingdom

The United Kingdom is clearly the second-largest market for cultural tourism in Europe. This position is mainly caused by the large number of outbound tourists: 70 million in 2018. A share of 48% opt for a culturally motivated holiday abroad – 26% for culture in general and 22% for a city trip. This amounts to an estimated number of outbound cultural tourists of 34 million in 2018. Events were also quite popular among British holiday makers going abroad (13%). Italy

If we look at the proportion of all outbound travellers motivated by culture, Italy is the European country that stands out with 66% of the 33 million outbound holiday makers. As opposed to the other five countries in the top 6, city trips are more popular (36%) than culture in general (30%). The number of outbound cultural tourists from Italy can be estimated at 22 million. The average length of an outbound holiday was 8.3 nights in 2018. The Italian cultural tourism market is less predictable than the other countries' markets, because it is more fashion-driven.

#### France

The French market for cultural tourism is the fourth-largest. In 2018, 27 million French travellers went abroad for their holiday and 62% of them did so for cultural reasons. Among them, the interest in culture in general or in a city trip was equally divided at 31%. All in all, in 2018 about 17 million French people went on holiday abroad for cultural reasons.

#### Netherlands

Despite its small size, the Netherlands has a relatively large number of outbound tourists. The Dutch holiday makers show the largest interest in culture (65%), second only to the Italians (66%), but as the population is relatively small it does only result in about 15 million culturally motivated holidays abroad. Compared to the other countries in the top 6, the interest in culture in general is much bigger (39%) than the interest in city trips (26%).

#### Spain

The market for cultural tourism in Spain is much smaller than it is in Germany, the United Kingdom, Italy, France and the Netherlands. If we take the relatively big population into account, the number of outbound holiday makers is relatively quite small with just 19 million. Despite the fact that half of these tourists go on holiday for cultural reasons, this only results in an estimated 10 million travellers in 2018. It's also interesting to note that the average length of the stay is relatively short (7.8 nights), while the average spending per day seems rather high (€103). According to industry experts, it is mainly the region of Catalunya (Barcelona and environment) in which people are interested in outbound cultural tourism<sup>12</sup>.

#### *Tourism habits*

According to the research on the demand for cultural tourism in Croatia - TOMAS Cultural Tourism 2008 - cultural tourists in Croatia are mostly middle-aged or younger, above average educated and relatively high purchasing power. They show a high degree satisfaction with visiting the attractions and events but, at the same time, a lower level satisfaction with the organization of arrival, available information and signalling.

<sup>12</sup> The European market potential for cultural tourism, <https://www.cbi.eu/marketinformation/tourism/cultural-tourism/market-potential> , visited 2nd December 2021



### D.4.3.1 Tourism Products Portfolio: LP LIRA

They are mostly foreign visitors, who spend the night in the place where the attraction is located or where an event is happening. They are satisfied with the quality of programs, the possibility of learning, tourism staff and cleanness.

Average daily consumption of visitors to cultural attractions and events amounted to 45 euros on multi-day trips, and 28 euros on one-day trips travel. Interestingly, the best consumers proved to be museum and gallery visitors. The main motives for visiting a cultural attraction or event were learning about culture, history and heritage of the area, image/reputation of attractions, curiosity and spending quality time with family or friends. Information about cultural attractions or events most often they find out informally, through recommendation of a friend or relative, or from local residents. During their stay in the destination, they visit more cultural and historical sights, museums and galleries while there is slightly less interest in festivals, themed route, roads and music events. In addition to cultural heritage, in accordance with world indicators, there are more and more guests interested in the so-called creative tourism, experiences created by their participation in creative or production processes through various workshops and courses<sup>13</sup>.

### 3.3. International Market size of the present global demand for this tourism product line and expected future trends

#### *Present market size*

B2.1

Max 1 page

Cultural tourism has a long history, but the past 30 years have seen dramatic changes in the nature and form of cultural tourism production and consumption. In the past, cultural tourism was generally linked to the elite, who saw travel to consume high culture as part of the educational process. With the growth of mass tourism in the 20th century, however, growing numbers of ordinary people were able to travel to enjoy culture as part of their leisure. Attention for the growth of a specific cultural tourism market arose in the 1980s, and by the 1990s estimates were being produced that cultural tourism accounted for 40% of all global tourism. The expectations were that cultural tourism would also continue to grow in the future, with Bywater (1990) predicting growth rates of 15% a year.

Although growth did not prove to be so dramatic, cultural tourism has certainly remained a major segment of global tourism. A recent review by the UNWTO (2018) confirmed that 'cultural tourists' make up almost 40% of all international travellers, or 530 million cultural tourists in 2017. This market also tends to be concentrated in particular countries and cities. Spain, for example is one of the countries that attracts not just large numbers of tourists, but also cultural tourists<sup>14</sup>.

It is difficult to talk about a unique product and a unique profile of a cultural tourist. It is generally believed that cultural tourism encompasses predominantly motivated travel by getting to know the cultural heritage, history, art and 'culture of life and work'. Cultural tourists are a desirable segment for several reasons, mostly because they have more paid power, they are more educated, and they stimulate cultural activities in the destination.

<sup>13</sup> Tomljenović. R.; Boranić Živoder S.: Cultural Tourism Development Action Plan

<sup>14</sup> Richards, G.: Cultural tourists: Profiles, Motivations and Activities, Paper presented at the Third Cultural Heritage Seminar, Tourism and Cultural Heritage: Confluences. Barcelona, 8th November 2018.



### D.4.3.1 Tourism Products Portfolio: LP LIRA

#### *Trends*

Max 1 page

The COVID-19 pandemic has stopped cultural tourism in its tracks. Throughout 2020 international arrivals plunged by 74% worldwide, dealing a massive blow to the sector, which faces ongoing precarity and unpredictability. Amidst international travel restrictions, border closures and physical distancing measures, countries have been forced to impose wide-spread closures of heritage sites, cultural venues, festivals and museums, some of which may never reopen<sup>15</sup>.

With COVID-19 bringing global tourism to a standstill, millions of people in quarantine have been seeking out cultural and travel experiences from their homes.

Despite all the challenges, the tourism and culture sectors are facing an opportunity to create new partnerships and collaboration. They are bound to jointly reinvent and diversify the offer, attract new audiences, develop new skills and support the world's transition to the new conditions.

The recommendations below have been prepared by the UNWTO Ethics, Culture and Social Responsibility Department in collaboration with its international partners with competence in culture and tourism.

#### Shift from quantity towards quality

Tourism success was traditionally measured by statistics highlighting visitors' numbers, while qualitative indicators and visitors' profile had less importance. The joint recovery of tourism and culture should align resilience policies, new priorities with the new measurement values, as well as tailor-made marketing strategies.

#### Diversify cultural tourism products

Destinations should address new and traditional markets & specific profiles of cultural visitors, whose interests and priorities may reshape after COVID-19 crisis. Culture will require support to survive and flourish, as it enriches the destinations' identity and inspires tourism revival. Some cultural gatherings may be temporarily replaced by alternative products, as new scenarios unfold.

#### Boost community's participation & domestic tourism

Engaging citizens' platforms in recreating the local cultural offer will have a strategic social and economic importance. Local communities' role will be essential in embracing first visitor flows, with precautions. Regaining domestic customers' confidence will accelerate the 1st phase of the cultural tourism recovery.

#### Customize cultural offer for international visitors

Bringing back inbound cultural tourism will be more challenging before consumers decide to travel abroad. By customizing their cultural offer, governments, destinations and cultural industries can have a more international outreach. International and cross-sectoral alliances will have a key role.

#### Enable cultural tourism entrepreneurship and innovation

Innovation in SMEs, cooperatives and creative economy will be needed for the recovery, especially for the empowerment of women, youth & indigenous peoples. COVID-19 will heavily affect these groups as their economy is often informal, notably in emerging destinations. Their livelihoods will improve by consolidating

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<sup>15</sup> Cutting Edge | Bringing cultural tourism back in the game, <https://en.unesco.org/news/cutting-edgebringing-cultural-tourism-back-game>, visited 10th December 2021



### D.4.3.1 Tourism Products Portfolio: LP LIRA

their market access and inclusion into the cultural tourism supply chain. The shift from informal towards formal economy will benefit many communities and destinations.

#### Make cultural tourism accessible to all

The accessibility of cultural facilities, products and services should be advanced to cater better to the needs of persons with disabilities, seniors and families with small children, locals & visitors alike. Scaling up accessibility in culture benefits everyone<sup>16</sup>.

### 3.4. Local and National size of the present demand and expected future trends of this tourism product line

#### *Present market size*

According to market research TOMAS - Summer 2004 (Institute of Tourism, Zagreb 2005), which monitors the motivation, activities, satisfaction and consumption of visitors in the summer months on the Adriatic, therefore, in the segment primarily interested in vacation "sun and sea", has increased significantly in the period 1997-2004 the number of those who visited cultural sites. As a motive for coming to the Republic of Croatia, only 6% of tourists state sightseeing. What is worrying is that tourists are relatively dissatisfied with the cultural offer. Of the 26 elements of the tourist offer, among the five worst elements were cultural sights, a variety of cultural events and a wealth of entertainment content. However, almost a third of guests in private accommodation, about a fifth in hostels and 17% of guests in hotels come wanting to see cultural heritage sites (Institute of Tourism, Zagreb, 2006).

Of the total number of guests arriving in Croatia, 12.5 percent come exclusively for culture, and Croatia is full of positive examples of the combination of culture and tourism. According to all statistics, about 40 percent of people on their travels necessarily have something of culture in the program.

The analysis of existing data shows that there is still no data about the number of tourists who visit Croatia for historical figures. The creation of tourist route dedicated to getting to know historical figures is still in its infancy and it takes a lot of effort, cooperation of various institutions and promotion, in order to attract more visitors.

#### *Trends*

Tourism is a complex economic activity that can contribute to economic development in many countries, including the Republic of Croatia. In such enduring efforts, the primary task must be to use the sources of cultural heritage that have emerged on the soil of today's Croatia for centuries. At the same time, the development of better quality tourism contributes to the strengthening of national cultural identity without which it is almost impossible to valorise the potential of cultural heritage for tourism purposes. Namely, the valorisation of cultural heritage in the function of the development of national tourism insists on the acceptance of architectural history as a national contribution to general cultural values. This requires the application of many already known strategies, such as remembering and retelling many different legends, because guests, tourists and hosts alike, are happy to listen, believing in the historical significance of what happened right where they are.

### 3.5. Most important criteria influencing the competitiveness in the global market for this tourism product line

*Cultural heritage tourism based on the historical figure*

<sup>16</sup> Cultural Tourism & COVID19, <https://www.unwto.org/cultural-tourism-covid-19>, visited 10th December 2021





### **D.4.3.1 Tourism Products Portfolio: LP LIRA**

Nikola Tesla as the most important historical figure from Lika is a brand itself and him being born and raised in Smiljan is one of the most important criteria influencing the competitiveness in the global market.

Tourism product line “The route of Nikola Tesla” includes locations that have cultural, historical and natural significance from which the competitiveness in the global market for this tourism product line can be drawn. This product line is a collection of customs, traditions, tangible and intangible heritage.

The area of Gospić is rich in historical sites that testify the past times and customs of the people of this area. The Tower of Aga Senković, the Murković Mill and the birthplace of Nikola Tesla in Smiljan are some of the most important historic sites that can tell many stories about the life in Lika at the turn of the 20th century. Apart from the cultural significance this tourism product line offers, there is also a chance to experience the natural heritage of Lika. Park forest Jasikovac has a significant role in the local history. There are also 3 national parks nearby: The National Parks Northern Velebit and Paklenica are less than an hour drive from Gospić, and the entire area of Velebit Mountain has been declared a Nature Park. The nearby Plitvice Lakes, UNESCO-protected landscape placed 65 km from Gospić, is another national park worth visiting. Although they are not part of this tourism product, they certainly contribute to its importance in the global market. There is a smaller number of tourists who travel exclusively for cultural heritage, so it is necessary to merge cultural and natural resources..

### **3.6. Most representative international best practices (max 3) regarding this tourism product line**

#### European Mozart Ways

This cultural route is connected with one of the most influential figures in the history of music – Wolfgang Amadeus Mozart. With an aim to enhance his education, learn about different styles and establish contacts with other performers and composers, he travelled throughout Europe for over 10 years. Considering that he died at the age of 35, Mozart spent one third of his life on journeys. This route describes him as the first truly European personality, in and beyond the field of music.

All of the journeys made by Mozart from 1762 to 1791 were documented on the basis of the Mozart correspondence and other authentic documents and can be followed by the traveller. From the initiatory tour, which took the young Mozart from Salzburg to Munich, to his last voyage from Vienna to Prague, a broad part of Europe is covered, spanning 10 countries and over 200 sites. Along the tourism itineraries, there are dozens of opportunities for artistic, cultural, educational and academic activities that allow the traveller to discover one of the most fascinating musicians of all time.

There is no better way to learn about and experience Wolfgang Amadeus Mozart's life and music than by retracing his footsteps through Europe, visiting some of the most significant music, art and architectural venues of Europe's cultural heritage. Official website: [www.mozartways.com](http://www.mozartways.com)

#### Destination Napoleon

This route follows the life of Napoleon Bonaparte (1769-1821), a remarkable political leader who influenced European and global affairs for more than a decade while ruling over France. The Napoleonic period bequeathed an exceptionally valuable heritage and the creators of this route believe that this heritage should be granted its rightful place in the shared interpretation of historical events by the people of Europe. They say that Napoleon marked our cities, shaping their urban form and their future fortunes, whether for good or bad and that this strong influence is still alive in present-day Europe.

The enormous heritage that Napoleon left, today constitutes a European common patrimony. The Napoleonic era's influence upon the cultural heritage of contemporary Europe includes sites, buildings,



### **D.4.3.1 Tourism Products Portfolio: LP LIRA**

monuments, furniture, works of art and the law, as well as a vast intangible heritage linked to the Napoleonic myth.

In Destination Napoleon, 50 cities in 10 countries are placing their Napoleonic historical heritage in its European dimension. The traveller can appreciate the geographical diversity of this legacy and its historical, cultural and patrimonial significance. The route endeavours to unite European cities whose history was influenced by Napoleon, including through exhibitions, arts events, discovery tours, tourism, and school or university exchanges. Official website: [www.napoleoncities.eu](http://www.napoleoncities.eu)



### **D.4.3.1 Tourism Products Portfolio: LP LIRA**

#### **4. Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. The route of Nikola Tesla [CULTURAL TOURISM BASED ON A HISTORICAL FIGURE]
- B. Active holidays with a special focus on biking in Lika [CYCLING TOURISM]



### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

#### PP2 PGZ

Partner (name and number)	PP2 Primorje-Gorski Kotar County
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1. Main elements collected during WP3 / SWOT & Reputation Analysis and WP4.1 / Participatory Planning Processes for the identification of Points of Interests, outlining the potential for tourism experiences in the target area(s)

#### 1.1. Intangible assets

- Legends and stories - Historical and biographical data contained in legends and myths closely related to the Municipality of Čavle represent a large and significant part of the intangible cultural heritage, accumulation of which occurred due to the geostrategic position of the area in history, mainly serving as a crossroad of many travelers, the ruling nobility, historically significant battles that took place on Grobnik Field, etc. Some of the most significant are: the legend of the battle of Croatian knights supported by bellmen of Grobnik (called dondolaši) with BatuKhan's Mongol army on Grobnik Field in 1242; the legend of Morčić from 1601, when the Turkish siege broke through on Grobnik Field; legend of the Liburnian idol of the female deity, the so-called Baba u kamenu (Old lady in stone) as guardians of the city; the legend of Mlikarice (Milkmaids), women who fed generations of the local population through the painstaking production and sale of milk; the legend of Lucia, a local young beauty who rejected the noble Frankopan prince Sigmund and, fleeing his temptation, threw herself into the river Rječina and died; the legend of the naughty dwarf, the devilish Malik as a synonym of a disobedient servant who offers help, and in return seeks the soul, etc.
- Indigenous gastronomic specialties - Potato polenta that has fed generations of Grobnik residents is made from corn flour and potatoes and, in its honor, the Festival of Polenta and Cheese is held every June. There, the 500 kg potato polenta is prepared, followed by another indigenous delicacy prepared by Mlikarice, widely known as Grobnik cheese (hard, salty, sheep cheese), served with potato polenta. <https://www.youtube.com/watch?v=njINvIsvYsc>
- Carnival customs and traditions - for some it is respect of religious ceremonies and rituals of invoking spring, while for others it is an opportunity to freely express their views on the socio-political situations through masks and planned parodies without fear of punishment, serving as a filter to release accumulated frustrations. A significant part of the customs are the bellmen of Grobnik (Grobnički dondolaši) who open and close the carnival every year. <https://www.youtube.com/watch?v=HasLCvdz6HQ> <https://www.youtube.com/watch?v=JvQdcZLEKH4>
- Flora and fauna - The municipality of Čavle is located on a natural, very interesting combination of mountain and sea climate and therefore abounds in diverse riches of flora and fauna. The Rječina river and its source are extremely important for this area as they are rich in water, which does not dry up even in the driest summers. In the Grobnik forest, nature lovers can find habitats for various birds, but also



### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

wild animals (horses, pigs, deer, badgers, and rabbits) while mountain meadows abound in medicinal plants (medicinal sage, plantain, dandelion, yarrow).

<https://www.youtube.com/watch?v=EggSzZfy9Ew>

#### 1.2. Tangible assets

- History and heritage - The Municipality of Čavle is rich in historical sites, which often contain historical artifacts. In the center itself is the Čebuhar house, which dates back to 1834, when it was built by the family of the same name as an inn for many travelers passing through the Louisiana (Lujzinska) road. Today, completely restored, it serves as a stone monument to the road. Not far away, in Soboli, there is a stone bridge dating from the same period of the road's peak. In Podčudnić we find the ruins of the baroque Mayer castle dating from the 17th century, which, just like the greatest asset of the Municipality of Čavle - the Frankopan castle in the Old Town of Grobnik, was used by princes Zrinski and Frankopan. Today, the latter has been completely restored with an interpretation center, a museum display and a souvenir shop, making it one of the biggest tourist assets of this rural area. The very core of the town of Grobnik has been inhabited since prehistoric times, and the Illyrians, Romans, Goths, Franks, princes of Krk and the Habsburgs took turns in ruling there. At the very entrance to the old town of Grobnik, where it is located, we have a Liburnian figure of the Baba u kamenu (Old lady in stone). The Grobnik Field at its foot is the heir of many historical legends about the important battles, but also a monument to the valuable people who sowed and planted there and led the cattle to pasture. In their immediate vicinity is a cheese factory and the old manor of the Frankopan - Frankulin, which is today one of the few cheese factories that produces indigenous Grobnik cheese. In conclusion, the ethno exhibition of indigenous clothing and useful everyday objects in the center of Čavle offers a journey into the history of the rural Grobnik area. <https://www.youtube.com/watch?v=qyleQHxwLHg>
- Memorial monuments - Memorial busts, plaques and monuments are scattered throughout the Municipality of Čavle as the heirs of the national liberation fight, among which the most prominent is the monument to the executed inhabitants of Podhum located in Soboli - the work of academic sculptor Šime Vulas. The monuments in question represent an opportunity for the formation of memorial tourism.
- Sacral heritage - The sacral buildings of Grobnik area have an exceptional cultural-historical and artistic value: the Church of St. Bartol in Cernik, parts of which date back to 1538., the Parish Church of St. Phillip and James in the Town of Grobnik from 1105 with the accompanying Chapel of the St. Cross and the Chapel of Holy Trinity. All contain valuable works of art and useful sacral objects available for sightseeing.
- Natural wealth - About a twenty-minute drive from the center of Čavle is Platak, best known to the general public as a ski resort overlooking the sea, which is not surprising, given that the first cable car began operating in 1966. The highest peak is Radeševo 1363 m, and it is the most famous ski trail. Today it has become a real sports-recreational-excursion destination that you can visit all year round, and it is equally interesting for athletes, families, retirees and all lovers of active leisure in nature.
- In addition, the municipality abounds in walking paths such as the Cernik Way of the Cross and the one dedicated to Mlikarice (Milkmaids), which leads all the way to Rijeka, but also bicycle paths and hiking trails. In addition, a total of five labyrinths at the entrance to Automotodrom Grobnik known as Grobnik labyrinths are a place for relaxation, meditation and self-reflection.  
<https://www.youtube.com/watch?v=vLujSjyRRHY>      <https://www.youtube.com/watch?v=RHSIO8fFTpY>  
<https://www.youtube.com/watch?v=Fpiu3xFC8Ps>
- Sport and recreation - Automotodrom Grobnik has been the home of all adventurers eager for excitement and adrenaline since 1978, whether as drivers, competitors, or spectators, at daily trainings



### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

or various international events. Right next to the Automotodrom, there is the Grobnik Airport where altitude lovers can embark on a Cessnam flight adventure or skydive. The less adventurous ones may explore the Municipality on numerous bike paths, while the more adventurous among them on downhill paths on Platak. Climbing enthusiasts also have at their disposal two climbing areas - Kamenjak and Vela Peša.

<https://www.youtube.com/watch?v=p4edObflhEk> <https://www.youtube.com/watch?v=xgAekOcvHok>  
<https://www.riprsten.com/cavle/krila-kvarnera-na-grobniku-pokazala-stohttps://www.riprsten.com/cavle/krila-kvarnera-na-grobniku-pokazala-sto-mogu-i-imajumogu-i-imaju>  
<https://www.youtube.com/watch?v=DVbL26P1Uxs>

#### 1.3. Key attractions

- The old town Grobnik with the Frankopan castle and the surrounding sacral buildings in the function of cultural and historical heritage and education
- Promenade Road Mlikarica and ethno exhibition of autochthonous clothes and useful objects of rural Grobnik area
- Gastronomic delicacies (Grobnik salty, hard sheep cheese, potato polenta) within the cheese factory Frankulin
- Sports and recreational activities on Platak
- Auto-moto sports at Automotodrom Grobnik
- Adrenaline sports at Grobnik Airport (panoramic flights in Cessna airplanes, parachute training and skydiving, training and piloting of gliders, training and flying kites)

#### 1.4. Intangible assets NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences

- Grobnik dialect čakavština (Chakavian dialect) - a dialect that is a protected intangible cultural asset of the Republic of Croatia and a charming addition to every tourist story, in honor of which the Grobnik skala Festival is regularly held with the aim of promoting young singers and songwriters who compose in the Grobnik dialect.  
<https://www.youtube.com/watch?v=qGCKMdUu3q4>
- Praesidio Frangipanis - Frankopan Guard Grobnik - a recently established association dedicated to the preservation of Frankopan heritage. Its members stand out for the medieval costumes of the Frankopan guard with the associated weapons and represent an effective visual interpretive addition to the Castle of the City of Grobnik and the film adaptation of the life of the Frankopans. <https://hr.facebook.com/frankopanskastraza/>
- Sausage Open event - At the very beginning of the year, on the feast of the Holy Three Kings - January 6th, when the carnival season (Mesopust) begins, an unusual event takes place – the so-called Sausage Open - a competition in preparing the best cooked and baked sausage, which represents a form of valorizing the autochthonous delicacy of the Grobnik area – Grobnik's sausages.  
<https://www.youtube.com/watch?v=TexO2rhw1B4>
- St. Bartholomew's Day - at the end of August, residents of the entire municipality gather to celebrate the day of their patron saint, St. Bartholomew. Popularly called Bartoja, in addition to religious facilities, it offers many cultural, entertainment, sports and culinary events, with the Bartoja cauldron at forefront.
- <https://www.youtube.com/watch?v=zZlokOmCm6U>



### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

#### **1.5. Tangible assets NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences**

- Interpretation center Grobnik in the northern tower of the Grobnik Castle - Center with multimedia equipment which presents the historical act of the Ottoman invasion of Grobnik and the political turmoil in the Frankopan era. In addition, the center is enriched with beautiful dresses made by fashion designer Juraj Zigman, which he designed in memory of the women of the Zrinski-Frankopan family, and which the young singer Mia Negovetić wears in the video for the Primorje-Gorski Kotar County song "Zavicaju, tebi".  
<https://frankopani.eu/en/interpretacijski-centar/interpretation-centre>  
<https://frankopani.eu/en/interpretacijski-centar/interpretation-centre-grobnik/grobnik/>  
<https://www.riprsten.com/cavle/u-grobnickom-kastelu-otvoren-novi>  
<https://www.riprsten.com/cavle/u-grobnickom-kastelu-otvoren-novi-interpretacijski-centar>  
<https://www.youtube.com/watch?v=lheIURYOKos>
- Roman limes at the foot of Kaštela Town of Grobnik - An archeostereoscope has been set up on the lookout point of the ancient Frankopan Castle - a device with which visitors can reconstruct the former appearance of the famous wall, the Roman limes. The device is placed on a decorated tower in front of Sokolana, which has thus become an attractive lookout point that offers a beautiful view of entire Grobnik.  
<https://ne-np.facebook.com/putovimafrankopana/posts/1174157953023254/>
- Ancient Roman Milestone Lookout (Miljokaz) - On the old road Rijeka-Zagreb (Louisiana road) there is an Ancient Roman Milestone Lookout (Miljokaz), located along the serpentine below Kamenjak. The milestone is a Roman stone obelisk that is two centuries old, marking exactly 15 kilometers from Rijeka and thus a real treasure of ancient Louisiana, which hides many charms.  
<https://www.riprsten.com/cavle/miljokaz-i-pogled-na-grobniscinu-vrijedni>  
<https://www.riprsten.com/cavle/miljokaz-i-pogled-na-grobniscinu-vrijedni-zaustavljanja>

#### **1.6. Key attractions NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences**

- Interpretation center in the Grobnik castle with Frankopan guards and archeostereoscope on the lookout in front of it
- Ancient Roman Milestone Lookout and rest area (Miljokaz) on the old Louisiana road towards Platak
- Various events organized by the Municipality and the Tourist Board



### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

## **2. Summary description and main characteristics of the 5 tourism experiences envisaged in the involved territory**

### **2.1 Tourism experience 1 – Along The Roads of Grobnik’s Noblemen**



The program begins by gathering in the center of the Municipality of Čavle, in front of the Culture home, from where the visitors start a three-hour, six-kilometer walk uphill, starting at Rakovo village, continuing along the old road towards the town of Grobnik. The first stop is close to the abandoned village of Matelci, where they can visit the ruins of the Baroque court Mayer from the 17th century. It continues along the cheese factory and the former estate of the owners of the Grobnik Castle Frankulin where travelers can stop to see the estate and taste the indigenous gastronomic delicacies of this area – Grobnik’s fresh sheep’s cheese, sheep and cow curds, potato polenta and liqueurs from the surrounding taverns.

On the access road leading to the Frankopan castle situated in the Old Town of Grobnik, visitors can stop to kiss Baba u kamenu (Old lady in stone), a grotesque female figure carved into a rock dating back to the Liburnian era and representing a female deity, the Great Mother, whose cult the Liburnians nurtured. According to folklore, Baba must be kissed by anyone who enters the city for the first time, and this is also an opportunity for a short photoshoot.

The Frankopan guards in historical costumes of the Frankopan army from the 16th century, with weapons and flags, introduce the visitors to the ancient Frankopan Castle in the Old Town of Grobnik, which was built about year 1000 on Roman foundations as the westernmost Frankopan castle of the former Vinodol principality Grobnik. In this cultural center of Grobnik area, visitors, guided by interpreters, can see the rich ethnographic collection, the museum exhibition of the Frankopans, a new interpretation center, a gallery and a souvenir shop.

In the courtyard of the Castle is a Gothic well with carved coats of arms of Frankopan family and Krbavski princes from the 15th century next to which there is a restaurant where visitors awaits a prepared fine dining concept with indigenous and ancient dishes of Frankopan princes as refreshments.

Finally, on the outer walls of the small tower in front of Sokolana, walkers can visit the lookout point with a view of the entire Kvarner Bay and islands, but also Grobnik Field and the mountains above it that connect it with Gorski kotar (known as Grobnik’s Alps).

The installed archeostereoscope gives them the opportunity to take a closer look at the old defensive Roman wall situated on Grobnik Field, which stretches all the way to Slovenia.

From the position of the lookout point near the chapel of St. Cross, visitors can enjoy the most beautiful view of Kvarner.





### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

It is also possible to see the Parish Church of St. Phillip and James, which dates from 1105, whose intersections of the vaulted ribbed arches hold miniature coats of arms of the Frankopans and a baroque bell tower.

Above Kačani is the Church of the Holy Cross, on a place recently called Vidikovac (lookout), towered over an almost vertical rock. From here you can see the canyon of river Rječina, mountain Učka, the entire Kvarner Bay, and the mountains from Klana in the northwest to Velebit, barely visible in the southeast.

Return is possible by foot (by the same route) or by regular bus line from the City of Grobnik to Čavle with a connection to Rijeka.

## **2.2 Tourism experience 2 - Chillout Platak**



Chillout Platak is an opportunity for physical and mental relaxation on 1111 meters above sea level. The program begins with a gathering in front of the Info point on Platak, where visitors, regardless of age, will find something for themselves.

In the lounge zone, they will be able to cool down lying in hammocks, enter the "Relaxation Corner" where a yoga workshop and sage and Gong bath awaits for them.

Various creative workshops are available for younger ages.

Refreshments follow in the Grill Zone, where visitors can show off their barbecue skills and prepare delicious snacks for themselves and their family and friends.

This is followed by sledding on a tubing trail that is equally appealing to younger and older ones.

The program comes to an end with a panoramic cable car ride to the top of Radeševo, where you can enjoy the sunset and the most beautiful view of Kvarner from 1,363 meters. Return by foot along the illuminated Tourist Trail to the Small Mountain Lodge for dinner where the program ends.

## **2.3 Tourism experience 3 - A walk along the Milky way**



### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**



The history of the city of Rijeka was marked by women from Grobnik who brought fresh milk to the city every morning - Mlikarice (Milkmaids). Strong women, neither thin nor fat, with strong legs, wider shoulders and medium height with their backs best suited for carrying heavy objects - these were the features on which they were selected - women who will be able to withstand the heavy burden that life intended for them, in addition to giving birth to children who will be nourished by this very burden.

Like a river, milkmaids walked one after another, often on difficult roads to the city center, no matter the weather. They would leave their homes in the dark to be reach their destination after two to three hours of strenuous walking, carrying on their backs and hands a load that could contain up to 20 liters of milk, cheese, butter and wood. In the morning you could hear the clatter of tin milk containers (called Lata) through the city. When they sold everything, they had to buy groceries and other necessities for the house, which, like milk and cheese in the morning, they would put on their backs again around noon and go along the same way back to Grobnik – day after day.

From Hrastenica in Municipality of Čavle to Rijeka leads Mlikaričin put (Milkmaids “Milky” way) - a beautiful promenade surrounded by attractive nature full of wild herbs, such as sage and heather, at the end of which there is a small chapel and a dedication to milkmaids but also the most beautiful view of Rijeka and Kvarner Bay.

The 4 km long medium-difficult trail can be crossed in 60 minute - if you start from Hrastenica in an organized route manner. Return is possible by the same path or public transport from Donja Orehovica.

### **2.4 Tourism experience 4 - Bird's Eye Grobnik**





### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

If you wish to see the Grobnik area from a bird's eye perspective, you can experience it with a 30-minute panoramic flight in a Cessna aircraft operated by experienced pilots from Grobnik Airport. The excitement of taking off and the freedom to fly in the blue sky are rounded off by unique views of Rijeka, the Adriatic Sea and numerous islands and bays, which are immortalized by unforgettable photos that you will take home as a souvenir.

Refreshments follow in the nearby fine-dining restaurant Aerosteak, which offers mostly local indigenous dishes.

### 2.5 Tourism experience 5 - Speed day Grobnik



For any enthusiasts of cars and fast driving, there is Automotodrom Grobnik with a tradition of motor sports dating back to 1978. The organized trip starts in the morning on a meeting point at the Grobnik Automotodrom where interested participants can sit in pre-prepared rented vehicles equipped with safety elements for the track. The trail is pre-rented for a one-and-a-half-hour free ride with timekeeping included and overall organizer support. Those who are less adventurous can cheer on their friends from the stands. This special experience is recorded on the runway next to the cars, as well as pictures from the cockpit and the track.

The experience is concluded with refreshments in the nearby inn "Putniku" with giant portions of homemade dishes.

### 3. Market analysis on tourism experiences / products: HISTORICAL BUILDINGS





### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

#### **3.1. Main characteristics of the product line**

Historic buildings are increasingly becoming a reason why tourists visit a destination. This recognized fact is being used for the purpose of progress and development of tourism in this direction. This is known as cultural tourism. Cultural tourism represents a specific trip to visit cultural monuments and sites, historic buildings, theaters, museums, galleries and cultural events. It puts culture, education and experiences as the requirements of an active and meaningful vacation. It overlaps with gastronomic, religious, transit, traditional, peasant and other forms and it creates the link culture and tourism. Thus, tourism and culture are interdependent concepts that influence each other. Tourism influences culture and it becomes one of the main factors and motives for the movement of tourists.

The concept of cultural tourism originated between 1970 and 1980, and can be defined as a trip with the aim of visiting famous buildings, seeing works of art or participating in events. Fifteen years ago, cultural tourism was a small niche in the tourism market, and today it is recognized as one of the main subtypes of tourism. Thus, cultural tourism is a relatively new form of tourism. It is not just about visiting cultural sights, but the desire to gain experience and new knowledge and enjoy first-hand contact with the local community.

Historical and cultural heritage plays a major role in the development of domestic tourism. For many regions, the use of historical and cultural heritage is becoming one of the real opportunities for economic, social and cultural recovery. Objects of historical and cultural heritage, as an important wealth of cities, bring profit and significantly affect their economic development. Revival of local cultural values, development of national creativity, traditions - historical and cultural heritage promotes the cultural upliftment of the local population.

Historical and cultural heritage also increases the attractiveness of regions, promoting the development of urban services, infrastructure, cultural organizations. Cultural and historical objects are divided into material and spiritual sides. Historical and cultural tourism is beginning to occupy one of the leading places among the main types of tourism. Therefore, most tourist destinations use history sparingly as a factor in attracting tourist flows, because the existence of unique historical objects predetermines the successful development of tourism in a particular area.

The following is a typical list of the types of places or attractions that are considered to attract cultural tourists since ECTARC (1989).

- a) archeological sites and museums
- b) architecture (ruins, historic buildings, entire cities)
- c) arts, sculpture, crafts, galleries, festivals, events
- d) music and dance (classical, folk, contemporary)
- e) drama (theater, films, playwrights)
- f) study of language and literature, travel, performances
- d) religious festivals, pilgrimages
- i) complete (folk or primitive) cultures and subcultures.

Europe's cultural heritage is one of the oldest and most important generators of tourism (Thorburn, 1986) and retains its central role in the European tourism industry. According to the European Union, "tourism, and especially cultural tourism in a broader sense, .... deserves priority attention" as policy areas (Bernadini, 1992).

The UNWTO recently reaffirmed cultural tourism as a major element of international tourism spending, accounting for more than 39% of tourist arrivals. Research on cultural tourism has also grown rapidly, especially in areas such as cultural consumption, cultural motivations, heritage conservation, cultural tourism economics, anthropology and the relationship with the creative economy.



### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

#### 3.2. General tourist profile of this tourism product line

##### **General description**

###### *Demographic description of tourist*

In one research, a survey of visitors was conducted across 26 locations in 9 countries in Europe. Respondents had a high level of education, with over 20% having some form of postgraduate education. The idea that cultural tourists are mostly of older age groups is widespread, but this research showed that over 40% of visitors are between 20 and 29 years old. Younger visitors were even more important in some larger cities, such as Amsterdam, where more than half of the visitors were under the age of 30 (Richards and Bonink, Greg Richards, 1996).

The research showed that the share of students among cultural visitors increases during the summer period (20%). This total age distribution is in line with other research on the attractiveness of heritage and museum visitors in Europe (Bourdieu and Darbel, 1991).

Cultural participation has always been closely linked to socio-economic status. People from higher social classes generally have greater access to funds to participate in cultural tourism (because there are higher levels of income and mobility), as well as the possession of cultural capital that facilitates participation. In a review of museum attendance in Europe, Schuster (1993) concludes that participation rates are much higher among senior socioeconomic groups and professionals. It is generally assumed that older people have a greater interest in the past, in history and culture in general. The growing market for senior citizens is therefore considered to be a major source of expanding demand for cultural tourism (Berroll, 1981). There is also evidence from the Netherlands that indicates a higher degree of cultural motivation for older tourists. Interviews with foreign tourists revealed that museums, Historic buildings and cities were the motivation to visit for 29% of tourists under the age of 30, compared with 33% of tourists aged 30-45 and 39% over the age of 45 (Nederlands Bureau voor Toerisme, 1988). While the share of culturally motivated tourists increases with age, however, younger people often make up a larger share of the total tourist population.

##### **Main markets of origin**

###### *Geographical point of view - both international and domestic markets*

Cultural tourism is growing in all destinations. For example, Europe is a key destination for it because of its cultural heritage. According to the European Commission, cultural tourism accounts for 40% of all European tourism: 4 out of 10 tourists choose their destination based on their cultural offer. The cultural tourism market in Europe is therefore becoming increasingly competitive. And an increasing number of cities and regions in the European Union base their tourism development strategies on the promotion of cultural heritage, so the number of cultural attractions is growing rapidly. Traditional cultural attractions such as museums and galleries need to re-evaluate their role as the pressure to generate visitor revenue intensifies, and the need to compete with a new generation of commercial tourist attractions grows. As cultural tourism becomes more important in economic terms and more prominent in political terms, more and more nations and regions in Europe are using cultural tourism as an integral part of tourism and economic regeneration strategies. Assessing the importance of cultural tourism in Europe is complicated by definition problems and a lack of data on cultural tourism. One of the first attempts to assess the importance of cultural tourism on a European basis was a study undertaken by the Irish Tourist Board (1988) on behalf of the European Commission. This study estimates that there are almost 35 million international cultural tourists in the European Union in 1986, of whom at least a third came from outside the EU. The study distinguished between 'general cultural tourists' (31 million) who visited cultural attractions as part of a general holiday



### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

and 'special cultural tourists' (3.5 million) with a specific cultural travel motive. However, these figures are based on estimates obtained from national tourist boards and are therefore very approximate. One of the key problems identified in the study was the lack of any consistent definitions or system for recording data on cultural tourism in the Member States. Despite the lack of accurate data on European cultural tourism, many observers are convinced that demand is growing. A large number of tourism studies have identified cultural tourism as a major area for future growth both in Europe and elsewhere (Zeppel and Hall, 1992; Bonifacije and Fowler, 1993). Bywater (1993: 30) states the importance of cultural tourism and mentions that the World Tourism Organization has estimated that cultural tourism currently accounts for 37% of all tourist trips.

#### ***Tourism habits***

A cultural product is not the buildings themselves or objects from the past, but the product is a way of their interpretation. Cultural resources must also be a source of emotions for tourists and provide them with a certain experience. It is not enough to offer only sightseeing of cultural and historical sights, historical buildings, museums, galleries and similar resources, it is necessary to form a cultural product - to create an attraction from the resources. Every cultural resource must provide an experience - it must enable the tourist to feel the history of the sights and to enjoy the visit. In the promotion of a tourist destination, cultural resources are values that can be highlighted as the leading product of the destination. What makes one destination different from others is its cultural heritage. Therefore, the emphasis should be on this resource as the leading product of the destination.

The presented facts tell us that tourists today do not travel just to escape from everyday life and for a vacation, but they travel to get to know other cultures, and thus enrich their knowledge, skills and personality.

In general, the improvement of living standards and globalization processes in the tourism market have significantly influenced changes in the behavior of tourism consumers. New desires and needs are created and tourists themselves become more active. Consumers' attitudes about the quality provided by the destination are also changing. Modern tourists are travelers with gained experience, they are well informed, they are looking for more extensive tourist experiences, they try to satisfy their needs in the best possible way, given the time and money availability. Their basic characteristics are spontaneity, curiosity, unpredictability and the desire to meet new destinations, the desire for new attractions and events. The growing tourist market and international competition, as well as the growing number of participants who have a developed and quality offer, enable tourists an increasing choice of services.

By definition, specific cultural tourists could be considered tourists who traveled specifically to visit cultural attractions (Bonink and Richards 1992). Using this definition, 9% of all tourists could be identified as "specific cultural tourists". These are estimated specific cultural tourists in a 1988 study, but these data are based on visitors to cultural attractions, which will tend to inflate the share of culturally motivated identified tourists. Specific cultural tourists tend to be more educated, travel more often, and are more influenced by the destination of cultural attractions when choosing.

When asked about the total consumption of cultural attractions during the trip, respondents stated that they visited museums more often (59% of respondents) or historical monuments (56%). There was a noticeable difference in the level of visits to usually more accessible heritage sites (museums, monuments, heritage centers) than to the attractions of the performing and visual arts. Again, specific cultural tourists were far more likely to visit more cultural attractions during their stay than other visitors. It was found that specific cultural tourists are not only more frequent consumers of cultural attractions than other groups, but have a high level of total tourist spending, especially in terms of short vacations. More than 40% of



### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

specific cultural tourists have made at least one short visit (3 nights or less) in the previous 12 months, compared to 22% of all cultural visitors. The high frequency of participation in short visits is considered a characteristic of a cultural tourist (Gratton, 1990; Faché, 1994).

The following are interesting facts gathered during the research:

1. 78% of all leisure travelers, or 118.3 million adults in the U.S., are cultural tourists.
  2. 36% of respondents in the survey heard the expression "traveler from culture and heritage".
  3. Culture and heritage travelers spent an average of \$994 on their last leisure trip compared to \$611 spent by non-cultural and heritage travelers.
  4. Although most often demographically older, travelers from culture and heritage are more educated and have higher household incomes; represent all demographic groups.
  5. Cultural travelers report an average of 5.01 trips in 12 months versus 3.98 trips by non-cultural and heritage travelers.
  6. Cultural and heritage travelers are more frequent business travelers and are more likely to take one international trip in the last 12 months.
  7. Cultural and heritage travelers are more interested in experiences where the destination, its buildings and surroundings have retained their historical character.
  8. Researchers of different cultures and cultural travelers want to learn more about the history of the place.
  9. More than half (58%) of cultural travelers want an educational experience when traveling for leisure.
  10. Cultural and heritage travelers are more likely to take part in a wide range of leisure activities, visiting museums and historical sites, participating in culinary activities, attending food and wine festivals, visiting agricultural markets and enjoying unique gastronomic experiences and fine dining.
  11. Almost half (45%) of cultural travelers fully/to some extent agree to spend more money on cultural and heritage activities on leisure trips.
  12. More than one third (37%) of cultural travelers will pay more for accommodation that reflects the culture and heritage of the destination they are visiting.
  13. It is estimated that 24% of all tourists will go on a trip with a cultural and heritage motive in the next 12 months. That equates to 36 million American tourists.
  14. Cultural heritage travelers are committed customers in museum shops (32%). They also buy at points of sale (galleries, unique / authentic retailers, traditional retailers).
  15. Approximately half of those surveyed had recently traveled 500 miles or more from home. More than a third say they traveled between 100 and 300 miles for a day trip.
  16. Cultural and heritage activities identified by travelers include: visits to historical sites (66%); attending historical reconstruction (64%); visits to art museums / galleries (54%); arts / crafts fair or festival (45%); professional dance performance (44%); visit to state / national parks (41%); purchase in museum shops (32%); and urban neighborhood research (30%). The vast majority of these travelers (65%) say they are looking for a travel experience where "the destination, its buildings and surroundings have retained their historical character."
- "This study on cultural traveler habits confirms the size of this lucrative market", said Scott Gerloff, president and CEO of Heritage Travel / National Trust for Historic Preservation, the study's main sponsor.

### **3.3. International Market size of the present global demand for this tourism product line and expected future trends**

#### ***Present market size***

Under the size of the international market of the current global demand for the Historical Buildings product line, the American and European markets are being studied. These facts are collected in various studies. The



### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

percentages of cultural tourists are stated, i.e. the size of the market of interest to cultural tourists, because this is the type of tourist whose motive for traveling can be historic buildings, analyzed product line.

The Cultural & Heritage Traveler Study conducted in 2009 among American domestic travelers highlights the popularity of American travel in terms of culture and heritage, revealing that 78% of all American tourists participate in cultural activities during their travels, representing 118.3 million adults each year. With passenger cultural spending averaging \$994 per trip, they contribute more than \$192 billion annually to the U.S. economy.

"We have found that an impressive number of American travelers are looking for experiences related to culture and heritage", said Helen Marano, director of the Office of Travel and Tourism, the U.S. Department of Commerce. 78% of all American travelers who participate in cultural and heritage activities - their expenses confirm that this is a strong market. In 2009, the estimated economic impact in the United States on cultural and heritage was \$ 192.3 billion.

Studies segment travelers from culture and/or heritage, showing the different groups that exist within this category of travelers. Segmentation analysis revealed five different types of cultural travelers. The first three segments of tourists are the type of tourists in which cultural and heritage activities have a greater impact on their choice of destination. Together, these three segments represent 40% of all. Travelers of culture and heritage as a whole are more frequent travelers.

The main conclusions of the research of tourists related to the American market:

- Cultural travelers represent and make a rich market.
- Market size: 118.3 million adults per year (78% of passengers)
- On average, they spend more: 994 USD compared to standard tourists: 611 USD
- Travel more often: 5.01 travel in 1 year
- Longer stay: an average of six nights per trip
- Shop at museum stores

(From the article: CulturalTravWhPaper)

Speaking of the area of Europe, it is considered an important destination of cultural tourism because of its cultural heritage. According to the European Commission, cultural tourism accounts for 40% of all European tourism: 4 out of 10 tourists choose their destination based on their cultural offer. Based on ATLAS research and data on visits to cultural attractions in the EU, Richards and Bonink (1994) estimated that the current EU cultural tourism market targets around 25 million specific cultural tourist trips in 1992. As a share of all international tourist trips in To the European Union, this was equivalent to about 11% of all tourist trips. In Ireland, for example, about 4% of international tourists can be considered specific cultural tourists (O Donnchadha and O Connor, Chapter 11). In the UK, about 5% of domestic tourists are listed whose main purpose of their holiday was culture (Foley, Chapter 16). In 1989, 41% of foreign visitors reported that historic sites were an important influence on their decision to visit Britain, compared with 44% in 1985 (British Tourist Board, 1989).

It is estimated that 8% of German tourists are cultural tourists, and in the Netherlands 8% of incoming tourists cited cultural heritage as their primary motive (Richards, Chapter 13). Foreign visitors to Greece stated that antiques (9%) or a combination of antiquity and climate (18%) were the main motives for their visit (Buckley and Papadopoulos, 1986). In Denmark, it is estimated that 3.4 million foreign tourists or 35% of the total number visited the museum during their stay (Hjalager, Chapter 7). A similar study shows the motivation of Japanese tourists to travel, with over 23% of respondents stating that art galleries and museums were the most important reason for visiting Europe (European Travel Commission, 1994).





### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

In the current year 2021, after excellent summer months, Croatia continued to achieve excellent results in the post-season. With more than 12 million overnight stays in September, as much as 94% of September 2019 turnover was reached. September financial indicators, i.e., the value of fissured accounts in tourism activities, are 18% higher than in September 2019, while at the year level their value amounted to more than HRK 21 billion, which is about 88% of the value from the first nine months of 2019. It is believed that positive trends will continue in the coming period [<https://bit.ly/31wKtBi> / 4.11.2021.] which is certainly a positive projection for tourism of the Municipality of Čavle.

One of the most important trends of modern tourist demand is precisely the change in trends and preferences of modern tourists. Modern tourists are increasingly looking for those forms of tourist offer that allows them to actively spend their holidays, new experiences and experiences, and participate in the so-called relaxed education. When creating tourist packages, it is important to know the motives of the arrival of tourists: 80% of tourists expressed the sea as a motive, 57.2% nature, 10.4% culture and art, 7.9% gastronomy, 6.1% of villages and rural areas, 5.56% hiking and walking, etc. [source: eVisitor] special attention in the tourist offer should be given to these motives and marketed to potential tourists. Trends in tourism are constantly changing and it is necessary to keep up with them, some of the current trends are listed below. Sustainable tourism – ecotourism: minimizes negative impacts on nature and culture, educates tourists about the importance of environmental protection, emphasizes the importance of responsible business and relies on infrastructure that has been developed in accordance with the environment. Local experience: with modern tourists more than ever they want to be involved in the local culture, learn about it and from it. From enjoying local cuisine to celebrating regional festivals and holidays, local experiences have become some of the most important tourist trends to watch and adapt to. Last minute – flexibility: under the current circumstances it is almost impossible to plan next weekend, let alone travel months in advance. Last minute accommodation has been trending for several years, and we think it will become standard. Personalized experiences: Today's consumers expect experiences that closely match their personal preferences, from destinations to accommodation and the types of activities they will engage in. User experiences: tourists rely heavily on the experiences of other visitors when choosing destinations and services there, and the experience and ratings of other visitors are what can very much distinguish someone from others (in a positive but also negative way). Smart tourism: in Croatia there is a great interest in the development of new models and modern technologies in tourism. And, although only in its infancy, the first steps have already been made at the state level with the eVisitor system. However, it is clear that this is not enough and that every single destination within Croatia must independently start working on modernization, smart exploitation of potentials and resources and monitoring of digital trends. In this way, they will be able to better present their projects in the local and global markets, respond to modern challenges and ultimately attract more visitors.

#### 3.4. Local and National size of the present demand and expected future trends of this tourism product line

##### **Current market size**

According to the Croatian Bureau of Statistics [<http://www.dzs.hr/PXWeb/sq/8b16f74d-47bd-48ce-9015-cc1d3984320f> / 4.11.2021. ] in 2019, 14,026,276 overnight stays of foreign tourists were recorded in Primorje-Gorski Kotar County, while in 2020 there were 6,804,633 overnight stays. Speaking only of the Municipality of Čavle, in 2019 there were 14,639 overnight stays of foreign tourists, and in 2020 there were 7,821. In terms of exclusive arrivals, in 2019 there were 2,409 arrivals of foreign tourists in the Municipality of Čavle, and in 2020 there were 1,332 [source: eVisitor]. Both in Croatia and in the rest of the world, tourism has faced great challenges and it can be said that this is a difficult time for tourism. Following the outbreak



### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

of the pandemic in early 2020, most countries in the world introduced certain epidemiological measures, with international travel restrictions and border closures among the first measures. Thus, since the very beginning of the pandemic, tourism has been and remains one of the economic activities most strongly affected by the pandemic and the epidemiological measures introduced. In 2020, according to published data from the Croatian Bureau of Statistics, Croatia achieved 55.3% fewer overnight stays than in 2019. It's a significant drop, but on the other hand it's much smaller than expected. Remember, all relevant actors, from rating agencies, to sectoral associations, to the Minister of Tourism, in 2020 expected only about 25 to 35% of the turnover from 2019. Also, if we compare our decline in tourist arrivals with that of competing countries such as Spain, Italy, Malta, Cyprus, Greece and Portugal, we can undoubtedly say that our decline is the smallest. It happened for several reasons. The first is always mentioned in a negative context – seasonality that is much more pronounced in Croatia than with the aforementioned competitors. Almost three-quarters of all overnight stays of foreign guests in Croatia usually occur between June and August. This can be considered as an unfavorable characteristic of a destination under normal circumstances, but in the conditions of the pandemic it proved to be a mitigating factor, since the opening of borders and the favorable epidemiological situation during the summer months contributed significantly more to the overall tourist result in Croatia than to the competition in the Mediterranean. The second reason is that the structure of arrivals of foreign guests in Croatia, unlike the competition, is dominated by road transport, while air transport is much less represented. This again proved to be an advantage in the conditions of the pandemic, as air transport saw significantly higher downsides than in road transport. In Croatia, the dynamics of the movement of tourist activity varied significantly at the regional level, so the least rates of decline in tourist activity of foreign guests particularly distinguished the counties where the structure is dominated by guests from road destinations. This is especially true of Primorje-Gorski Kotar County, Istria and Zadar Counties.

After the falls in the previous year due to the pandemic, this year the situation is much more favorable. In September 2021, Croatia achieved 1.9 million arrivals and 12 million overnight stays, or 245% more arrivals and 147% more overnight stays than in the same period last year. Of these, foreign tourists achieved 10.8 million overnight stays. This year, at the level of the Republic of Croatia, the most overnight stays so far have been achieved by guests from Germany (20.3 million), followed by domestic tourists (11.3 million), guests from Slovenia (8.6 million), Poland (6.6 million) and Austria (6 million). The majority of tourist overnight stays were achieved in Istria (22.7 million), Split-Dalmatia (14.8 million) and Primorje - Gorski Kotar County (14.7 million), which is a favorable situation for tourism of the Municipality of Čavle because there is a large circulation of tourists in the county where the Municipalities are located and thus, they can easily attract the arrival of tourists [<https://bit.ly/31wKtBi> / 4.11.2021.].

#### **Trends**

As mentioned above in B2.2. it is believed that positive trends will continue in the coming period. Projections regarding domestic tourists are positive, one can also take into account the current Covid situation and frequently changing measures, which often leads tourists to decide to travel within their country. An item that has a positive impact on projections is the dominance of road transport within the county, while air transport is much less represented. This proved to be an advantage in the conditions of the pandemic, and considering that the largest number of tourists coming to Primorje-Gorski Kotar County county comes by their own car. General trends in tourism are listed in the previous section (B2.2).



### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

#### 3.5. Most important criteria influencing the competitiveness in the global market for this tourism product line

##### *Historical buildings*

The municipality of Čavle has a rich history and heritage that marks the rulers of the Frankopans in the past who, during their rule, built a number of castles, fortifications and castles, and they shared some of these buildings with the Zrinski family, with whom they were connected many times over. The biggest attraction of the Municipality, the Grobnik castle, has primarily cultural purposes with exhibition and museum space. Among the cultural heritage are numerous sacral objects (St. Bartholomew's church, St. Philip and James, Holy Trinity Church) and monuments (Monument to the Victims of Podhum, Miljokaz, Čebuhar's house). In addition to its cultural heritage, it is inevitable to mention the richness of natural heritage (Grobnik Alps, Hahlić Area, Platak, Risnjak, Rječina...). In geographical terms it extends from Primorje to the higher highlands of Gorski Kotar. This area, due to the specificity of the relief and geological structure, includes pedologically different types of soil and vegetation, which affects the diversity of the climate.

The Municipality of Čavle offers a variety of events throughout the year. The diverse offer was based on natural resources, gastronomy, culture and tradition. The events are of different character and are divided into cultural and religious events and entertainment and sports events.

Cultural and religious events:

- Carnival announcement, opening of trick-or-treaters, organization of carnival parties organized by Grobnik dondolaš ☞ January
- Grobinština rings (Grobnik dondolaši) ☞ February
- Lidrano - literary-dramatic expression ☞ February
- International mother tongue day – meeting with Čakavian writers ☞ February
- Guest appearances of Grobnik dondolaš ☞ February
- World Water Day ☞ February 22.02.
- International Theater Day ☞ March 27.03.
- Europe in School ☞ March
- International Book Day and Croatian Book Day ☞ April
- Presentation of the project cultural and historical heritage of my region - cooperation of schools ☞

April

- Easter - student workshop ☞ April
- Earth Day ☞ April 22.04.
- Red Cross Week - admission of first graders to PCK ☞ May
- International Family Day ☞ May
- International Museum Day ☞ May
- Čavle Municipality Day and School Day ☞ May
- International School Library Day ☞ October
- World Youth Day ☞ October
- Grobnik Autumn ☞ November
- Christmas our way ☞ December
- Christmas concert ☞ December

Entertainment and sports events:

- Carnival festivities ☞ February
- Masked Platak ☞ February
- Days of wine and beauty ☞ May
- World Parachute Cup ☞ June



### D.4.3.1 Tourism Products Portfolio: PP2 PGZ

- Airshow ☞ June
- Polenta and Cheese Festival ☞ June
- Competition of journalists in the storage of hunting stew ☞ June
- Eco Bike Marathon Platak ☞ July
- Čavle Municipality Day ☞ August 24.08.
- Bartoja ☞ August

[Source: www.tz-cavle.hr]

### 3.6. Most representative international best practices (max 3) regarding this tourism product line

#### ***Le Cannet-des-Maures: good case practice in Provence, France***

Successful key elements for tourism XXX line development in the chosen best practice / benchmarking case

One example of good rural tourism practice is Le Cannet-des-Maures, a village in the French province of Provence. It is a traditional village built in the Gothic style. In the village there are traditional houses characteristic of the subject area. The village exudes tradition in every part, either through architecture or through landscaping, culture, food and drink, local customs related to everyday life, etc. The village has made the most of its potential and today offers tourists an active and adventurous vacation in untouched nature, cultural and historical sights and numerous events. The catering facilities are decorated in a traditional style, and in gastronomy, local cuisine and traditional dishes are preferred. Since it is a hilly area, outdoor activities include: hiking, biking, mountain biking, climbing, body jumping, etc. Tourists can participate in the local life of the community and taste local products. The main attractions are markets, vineyards and wineries, rural households, a zoo with domestic animals, etc. Tourists can see many churches, old abbeys, mansions and castles. The main attractions of this rural area are:

1. Château Grimaud - a castle on top of a hill that connects active vacation (hiking) with the culture of the area.
2. Moulin du Roch - a windmill from the 16th century on top of a hill that connects hiking with the history of life in the area.
3. Chapelle Saint-Roch - a chapel on top of a hill that connects active tourism with a sacred cultural monument.
4. Route de Grimaud - a bike path that is very attractive among tourists because of its construction and panoramic views.
5. Le long Lac Sainte Suzanne - a lake that offers tourists the opportunity to fish, consume local food, ride a bike around the lake, enjoy walks, boat rides on the lake and more.

Le Cannet-des-Maures is a rural area that places great emphasis on autochthony associated with modernity. Tourists in this rural area, in addition to enjoying the tradition, can use the accommodation facilities of highly categorized and wellness and spa services. [Source: <https://bit.ly/3wqaVb5> / <https://bit.ly/3wgw11Z> / <https://bit.ly/3ERmAmr> / 05.11.2021.]

#### ***Villaggio ecologico di Granara: Tuscany, Italy***



### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

Granara Ecovillage is located in the heart of the Apennines, on the border of the Emilia-Romagna and Tuscany regions. It was an abandoned village and today it is a place where you can meet different experiences from ecology. Appropriate technologies, environmental education, theater, and the arts, along with nonviolence and social awareness, have been areas of research, practice, and exchange that have been at the core of the idea of the village from the beginning. Small organic agriculture and catering facilities help raise the quality of products and services of this eco village. This rural area is known for the Granara Festival which was initially a film festival and later grew into a music film festival where visitors can enjoy local gastronomy, various workshops and art in general. In addition, art workshops, seminars and performances are held throughout the year in this rural area. Trainings are also conducted in other areas and cover different target groups: pupils, students, etc. In addition to tourists in this area can participate in various activities related to everyday life and thus learn how people lived in this area in the past, they can taste traditional dishes and enjoy traditional drinks. This tourist destination gives tourists the opportunity to enjoy the indigenously arranged catering facilities and accommodation facilities. An important factor of this tourist destination is an active vacation. The destination offers tourists the opportunity to spend an active vacation in nature (hiking, biking, running, group sports) or indoors (dancing, aerobics, gym).

[Source: <https://bit.ly/3wmHrLo> / 5.11.2021.]

#### ***Schloos: Laxenburg***

Laxenburg is located about 15 km south of Vienna. The historical importance of the village "Lachsendorf" has its roots in the 13th century, and as early as 1388 under the rule of Duke Albrecht III. Laxenburg becomes the "Marktgemeinde" (a special kind of village in Austria). Laxenburg has been a favorite residence of the imperial family during spring and summer, thanks to its proximity to Schönbrunn Castle. The most famous building is certainly the "Franzensburg" (castle), which was built in the period from 1799 to 1801, and completed in 1835. Of interest to tourists is the equipment of the premises, which is considered the Austrian treasury. Today there is a museum that can be visited. There is a panoramic train that passes by many sights, and the children can enjoy the huge playground near nature or they can ride a pony or ride a horse and cart. Some can also enjoy sports activities, or visitors can rent a boat for the castle pond. Someone interested in culture can take part in organized tours - guided tours of the Franzensburg Museum or a visit to the "Hoher Turm und über die Dächer"). There is also a good gastronomic offer where visitors can enjoy a meal with a special atmosphere. The tradition of the village with all its historical importance is manifested not only in the castle but also in many other places of the village. There is a cultural walk (Laxenburger Kultur-Parcours) that takes visitors to over 50 stops, which are not only located inside the castle, but provide insight into the most important sights of the village. For example, the parish church is an important exhibit of the early Austrian Baroque. The present form dates from the time after the war against Turkey in 1683. It is interesting to point out that various events are organized: for example, Halloween shows, Christmas program for Advent, etc.

[Source: <https://bit.ly/2ZX5vZ6> / <https://bit.ly/3mMFlvD> / <https://bit.ly/3k9vrrr> / 05.11.2021.]



### **D.4.3.1 Tourism Products Portfolio: PP2 PGZ**

#### **4. Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. **Historic Buildings**
- B. **Mountain fun (Platak)**



### D.4.3.1 Tourism Products Portfolio: PP3 JURRA

#### PP3 JURRA

	V1	08. 03. 2021	partners
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1. Main elements collected during WP3 / SWOT & Reputation Analysis and WP4.1 / Participatory Planning Processes for the identification of Points of Interests, outlining the potential for tourism experiences in the target area(s)

#### 1.1. Intangible assets

1. Bosiljevo - the history of the Frankopan family, historical stories related to Croatian nobles and Ana Katarina Zrinski, events - bicycle races, chestnut festival and other gastro, sports and recreational events,
2. Cetingrad - the Cetingrad fair,
3. Josipdol - brand "Josipdol in the heart of Croatia", religious events, bicycle races, fire brigade cups,
4. Karlovac - tourism events (St. John's bonfire, folklore festival, manor fair, beer days), history of the city related to the Frankopan family,
5. Novigrad na Dobri - Farkas tambourines, religious events,
6. Ogulin - brand "town of fairy tales", one of the most famous Croatian writers – Ivana Brlic Mazuranic, folk dances and customs, historical stories, legends and myths and the specific Ogulin speech,
7. Ozalj - tourism events (folklore festival and the event "In the Footsteps of Slava Raškaj", the Strudel Fest, moto meet...),
8. Rakovica - cultural and historical features of the area – Eugen Kvaternik as the most famous figure whose activities are related to Rakovica when leading Rakovica uprising, Sarežani - historical guardians of The old town Drežnik, traditional Lika song,
9. Slunj - European Cup in rafting, traditional crafts, tourism cultural and sport events, Honorary City Guard, traditional songs.

#### 1.2. Tangible assets

1. Bosiljevo - Bosiljevo Castle Old town Bosiljevo, rivers (Kupa and Dobra), bicycle routes,
2. Cetingrad - Cetin fortress, forests and caves, hiking, cycling and forest paths, specific Cetingrad cheese,



### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

3. Josipdol - The Tržan Castle Old town Modruš, Munjava stream, Viničica (hill), Sabljaci Lake, BDM shrine in Oštarije, Sv. Katarina in Viničica, bicycle routes, Local products - honey, cheese, potatoes, blackberry wine, raspberries,
4. Karlovac - Dubovac Castle Old town Dubovac, The City Star Karlovac, Aquatica - freshwater aquarium, four rivers (Mrežnica, Dobra, Kupa and Korana), Karlovačko beer, bicycle routes, Homeland War Museum,
5. Novigrad na Dobri - Frankopan city Novigrad Old town Novigrad, rivers (Kupa and Dobra), a bridge, numerous sacral buildings, two historic roads (Louisiana and Carolina), bicycle routes, local family farm products,
6. Ogulin - Frankopan Castle The Castle of Ogulin, Ivana's house of fairy tales, Đula abyss, the cave system, Mount Klek, Lake Sabljaci, bicycle routes, famous Ogulin sauerkraut (Ogulinsko kiselo zelje),
7. Ozalj - Ozalj Castle Old town Ozalj, The Homeland Museum, river Kupa, bicycle routes, Ozalj cave, Herman Bolle Promenade,
8. Rakovica - Drežnik Castle Old town Drežnik, forests and caves, Barac's caves, the Ranch Deer Valley, the adrenalin park in Selište Drežničko, network of wells on educational routes, Rakovica cheese, archaeological and speleological finds, bicycle routes,
9. Slunj - The Old Town of Slunj, The Napoleon's magazine, Rastoke, four rivers (Korana, Slunjčica, Mrežnica and Glina), bicycle and hiking trails, Hiking trail Forests and Waters (Šume i Vode), Educational trails Melnica, town beach, Slovin bridge, creeping Celery - indigenous plant, gastro offer - trout, proja, honey, brandy, First Slunj wine - brand.

#### **1.3. Key attractions**

1. Bosiljevo Castle, Old town Bosiljevo – Bosiljevo

Bosiljevo Castle is situated on an elevation, in a picturesque natural environment, along the historical Carolingian road. It was built by the Frankopans in the 15th century and held until 1671, after which it became the property of Nikola Erdody until 1710. Until 1825 it was owned by the Auersperg family. Earl Laval Nugent bought it in 1825, and the Cosulich family at the beginning of the 20th century.

Around the castle there is a preserved park which has been a protected monument of horticultural architecture since 1974.

**Bosiljevo:** *The Bosiljevo Castle* <https://bosiljevo.hr/dvorac-bosiljevo/>

2. Cetin fortress – Cetingrad





### D.4.3.1 Tourism Products Portfolio: PP3 JURRA

The town of Cetin was once a strong fortress surrounded by double eighteen meter high defensive walls, towers and observation posts. During the centuries-old Croatian-Turkish wars Cetin was an important military-strategic point and defensive fortress.

The Cetingrad Charter, signed during the Cetin Parliament on 31 December 1526 and 1 January 1527. is one of the most important document of Croatian statehood and is stored in the Austrian State Archives in Vienna.

**Cetingrad:** *The Cetin fortress* <https://www.cetingrad.hr/stari-grad-cetin/>

#### 3. The Tržan Castle, Old town Modruš – Josipdol

Medieval fortress on a steep hill above the fortified town of Modruš on the eastern slopes of Velika Kapela, once the administrative seat of the Modruš County, and today a ruin in the southern part of Karlovac County. It reached its peak in the 14th and 15th centuries, when members of the powerful Croatian family Frankopan ruled there, and when it was the episcopal see.

Today, it has been left to the ravages of time, and all that is left of it are the ruined remains of walls and towers, which protrude into the air, but still, it represents a great tourism potential.

**Josipdol:** *The Tržan Castle* <http://tzo-josipdol.hr/modrus/>

#### 4. Dubovac Castle, Old town Dubovac – Karlovac

The Dubovac Castle is the oldest monument in Karlovac and one of the best preserved and most beautiful monuments of medieval architecture in Croatia.

It was built on a hill above the Kupa river, and was named after the oaks growing on the surrounding slopes.

Historical sources indicate that Dubovac came into the hands of the noble family of Zudara (Sudar) before the end of the 14th century. In 1442, it was leased to the prince and ban Stjepan Frankopanski, but soon became the permanent property of the princes of Krk-Frankopan. It remained in their possession until the middle of the 16th century, when it passed into the possession of the Zrinski.

**Karlovac:** *The Dubovac Castle*  
<http://www.gmk.hr/O%20nama/U%20sastavu%20muzeja/Stari%20grad%20Dubovac>

#### 5. Frankopan city Novigrad, Old town Novigrad – Novigrad na Dobri

Old town Novigrad was allegedly built in 1193 but exact year is not actually known. However, in the 15th century at the latest it came into the possession of the Frankopan princes of Krk, and remained in their possession until their downfall in the "Zrinsko-frankopanska conspiracy" in 1671.



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### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

Its ground plan is an elongated pentagon of unequal sides with a pointed tip to the northeast. There are towers in all the peaks, four approximately semicircular and smaller in size, while the fifth on the steepest cliff is the largest. The main and the only entrance to the city is on the south wall with a folding entrance bridge.

**Netretić:** *The Frankopan city Novigrad* <https://netretic.hr/turizam/znamenitosti/>

#### 6. Frankopan Castle, The Castle of Ogulin – Ogulin

Frankopan Castle was built around 1500., above the abyss of the river Dobra - Đula's abyss. The founder of the city was Bernardin Frankopan, the feudal lord of Modruš, Plaški, Vitunj, Tounj, Zvečaj, Bosiljevo, Novigrad and Dubovac.

The city walls bounded the courtyard on three sides, and on the fourth there was a palace consisting three-story building with towers on the edges. The military significance and position of the town of Ogulin required a well-fortified fortress. In 1967, the Heritage Museum was opened in the castle.

**Ogulin:** *The Frankopan Castle of Ogulin* <https://www.tz-grad-a-ogulina.hr/zavicaj-bajke/kulturno-povijesni-spomenici/frankop/>

#### 7. Ozalj Castle, Old town Ozalj – Ozalj

Ozalj Castle is a valuable part of cultural and historical heritage of the continental part of Croatia and an attractive destination for many visitors. The existence of the walls dates from the VI. century, but the beginning of the construction of today's building can be placed in the XIII. century when it was first mentioned in written sources.

The entire castle consists of an entrance tower, a smaller tower on the left side of the entrance tower, the main defensive tower, the south, east and north city wings (all three wings are large buildings on two floors) and the so-called "Zrinski Palace" or "granary".

**Ozalj:** *The Ozalj Castle* <https://ozalj.hr/grad/zavicajni-muzej/>

#### 8. Drežnik Castle, Old town Drežnik – Rakovica

Drežnik castle is located on a cliff above the steep canyon of the river Korana. It has an irregular quadrangular shape, stone walls with two quadrangular and one round tower located on the north side of the building. The round tower is the most valuable part of the site.

First record about the Drežnik castle is mentioned at the beginning of the 12th century. During the 16th century, the Old Town of Drežnik was under constant siege by the Turks and was an important defensive stronghold that was conquered, destroyed and rebuilt many times. The castle was liberated at the end of 18th century.



### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

**Rakovica:** *The Drežnik Castle* <https://www.plitvickedoline.hr/info/rakovica-plitvicke-doline/atrakcije/stari-grad-dreznik/>

#### 9. The Old Town of Slunj – Slunj

The Old Town of Slunj was built for the original residential purpose of the princes of Krk, as a polygonal, hexagonal building, within which there was

palace and probably auxiliary rooms. It dates from around the 1322 when the Hungarian and Croatian king Charles Robert donated the Drežnik parish with the town of Slunj to Friedrich III Frankopan.

The Old Town of Slunj has been connected with the Slunj settlement, on the left bank of Slunjčica.

**Slunj:** *The Old Town of Slunj* <https://slunj-rastoke.hr/povijest-starog-града/>

#### 10. The City Star Karlovac – Karlovac

The Star is the oldest and the central part of the city of Karlovac. The Karlovac Fortress, which was built in the 16th century as a Renaissance fortification system with a characteristic six-pointed shape.

This star-shaped fortress area of geometrically regular and proportional streets and squares is bordered by six five-sided bastions connected by earthen ramparts, which are followed on the outside by a fortress hornbeam and a sloping outer earthen embankment that allows good defensive control in front of the fortress.

**Karlovac:** *The City Star Karlovac* <https://www.karlovac.hr/grad/zvijezda-93/93>



### D.4.3.1 Tourism Products Portfolio: PP3 JURRA

## 2. Summary description and main characteristics of the 5 tourism experiences envisaged in the involved territory

### 2.1. Tourism experience 1 – Fortresses of Karlovac County

#### Cultural route of Karlovac County Fortresses

Target group: families, school children

As identified at a1.3 - *Key attractions*, there are ten localities - old towns, castles and fortresses which are the basis of the local tourism offer. All ten attractions are important cultural and historical heritage of The Karlovac County and all of them, except The Karlovac City Star, are medieval fortifications and main symbols of today's towns.

Potential tourism experience can be created as a cultural route, the path of the castles of Karlovac County.

**Bosiljevo:** *The Bosiljevo Castle* <https://bosiljevo.hr/dvorac-bosiljevo/>

**Cetingrad:** *The Cetin fortress* <https://www.cetingrad.hr/stari-grad-cetin/>

**Josipdol:** *The Tržan Castle* <http://tzo-josipdol.hr/modrus/>

**Karlovac:** *The Dubovac Castle*

<http://www.gmk.hr/O%20nana/U%20sastavu%20muzeja/Stari%20grad%20Dubovac>

**Netretić:** *The Frankopan city Novigrad* <https://netretic.hr/turizam/znamenitosti/>

**Ogulin:** *The Frankopan Castle of Ogulin* <https://www.tz-grad-ogulina.hr/zavicaj-bajke/kulturno-povijesni-spomenciji/frankop/>

**Ozalj:** *The Ozalj Castle* <https://ozalj.hr/grad/zavicajni-muzej/>

**Rakovica:** *The Drežnik Castle* <https://www.plitvickedoline.hr/info/rakovica-plitvicke-doline/atrakcije/stari-grad-dreznik/>

**Slunj:** *The Old Town of Slunj* <https://slunj-rastoke.hr/povijest-starog-grad/>

**Karlovac:** *The City Star Karlovac* <https://www.karlovac.hr/grad/zvijezda-93/93>

Spring and autumn are the best time of the year to explore the cultural route of Karlovac County Fortresses and visit 10 old towns, which, although they share a common history, each have special significance in the historical and political context of The Karlovac County and Croatia in general.

### 2.2. Tourism experience 2 - The route of Frankopan family

#### The route of Frankopan family

Target group: school children, families, individuals

The Frankopans are a Croatian noble family deeply rooted in Croatian historical heritage. Their significance can be shown in two most important topics:

1. Political and military activities;
2. Cultural and literary heritage.

**Political heritage route:** The Frankopan Family connects the most important historical and cultural heritage elements in Karlovac County - the old towns and castles which were their fortresses. Their two most known



### D.4.3.1 Tourism Products Portfolio: PP3 JURRA

members, Katarina Zrinski and Fran Krsto Frankopan, were born in the old town of Bosiljevo, and many of them lived and ruled from old towns Moduš, Ogulin, Cetin and Slunj.

Potential tourist experience can include the political and military legacy of The Frankopans, and be presented through authentic stories about the famous family whose legacy can become the backbone of county and local tourist offers.

#### Cultural and literary heritage route:

As members of the high nobility, The Frankopans supported artists and writers as patrons, but at the same time they themselves contributed to literary achievements.

Potential tourist experience can include stories and interpretations of literary achievements of The Frankopan Family.

- Zrinsko-Frankopanski or the Ozalj language circle it's based on a characteristic mixture of čakavice, kajkavice i štokavice and presents care and preservation of the Croatian language almost two centuries before it was declared official in public administration
- The interpretation of the contribution to the development of the Croatian language through the presentation of the work of Katarina Zrinski and Fran Krsto Frankopan.

### 2.3. Tourism experience 3 - Bike through Karlovac County

#### Bike route of Karlovac County

Target group: adventurers, families, young people

Preserved natural resources of Karlovac County are one of the symbols of the area, and combined create a complete cycling route. Among Karlovac County there are 31 bike routes with more than 500 kilometers of marked bike paths that pass by valleys of four Karlovac rivers, stone bridges, numerous waterfalls, ancient castles, old villages and wine-growing hills.

Potential tourism experience can include three bike routes:

**Slunj - Cetingrad - Slunj**, a bike route along which tourists pass by the natural beauties of Slunj, continue cycling to the Old town of Cetin, and then return to Slunj by a circular bike route. <https://cyclingadventure.net/slunj-cetingrad-slunj/>

**Karlovac - Pokuplje - Karlovac**, the route starts at the center of Karlovac, passes by the Old town Dubovac, and then mostly runs along the Kupa river. <https://cyclingadventure.net/8-karlovac-pokuplje-karlovac/>

**Selište Drežničko - Korana**, Although very short, the route is full of beautiful landscapes as well as attractive parks along the Korana river. <https://cyclingadventure.net/36-seliste-dreznicko-korana/>



### D.4.3.1 Tourism Products Portfolio: PP3 JURRA

#### 2.4. Tourism experience 4 - Nature of Karlovac County

##### Nature route of Karlovac county

Target group: primarily adventurers, families, tourists of all age categories

Karlovac County is one of the richest regions of the Republic of Croatia in terms of the amount of natural waters, while the City of Karlovac, due to its position on four rivers - Korana, Kupa, Dobra and Mrežnica, stands out with its unique geographical location.

Tourist experience of the natural heritage of Karlovac County can be created through all ten localities, but the proposed route of nature, as potential tourism experience includes - Karlovac, Slunj and Rakovica.

**Karlovac:** City of is situated on the banks of four rivers. <https://visitkarlovac.hr/the-four-rivers/?lang=en>

**Slunj:** Slunj area is famous for Rastoke, a watermill pearl, where Slunjčica river flows over the travertine barriers into the Korana river, thereby creating a multitude of waterfalls, rapids, small lakes and cascades. <https://slunj-rastoke.hr/en/about-rastoke/>

**Rakovica:** Barac's caves which are declared permanently protected in the category of significant landscape. The area of Barac's caves has specific geomorphological and geo speleological values. <https://baraceve-spilje.hr/>

The nature route of Karlovac County has its charms at any time of the year. During the summer season rivers of Karlovac County allow swimming and rafting, in spring and autumn tourists can explore them by boat and enjoy fishing, and the Barac's cave during the whole year have the same temperature, around 9°C, so they fit perfectly into the tourist route at any time of the year.

#### 2.5. Tourism experience 5 - Gastronomy of Karlovac County

##### Gastro route of Karlovac County

**Target group:** young people, couples, families, tourists interested in active tourism experiences

**Karlovac** - *City of beer*. Once a year, there is a beer fest called *Karlovac Beer Days*, which is the most famous and longest-lasting Croatian festival of beer and gastronomy. <https://danipiva.net/>

**Ozalj** - *Štrudlafest* includes gastro workshops of making the traditional strudel and thematic bike routes overlooking rivers and picturesque hills, all sweetened with homemade strudels prepared by the hosts on the family farms. This gastronomic event is designed as an interactive tourist attraction. <https://strudlafest.com/>

**Ogulin** - Ogulinsko kiselo zelje is a specific local product - cabbage, marked with the symbol of the European Union for the protected designation of origin. [https://poljoprivreda.gov.hr/UserDocsImages/dokumenti/hrana/zoi-zozp-zts/Katalog\\_zasticenih\\_proizvoda\\_2021\\_web.pdf](https://poljoprivreda.gov.hr/UserDocsImages/dokumenti/hrana/zoi-zozp-zts/Katalog_zasticenih_proizvoda_2021_web.pdf)



### D.4.3.1 Tourism Products Portfolio: PP3 JURRA

Time to visit the gastro route of Karlovac County is at the end of summer, the last week of August and the first week of September, since then there are beer and strudel events, and “Ogulinski” fresh cabbage indigenous sort is possible to try during whole year.

#### 2.6. Tourism experience 6 – The fifth river (Beer route of Karlovac County)

The fifth river (Beer route of Karlovac County)

Target group: young people, couples

**Karlovac** - City of Beer

*Karlovačka pivovara* is a brewery founded in 1854 in Karlovac and is the backbone of the brewing tradition in Karlovac County. <https://www.karlovacko.hr/hr>

Long tradition encouraged the establishment of brewing studies at Karlovac University of Applied Sciences, which indicates the importance of beer production in the local area. [https://www.vuka.hr/index.php?id=veleuciliste\\_u\\_karlovcu](https://www.vuka.hr/index.php?id=veleuciliste_u_karlovcu)

City of Karlovac is well known for its brewery, and once a year the usual city slogan is changed from *The city on four rivers* to *The city on five rivers*, since the river of beer flows abundantly on it. The end of summer in Karlovac is booked for Beer Days, the largest brewing event in Croatia. <https://danipiva.net/>

Apart from *Karlovačko* beer, as a recognizable brand of the City, the gastronomic and beer offer at the festival also includes numerous craft breweries, and activities as a beer academy where a whole beer story is presented, and true beer lovers have the opportunity to make their own beer.

The tradition of beer production has spread through the entire Karlovac County where there are few small, craft breweries that complete this beer route.

**Karlovac** - In 2016 in the City of beer, it was established the first craft brewery called *Podrum*. Currently the brewery produces three types of beer - Pale Ale, Brown Ale and Spicy Herbs Ale. <http://pivovarapodrum.com/>

**Duga Resa** - In the neighbourhood of Karlovac, the town of Duga Resa, in 2019 it was founded another craft brewery - *Prva Dugoreška Craft Pivovara*. Given the town is situated on the river Mrežnica, this brewery produces a beer called *Mrežničko*. <https://pdc-pivovara.hr/>



### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

#### **3. Market analysis on tourism experiences / products: BEER TOURISM**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience:

##### **3.1. Main characteristics of the product line – Beer Tourism**

Over the past decade, gastronomy tourism has become a key component of destination marketing strategies (Du Rand & Heath, 2006). Economically speaking, gastronomy tourism has become one of the most dynamic and creative segments of the global tourism market (WTO, 2012) and represents 25% of global tourism spending (World Food Travel Association, 2014). Many destinations communicate about their gastronomic resources to differentiate themselves from others (Chang et al., 2010; Hall & Mitchell, 2002; Scarpato, 2002). Although wine and wine tourism are at the forefront of the gastro tourism category, beer tourism is expanding and showing great prospects for even greater progress. Both wine and beer belong to the gastronomic tourism offer but, apart from the raw materials from which they are produced, they differ in many other ways, including the market in which they are consumed, i.e., they have a specific tourism demand with specific needs. Just to compare, wine tourism is more focused on products (red, white, Bordeaux, Bourgogne) and production attributes (cellar, grape, vine) while beer tourism is more related to context (friends, discovery, taste, breweries) and some specific characteristics (alcohol, hop, foam, blonde).

Beer tourism refers to tourism where the primary motivation of travel is to visit a brewery, beer festival, beer related activity or other event that allows attendees to experience all aspects of the beer-making, consuming, and purchasing process. The beer tourism industry has evolved from the larger culinary and beverage tourism category in which people began planning travels based around experiencing food and drink of different geographies. Informally, vacations centric to the theme of enjoying beer have been dubbed "beercations".

However, beer tourism may be divided into two distinct groups based on its outward forms. In the first case, beer is the primary source of motivation for the tourist i.e., the aim is to consume the selected, chosen type of beer in a given environment. In the second case, motivation may stem from other factors, for example when a tourist is primarily interested in a place that may be in connection with beer and beer consumption is only secondary or does not take place at all.

Beer tourists are motivated by more than just simply drinking beer. The beer is obviously important, but its importance is in the uniqueness and individuality of the beer, brewery, manifestation etc. Those attempting to attract beer tourists to their area or attraction should focus on the uniqueness of the beer offerings they have and include information about the brewing process and the history of the beer, brewery or manifestation.

##### **3.2. Sub-products – the main aspects that differentiate the sub product from the main product – Beer Tourism**

###### **Beer fest Tourism**

Beer festivals are popular events in many places and generate tourist overnight stays and day visitors (Wilson, 2006). Beer is sold at other festivals as well which might be an attractive force and it is an important product featured at most food and drink festivals. When talking about beer related festivals the first that comes to mind is the Munich Oktoberfest. This event is visited by more than 6 million





### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

people annually representing a more than €1 billion income for the city (Dávid et al., 2009). The Czech Beer Festival in Prague is also visited by more than a million people and programmes in the Baltic States are becoming increasingly popular (Öllesummer in Estonia).

Besides beer festivals, other beer themed programmes and events with unique attractions need to be mentioned. So, we have a beer marathon which connects several towns in Lithuania. The main point of this event is that participants visit checkpoints (bars, cafés) where the owners accomplish tasks together with the competitors. During the beer marathon beer drinking is not a must but not forbidden either, however, contestants can only walk, run or use the public transport system, the use of any other vehicles is forbidden. The Beer Bike competition in Houston, USA is a similar event. Beer Bike competition is a combination intramural bicycle race and drinking competition dating back to 1957. It takes place at Rice University, with participating students originating from all around the world. There are similar less known events or, say, less-promoted events such as MedvedRUN in Zagreb. It is a race that combines running through the most beautiful parts of Zagreb and a beer after party. Competitors can choose between a race of 5 or 10 kilometers, and the fastest runners of the 10 km race win as much beer as they weigh.

#### **Beer and culture tourism routes**

Beer and culture tourism routes have become a highly increasing tourism product that combines beer and beer tradition with the cultural, historical, and natural attractions of the destination. The goal is to visit the sights and taste the beer specific to the area. One example of this form of tourism is the Explore Salzburg on the Beer Tour. With eleven breweries, Salzburg is Austria's beer capital. This can be experienced in shady beer gardens or trendy bars as well as on themed tours. Their beer tour explains the most important historical stages of beer culture from the first brewery to the present day. The other example is The Ale of the Trail, a map linking local beer and cultural heritage with breweries. Ten breweries located along the North Downs Way National Trail (Kent, England) dedicated an "Ale of the Trail". Each brewery was encouraged to dedicate a beer that has some connection to the trail either by name, ingredients, or historical links. Each brewery made an annual donation towards the upkeep of the trail. A map and passport were designed and printed to encourage walkers to discover local beers, breweries, and related heritage along the trail. Over 6,000 maps & passports were distributed to local pubs, farm shops, brewery outlets. North Downs Way Walkers and Cyclists are encouraged to visit local pubs, breweries, and outlets to tick off each beer on the map and passport. Pubs, ales, and trails are promoted via social media and on partner media channels.

### **3.3. General tourist profile of this tourism product - Beer Tourism**

#### **General description**

As earlier described, beer tourism refers to tourism where the primary motivation of travel is to visit a brewery, beer festival, beer related activity or other event that allows attendees to experience all aspects of the beer-making, consuming, and purchasing process. The beer tourism industry has evolved from the larger culinary and beverage tourism category in which people began planning travels based around experiencing food and drink of different geographies.

Beer tourists may be divided into two distinct groups based:

1. The ones that have a beer as the primary source of motivation,
2. The ones that are motivated by other factors like cultural and natural heritage.



### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

Beer tourists are motivated by more than just simply drinking beer. Even though beer is important, the beer tourists are in for the whole experience (beer, brewery, manifestation etc.). Those attempting to attract beer tourists to their area or attraction should focus on the uniqueness of the beer offerings they have and include information about the brewing process and the history of the beer, brewery, or manifestation.

According to Bujdosó & Szucs, the market for beer is most likely to be middle aged men from higher socio-economic groups. Fewer young people and women drink beer and perhaps lower socio-economic groups are more likely to drink beers and lagers from global companies. Special markets to be considered include stag breaks, college reunions, and sport clubs' trips.

#### **Main markets of origin**

Foreign visitors in Karlovac County in 2020 made 70 760 arrivals and 121 138 nights, and domestic tourists made 31 101 arrivals and 58 825 nights. If we consider the COVID 19 and the restrictions that have hit tourism due to epidemiological measures, the indicator of the number of foreign arrivals and overnight stays of tourists speaks of the development of Karlovac County as a tourist destination.

Tourists from Germany predominate in the arrivals and overnight stays of foreign tourists, followed by Poles and Czechs.

Given beer tourism as a tourism product is still in development, there are no accurate statistics on guests visiting attractions in the area.

#### **Tourism habits**

In 2020 a study called Motivation, behaviour, and travel activities of tourists was conducted by Stone, Garibaldi and Pozzi. This study provided evidence of beer tourists as a segment of the travel market as well as indicating that beer tourists (or beer travellers) are more active participants in travel activities, including visiting landmark restaurants/bars, enjoying food, beer, or wine festivals, attending major events and concerts. There appears to be evidence that beer tourists are also an important market segment to pursue, as their travel money is spent not just at beer attractions, but also at many other locations. Beer tourists are not lowbrow tourists but can be considered cultural omnivores. Destinations with beer attractions are likely to benefit by marketing to attract more beer tourists, as they are likely to take advantage of many other culinary, food, beverage, and other tourist attractions while visiting.

The study was conducted on a sample of 562 people. The results showed that about one fifth (20.5%) of respondents can be considered beer tourists, as they have been motivated to take a trip or visit a destination for a beer experience (brewery, taproom, or beer trail) in the past 2 years. Individuals may be motivated to travel by many different factors, but this delineates those travellers for whom beer attractions are a travel motivator. This provides initial evidence of the breadth of beer tourism.

Beer travel was associated with male (over one quarter of male travellers were beer tourists, compared to about 15% of females) and younger (over one quarter of both Generation X and Millennials were beer tourists), compared to about 10% of older generations. Furthermore, beer tourists are more likely to drink local beers and local wine than non-beer travellers. However, to portray beer tourists as young, single, and focused on drinking appears to be inaccurate. For example, 23.5% of American married respondents (or in a domestic partnership) were beer tourists, compared to 16.4% of singles. Additionally, a larger percentage of college graduates and individuals with children at home were beer motivated.

The study also provided conclusions about:

- Participation in Food and Beverage Activities



### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

Beer tourists participated in many food and beverage activities. These include visiting wineries; attending food, beer, and wine festivals; eating at food trucks, carts, stalls; and taking cooking classes. Compared to travellers who have not been motivated by beer, beer tourists are more likely to participate in nearly every type of food and beverage travel activity, excluding the most common or “usual” (namely going to a restaurant for a memorable experience, eating at a fine dining restaurant, and going to an agricultural fair/farmer market).

Beer tourists are not just interested in beer. While beer activities may often be a motive to travel, beer tourists are also taking part in other food and beverage travel activities at a higher rate than other travellers.

#### **- Participation in Other Tourist Activities**

Travelers usually partake in a variety of activities during their holiday, and many of them are not related with their initial motivation for a trip. Beer tourists are likely to participate in many different activities while traveling. The most popular are: sightseeing, visiting bars/pubs/nightclubs, visiting historical/cultural attractions, and shopping. When compared with non-beer tourists, they seem to seek active “experiences” beyond simply material consumption. Beer tourists are more likely to participate in a variety of activities, including: attending major events (sporting events, festivals); performing arts events (concerts or plays); hiking/walking; and visiting bars, clubs, and nightclubs.

#### **- Attitudes and Beliefs About Food and Drink While Traveling**

Beer tourists consider themselves to be more knowledgeable about food and beverage than other travellers and are more likely to believe that eating and drinking experiences helps to understand the local culture when traveling. Additionally, they are more likely to consider the availability of food and beverage and/related activities when selecting a travel destination. Their post travel experiences and attitudes also differ from other travellers. Beer tourists are more likely to believe that food and beverage experiences are important to their overall trip satisfaction, and they also believe that these are an important part of the memories. Food and beverage are not simply something beer tourists do while they travel but are central to their travel experience.

### **3.4. International Market size of the present global demand for this tourism product and expected future trends – Beer Tourism**

#### **Present market size**

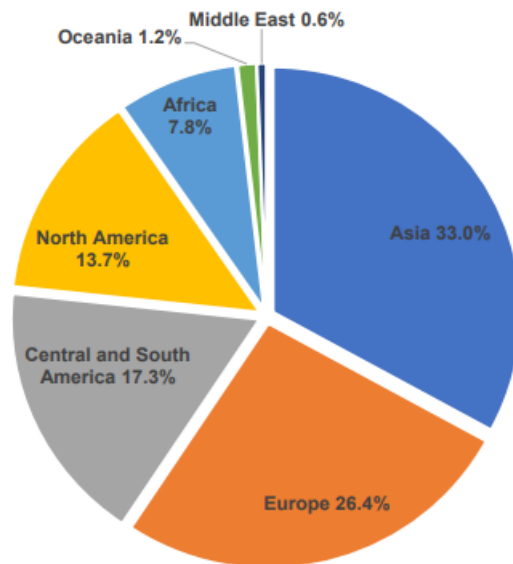
According to a report from Kirin Beer University, global beer consumption reached some 189,05 million kilolitres in 2019. In Asia alone, beer consumption holds a 33 percent share of the global beer market. Next to Asia, Europe is the second largest beer-consuming region in the world, with a 26,4 percent global market share. This is followed by Central and South America with 17,3 percent, and North America with 13,7 percent. China has been the world’s largest beer-consuming country since 2003 with a 20,9 percent share of the market, The United States comes in second, Brazil, Mexico, Russia, Germany, the United Kingdom, Vietnam, and Spain complete the top 10.

The overview of research on beer consumption by world regions has been shown graphically to get a broader picture of the differences between regions.



### D.4.3.1 Tourism Products Portfolio: PP3 JURRA

**2019 Global Market Share of Beer Consumption by Region**



However, the Czech Republic remains the largest beer consumer per capita since 1993. Traditional beer markets such as Austria, Romania and Poland also come up to par and Croatia has made it on the ninth place.

According to the Kirin Beer University Report Global Beer Consumption by Country in 2019, top 10 countries (inhabitants) that drink the most beer are:

1. Czech Republic – 188,6 litres per capita
2. Austria – 107,8 litres per capita
3. Romania – 100,3 litres per capita
4. Germany – 99,0 litres per capita
5. Poland – 97,7 litres per capita
6. Namibia – 95,5 litres per capita
7. Ireland – 92,9 litres per capita
8. Spain – 88,8 litres per capita
9. Croatia – 85,5 litres per capita
10. Latvia – 81,4 litres per capita

Regarding beer production, according to Eurostat, beer production in the EU was about 77 litres per capita. In addition, the EU produced 1,4 billion litres of beer in 2019, which contained less than 0,5 percent alcohol or no alcohol at all.

Among EU member states, Germany was the leading brewer in 2019 with production of 8 billion litres (or 23 percent of total production in the EU), which means that every fourth alcoholic beer produced in the EU comes from Germany. Germany was followed by Poland and Spain (with 3,9 billion litres or 11 percent produced), the Netherlands (2,5 billion litres or 7 percent), Belgium (2,4 billion litres, or 7 percent), France (2,0 billion litres or 6 percent), the Czech Republic (1,9 billion litres or 6 percent).



### D.4.3.1 Tourism Products Portfolio: PP3 JURRA

The Netherlands exported 1,9 billion litres of alcoholic beer in 2019, making it the largest exporter of beer in all EU member states, ahead of Belgium (1,7 billion litres) and Germany (1,6 billion litres), followed by the Czech Republic, France, and Ireland (all 0,5 billion).

The main destinations for beer exports to non-EU countries were the United States (911 million litres, 22 percent) and the United Kingdom (825 million litres, 20 percent), followed by China (364 million litres, 9 percent), Russia (258 million litres, 6 percent) and Canada (193 million litres, 5 percent).

However, when importing from non-EU countries, member states favoured British (278 million litres, or 47 percent of all non-EU beer imports in 2019) and Mexican beer (125 million litres, 21 percent)

#### Trends

The beer tourists are a specific but increasing part of tourism demand. Beer tourists can be highly specific and search only for the beer and breweries but also can be interested in other points of tourism demand and consume beer along the way.

Nowadays, there are a lot of trends regarding beer tourism and here are some of them:

1. Beer tasting

The most popular form of beer tourism may be the consumption of the beers of a given country and visiting brasseries. Beer tourists collect beers as souvenirs.

2. Beer tours

A common mechanism for promoting an area using food or drink as a theme is a trail or route. It is helpful to include more general themes such as the landscape and local heritage. Serious beer tourists may be a relatively small sector, but they are quite high spenders. A beer trail might be a major motivator to plan a weekend break or short holiday in the area in order to sample local beers, stay at pubs and visit one or two breweries.

3. Festivals, events

Beer festivals are popular annual events in many places and generate tourist overnight stays and day visitors. Naturally beer is sold at other festivals as well which might be an attractive force. Beer is obviously also an important product featured at most food and drink festivals. Besides beer festivals, other beer themed programmes and events with unique attractions are very often (beer marathon, beer bike competition etc).

4. Beer house, brewery visits

The best known and classical form of beer tourism is the brewery visit during which the main motivation of the visitor is not necessarily beer consumption or familiarisation with the brewery itself, rather visiting a tourism attraction. Naturally, to make a brewery hospitable for visitors, it must possess the necessary infrastructure. Above all there must be a visitor centre.

5. Acquiring beer related products

It is not only beer but also products related to it that may motivate people to travel. These products may be coasters, mugs, beer cans, glasses, beer steins, labels or even bottle caps. More and more people go on so called souvenir gathering tours in order to acquire beer related items in a given country.

### 3.5. Local size of the present local demand and expected future trends of this tourism product

#### Present market size

##### Croatia

According to Kirin Beer University for the last relevant year, pre-pandemic 2019, Croatian's drink 85,5 litres of beer per capita, which is a total of 350 million litres per year. Croatia produces approximately



### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

333,8 million litres of beer and ranks 19th in production among other EU member states. The price of beer in Croatia is somewhere between 15 and 30 Croatian Kuna, or between 2 and 4 Euros. As it can be concluded, beer is a popular beverage in Croatia, approximately one half of the adult population are beer consumers.

More than 90% of all beer sold in Croatia is domestically produced. There are many types and brands of beer in Croatia, though more than 90% of revenue is shared among six largest beer companies. Some of the most famous brands (industrial production) are Osječko, Karlovačko, Ožujsko, Pan, Laško, Heineken and Tomislav. The most popular beer is Ožujsko and the second most popular is Karlovačko.

On the Croatian market, the term craft was first introduced in 2013, with the registration of the first Croatian craft brewery, Zmajaska pivovara. In the same year, the breweries Nova runda and Bujska pivovara were registered, the first craft beer on the Croatian market was launched by the craft brewery Nova runda in June 2014. According to data available on the internet, since 2013 and the first mention of the word craft, over 70 small independent breweries (Craft breweries) have opened in Croatia until 2020.

The specific beer tourism offer in Croatia, although small, is really diverse. Some examples of good practice are:

1. Zagreb Brewery Beer Museum - In 2018, Zagrebačka pivovara opened a beer museum as part of its Microbrewery, which organizes visits by individuals and groups interested in the beer production process, following the example of the world's leading breweries.
2. San Servolo beer resort in Istria - The first beer resort in Croatia which, in addition to accommodation, also offers a swimming pool, sauna, fitness and beer spa within the San Servolo brewery.
3. Beer festivals - Primavera Craft Beer & Gin Festival Circolo (Pula), Osijek CRAFT BEER Festival Sunčana ulica and Hombro - homebrew festival (Osijek), Zagreb Beer Fest (Zagreb), Beer Days of Daruvar Brewery (Daruvar), Beerfest Sjever (Čakovec), Craft Beer Festival (Rijeka), Beeram domaće (Vinkovci), Krafting - Makarska Craft Festival (Makarska), Fakin Craft Fest (Zagreb), Dubrovnik Craft Beer Festival (Dubrovnik), Craft Beer Festival (Županja), Zmajjevo - craft beer festival and music (Zmajaska pivovara, Zagreb), Beer Days (Karlovac) and many others.
4. ReUnion restaurant - in cooperation with the Canopy by Hilton hotel and the brewery, a pairing of food and the best Croatian craft beers was organized.

#### **Karlovac county**

Probably the most famous brand of the city of Karlovac and Karlovac County is Karlovačko beer produced in Karlovačka brewery. Karlovačka brewery was founded in 1854 in Karlovac and is the backbone of the brewing tradition in Karlovac County. Long tradition encouraged the establishment of brewing studies at Karlovac University of Applied Sciences, which indicates the importance of beer production in the local area.

City of Karlovac is well known for its brewery, and once a year the usual city slogan is changed from The city on four rivers to The city on five rivers, since the river of beer flows abundantly on it. The end of August in Karlovac is booked for Beer Days, the largest brewing event in Croatia. Apart from Karlovačko beer, as a recognizable brand of the city, the gastronomic and beer offer at the festival also includes numerous craft breweries, and activities as a beer academy where a whole beer story is presented, and true beer lovers have the opportunity to make their own beer.

The tradition of beer production has spread through the entire Karlovac County where there are few small craft breweries that complete the beer experience. In 2016 in the City of beer (Karlovac) the first



### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

craft brewery called Podrum was established. Currently the brewery produces three types of beer - Pale Ale, Brown Ale and Spicy Herbs Ale. In the Karlovac neighbourhood, the town of Duga Resa, in 2019 another craft brewery was founded - Prva Dugoreška Craft Pivovara. Given the town is situated on the river Mrežnica, this brewery produces a beer called Mrežničko.

As beer is not the only motivation for beer tourists to visit some destination, it should be emphasized that Karlovac County is rich with natural, cultural, and historical attractions. The old towns, which are located in almost every major destination within Karlovac County, are especially noteworthy. Thus, it is possible to upgrade the beer experience with cultural upliftment through the culture tourism route that permeates the entire Karlovac County.

#### **Trends**

According to available research, in Croatia, beer is still considered an alcoholic beverage that is mostly consumed by men, during sports meetings and hanging out. In Croatia, beer does not have the image of a part of national tradition such as wine and, in that sense, investments in "beer facilities" (e.g., craft breweries) are relatively neglected. Beer festivals and beer tours are certainly the most popular part of the tourism offer and a great opportunity to entertain and raise awareness of the diversity of beer styles, while the beer museums and beer workshops are a useful opportunity for tourists with more interest in beer education. Beer accommodation facilities, as the latest trend in beer tourism, are on the rise. For now, due to the prices of the arrangements, they are not available to a wide range of consumers, but this should be corrected by increasing supply and greater competition.

Given that the growing trend of so-called craft beer is relatively new, beer tourism is still in its infancy. However, given the dynamics of the development of new beer styles, this type of gastronomy tourism has significant development potential. From investments in beer facilities to the combination of local gastronomy and beer, it can be concluded that the brewing industry will continue to significantly affect the development of the Croatian economy, as well as other countries.

### **3.6. Most important criteria influencing the competitiveness in the global market for this tourism product**

#### **Beer Tourism**

Karlovac County has plenty of beer excellences, with both small craft breweries and big company producing many kinds of beer. Karlovačka brewery was founded in 1854 in Karlovac and is the backbone of the brewing tradition in Karlovac County. During the open days of Karlovačka brewery visitors, guided by brewery experts, have a tour around the brewery, through the production process of Karlovac Beer. The visit ends with a tasting of beer from the portfolio of Karlovačka Brewery. On the other side, visiting small craft breweries offers tasting of many kinds of craft beers of fantastic quality and value.

Beer tourism involves more complex experiences than beer tasting, since there are various activities connected to the beer tourism products. Beer experience can be connected to many sports activities and all kinds of active tourism and discovering the natural heritage of Karlovac County.

Preserved natural resources of Karlovac County are one of the symbols of the area and combined create a complete cycling route. Among Karlovac County there are 31 bike routes with more than 500 kilometers of marked bike paths that pass by valleys of four Karlovac rivers, stone bridges, numerous waterfalls, ancient castles, and old villages.

### **3.7. Most representative international best practices (max 3)**



### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

#### **Gent Beer Tasting Tour - Belgium**

In Gent, beer brewing went hand in hand with religious life. They “invented” a tourism product that gives tourists the opportunity to discover Ghent and its history during a three-hour beer walk and beer tasting with a guide through the city. On this route tourists gain five beer tasting sessions and an official BeerWalk glass. Ghent Beer Tasting Tour is a perfect way to explore the beer Abbeys and Monasteries where some of the world’s best beers were created. This is an important part of the culture and history of Ghent. Throughout the medieval heart of the city and the surrounding less touristic sites, tourists can discover the history that engulfs those places. During the beer tasting sessions, tourists discover five special beers from brewery Van Steenberge and immerse themselves in stories and anecdotes concerning the religious heritage of the beers and its brewers. Anyone who takes part can decide, at any time during the BeerWalk tour, to have one or more beer tastings replaced by a coffee or a soda of their own choice. This way anyone can enjoy the beer stories and the town visit.

#### **Beer Spa Prague - Czech Republic**

Spa and beer go well together. With the first beer spa dating back 2,000 years ago, people were aware of the beneficial effects of both spending time in hot baths and one of the oldest drinks known to mankind. Bathing in beer, including its consumption, has a long history in folk medicine - and the brewer's yeast itself has been used for medicinal purposes since ancient times.

Beer Spa Prague offers a satisfying relaxation in an oak tub whirlpool bath followed by a rest on a wheat straw bed to help fully absorb all the vitamins and extracts from the bath. While relaxing by a fireplace, tourists can taste fresh homemade beer bread as well as the beer itself - the unlimited consumption of which they can enjoy throughout the whole procedure.

#### **Beer trips - Germany**

Brewery Tour in The North, Brewery Tour in The East, Brewery Tour in The South, Brewery Tour in Western Germany... The four best German brewery and beer tours, one tour for each direction.

In Germany, the leading EU member in terms of beer production and consumption, in addition to the Beer Spa programs, beer tours are very popular and have been regularly organized. The experience provides multi-day tours through German cities with sightseeing and tasting of beer specific to a particular city or region.

For example, the Brewery Tour in The North is a four-day tour that offers a visit to four German cities (Bavaria, Jever, Hamburg and Flensburg), visiting their breweries and tasting of their famous beer brands.





### **D.4.3.1 Tourism Products Portfolio: PP3 JURRA**

#### **4. Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. Fortresses
- B. Beer Tourism



### D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA

#### PP4 CMC CARNIA

Partner (name and number)	Comunità di Montagna della Carnia (PP4)
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#### 1. Main elements collected during WP3 and WP4.1 outlining the potential for tourism experiences in the target area(s)

##### Intangible assets

##### Paularo:

- **Handicraft - Basketry:** The local basketry is based on the production of artifacts functional to the traditional activities of transport and conservation and is made with wood materials found in the surrounding woods. Given the availability of some basket masters (who also offer the creation of artifacts on request), it could be possible to provide intensive courses for a fee to be combined with walks to learn the type of suitable wood essences and their collection, taking into account the long processing times required.
- **Crafts - Embroidery:** To rediscover and enhance this intangible heritage, a group was born in 2004, active in the practice and teaching of embroidery. Tourists can visit the ecomuseum exhibition dedicated to embroidery, accompanied by one of the women who are part of the group. Given the willingness of volunteers to play a role of teachers also to be able to count on small income supplements, it would be interesting to create the conditions to activate paid immersive courses.
- **Handicraft - Scarpez:** Scarpez are the traditional footwear of the Carnic area, they take on different characteristics and details in each valley. In recent years they have been rediscovered, also thanks to the proposal of new colors and fabrics. The tourist experience could be built by proposing a place for exhibiting the creations that could be an atelier and a workshop space at the same time.

##### Ovaro:

- **Handicraft - Baus Mill:** The Donada di Baus mill is one of the few remaining active mills in Carnia. It is located on the left bank of the Degano stream and, if it is now electro-mechanical, the wheels, which were moved by the water of the canalized stream, are still preserved. It is milled with long times that allow to keep the organoleptic properties of the product intact. The informant is the owner of the mill. He reported that he did teaching for schools.
- **Ovasta - Festa della Mesta and traditions:** The community of Ovasta preserves religious and pagan traditions organized by the parish and by the fractionists such as, for example: San Visent dance combined with the launch of the Cidulas (22 January): the festival has been moved to Saturday to allow villagers and non-villagers to participate. La in sops con la stella (December 31): children carry the spinning star, hoisted on a stick, from house to house, they sing good wishes to families. They receive small gifts from each family. Another significant element is the mesta is a Carnic dish that has a typical recipe from Ovasta. It



### D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA

represents the element in which the community identifies itself. The festa da mesta falls on mid-August: village festival with dances and music and lunch with mesta prepared outside in front of the dairy.

#### Prato Carnico:

- **Gastronomy - Inn Pik cooking workshop:** Alessia Fruch and Alessia Cosetti are the two chefs who manage the Inn Pik restaurant, where traditional and at the same time innovative Carnic cuisine is offered. They have shown interest in developing show cooking and cooking class events, of which they have gained experience in other contexts. The tavern also offers an architectural cross-section of an ancient Carnic house.
- **Gastronomy - Sot la Napa herb harvesting laboratory:** They participated in a project to recover the regional biodiversity of beans and continue with the cultivation of a field-catalog of native varieties of beans from Val Pesarina. The company is registered in the list of educational farms; offer educational activities related to the collection and cataloging of wild herbs and the cultivation and harvesting of seasonal products.
- **Typical tavern - Osteria da Blas:** Typical village tavern with a small food shop. Characteristic of the tables is having a compartment shelf to store the glass and cards during card games, to leave the table free. Regular customers have personalized goblets with their name, or a symbol attached to it. The tavern has been included by the guide as a stop on the Pesariis-Osais tours of Promoturismo FVG.
- **Handicraft - Laboratory of the Leita Brothers:** scholars of piano and opera singing, who have acquired the knowledge and skills in the construction of harpsichords and in the restoration of ancient musical instruments from maestro Canciani in Paularo (founder of Mozartina). They own a company that handcrafted every single component of harpsichords following ancient artisan practices and using certified wood. The harpsichords are built on original models of ancient instruments kept in European museums. <https://www.youtube.com/watch?v=Gn9OVwZGg7I>
- **Brusa la Vecja, Cidulas (Osais), Val Pesarina Legends:** Mid-Lent ritual, which marks a moment of pause from the rigors of Lent, linked to fire and the moment of transition from winter (apparent death) to spring (rebirth). The company of the young people of the country builds a large structure (medêli) which is covered with dry plant materials, such as corn stalks, dry parts of plants. A puppet is created that looks like a Vecja (old) to which it is set on fire. The association of the "Friends of Osais" is the guardian of ancient traditions which it keeps vital not for tourist purposes, but as an intangible heritage for the community. It is perceived as a ritual that belongs to the Osais tradition, not to that of Val Pesarina in general and is one of the few still to survive. Several informants reported tales of haymaking and washing, as well as traditional legends which in many cases were reported by informants between the ages of 70 and 90. One person, however, is less than 40 years old and is active in the recovery of the country's histories and traditions.



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#### **Tangible assets**

##### **Paths to discover the villages, or along paths that connect the hamlets.**

(Note: as regards the more challenging routes / alpine excursions, we refer to the proposals of the Carnic Alps Geopark, as all 3 municipalities are part of it)

##### **Paularo (routes within the villages, to be traveled independently):**

- **Scalinate:** Various areas of the town are accessible via long and panoramic stairways. For example, the stairways that go up towards the parish church from Borgo S. Antonio, towards Palazzo Calice Valesio, towards Castoia. The stairways could be part of low-altitude paths / itineraries, allowing the various hamlets to be joined and creating diversions to offer ring walks. They could also be offered to third-age tourism as "heart-saving" walks.
- **Borgut:** The borgut is one of the most beautiful and ancient villages of the capital. It is located near Palazzo Fabiani, it develops from the back of the historic residence, in a crossroads of streets and stairways. Among the buildings in the neighborhood, the "Casa Del Negro" undoubtedly stands out, with a closed courtyard, guardian of an ancient press and an external oven for shared cooking of focaccia. The visit to the village can be done independently.
- **Castoia:** The small village of Castoia is located above the hamlet of Salino, and is characterized by a perched structure, with houses all close together and cobbled streets. From the village you can also reach the sanctuary of Mount Castoia, with the so-called Madonna del Sasso.
- **Chiaulis:** Chiaulis is the first village of the Municipality of Paularo that you meet upon entering the Incarojo valley. The village, which now has about thirty inhabitants, has never been made suitable for vehicles and also for this reason it seems to have stopped in time: it can only be covered on foot, on cobbled streets, ramps and stairways that wind between the houses, flanked by stables. and shelters for the breeding of pigs. In Chiaulis there is a village festival which, through workshops and demonstrations, wants to save the memory of the processing of the pig for the production of sausages and cuts. Considering such a spectacular moment of the year and the unusual movement that the festival brings to the village, it is an interesting opportunity for a food and wine and cultural visit.

##### **Ovaro (routes that connect the hamlets / artistic areas are currently poorly marked, it would be preferable to follow them with a guide):**

- **Donne del Bosco, Chialina:** The group formed spontaneously in the summer of 2003, reconnecting with the ART in NATURE movement. The exhibition itinerary is in the wood of Chialina and the artistic installations are constantly renewed on the basis of the thematic choices of the artists.
- Routes that connect the hamlets:
  - Ovasta-Luint-Mione (marked path)
  - Luincis-Ovasta-Aplis
  - San Martino-Luint-Mione-Pieve di Gorto route

##### **Prato Carnico (routes that connect the hamlets are currently poorly marked, it would be preferable to follow them with a guide):**

- **Fuas Waterfall:** The Fuas waterfall feeds the Possal stream that flows inside the beech forest to the road line, next to which the Solari factory stands. The restaurateurs advise customers to visit the waterfall, which arouses interest and appreciation among tourists. It is a place known and frequented over time by the inhabitants of Pesariis, also indicated on the map of the monumental path of the clocks. The path is currently not accessible.



### D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA

- **Orias:** Rural hamlet, made up of 12 stone and wood buildings with roofs with terracotta panels, in the past used as a temporary stop for livestock during their transit to the mountain pastures. They are carefully restored buildings placed in a panoramic position. They can be reached via the paved road from Osais or via a footpath on a dirt road from Pieria, with a difference in height of 400 meters. “The owls of the moon” believe that it is a suggestive location for the presentation of books and for photographic exhibitions.
- **Pesariis-Osais-Pesariis Route:** Walking route on a wide dirt road that connects Pesariis to Osais along the Pesarina stream, where you can appreciate naturalistic and botanical aspects. You can visit the town and the Church of San Leonardo.
- **Osais Kiln -Rio Fuina-Orias-Truia-Osais Trail:** Challenging hiking trail starting at the lime kiln in Osais. Turn towards the stavoli di Orias, from which you descend towards Truia. Rio Fuina is linked to the legends of “I danats da Fuina” and “Il danat di Lauc”. Very popular route in the past and linked to family tales at times with tragic traits. Note: the accessibility conditions of the route need to be checked.

#### Key attractions

##### Paularo:

- Shoesz
- Chiaulis
- Ecomuseum
- Palazzo Calice-Valesio Palace (<https://www.youtube.com/watch?v=luulQeEkkCg> )
- Mozartina (<https://www.carniamusei.org/museo.html?entityID=433> )

##### Ovaro:

- Baus Mill
- Pieve di Gorto - Museo della Pieve
- Apls - Museum of the Venetian Sawmill
- Planelas and Scugjelas (Cella)

##### Prato Carnico:

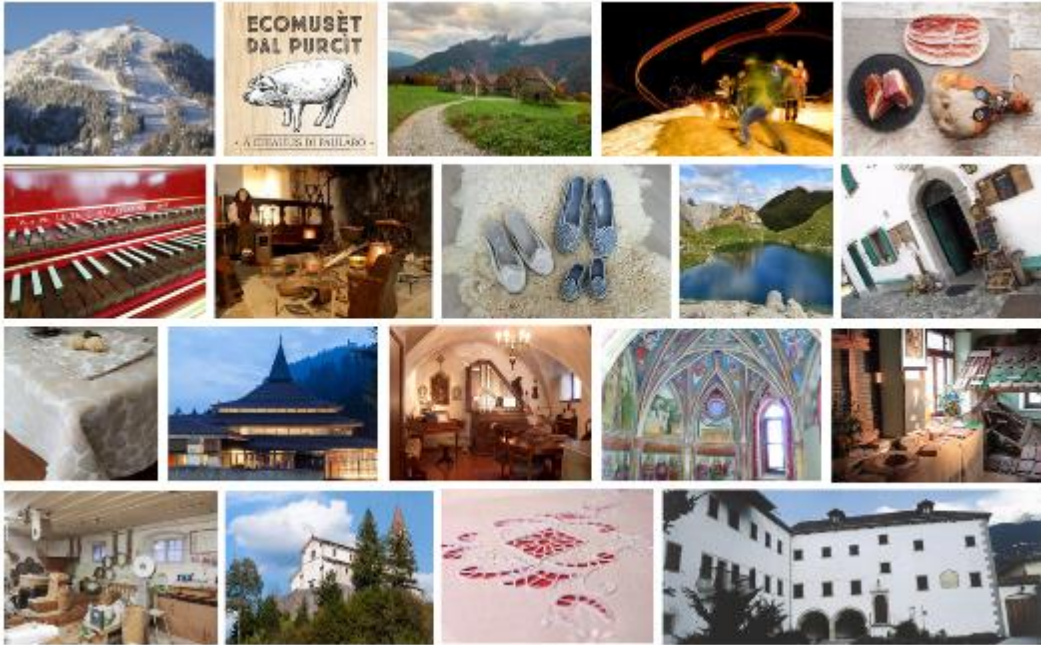
- Watches (Pesariis)
- Inn Pik (Pesariis)
- Stables of Orias (Osais)
- Church of San Leonardo (Osais)
- Osteria da Blas (Osais)

N.B. For the descriptions of the museums, please refer to CarniaMusei: <https://www.carniamusei.org>

2. Summary description and main characteristics of the 5 tourism experiences that you envisage in the involved territory.



### D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA



#### 2.1 Tourism experience 1 - Cuisine and gastronomy

[Proposed target: individuals, couples]

- Prato Carnico:
  - Knowing and gathering herbs (meadows and valley paths) and subsequent preparation of a dish (Sot La Napa)
  - Cooking workshop (Inn Pik)
- Paularo:
  - Evening with dinner in a historic residence (Palazzo Calice-Valesio): this is an experience that is already feasible and already successfully organized as part of the Gusto Carnia circuit (<https://www.youtube.com/watch?v=luulQeEkkCg>). It could then be placed in a package.
  - Ecomuset in Chiaulis: The party for the moment has a strong local significance, that is, it was conceived not so much as a tourist attraction but as a moment of sharing among valley dwellers. Tourists are in any case welcome, respecting the specificity of the situation and the organizational possibilities of the volunteers.
  - (to be evaluated) Gloria Clama, MasterChef finalist and originally from Paularo, has opened a restaurant in Raveo (Indiniò). It might be interesting if you are willing to organize cooking workshops. The ProLoco di Sutrio already organizes events of this type: <https://www.cuciniamocon.it/>

#### 2.2 Tourism experience 2 - Ancient fires

[Proposed target: families, individuals, couples]



### **D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA**

The launching of cidules and other fire-related rituals are held at different times of the year, from Lent to summer. The experience could be built around these occasions, during which a narrative relating to the uses linked to these ancient rituals could be proposed.

- Ovaro: Cidulas destro Degano
- Prato Carnico: Osais, Brusa la Vecja and Cidulas
- Other places in Carnia: Cidulas (Ulderica Da Pozzo, photographer, has published a book with DVD on the subject): <http://www.uldericadapozzo.it/libro-fotografico.php?ID=3>

#### **2.3 Tourism experience 3 - Music**

[Proposed target: connoisseurs and connoisseurs]

- Paularo: La Mozartina (<https://www.carniamusei.org/museo.html?entityID=433>) is already included in the CarniaMusei network, but the proposal could be integrated by thinking of moments of performances, as well as masterclasses dedicated to instrument musicians keyboard (several interviewees talked about a possible musical theming of the valley).
- Prato Carnico: the visit to the Mozartina can be integrated with a visit to the laboratory of the Leita Brothers, owners of a company that handcrafted every single component of the harpsichords following ancient artisan practices using certified wood.

#### **2.4 Tourism experience 4 - Handicraft**

[Proposed target: individuals, couples, families, seniors]

- Carnia: Shopping in the artisan shops of Carnia and visit to the workshops
- Paularo: shoes, embroidery, wood
- Villa Santina: Carnic weaving
- Sutrio: wood
- Paularo: Embroidery Masterclass held by the Mans D'Aur group and aimed at those who already have a good technique (insights into specific points or techniques),
- Ovaro: Visit to the Baus Mill. The experience could be aimed at both schools and visitors (possibility of purchasing flour).

#### **2.5 Tourism experience 5 - Narrated paths**

[Proposed target: families, scholastic]

- **Narrated paths**

(Supported by the Community Map under development, where you can insert POIs relating to the narratives that emerged + a guide who guides visitors along the paths and to discover the different points of interest. Possible to offer the possibility to buy picnic baskets to be consumed along the way).

- Prato Carnico: paths that connect Osais with Prato Carnico or Orias (narrative themes: haymaking, Val Pesarina legends, sulphur spring and wash houses ...)



#### **D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA**

- Ovaro: Donne del Bosco, Ovasta excursions, itineraries between hamlets (narrative themes: Ovasta traditions, Fiera di San Martino ...)

### **3. Market analysis on tourism experiences / products: EVENT TOURISM**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience:





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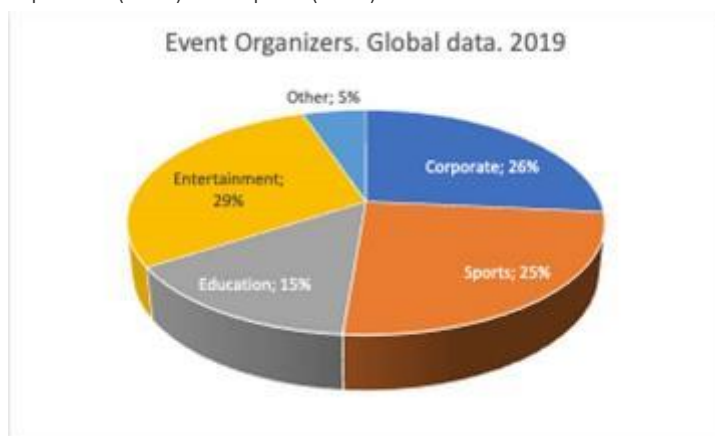
#### **3.1 Main characteristics of the product line**

Event tourism is a sector of the economy of great importance at all levels from local to global. It is a complex phenomenon which includes very different activities (from business seminars to rock festivals) and business models (from world football championships to trade fairs). The only aspect that the sector has in common is the simultaneous participation in these events of groups, sometime very large groups, of people animated by the desire to participate in some way to the same activity.

One of the effects of this inhomogeneity emerges at the level of the statistics of the sector, whose boundaries are often not well defined and therefore it is very difficult to make comparisons.

In last decades, the effect of globalization on world tourism has led to increased competition between destinations in search for the optimal positioning. In this scenario, events have become an essential element in the tourism development of destinations: they attract visitors, encourage investment, improve image and boost the local economy. Therefore, not by chance the number of events is grown and the turnover of this business has achieved a huge amount: before COVID years, over one thousand billion of US\$ according some specialized consultant company.

In global terms, the main event organizers<sup>17</sup> belong to the entertainment business (about one third of total) followed by corporate (26%) and sport (25%).



The first step in navigating the world of events is to group together the vast, and sometimes confusing, range of these activities. Scholars suggest many variables: number of participants, content, format, impact, etc. The most common and basic approach considers the dimensions (number of participants) and content of the event (religious, sports, commercial and commercial, etc.).

<sup>17</sup> Allied Market Research “Event Industry by Type – Global Opportunity Analysis and Industry Forecast 2021 and 2028”



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The table below is an example<sup>18</sup> of possible classification of the events.

Tab. 1 - Outline of Mega Events and International Events

City positioning strategies themes	Mega events	International events	Medium-sized events	Minor events
Events/festivals based on sports	Summer Olympics, Winter Olympics, FIFA World Cup	Tennis tournaments (Wimbledon Championships, the French Open, the Australian Open and the US Open); football games; major golf championships	Marathons, college sports events, regular season sports competitions (ice hockey, basketball, soccer, rugby leagues)	School tournaments; city running championships
Events/festivals based on famous people/ characters	The Pope; Royalty (Kings and Queens)	Famous people such as Mozart, Grace Kelly, William Shakespeare	Mayor or city treasure	Celebrity residents; parade
Events/festivals based on films	Hollywood movies	International TV series	Local TV series	Single instalment of local TV series
Events/festivals based on cultural themes	Music and Art Fairs	Rio Carnival	Local cultural events	Local exhibitions

Source: Ron Berger, Ram Herstein - *Cities for Sale: How Cities Can Attract Tourists by Creating Events - The Marketing Review, 2014 – Vol14, No.2*

<sup>18</sup> An alternative classification of events that drive international tourism in large numbers has been proposed by the OECD:

**Niche events** - often with close links to the host destination, whether the connection is literary, culinary, adventure sports, music festivals. This category may also include events at the smaller end of the spectrum. This kind of events are relatively inexpensive to organize and are likely to attract a higher proportion of high-spending international attendees.

**Participatory sports events** - for example, the World Master's Games, ironman events, and junior sports events. These are 'destination' events which attract thousands of competitors from outside the host country, most of whom bring multiple people with them and often extend their event related stay into a holiday.

**Signature cultural events** - events which gain an international reputation as 'must see' and include, for example: Sonar festival in Barcelona, White Nights in Melbourne, or the Edinburgh Fringe Festival and Biennale d'Arte of Venice.

**International sports events** - for example, single or multi-sport events such as Summer Olympic Games and the Football World Cup and World Championships for a variety of sports. Such events can not only bring in large numbers of participants and spectators but also achieve large worldwide television coverage and can play a significant role in raising the profile of the destination and the brand of the country. Smaller international sports events can have a similar effect on a smaller scale, often with less financial risk.

OECD Tourism Papers 2017/02 - Major events as catalysts for tourism



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### **D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA**

Although all types of events have tourism potential, mega events and international events dominate event tourism.

At destination level the events can be watched under additional and different points of view, as:

- tourist attraction,
- catalyst and animator
- image maker, • place marketers.

In case of individual events, event tourism means taking a marketing orientation to attract tourists, sometimes as an additional segment and sometimes as the core business. When tourists are the core business, “destination events” are created.

Finally, if several events are based in a specific location, they have to be considered according to a portfolios of destination assets<sup>19</sup>.

## **3.2 General tourist profile of this product line**

### General description

The huge mass of economic and social interests that event business moves has made it the privileged object of numerous research aimed at identifying the key management rules, the motivations driving the participants and its possible social and economic impacts.

As regards the socio-demographic characteristics of the participants, these depend substantially on the type of event and the target to which it is addressed. The graph below highlights the age structure, on a global level, of the event participants, regardless the type of organizers and contents.

What immediately attracts attention is that the world of events "is not stuff for older". Almost 70% of attendees are less than 40 years old and this data, as we will see, is confirmed also by other independent surveys.

<sup>19</sup> J.B.R. Ritchie and G. Crouch “A model of destination competitiveness/sustainability: Brazilian perspectives” Revista de Administracao Publica 44, 2010.

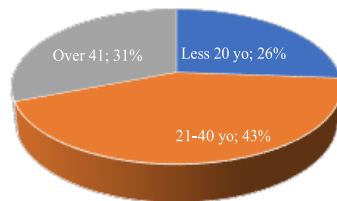


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### D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA

Age of event attendees - Global data  
 2021



According to Allied Market Research<sup>20</sup> in the near future there will be a concentration of participants in the class "20-40 y.o." which should increase by 6 points to the detriment of the "elderly" (See the table below).

Event attendees by class of age. Global data - 2021 – 2028 5

	2021	2028
Less 20 yo	26%	26%
21-40 yo	43%	49%
Over 41 yo	31%	26%
	100%	100%

The forecast seems to contrast with the expected growth of blended meetings which should stimulate a wider participation also by the population that has more obstacles to participate in events.

Surprising results relating to the event business arise both from surveys on the field and academic research which offers stimulating ideas as regards the motivations that lead to participate in an event. This result arose from an analysis<sup>21</sup> that took into consideration a large number of research on different types of events held in many different countries (USA, Europe, Asia and New Zealand). The survey highlights the considerable homogeneity of the reasons shared by the participants regardless of the country and type of event.

The result must be accepted with due caution, given that the investigations, the results of which have been analyzed in the article, were not conducted with a homogeneous methodology, however, it should be noted the regularity with which they occur, reasons such as:

- Family togetherness, • Excitement / Entertainment,
- Socializations.

Beyond the specific individual interests related to the content of the event, the article highlights a substrate of common motivations that lead people to attend collective moments. This homogeneity shared by the event attendees, beyond the cultural differences, seems to be confirmed also in some research of CrossCulture Testing.

<sup>20</sup> Allied Market Research "Event Industry by Type – Global Opportunity Analysis and Industry Forecast 2021 and 2028"

<sup>21</sup> Xiang (Robert) Li and James F. Petrick "A review of festival and event motivation studies" Event Management, vol. 9, 2006



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However, the panorama of motivations is not so uniform, significant differences can be detected between participants in the events residing in the locality where the event takes place and non-residents: among the former the “socialization” prevails, while among the latter the “entertainment”. Between the new participants, also, and the repeaters there are differences: in the former it is “curiosity” that manifests itself as the main motivation.

Recent research initially conducted on sporting events have highlighted the weight of motivations related to belonging to a sporting “tribe.” In this case, participation in events is a factor in strengthening identity by confirming membership of the group.

This set of reasons also seems to emerge in categories of events in which “belonging” (religious, social, etc.) or social standing play a very important role.

#### Main markets of origin

#### Geographical point of view - both international and domestic markets

The global turnover of events industry was estimated at 1,135 billion US\$ in 2019.



Taking into consideration that the geographic boundaries applied by Allied Market Research are significantly different from the usual ones (see map aside) Europe was the main player in this business with a share of 36,9%<sup>22</sup>, followed by North America, Asia (26,3%) and Latin America-Africa.

Inside Europe, the weight of different countries in terms of turnover is available only for music festivals which represent about the 30% of the whole business of the events.

In this case the main markets for this type of events are UK, Germany, France and Italy. England holds by far the first position on this market.

*Main European Countries for music festivals*

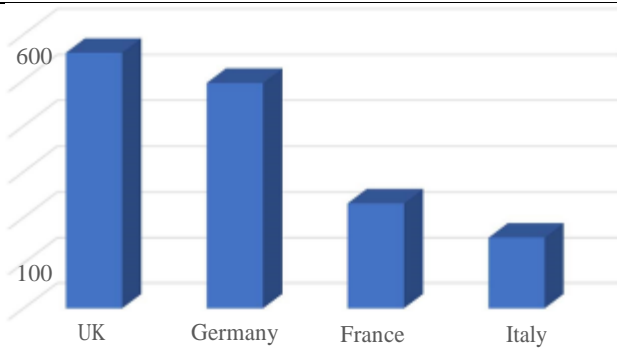
<sup>22</sup> Allied Market Research “Event Industry by Type – Global Opportunity Analysis and Industry Forecast 2021 and 2028”



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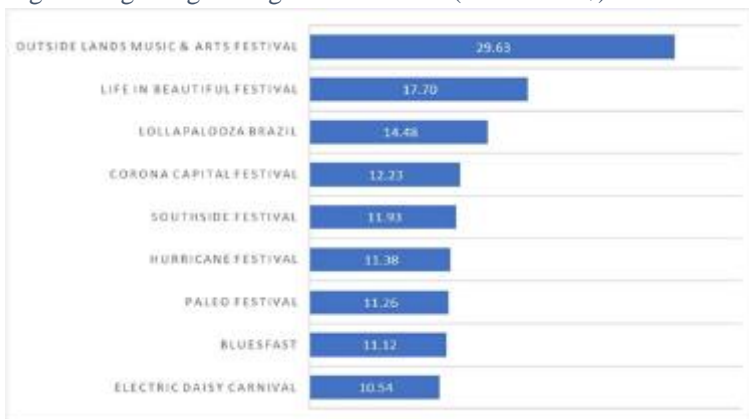


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Regarding highest-grossing festivals worldwide in 2019<sup>23</sup>, Outside Lands, Music & Arts Festival was the most profitable with US\$29.63 million in revenue. It takes place annually in San Francisco and has been running since 2008. This was followed by Life is Beautiful Festival in Las Vegas and Lollapalooza Brazil, which made US\$17.7 million and US\$14.48 million respectively. Top revenues are detailed in figure below.

Fig. 2 - Highest grossing festivals 2019 (million US\$)



#### Tourism habits

This homogeneity of motivations disappears when the socio-demographic and behavioral characteristics of the participants in the events are analyzed. Several researches<sup>24</sup> have highlighted how the similarity of the

<sup>23</sup> <https://www.statista.com/statistics/306095/highest-grossing-festivals-worldwide/>

<sup>24</sup> Grunwell S., Inhyuck Ha, Martin B.S. A comparative analysis of attendee profiles at two urban festivals Journal of Convention & Event Tourism; 2008



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contents and the proximity of the places where the events take place do not imply participants with similar characteristics from a social and behavioral point of view.

A quick and smart description of festival attendees<sup>25</sup> collected by a wide random sample is displayed below:

#### **/ WHY THEY ATTEND FESTIVALS**



Interestingly, only 51% of festivals attendees are motivated by an interest in music. In the other 49% of the interviewees, a quarter (23.3%) wants to get out of the everyday life (even to an extreme way: 3.2%), be with friends or make new friends (16%).

The modal age groups (68%) are between 18 and 30 years old. All in all, however, there are fewer singles than can be expected: only 39%.

There is also a small but significant group (14%) of festivalgoers who are accompanied by their children.

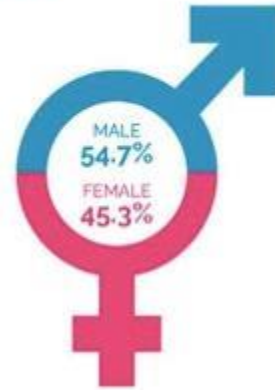
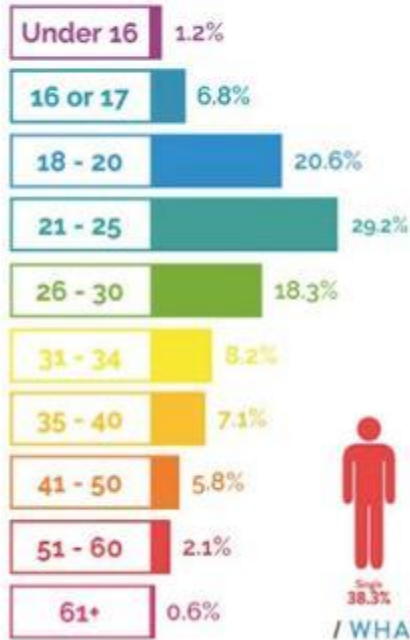
<sup>25</sup> <https://www.festivalinsights.com/2017/08/european-festival-market-report-2017>



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**/ MEET THE FESTIVAL-GOERS!**

**/ HOW OLD ARE THEY?**



**/ HOW MANY CHILDREN DO THEY HAVE?**



**/ HOW MANY PEOPLE DID THEY GO WITH?**







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### D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA

#### / HOW DID THEY TRAVEL TO THE LAST FESTIVAL THEY WENT TO?



The worse of the festival experience.

#### / THEIR FIVE WORST PARTS OF THE FESTIVAL EXPERIENCE



The previous data are focused on music festivals attendees, to generalize this info to other festival and cultural events goer profile must be done very carefully

The previous data are focused on music festivals attendees, to generalize this info to other festival and cultural events goer profile must be done very carefully.

However, broadly, we can say as follows:

- The pre-family and post-family segments represent the key target groups for cultural events and festivals tourism. The 45-65 age group is most significant for cultural events attendees.
- However, attendees of other types of cultural events/festivals (not music events) have a different attitude. In this case, a third of them buy the tickets on the day or the day before, another 30% buy around one month before, and the 27% buy around 3 months in advance. The timing of cultural events ticket sales is especially important for the organization and implementation of the communication and commercialization strategies of the events.
- Social media exposure is extremely important for all cultural events. For example, around 65%<sup>26</sup> of music festival-goers tweet or post during a live concert or festival, while 56% upload photos of the event and 31% write reviews of their experience.

<sup>26</sup> Source: Eventbrite 2019 "New Trends Impacting Festival and Consumer Events"



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### **D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA**

#### **3.3 International Market size of the present global demand for this tourism product line and expected future trends**

##### **Present market size**

The global turnover of the event industry was estimated at 1,135 billion US\$ in 2019. This huge number of resources is shared among different types of events<sup>27</sup>:

Corporate events (meetings, seminars, incentives, etc.) cover 28% of the total, followed by Sports (26%), Music-concert (20%), Exhibition & Conferences (13%), and Festivals 8%.

46% of the resources used for implementing events are provided by sponsors; a bit more than one-third (38%) is generated by ticket sales.

Among the sponsored events the corporate ones are the key component. Indeed, this category groups different events: their type and related weight, in Europe:

Meeting & conferences 32%, followed by Seminars cover (30%), Exhibitions (18%), Incentive (14%), Others (7%). The percentage of the incentive trips is small but the year when the data were collected was 2020, the worst of pandemic. As we will see the forecast related to this component is extremely positive.

##### **Trends**

###### **Geographical point of view - both international and domestic markets**

The forecasts related to the turnover of global events industry are strongly affected by the pandemic of 2020 – 2021. In 2019 the turnover was valued US\$ 1.135,4 billion and it's expected to reach 1.552,9 billion by 2028, registering a CAGR<sup>12</sup> of 11,2% from 2021 to 2028.

In this period of time not only the turnover will growth but the share of different type of events will be modified also: sports and festivals are expected lose a few percentage point while corporate and music-concert should increase their importance.

<sup>27</sup> Allied Market Research “Event Industry by Type – Global Opportunity Analysis and Industry Forecast 2021 and 2028”

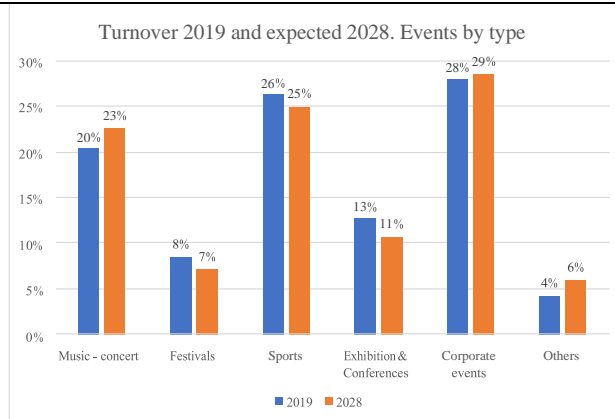


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Source: *Events Industry Outlook 2028. Allied Market Research.*

The positive trend before the pandemic of music and festivals is dramatically changed. It is not possible yet to understand if because of the pandemic people will change their interests in cultural events, however, we consider important to take into consideration the main worldwide trends before this crisis:

- **Immersion in local culture**<sup>28</sup> - Interest in festivals and cultural events are generally on the rise and experiencing them is perceived by tourists as one of the foremost authentic ways of immersing themselves in native culture. Consequently, there is significant competition within the “calendar” of big festivals and events.
- **Family-friendly big events** – A notable trend of events appealing to families with children (14% of attendees according Festivalinsider) recognize that a lot of couples still have the time and cash to participate in festivals after having a family. As a result, many festivals are adapting themselves as ‘family friendly’ events, to appeal to a wider audience e.g., the Camp Bestival<sup>29</sup> in Lulworth, UK attracts 55,000 participants, with a massive turnout from families (one out of three participants are children). This is a key trend driving the popularity of big events.
- **Alternative festivals becoming mainstream** - e.g., ‘Burning Man,’ which explores numerous types of creative arts and forms of self-expression with a focus on ethical living. Over 70,000 individuals visited Burning Man in 2018<sup>30</sup> in Black Rock City, a temporary town erected within the Black Rock Desert of This is expected to grow to 100,000. People who attend Burning Man, referred to as “Burners” include many well-known celebrities.
- **Rethinking models** - creatives are finding inventive ways to engage virtual and physical shows in blended cultural events. E.g., about 20,000 people were expected to witness “Savage Beauty,” a Land Art event by Finnish artist Kari Kola to illuminate the Loch Na Fuaiche in rural Ireland and its

<sup>28</sup> Marta Disegna, Juan Gabriel Brida, Linda Osti - Authenticity Perception of Cultural Events: A Host-Tourist Analysis, - *Tourism Culture & Communication* 12(2), 2011

<sup>29</sup> Arron Hendy, Miriam Phillips - Camp Bestival is a real family affair, 2009

<sup>30</sup> Jennifer Kane - Are Nevada's small desert towns ready for Burning Man's population to hit 100,000? - *Reno Gazette Journal*, 2018



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mountainous scenery<sup>31</sup>. The colorful site-specific work, which was to be held over a fourday period, now has been put on the hold amid the coronavirus crisis. However, it was documented and is currently available online.

- **Digital marketing plays a large part in the overall success of a festival.** Based on a study<sup>32</sup>17 carried out in 2019, social media is considered the most important marketing method by almost 45% of those interviewed. Social media posts represent the most important marketing tool for almost 27% of interviewees, followed by “paid social marketing” with 18.2%. Strategic partnerships carried out to promote festivals is third in this list and it is considered an important marketing tool by 15% of those interviewed.

### 3.4 Local and National size of the present demand and expected future trends of this tourism product line

#### Present market size

In 2019, about 431 thousands events were held with a minimum of 10 participants each and lasting a minimum of 4 hours (+ 2.3% compared to 2018), for a total of 29,101 thousands (+ 2.5%) - on average 67.5 people per event (a slight increase compared to 67.3 in 2018) – and more than 43 millions of participation days (+ 2.6%).<sup>33</sup>

The most frequent type of events concentrating the largest number of participants are the categories between 25 and 100 participants.

Eventi e partecipanti per dimensione dell’evento in Italia. 2019

	Events		Participants	
< 25 Attendees	22.373	5%	543.932	2%
25 - 49 attendees	209.831	49%	8.131.566	28%
50 - 99 attendees	156.334	36%	10.062.341	35%
100 - 249 attendees	34.516	8%	4.859.417	17%
250 - 499 attendees	3.419	0,8%	1.244.353	4%
500 - 999 attendees	3.795	0,9%	2.409.963	8%
> 1000 attendees	859	0,2%	1.850.243	6%

<sup>31</sup> <https://edition.cnn.com/style/article/cultural-events-impact-coronavirus/index.html>

<sup>32</sup> Festival Insights Report – 2019 (interview with 145 festivals on marketing and the digital brand experience)

<sup>33</sup> Federcongressi. Osservatorio Italiano dei Congressi e degli Eventi. OICE 2019. L’indagine si basa sulle dichiarazioni dei contenitori congressuali di diversa tipologia, (hotel, centri congressi, dimore storiche, etc) mentre non raccoglie informazioni da quei contenitori utilizzati per festival, concerti ed eventi sportivi (stadi, palasport, autodromi, etc). L’Osservatorio quindi stima in modo piuttosto preciso l’attività di meeting, congressi, seminari, fiere e simili mentre sicuramente sottostima gli eventi sportivi musicali o anche talune categorie di attività culturali.



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431.127    100%    29.101.815    100%

Just under 90% of the events and 63% of the participants are concentrated in the second and third categories of events, therefore a large number of events have a small number of participants.

From the point of view of duration, 71% of the events run out within a day, so these events do not generate tourist flows.

On the other hand, 29% last for two days or more. These are generally larger than average meetings as the share of participants is 41% of the total number of attendees.

In absolute terms, this is just under 12 million people, to all intents and purposes to be considered tourists (unless the event takes place in the locality where they reside)



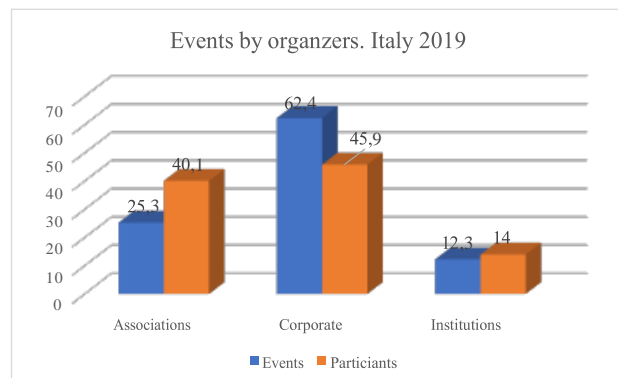
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The corporate sector is the leading event organizer. 62% of the events are promoted by the private sector while the participants are much lower than the share of the events. (45.9%)

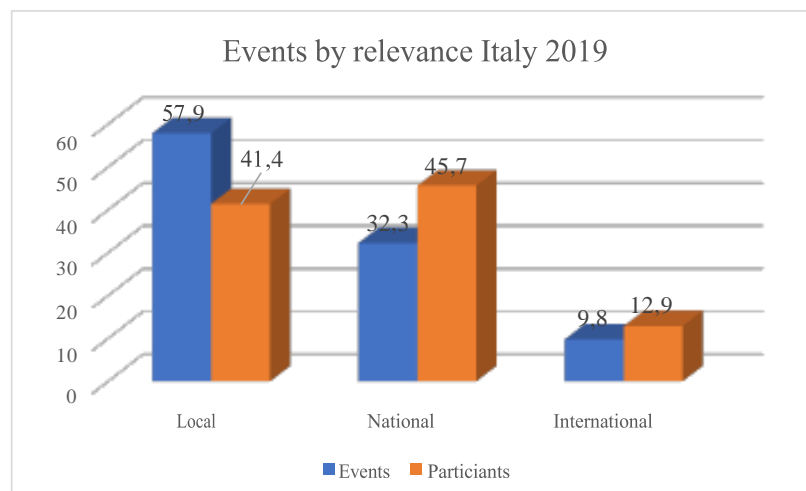
Fig . B3.1



The other subject that substantially influences the meeting and congress sector are associations. On the contrary of the previous case, the percentage of participants (40%) is higher than the share of events (25%).

Events that have national or international significance have a rather significant share: over 40% and involve almost 60% of the participants.

Fig B3.2



Finally, it is worth highlighting the territorial distribution of events: the North of Italy concentrates 57% of the events. The Center is very far behind with 24.9% and the South



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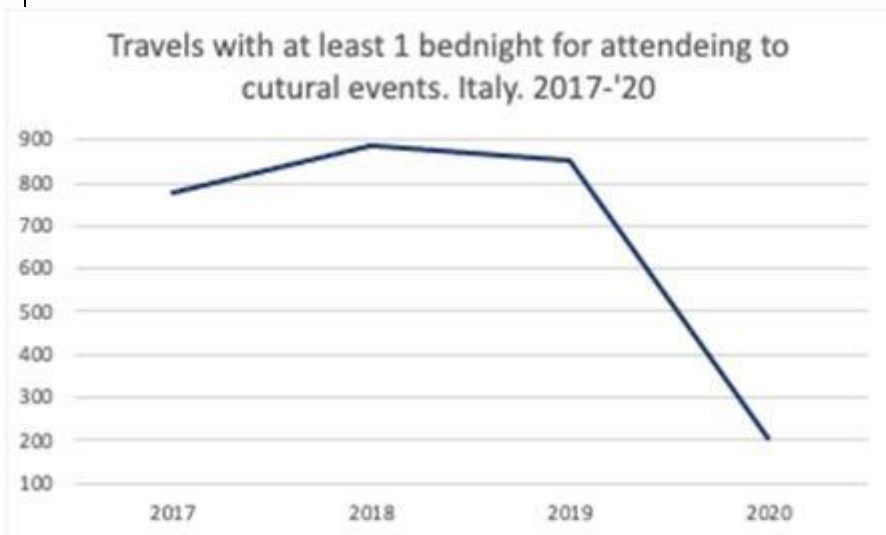


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17.5%. The sum of these last two areas is however far below the figure for northern Italy. The different weight of the production structure of the Country among the three areas certainly influences the result in the corporate component but contributes to the result described also the unequal distribution of the congress offer, both as congress hotels and congress centers.

ISTAT adds another piece to the picture of event tourism in Italy.

The Federcongressi Observatory, as we have explained, is not particularly attentive to cultural events. In the survey on travel and holidays of Italians, the Central Statistical Institute monitors trips for "cultural, folkloristic events, shows, exhibitions, food and wine holidays". A definition that overestimates the travels for cultural events.



The previous graph shows that in recent years the number of overnight trips to participate in cultural events has remained constant between 800 and 900 thousand. Instead, they suffer a dramatic collapse in 2020 in the first year of the pandemic.

Until 2019 the world of events, in its various forms, was able to determine extremely significant tourist flows.

By adopting a prudent approach that considers any duplications between the two sources and the possibility that a share of the participants in meetings longer than a single day are resident in the meeting place, the estimate in this case can fall between 10 and 11 million. An extremely significant number of tourists that makes this segment one of the most important in the tourist market, certainly not a simple niche.



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#### Trends

The event tourism trend was, as expected, strongly influenced by the effects of the pandemic. The problem of recovering from the traumatic collapse of activity recorded in the two-year period 2020-2021 is shared both by corporate and association events, monitored by the Federcongressi Observatory, and by tourism of cultural events, detected by ISTAT.

Figure B3.3 shows that in 2020 the number of those who traveled to participate in cultural events fell to a quarter of that recorded in previous years, while in the case of corporate events in 2020, 69,880 events were held in attendance, with a dramatic 83.8% compared to 2019.

The situation raises several questions about the future: how many years will it take to return to the "normal" level? Granted that this happens<sup>34</sup>, how will the situation evolve? Will the ways of holding events change?

An answer is offered by Federcongressi<sup>35</sup>: *On the basis of the sample of respondents to the OICE survey, 42% of the locations that are part of the sample held one or more hybrid events: the locations that hosted the greatest number of this type of event (67%) were the congress centers and congress-exhibition venues.*

*By comparing the collected data to the entire universe, it can be assumed that last year (2020) about 4,900 hybrid events took place, equal to 6.6% of the total of 74,780 in presence and hybrid events. As regards the hypotheses of a return to the levels of events hosted in the pre-Covid-19 period, most, 63.8%, estimated a time frame of 1-2 years and 26.8% of 3-4 years.<sup>36</sup>*

The pandemic did not only impact the number of events and the number of participants. It also forced to look for new formulas to continue meeting in order to minimize the risk of infections by reducing the number of trips and the number of participants "on site" at the events.

This is how "blended" events were born: it is possible to participate in a given event both on site and online.

<sup>34</sup> Esito tutt'altro che scontato date le crisi (guerra in Ucraina, inflazione, carenza di generi alimentari, etc) che si stanno sovrapponendo l'una a l'altra.

<sup>35</sup> National association of companies involved in meeting and congresses.

<sup>36</sup> Federcongressi OICE 2020





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Indeed, this type of meetings was technically possible even before the pandemic, the COVID period transformed it into the new normal. However, this adaptation required significant technological investments to bring the online connection systems to an acceptable level of quality which, before the pandemic, were still at an amateur level, apart from a few exceptions.

This evolution was imposed by the health situation, the continuation of this trend, even now, is not a simple force of inertia but is also appreciated by Professional Congress Organizers and event promoters. Both categories are interested in the benefits that the "new normal" brings with it: cost containment, reduction of the risk of "no-shows" and therefore an increase in the probability of event success, not to mention the possibility of selling tickets for the event. online participation "all over the world".

Fig. B3.4

#### Why choose blended meetings?



Source: How to run Blended (Hybrid) Meeting Environments well - saving the planet in multiple ways.

[www.duncanwallace.org.uk](http://www.duncanwallace.org.uk)

We must be aware that the development of blended meetings will not be painless: the volumes of expenditure for the corporate meetings sector are destined to decrease and the reduction in spending will spread along the entire value chain (hotels, means of transport, restaurants, etc.). How much this decline will amount to we will find out in the months to come.



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#### **3.5 Most important criteria influencing the competitiveness in the global market for this tourism product line**

##### **Criteria for successful events**

The wide-ranging diversity of the specific content of each cultural event and event renders it impossible to outline common patterns, however, some criteria represent important elements for all festival goers:

☑ **Uniqueness** – Festival-goers and hallmark events participants select experiences based on their exceptionality.

☑ **Once in a lifetime** - Big events participants are searching for once-in a lifetime experiences at major one-time events.

☑ **Unpredictability** - All events participants and spectators are searching for forms of entertainment characterized by being unpredictable and generating emotions at an intensity that cannot be compared to anything else.

☑ **Tickets & Prices** - For festival goers, ticket price does not affect attendance, but possessing costly events tickets increase the feeling of prestige for event participants and this generates the positive sensation of belonging to an elite.

☑ **Promote sociability** Recalling the reasons shared by those who participate in events: to create spaces and moments that stimulate meetings and promote sociability within groups and also between different groups

☑ **Analyze events from the perspective of online and on-site attendees and make them attractive to both categories.**



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#### **3.6 Most representative international best practices (max 3) regarding this tourism product line**

Speech by the Director of the Berlin Film Festival at a conference organized by the OECD on COVID-19 and Future of Global Events – 13<sup>th</sup> April 2021

Mariette Rissenbeek, Executive Director, Berlin International Film Festival (BIFF), described how the strength of cinema as a global and local communal experience could be maintained in the post-COVID future.

The Berlinale had to adapt its format so that the 71st edition could take place under the current circumstances. It was split into two separate events:

one for the film industry, which took place mostly online with professionals and accredited representatives earlier in the year, a summer special edition, which will be open to the general public in June.

Buyers that would usually come to Berlin in February were unable to come to the city. She considered the online edition to be a temporary interim solution that was born out of necessity. For the event in June, her team is facing restrictive sanitary measures (e.g. one third occupancy, more time between screenings, reduced receptions). The digital meeting was praised by participants, but most also highlighted that they missed the in-person experience, in particular to discuss and exchange with others. One advantage of the digital format was the possibility for people that would have normally been unable to travel to Berlin. She explained that the final effects of the pandemic are not yet completely visible. In her view, the crisis has further accelerated a pre-existing trend: more and more people watch films through streaming platforms. “Big screen” films will further need to distinguish themselves and create a special experience to bring people back to the theatres. Films will need to have a very strong profile in their entertainment value, in the topic they address or their artistic shape. There needs to be an in-depth reflection on this issue, even in regions like Europe, where the “big screen” has so far been relatively protected compared to North America, Latin America or Asia.

Paganello

What is Paganello? <https://www.paganello.com/history>

.... Paganello is a Frisbee tournament, which includes two disciplines: Beach Ultimate, a team sport played with the Frisbee (beach version of Ultimate Frisbee) and Freestyle, which is played individually or in groups of two or three, for those who love acrobatics. Born as a weekend between friends, Paga, as called by the fans, turned to be the most prestigious Beach tournament in the Ultimate world. Teams from Usa, where Frisbee born fifty years ago, Russia, Sweden, Canada, UK and so on join Paganello every year.

Beach Ultimate is really easy: 5 players, a field of 75 meters long and 25 widths with two opposite end zones. As in rugby, you score when a player gets the Frisbee in the end zone. The difference is that you cannot walk with the Frisbee in your hand, you have only 10 seconds to throw it and the physical contact is almost absent. Have you ever seen it? Till now, have you been thinking that the Frisbee was only played with your dog? This is not true. Come to Paganello and take a look! You will be surprised of the atmosphere, the colors and matches played without referee. Yes, without referee. The players, they



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referee by themselves in a fair played game and respect of the rules, unlike the most famous and popular sports.....

.....Paga is a tradition, as Wimbledon for tennis players. If you love this sport, you must come to Rimini once in life: challenges with the best players of your discipline, half kilometer of free beach dedicated to Frisbee and parties, and dancing until morning.

Paga is not only sport and competition. Paganello are concerts, parties, free wine and piadina on the Welcome Party. Furthermore, you will find activities for children and, why not, try to play Frisbee you too! See you on the beach! Free entrance obviously! And we take care of the ecology with "Paganello is green" and the objective is to be a zero environmental impact.

Paganello takes place on Easter (from Saturday to Monday). The finals start from 12:30 on Monday, whereas on Sunday afternoon start the finals of the Freestyle division (from 14:30)



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### **D.4.3.1 Tourism Products Portfolio: PP4 CMC CARNIA**

#### **Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. **Music**
- B. **Traditional Handicraft**



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### D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO

#### PP7 RIVE D'ARCANO

	V1	08. 03. 2021	Partners
Partner (name and number)	RIVE D'ARCANO – PP7		
Main editor/s	Gilberto Zangari (Agenzia per lo Sviluppo Sostenibile)		
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#### 1. Main elements collected during WP3 and WP4.1 outlining the potential for tourism experiences in the target area(s)

##### Intangible assets

- **Cantine Aperte al Castello d'Arcano.** Open Wine Cellars at the Castello d'Arcano.
- **Il Paese dei balocchi.** The land of toys. Expected event that annually attracts visitors from all over the Region. The appointment includes various educational workshops for children that frame the entire event. And the workshops want to become the extra gear of the party, making the little participants discover the creativity inherent in each one. The Land of Toys is also an opportunity to get to know and rediscover the historical and artistic beauties of the country and the wonderful hilly landscape in which Rive d'Arcano is located. Families and all visitors can also taste the best traditional Friulian dishes, accompanied by excellent wines.
- **Sagra di Fagagna:** festival, which, as tradition has it over a hundred years, always takes place in the first two weekends of September, with main events the Corsa degli Asini (donkey run) on the first Sunday and the Palio dei Borghi on the second. The whole town is dressed in the colors of the four villages. In fact, there are many jockeys from Fagagna who animate the Corsa degli Asini with their "donkeys", and many are also the inhabitants who are part of the cast of their village for the Palio show, others are busy setting up of the facilities and the service at the gastronomic kiosks, where you can find tasty grilled meats, as well as dishes based on donkey and local cheeses accompanied by excellent wines from our hills.
- **Aria di Festa per Castelli.** Fest atmosphere for Castles. The Hills Community of Friuli organize a "tour" of promotional guided tours in the hills to discover ancient manors: Castle of Villalta (Fagagna), Castello d'Arcano (Rive d'Arcano), Castle of San Pietro (Ragogna).
- **Arcania Vino Biologico.** Arcania Organic Wine. beautiful place full of history as all castles. In addition to organic wines, other typical products such as honey are also available.



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### **D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO**

#### **Tangible assets**

- **Parco del Cjastenar. Cjastenar Park.**  
Small Park on the immediate outskirts of Fagagna. Hilly circuit with gravel paths.
- **Castello di Fagagna. Castle of Fargagna.**  
Close to San Daniele, this village is one of the most beautiful in Italy. The main attraction is certainly the castle, which can be reached by car and from which you can admire a beautiful view. Only a few ruins remain of the ancient castle.
- **Mansion La Brunelde.**  
Medieval stronghold of thirteenth-century origin, it has belonged to the lords of Arcano for 1000 years! Built on pre-existing Roman buildings, thanks to the passion and conservative restoration of the d'Arcano family, it has kept frescoes, terracotta floors, exposed beams, stone walls, and original furnishings, where you can relive 800 years of history. It is surrounded by greenery in Fagagna (Friuli), one of the most beautiful villages in Italy. Guided tours with the owners in the stronghold-museum full of furnishings, paintings, strange and curious objects, such as the rotisserie of the '500.
- **Museo della Vita Contadina Cjase Cocèl. Cjase Cocèl Peasant Life Museum.**  
The Cjase Cocèl Museum offers the visitor the opportunity to experience the everyday life of our grandparents' times in an intact rural atmosphere and in a truly unique landscape. The various activities promoted by the Museum make it alive. In addition to the interesting collections of objects (costumes, plows, toys) and the environments (mill, kitchen, bedroom, classroom of the Lace School), the Laboratories have been open to the public for some years, where the culture of the trade is transmitted and preserved. The first laboratory that was established was that of weaving on manual looms, later a Ceramics Laboratory was set up.
- **Castello di Villalta. Villalta Castle.**  
Villalta is the most important medieval castle in Friuli, it is in a dominant position on the Friuli plain. Its history is lost in the mists of time, as evidenced by the Roman foundations and traces of a fortress. The oldest known document dates to 1158. Several times besieged, destroyed, and rebuilt between 1200 and 1400 had its monumental structure expanded in 1500. The double walls, the walkways, the drawbridge, the defence towers, and the picturesque and romantic inner courtyards reflect an era of greatness and strategic importance. This importance of the castle is reflected in Udine, where one of its gates is called "Porta Villalta".
- **Museo della Grande Guerra di Ragogna. Museum of the Great War of Ragogna.**  
The Museum of the Great War of Ragogna allows you to integrate the four itineraries proposed by the open-air museum through a description of the events that occurred in the area, in the Municipalities of Ragonga, San Daniele, Pinzano, Forgaria and Rive d'Arcano. There is also no shortage of other useful information to better understand the territory such as the history of the fortifications before the war, the reconstruction of the country after 1918 and the recovery of memory.

#### **Key attractions**

- **Castello d'Arcano Superiore. Arcano Castle.**  
Beautiful castle, well kept, with a fascinating history, an excellent point of arrival for walks through the hills of Rive d'Arcano with the presence of some ancient trees. In addition to the beauty of the place,



### D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO

the castle is very famous for its own oil that has won numerous awards for its peculiar very low acidity and delicate flavor.

- **Forte di Col Roncòn. Col Roncòn Fort.**

This large defensive structure that was part of the "Defensive Line of the Tagliamento River" was erected by the Italian Army between 1911 and 1912. In fact, at the beginning of 1900 along the entire border between the Kingdom of Italy and the Empire Austro-Hungarian was built a whole series of defensive works such as Forts - barrages - Batteries of Cannons - Armored Towers. This defensive line was made up of three distinct sectors: Alto Tagliamento - Fella; Middle Tagliamento; Lower Tagliamento River.

The mighty structure presents itself to us on two floors and is made up of thick reinforced concrete walls; it is surrounded by a system of ditches on several levels and on the top, there were four housings for the positioning of the same large-caliber cannons (4 cannons cal. 149 mm. inside 360 \* rotating steel towers on the roof and no. 6 Cannons 75 caliber in Outdoor Heats).

Recovered in recent years, today it houses a permanent collection of military relics.

- **Lago di Ragona. Ragona Lake.**

The lake has a circular pedestrian cycle path along its entire surface and a "lookout" for admiring the surrounding landscape. The Ragona lake is of morainic origin. Recognized by the European Community as a naturalistic site of Community interest for its naturalistic peculiarities, it is characterized by an elliptical shape, has a diameter of about 700 m, with an area of 25 hectares. An important feature of the lake is the presence of the "water chestnut" (Trapa Natans), an aquatic plant. On the edges of the lake basin there are plants typical of wet areas, such as willows, alders, and poplars.

- **Natural Oasis Biotopo Prati di Col San Floreano.**

The naturalistic oasis of Col San Floriano, established in 1998 by the Friuli Region, preserves in its 35 hectares of extension the best of the FLORA existing in these parts of Upper Friuli and at high risk of extinction.

- **Pieve di San Martino di Rive d'Arcano. Parish church of San Martino of Rive d'Arcano.**

It stands isolated from the Borgo and was built on the remains of a small private chapel since the eighth century. In the centuries to come, the structure has been rebuilt or remodeled several times and today it is in the state in which it is found. Inside there is a beautiful altar of the eighteenth century, as well as other "things" of undoubted historical and cultural interest.

- **Chiesetta di San Mauro di Rive D'Arcano. Church of San Mauro di Rive D'Arcano.**

Built around the sixteenth century on a pronounced natural embankment at the behest of the noble Tricano family, over the centuries it has undergone many changes due to war (including Turks) or telluric events (the one of 1976 above all). Rectangular in plan with a roof made of wooden trusses, it presents on the front an atrium with two lowered arch openings; moreover - above it - there is a small Vela Bell with two bells.

Inside there are 12th / 13th century frescoes with depictions of Christ, the Madonna with Child, and the Last Judgment. It is also interesting for the beautiful panorama.

- **Prosciutto San Daniele (San Daniele Ham).**

Prosciutto di San Daniele is a unique product as it is made only here on the hills around this town. In late June every year, a big festival celebrates this excellent ham of San Daniele.





### **D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO**

#### **Tourism experience 1 – Wandering about the romantic medieval castles and manors. HISTORICAL BUILDINGS CULTURAL TOURISM**



"The Castles and Manors Route" experience is scenic drive that runs among many beautiful villages in the region of Friuli Venezia Giulia, located in the northeastern part of Italy. This route links some villages of Friuli, and it is an area that offers many tourist attractions in terms of history, art, nature, food, and wine.

The route takes off on the road towards Fagagna, where the first stretch of the suggestive "Route of Castles and Manors" starts. The road runs around the Castle of Fagagna, which was the residence of the lieutenant of Friuli during the Venetian conquest (from 1420). In the nearby village of Villalta, there is another beautiful and well-preserved castle, which dominates the surrounding area from a small hill. Our next stop will be Rive d'Arcano with its beautiful castle, one of the best-preserved in Friuli. From Rive D'Arcano, a short drive will lead you to the town of Ragogna. The Castle of Ragogna is located on a rocky promontory overlooking the river of Tagliamento.

#### Assets included:

- Castle of Arcano Superiore
- Castle of Fagagna
- Mansion La Brunelde
- Castle of Villalta.



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### **D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO**

#### **Tourism experience 2 - On the traces of the Grand War (1914-1918). MILITARY TOURISM BASED ON BUILT HERITAGE**



The area around Rive D'Arcano has been an important "war theatre" during the first World War, as the Fort of Col Roncòn significantly testifies. This large defensive structure that was part of the "Defensive Line of the Tagliamento River" was erected by the Italian Army between 1911 and 1912. In fact, at the beginning of 1900 along the entire border between the Kingdom of Italy and the Empire Austro-Hungarian was built a whole series of defensive works such as Forts - barrages - Batteries of Cannons - Armored Towers. This defensive line was made up of three distinct sectors: Alto Tagliamento - Fella; Middle Tagliamento; Lower Tagliamento River. The mighty structure presents itself to us on two floors and is made up of thick reinforced concrete walls; it is surrounded by a system of ditches on several levels and on the top, there were four housings for the positioning of the same large-caliber cannons.

Recovered in recent years, today it houses a permanent collection of military relics.

The military tourism experience includes a great War historical excursion to the forgotten gunboat of the Cuel Mulimiela. Duration: about 5 hours, 300 meters of elevation.

Another important asset of this experience is the visit to the Museum of the Great War of Ragogna, which offers four outdoor itineraries through a description of the events that occurred in the area, in the Municipalities of Ragogna, San Daniele, Pinzano, Forgaria and Rive d'Arcane. In the museum there is no shortage of other useful information to better understand the territory such as the history of the fortifications before the war, the reconstruction of the town after 1918 and the recovery of memory.

Assets included:



### D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO

- Fort of Col Roncòn
- Museo della Grande Guerra di Ragogna
- Forgotten gunboat of the Cuel Mulimiela

**Tourism experience 3 - Tasting the worldwide famous Prosciutto di San Daniele (San Daniele Ham) and excellent organic wines. GASTRONOMY TOURISM**



San Daniele del Friuli, bordering with Rive D'Arcano, is a popular town which should be visited for its local specialty: the worldwide famous "Prosciutto di San Daniele" (San Daniele Ham). It is a unique product as it is made only here on the hills around this town. In late June every year, a big festival celebrates this excellent ham of San Daniele.

Rive D'Arcano host various wine producers. It hosts events, such as "Open wine cellars" (cantine aperte) at the Arcano Castle. A well-known must-see spot is the Arcania Vino Biologico. A beautiful place full of history as all castles. In addition to organic wines, other typical products such as honey are also available.



### D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO

Assets included:

- Prosciutto di San Daniele
- Cantine Aperte al Castello D'Arcano
- Arcania Vino Biologico

#### Tourism experience 4 - Traditional festivals and events. EVENTS TOURISM



The proposed experience is based on some original and unique events which are yearly organized in Rive D'Arcano and surrounding communities, and in particular the following:

- **Sagra di Fagagna:** festival, which, as tradition has it over a hundred years, always takes place in the first two weekends of September, with main events the Corsa degli Asini (donkey run) on the first Sunday and the Palio dei Borghi on the second. The whole town is dressed in the colors of the four villages. In fact, there are many jockeys from Fagagna who animate the Corsa degli Asini with their "donkeys", and many are also the inhabitants who are part of the cast of their village for the Palio show, others are busy setting up of the facilities and the service at the gastronomic kiosks, where you can find tasty grilled meats, as well as dishes based on donkey and local cheeses accompanied by excellent wines from our hills.
- **Il Paese dei balocchi.** The land of toys. Expected event that annually attracts visitors from all over the Region. The appointment includes various educational workshops for children that frame the entire event. And the workshops want to become the extra gear of the party, making the little participants discover the creativity inherent in each one. The Land of Toys is also an opportunity to get to know and rediscover the historical



### **D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO**

and artistic beauties of the country and the wonderful hilly landscape in which Rive d'Arcano is located. Families and all visitors can also taste the best traditional Friulian dishes, accompanied by excellent wines.

Assets included:

- Sagra di Fagagna
- Il Paese dei balocchi

### **Tourism experience 5 – Flora & Fauna education. DIDACTIC / SCHOOLS TOURISM**



The proposed experience is centred on the existence of the nature oasis Biotopo Prati di Col San Floreano. The naturalistic oasis of Col San Floriano, established in 1998 by the Friuli Region, preserves in its 35 hectares of extension the best of the FLORA existing in these parts of Upper Friuli and at high risk of extinction.

Assets included:

- Nature Oasis Biotopo Prati di Col San Floreano.



### **D.4.3.1 Tourism Products Portfolio: PP7 RIVE D'ARCANO**

#### **Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. HISTORICAL BUILDINGS CULTURAL TOURISM
- B. GASTRONOMY TOURISM



**Interreg**  
Italy - Croatia  
**EXCOVER**  
European Regional Development Fund



EUROPEAN UNION

### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### PP8 DELTA 2000

	V1	08. 03. 2021	Partners
<b>Partner (name and number)</b>	DELTA 2000 – PP8		
<b>Main editor/s</b>	DELTA 2000 Team project: Angela Nazzaruolo: coordinator Marzia Cavazzini: project manager communication Tristana Randi: project manager tourism		
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#### 2. Main elements collected during WP3 and WP4.1 outlining the potential for tourism experiences in the target area(s)

##### Intangible assets

WP3 – Tourists (Reputation) and SWOT

**Ostellato**, as a rural destination far from crowded cities and located in the midst of the countryside, is a beloved place for **quietness lovers**.

Data emerged from WP3 - Reputation Analysis confirm that tourists visiting the destinations for nature are emotionally influenced by the **quiet and pleasant atmosphere and experiences in rural areas**. Ostellato, the nearby countryside and the Vallette Natural Reserve represent the perfect gateway to spend a comfortable day in nature not only for tourists, but also for one day visitors who want to **escape the dynamic and intense rhythm of city life and the pollution of the urban environment**.

**Local traditions** and the **Gothic line represented by Senio River** are considered the main strengths, as far as intangible heritage is concerned, by residents of **Alfonsine**. The destination is closely related to the Italian resistance, a **site of memory, both topographically and metaphorically, a place that has a collective 'memory function'** which should be transmitted to as many visitors as possible is also a perfect location for students on school trips.

WP3 – Focus Group

Data emerged from Focus Group with local stakeholder asses that **water ways and valley traditions related to way of living, cooking, working are important intangible elements** As an example, during the Modern Age, commercial fishing in valley waters became a public or public-related monopoly (at that time, the Papal State) that created a dichotomic split: State-salaried wetlands fishermen (“vallanti”) and guards (“guardiavalli”) VS. **fish poacher (“fiocinino”), whose social consideration grew in proportion with the number of his arrests or months passed in jail**. The icon figure and the life of “fiocinino” is still alive in the memories of most of the people involved in Ostellato.

WP4.1 – Identification of local heritage

The mapping of local heritage revealed that the contemporary history of the territory of **Ostellato** has been forged by the economic and social changes consequent to **land reclamation** that started after the end of WW2.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

Once surrounded by valleys, Ostellato, after WW2, underwent a long process of land reclamation that changed profoundly the socio-economic system and bettered the conditions of the communities living in the marshes. The mapping of local heritage revealed that the contemporary history of the territory of **Alfonsine** is linked to **resistance and liberation themes**, with events taking place in different times every year, with the active involvement and participation of citizens.

#### Tangible assets

WP3 – Google Trend Analysis. **Vallette di Ostellato** is the most popular attraction in Ostellato, and, after Comune di Ostellato, the most searched term, well-known for beautiful marshes and valleys, walking trails, barbecue stands and a renowned location for national and international **fishing competitions** (with popularity peaks in Easter and Summer). Tourists (Reputation): also interviewed tourists affirmed that Fishing organization and activities and fishing competitions are the main assets.

WP3 – SWOT & WP4.1: **Museum of the Territory. Ostellato.** The Museum does not fall under the archetype of archaeological museums, but, in its atypical nature, represents a unique opportunity and a preparatory starting point to understand and deepen the local history since its origins. It also hosts an interesting exhibition dedicated to Mario Soldati. **Museo Casa Monti, in Alfonsine**, was the birthplace and childhood home of notorious Neoclassical poet and writer Vincenzo Monti, born in 1754. Alfonsine area is rich in ecological and natural diversity and local community is aware of the potential opportunities offered by **natural environment** and all activities related to nature as **cycling** and **walking** in the countryside and along Senio River and birdwatching.

WP4.1: The **parish church of San Vito**, Ostellato, built in 1027 on the foundations of an earlier building, in pure Romanesque style, with three naves and three apses with crypt. The church was surrounded by a necropolis, which suggests the presence of an ancient village. The territory of Ostellato is scattered by numerous **operating pumping systems**, which testimony the process of land reclamation started during the Renaissance by the Este family and concluded in the 70s'. **Madonna del Bosco** in **Alfonsine** is an important sanctuary, destination of numerous pilgrimages, which rises in an area formerly covered by a dense bush, where, according to tradition, frequent miracles were repeated. The first miracle occurred in 1714, after the deposition of an ex-voto image. The sanctuary preserves a ceramic image of the Virgin dating back to the 1500's.





### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### Key attractions

WP3 (SWOT, Reputation, Google Trend analysis) and WP4.1

**Valette Natural Reserve**, Ostellato, is considered the main local attraction both by tourists and residents and the main strength in the Swot analyse. **Vallette** is a natural oasis about 10 km long where earth and water coexist in perfect harmony making it **the ideal place for walking, hiking, bird watching, sport fishing and nature photography**. It represents a unique natural environment, the remnants of the ancient Valleys of the Mezzano, today a place for stopping, wintering and nesting for numerous species of birds, especially aquatic ones. The area is loved by residents and therefore is considered one of the main strengths for tourism growth and development as it is already well-equipped for tourists, and it offers accommodations, places to eat, excursions, sports activities, especially fishing competitions, an astronomical observatory and a permanent exhibition of sculptures by local artists. Travelers and residents come to rest at the stunning overlooks, walk a peaceful trail, or exercise in a clean, beautiful environment. They can enjoy nature by finding the ideal spot to have a barbecue in the picnic grounds. Even if Vallette is not a big plot of land, it guarantees a big list of birds and the perfect destination for birdwatchers. Last but not least Vallette with its nearby **Canale Circondariale is one of the most famous area in Europe for carp fishing**.

**Museo della Battaglia del Senio**, Alfonsine, opened in 1981, collects and preserves memories, documents and evidences of alterations in the territory and the living conditions of the population during the war and CEAS, **Environmental Education Centre**, located in Casa Monti, whose goal is to spread environment and sustainable education among residents and visitors. The centre offers different typologies of visits, educational programs, activities and excursions to schools, groups and individuals. Casa Monti can be considered both a cultural and a natural attraction, being a historic farmhouse situated in the open countryside, in an area that today is part of Po Delta Park.

3. **Summary description and main characteristics of the tourism experiences that you envisage in the involved territory.**



### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

#### **2.1 Tourism experience 1 – Sport Fishing Competitions**



**Fishing activities and competitions** are very popular in Ostellato, especially in the **Vallette Natural Reserve**, a natural area considered a key attraction both by tourists and residents.

The area is repeatedly chosen as competition playground by FISPAS (Federazione Italiana Pesca Sportiva e Attività Subacquee) - Italian Sport Fishing association, that, for years, has elected Vallette as one of the main locations for national and international competitions. Ostellato offers also a unique venue for Carp fishing and, in general, leisure fishing which can be practised not only at the Vallette but also in many nearby canals. Ostellato is one of the most popular Italian competition fields, where competitors usually fish English style with floats up to 25gr and also Carp fishing gives excellent results, like catfish fishing. In the 80s, the international presence on this competition field reached 80,000 / 100,000 units, thanks to the many competitions organized especially by Fipsas and other fishing organizations. In that period, a Regional English fishing championship with over 1800 entries in a single day entered history, races that unfortunately no longer exist today for many reasons. The current competitive numbers on the Ostellato competition field reaches 10,000 units and it is clear that when it comes to agonists, the economic and social spin-off generated by midweek tests and travel companions or spectators has undoubtedly a significant impact if we consider that Ostellato is the fourth largest municipality in the province for tourist flows after Ferrara, Cento and Comacchio.

Fishing in Ostellato is described as a unique experience by sport-fishermen who choose the destination for the abundance of fish and the beauty of the landscape and the quietness. As a matter of fact, the countryside offers an escape from the dynamic and intense rhythm of city life and the pollution of the urban environment.

The sport fishing tourist experience would be further enhanced with services and facilities for this target such as: a visitor centre providing information (such as maps, sites, restrooms, etc.), shops selling goods for fishing, a local fishing association.

The visitor information centre along with shops and local fishing knowledge can promote a positive traveler experience by maintaining a visitor information program that provides reliable resources about the destination. Tourists' information centre can enhance visitor enjoyment, attracts them to stay



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

longer and spend more money by providing more information about the destination's offerings. A local museum with an exhibition dedicated to the fishing traditions could enhance visitor's experience. **Museum of the Territory**, close to fishing competition fields, could be the perfect place to host a permanent exhibition of fishing traditions, techniques and the relationship between men and surrounding valleys.

#### 2.2 Tourism experience 2 – Birdwatching in Po Delta Park



Ostellato, as a rural destination far from crowded cities and located in the midst of the countryside, is a beloved place for quietness lovers and **Vallette** is a natural oasis about 10 km long where earth and water coexist in perfect harmony making it **the ideal place for birdwatching**. It represents a unique natural environment, the remnants of the ancient Valleys of the Mezzano, today a place for stopping, wintering and nesting for numerous species of birds, especially aquatic ones.

In the Vallette there are 150 species of aquatic, nesting and passage birds, a high concentration of species rarely seen in other European sites that provides therefore a unique setting for those who want to practice birdwatching. Around the shallow waters live numerous long-legged wading birds, including the Black-winged Stilt, and along the banks of the lake nest dabbling ducks such as the Mallard and diving ducks like the Common Pochard, as well as coots, moorhens, and various passerines. **Alfonsine** area is **rich in ecological and natural diversity** and local community is aware of the potential opportunities offered by natural environment and all activities related to nature as cycling in the countryside and along Senio River and birdwatching. There are three small distinct oases halfway between Argenta and Comacchio Valleys, with a strategic role for environmental education and for the



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

conservation of the lowland landscape linked to water. Ceas organizes birdwatching activities in Alfonsine Natural Reserve and its surrounding with the aim to inspire love and care for nature and wildlife.

**Vallette** is equipped with facilities for birdwatchers, as birding hotspots, birding routes, bird lists, trails, walkways, hides and observation towers, while information boards on the biology of birds and their identification add an extra value. A ow attractive your destination is for birdwatching of course depends on the quality of its birdlife. As deciding factors, when choosing a birdwatching destination, are the availability and variety of birdlife, as well as the presence of specific bird groups or endemic species together with annual migratory patterns, Vallette has informative panels with detailed information on the birds in the area, and a “calendar” with the best periods to see certain birds.

### 2.3 Tourism experience 3 – Bike Experience



Ostellato offers numerous beautiful **bike trails** that take in the countryside on gentle paths that favour scenery over strenuous pedalling. The routes' gentle, mostly flat trails range from a few miles to explore Ostellato surrounding to longer trips to discover some of the most beautiful scenery in Po Delta Park. Bike itinerary from Ostellato Valley to Argenta Valley along the cycle route named after Bruno Traversari, journalist and writer, who used to bike in the valleys and wrote books on Delta, its people, history and traditions. The itinerary, proposed by a resident, offers a view of Ostellato from a different perspective and touches places that refer to traditions, historical memories, economic and social changes that have profoundly transformed the territory from the post-war period onwards. For example, the territory is scattered by numerous operating pumping systems, which testimony the process of land reclamation started during the Renaissance by the Este family and concluded in the 70s' and a bike tour could be based on the discovery of the remnants of the ancient Valleys of the Mezzano. The Nature Reserves path from Ostellato to Argenta goes alongside the reclaimed land of the Mezzano, crosses the Bando Reserve and the Anse vallive di Porto and, after the Oasi Trava,



### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

reaches Argenta and its lagoons. The area is well provided with visitor viewpoints, with places to stop, refreshment, excursions, sporting activities, horse-riding trips and an astronomical observatory.

“AL.BA.CO. in bici – the wellness itinerary” is a cycle path between sport and nature that crosses the slow streets and cycle paths in the municipalities of **Alfonsine**, Argenta, Bagnacavallo, Conselice, Fusignano e Lugo. For those who love open air and sports, this new itinerary runs along the slow narrow roads and cycling paths, granting a full enjoyment of beauty, colours and perfumes of Bassa Romagna. The name Albaco derives from the names of the Municipalities it runs through; it is a two-wheel trip along white (gravel) little roads, off-road tracks (rived banks) and slow-traffic roads. Along the route are some of the most interesting spots from the natural point of view but not only that....ancient and impressive parish churches, water ways that marked the history of this landscape and parks, where you can relax and indulge yourself into wellbeing.

The SWOT and Reputation analysis reports the need for action not only in terms of infrastructure, but also in extended measures (cycling businesses, information, etc.) especially in Ostellato. Maintenance of the existing cycling infrastructure (including rest areas, etc, consistent, clear (overwhelming number of signs) and easy to understand signage of cycling routes, opportunities to rent bicycles, especially e-bikes and service and service stations in case of breakdowns as well as missing opportunities to park and lock the bicycles.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### 2.4 Tourism experience 4 – Cultural Experience for schools



**Historical and cultural experiences for schools are trips and travels** that have the primary purpose of exploring the history and heritage of a place. It may mean simple sightseeing of historical buildings, visiting local museums that document the past through artefacts, art, and literary remains, or experiencing and interacting with local people. One of the best experience to get students excited about local history and culture is to get them out of the classroom to visit a historical site or museum. Alfonsine and Ostellato offer plenty of historical and cultural attractions that will enrich young people's understanding of local heritage, customs and traditions.

**Some museums also display interactive exhibitions** providing informal and non-formal learning opportunities for students which impact of young people in terms of personal well-being, active citizenship, social skills development and cultural understanding.

A cultural school trip to **Ostellato** provides the chance to visit the **Museum of the Territory**, a small museum established on June 13, 2006 that illustrates the evolution of the Earth and Man in history. The Territory Museum does not fall under the archetype of archaeological museums, but, in its atypical nature, represents a unique opportunity and a preparatory starting point to understand and deepen the local history since its origins.

The **interactive exhibition**, dedicated to the evolution of the universe, to the history of human settlements in these "middle" lands, to the Etruscan period and the city of Spina, to history of hemp cultivation at the beginning of the 1900's etc, is a **perfect tool to engage young people, who, more and more, want to be involved, to touch, to be part of the work of art and to share it on the social media**. The Museum hosts an interesting exhibition dedicated to Mario Soldati, writer, film director, journalist. He was one of the



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

pioneers of television in Italy with several successful shows and his films included *The River Girl* (1954), starring Sofia Loren and filmed in Comacchio Valleys. In the early 1950's, he decided to explore the new medium of television and started making documentaries, including *Travels Along the Po Searching for Genuine Food*.

In Alfonsine students can visit **Museo della Battaglia sul Senio**, a unique opportunity to learn about the dynamics of WW2, the allied attacks, the withdraws of German troops and the incredible organization of local partisans in the Italian Resistance movement, together with the **Resistance Itinerary**, characterized by commemorative stones listing the names of the fallen from the years of fascism to the end of the second world war. The itinerary, with its memorial stones and the bronze sculpture in the main square, helps to understand the events of the past and the sacrifice of very young men who had taken up arms to end the war. Students can visit the commemorative stones thanks to the interactive and printed maps of the memorial places dedicated to the fallen of the Resistance, a project realized by secondary school students, which aims to increase awareness of the immense sacrifice and suffering during the Resistance period.

**As far as Ostellato, the SWOT, together with the outcomes of a focus group with citizens and institutions, has come to a definition of the Museum of the Territory as ruinous.** Probably the lack of a strong chronological framework disorients the narrative structure, while direction signs, which should support visitors as they make their way to and around the museum, are not clear enough. **It would be interesting to evaluate a feasibility study that takes into account economic, technical and planning issues to enhance the potential of the museums, with a section also dedicated to traditional fishing culture and activities.**

## 2.5 Tourism experience 5 – Cinema, Cultural Heritage, and Museums



Museums and Cultural heritage are considered among the main strengths of Ostellato and Alfonsine in terms of tourism development.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

**Museum of the Territory** in Ostellato, located halfway between Vallette Natural Reserve and Ostellato main square and considered one of the main opportunities for tourism growth by residents, is a small museum established on June 13, 2006 that illustrates the evolution of the Earth and Man in history. It offers an interactive exhibition dedicated to the evolution of the universe, to the history of human settlements in these "middle" lands, to the Etruscan period and the city of Spina, to history of hemp cultivation at the beginning of the 1900's etc. On the ground floor there is a section dedicated to Mario Soldati, writer, film director, journalist. He was one of the pioneers of television in Italy with several successful shows and his films included *The River Girl* (1954), starring Sofia Loren and filmed in Comacchio Valleys. In the early 1950's, he decided to explore the new medium of television and started making documentaries, including *Travels Along the Po Searching for Genuine Food*. The territory of Po Delta is closely linked with movies, and, during the twentieth century, cinema often made use of this scenario to set stories of struggle and emancipation, of subjective dramas and marginality, constituting a formidable album of collective memory and transformations experienced between earth, wind and waters. Museum of the Territory experience is linked with **Casa dell'Agnese**, a rural house in the countryside of Alfonsine, where the movie "And Agnes goes to die" was filmed. *L'Agnese va a morire*, internationally released as *And Agnes Chose to Die*, is a 1976 Italian drama film directed by Giuliano Montaldo based on a novel of the same name by Renata Viganò. *Agnes goes to die* is a neorealist novel where the main character, Agnes, a middle-aged laundress, who, struck by the death of her deported husband, even though she has never been interested in politics before, begins to collaborate with the partisans. **The storytelling of Ostellato and Alfonsine then passes through new digital tools to reach, with the evocative power of images and memories, the wider and younger audience who will want to come and visit the Museum and learn about the authenticity of the place** and its traditions related specially to water and fishing activities, which have been the primary support for living for centuries. The Museum and Casa Agnese are among the attraction of a tourist itinerary in Po Delta Park dedicated to post-war Italian cinema. Unfortunately, the museum does not offer yet to visitors a full emotional experience and, even if it was completely renewed in 2015, audience is very low, especially among tourists. The SWOT, has come to a definition of the Museum as ruinous. Probably the lack of a strong chronological framework disorients the narrative structure, while direction signs, which should support visitors as they make their way to and around the museum, are not clear enough. Furthermore, the shortage of advertising and SNS, which are vital to attract visitors and tourists, might be attributed to the lack of time and resources of the Museum. It would be interesting to evaluate a feasibility study that takes into account economic, technical and planning issues to enhance the potential of the museums, with a section also dedicated to traditional fishing culture and activities.





### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

#### **3. Market analysis on tourism experiences / products: CULTURAL SCHOOL TRIPS / EDUCATIONAL TOURISM**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.

##### **3.1 Main characteristics of the product line**

A field trip or excursion is a journey taken by a group of people to a place away from their usual environment. In education, field trips or school trips are defined as visits to an outside area of the normal classroom and made by a teacher and students for purposes of firsthand observation. A field trip can be expressed in many terminologies. People call educational trips or school tours in the UK and New Zealand, and *gite scolastiche* in Italy. Field trips are a popular method carried out for students to introduce to the concepts, experiences, and ideas that cannot be given in a classroom environment. School tours can be considered as short-term learning activities providing students the opportunity to observe their chosen subject outside of a classroom setting. Exploring other cultures and customs, getting to the motherland of languages, uncovering pristine nature and experiencing fascinating local life are striking demonstrations of educational school trips. Efficient educational tours can spark students' imagination, give them valuable experiences and refresh their minds after days with pencils and papers. A school tour can be themed with one type of field trip or combined by various school trip ideas.

Field trips include events or activities where students leave the school grounds for the purposes of curriculum-related study (part of the classroom experience), or outdoor education. These trips range from a few hours during the school day to extended overnights and even out of the state or country.

Examples of *field trips* include:

day trip to museum, nature centre, science laboratory, etc.;

recurring trips (if tied to curriculum);

overnight trips or longer trips for educational programs; and

trips requiring special considerations, such as remote locations, near water or swimming facilities, involving animals, or adventure trails



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### 3.2 Sub-products – describe the main aspects that differentiate the sub product from the main product

##### Historical and cultural school trips

Historical or cultural school trips means traveling with the primary purpose of exploring the history and heritage of a place. It may mean simple sightseeing of renowned historical buildings, visiting local museums that document the past through artefacts, art, and literary remains, or experiencing and interacting with local people. In general, cultural school trips may be explained as the very nature of travelling in order to understand and become familiar with way of life and history of a specific location accompanied by a range of cultural factors which may include local customs, entertainment, architecture, hand crafted and manufactured products or every element representing characteristics of way of life in a particular destination. For example, to understand the cultural and social and economic changes that characterize Ostellato's territories and the man-waters interactions in the Po River Delta and its historical evolution, **school trips provide excursions and sightseeing to the most relevant historical hydraulic works in this zone with tips and information on Wetlands, very common in Ferrara Province until some decades ago before the land reclamations program**, in this region are known as "valli"/sing. "valle" (from Latin "vallum", "wall", in this case probably a dune-bar), or "campi" (literally "fields").

##### Environmental school trips

Environmental school trips help to develop the skills and attitudes needed to understand the relationships between human beings, their cultures, and the biophysical world. All programmes of outdoor environmental education will therefore include the acquisition of knowledge and understanding and the development of skills. However, they should also encourage curiosity, foster awareness and lead to an informed concern which will eventually be expressed in terms of positive action. Environmental education emphasises the teaching of the holistic nature of the environment through inter-disciplinary and problem-solving approaches. Environmental centres located both in Ostellato and Alfonsine provide amazing high quality outdoor learning in varying rural and natural sites where students can experience hands on topics such as organic farming, the countryside, nature, sustainable living, birdwatching, ecosystems, making it a perfect fit to learn outside of the classroom. **In Vallette di Ostellato schools can explore issues related to valleys and biodiversity, with excursions, workshops and guided tours.** Some proposals are also available in English. **Alfonsine Natural Reserve prestigious naturalistic area with rich avifauna and particularly interesting for the presence of the pond turtle Emys orbicularis.**

All excursions can be combined and come with a 45-minute interactive video lessons to introduce and deepen the visit and to support and complement school curricula.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### 3.3 General tourist profile of this tourism product

##### General description

###### *Demographic description of tourist*

Schools trips are usually organized by all schools, both on the national level and internationally. Usually school trips are planned by teachers and take place mainly in spring. Even if the participants in school trips are mainly students, in the most cases the decision regarding the location and the time spent on school trips is demanded to teachers.

The school trips tourism products for Ostellato and Alfonsine are suitable for all classes and all ages, as different programmes have been developed to respond to the needs of different ages. The Italian school population comprehending elementary schools, primary and secondary schools, is constituted by:

Primary education (6-10yrs old): 2.713,373 (2018/2019)

Lower Secondary education (10-13yrs old): 1.725,037 (2018/2019)

Upper Secondary education (14-18yrs old): 2.677,094 (2018/2019)<sup>37</sup>

Although there are not statistic evidences and academic researches related to demographic information of students attending schools trip, it is presumable that all schools, from every order and grade, organize school trips and field trips during the academic year. But students aren't getting the same field trip experiences, with students in some poorer areas having fewer opportunities. Most of the trips are optional but parents complain they are always announced to the learners and not the parents first. Parents believe that school administrators should hold prior presentations for parents about the trips and their opinion sought. Simply announcing an upcoming trip to learners causes excitement among the latter which in turn translates into undue pressure on parents to pay for the trips.

A research conducted in UK reports that the soaring price of school trips means many parents are forking out thousands of pounds a year for their children's excursions - or simply having to kibosh the trip entirely.<sup>38</sup>

One in 10 parents spend more than £1,000 a year on trips while five per cent dish out beyond £3,000 a year, **but despite most parents spending out for the trips, more than three in five believe that organised school trips are unaffordable**. Almost five per cent of parents said that they couldn't actually afford for their children to go on school trips at all, the survey of 1,800 parents indicated.

The pressure is on for parents to give their child the best possible experiences but that comes at a hefty cost.

##### Tourism habits

Student Travel Business Barometer – Annual Report 2019 declare that the seasonality of the industry confirms that spring and early summer are the most travel-heavy periods for both domestic and international student group travel. May significantly outperformed other months in terms of student volume, reaching an average of just below 2,800 traveling students per tour operator. April, March, and June followed, accounting for 1,759, 1,662, and 1,584 students on average, respectively. August,

<sup>37</sup> This text provides general information Statista assumes no liability for the information given being complete or correct Due to varying update cycles e Statistics Can Display More up-to-Date Data Than Referenced in the Text, «Topic: Education in Italy», Statista, consultato 17 gennaio 2021, <https://www.statista.com/topics/3960/education-in-italy/>.

<sup>38</sup> Rys Farthing, «The costs of going to school, from young people's perspectives», *Child Poverty Action Group*, 2014, 10–11.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

September, and December turned out to be the months with the fewest students on the move, reaching averages of only 101, 137, and 207, respectively. Trip duration remained fairly stable in the first half of 2019, with the average oscillating between 5.0 and 5.7 days. The average trip length peaked in July, when students spent an average of 7 days per trip. Conversely, in September and October students were embarking on the shortest trips, of 3.9 and 4 days, respectively. Compared to the previous two indicators, average group size did not record any significant shifts throughout the year, remaining within the range of 48 to 65 students per group. The highest number of students traveling in May also translated into the biggest groups for this month.<sup>39</sup>

An Italian research promoted by Centro studi La Fabbrica s.p.a. e GeeTrips

“Viaggi d’istruzione – i trend della domanda II edizione - 2018/2019” reports that Primary schools organize mainly day trips, at a distance of up to two hours from the school, while Lower secondary schools provide, during educational trips, a stay average of 1-2 nights and Upper secondary schools provide for an average stay of 3-5 nights. The preferred means of transport for school tourism is the bus: the closeness to railway stations or airports is not influent of the destination choice.

### 3.4 International Market size of the present global demand for this tourism product and expected future trends

#### Present market size

According to the responding organizations, the student group travel industry was in a healthy condition in 2019. Comparing business volume to 2018, most of the tour operators and agencies noted increases in the number of students traveling in all four quarters. More than half of STOs reported growth in Q1 2019. However, at 65 %, the biggest percentage of tour operators saw their bookings increase in Q2. At the same time, 21 % of respondents noted a greater decrease in student volume in Q2 than in any other quarter. Q3 represented the most stable quarter in terms of number of students traveling, while 60 % of businesses saw growth in Q4. Compared to 2018, the average length of trips remained the same for more than 70 % of respondents. Nonetheless, 24 % (Q1) and 20 % (Q4) of tour operators reported sending groups out for more days than in 2018. Average group sizes experienced more notable shifts than average trip duration. In all quarters one third of respondents reported bigger groups than in 2018. The majority of tour operators in Q1, Q3, and Q4 did not register a change in group size; however, 11 % and 23 % of respondents noted sending smaller student groups in Q1 and Q2 of 2019. Similar to domestic travel, the volume of students traveling abroad rose in comparison with the previous year. In the second and third quarter more than half of the respondents (52 % and 56 %) noted an increase in number of students traveling in comparison with 2018. The last quarter saw less of a boom; however, 40 % recorded an increase in the volume of students and 56 % reported no change in this indicator. Conversely, numbers faltered in the first and second quarter as 18 % and 30 % of tour operators, respectively, reported fewer students traveling. The other two indicators, average trip duration and average group size, are less prone to changes than volume of students, as demonstrated by the research. Most of the respondents did not note any major changes in trip duration or group size when compared to 2018. The number of students per group remained the same as in the previous year for the majority of tour operators and agencies. Nonetheless, in all four quarters, between 19

<sup>39</sup> «Business-Barometer-Annual-Report-2019.pdf», consultato 17 gennaio 2021, <https://syta.org/wp-content/uploads/2020/08/Business-Barometer-Annual-Report-2019.pdf>.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

% and 30 % of respondents reported an increase in average group size in comparison with 2018. On the other hand, 13 % of respondents in Q1 and 19 % in Q2 noted a decrease in number of students per group.<sup>40</sup>

#### Trends

**Student Travel BUSINESS BAROMETER ANNUAL REPORT 2019:** Trips with an **educational component** were, by a considerable margin, **the most popular domestic travel type** across all four quarters, **with those offering a performance arts/music experience** the next favorite among student travelers. School/college tours, leisure travel, and trips offering a cultural/language program came in third. and content aspects as their top priorities in 2019. Nonetheless, **health and safety has become a top global concern in 2020 and the tourism industry will have to turn this massive new challenge into meaningful change in order to regain trust from their customers in a post-Covid travel world.** Increasing demand for safety assurances and the need for global recognition of safety management were more often reported by SYTA members than by non-members. Role of Technology Results reveal that all STOs make use of mobile applications and social media to communicate with school, parents, and also students during trips. A consensus was noted in relation to using GPS and devices that track students during trips. A majority of both SYTA and non-SYTA affiliated respondents did not use GPS and devices that track students during trips. **The latest global shifts in the use of technology sparked by the outbreak of Covid-19 show that technological progress will likely play a more important role in tourism than was previously expected. Working remotely, going online, using technological gadgets and applications, digital payments, telehealth and robotics – these technologies facilitate curbing the spread of the coronavirus and will help make society more resilient in the face of the current pandemic and its aftershocks.**

#### Sustainability

Neither SYTA members nor non-members recorded high demand from customers for sustainable elements in group travel. Furthermore, both noted consumers' reluctance to bear the higher costs incurred by such elements if included in a trip itinerary. More than 90 % of all respondents did not follow the U.N. Sustainable Development Goals at the time the research was conducted, with 30 % expressing no interest in doing so. The only operators that are already following the U.N. goals are SYTA member STOs. **In light of the repercussions of Covid-19**

**on sustainable development, the U.N. has called for a scaling-up of the response to suppress the spread of the virus, saying that a swift 'response and joint action on the ground' to help the most vulnerable countries and communities is more**

**necessary than ever.** Neither should the ongoing climate debate be overlooked. Following a rise in global commitments to more environmentally-friendly travel behavior, **some tour operators cancelled their promotions of long-haul destinations and replaced them with ones that are reachable by more eco-friendly means of transportation than air.** In the coming years, particularly in light of the effect of a pandemic, **the industry is likely to be urged to reconsider travel habits and incorporate more sustainable elements into travel experiences. However, the financial aspects of such travel will still play a crucial role.**

<sup>40</sup> «Business-Barometer-Annual-Report-2019.pdf».



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#### 3.5 Local size of the present local demand and expected future trends of this tourism product

##### Present market size

Casa Monti and Alfonsine Natural Reserves carry out many educational activities, mainly free of charge, for the schools of Alfonsine Municipality. These are visits to Casa Monti, to the Reserves but above all environmental education activities in the classroom. In 2018, about 650 students were involved and in 2019 about 1200. Obviously, 2020 doesn't make sense. In terms of numbers referable to school tourism, the market size is very insignificant, with 50/100 students a year.

As for Ostellato, the situation is different, schools come precisely to visit the area. In 2018 around 950 students and in 2019 around 600 visited Le Vallette.

During the summer the Vallette organizes visits and workshops ideal summer camps, specially designed for children and teenagers.

##### Trends

**Health and safety together with destinations that guarantee social distancing** will be the **most important issues** when the pandemic will be over. Even now, when browsing for travel tips, many destinations worldwide promote security and highlights the measures already put in place to guaranty the protection of tourists. **School trips safety and risk management will represent the mayor challenge** and striking the right balance between protecting students from risk and allowing them to learn from school trips will be the priority in the future. It will **be vital**, therefore, to use a **clear and transparent communication** to ensure early stimulation of the recovery of school trips.

Preferences and behaviors have shifted toward the familiar, predictable, and trusted. Domestic and **regional vacations and the outdoors will reign in the short-term**, with tourism businesses and destinations already adapting.

Though the longevity of these shifts is still unclear, **Ostellato and Alfonsine have a unique opportunity to develop and increase school trips numbers, as they represent the best example of outdoor and uncrowded places**. To avoid crowds, school trips managers will increasingly seek out "off-the-beaten-path" nature and outdoor destinations, with small towns/rural areas topping the list.

#### 3.6 Most important criteria influencing the competitiveness in the global market for this tourism product

**Vallette di Ostellato**, a natural and protected oasis of wildlife exemplary for recreation, education, excursions and sports. Open from 7am to 7pm, equipped with info point, bar, restaurant, **education center**, Vallette is home for a significant number of unique species of birds, insects, fishes, amphibians, and other wildlife representatives. Therefore, it can be assumed that Vallette di Ostellato represents the perfect gateway for educational school trips to spend one or more days in nature for two main reasons: first, the uniqueness of the natural environment and secondly the remoteness, quietness, and safety of the location. Both Vallette in Ostellato and Alfonsine Natural Reserve together with Casa Monti are part of a circuit called AmaParco, a network of theme parks in Emilia Romagna distributed in the territories of Ravenna, Rimini, Forlì-Cesena, and Ferrara. Each park has a team of professional educators responsible for managing and conducting guided tours, excursions, workshops and educational activities and special initiatives for school trips. Many **AmaParco parks are recognized as CSC Service and Consultancy Center for autonomous educational institutions in Emilia-Romagna, a tool that supports educational institutions in the process of innovation in teaching and development of the educational offer**.



### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

**Museo della Battaglia sul Senio** in Alfonsine represents a unique opportunity for students to learn about the dynamics of WW2, the allied attacks, the withdraws of German troops and the incredible organisation of local partisans in the Italian Resistance movement.

#### **3.7 Most representative international best practices (max 3)**

##### **The North York Moors National Park - UK**

The [North York Moors National Park Education Service](#) offers a wide range of inspiring activities to help young people to experience, understand and enjoy the spectacular countryside and coast of this special place. It provide activities for schools and groups from reception through to A level. All school activities are curriculum linked and can be tailored to exam specifications. Reception and KS1 children can enjoy activities linked to the Gruffalo and Percy the Park Keeper, whilst having woodland and countryside adventures. KS2 children can undertake habitat studies including rivers, woods, moorland and seashore, they can experience a variety of walks whilst practicing their map, compass and GPS skills. Activities for KS3, GCSE and A level involve fieldwork and geographical skills; river investigations, flood management and coastal processes and management. Many of these activities can be adapted for groups other than schools and we do offer specific activities for uniformed groups working towards specific badges.

##### **SOMME - FRANCE**

[The Somme](#) is synonymous with the horrors of the First World War, also known as the Great War. On the first day of the Battle of the Somme, 1st July 1916, the British army suffered over 57,000 casualties, of which nearly 20,000 died.

The Somme has always been an agricultural area with rolling fields exposed to harsh winds and cold conditions which can prove to be very uncomfortable. Students will be able to understand the realities the various forces endured in 1916. The memorials, cemeteries, museums, and churches in this region are numerous and considerable effort has gone into preserving the memory and the sacrifices that were made by soldiers and civilians. Students will be encouraged to seek references for men from their communities or members of their families, and it may be possible to visit the sites. (subject to timings and locations). They learn to understand and appreciate how most of the soldiers who died, were a little older than they are now and the difficulties encountered.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### 3. Market analysis on tourism experiences / products: SPORT FISHING

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.

##### 3.1 Main characteristics of the product

The outdoors is a salient if not core element in the lure of Ostellato for tourists in each segment. Some activities are more proper to be the reason for taking a trip whereas others tend to be one-of-many activities a tourist engages in during a trip driven by other purposes. The core attraction of Ostellato is represented by Vallette Natural Reserve and its nearby canals derived and constructed by reclamation. The Swot and Reputation Analysis and the Focus Group with local stakeholders substantiate that one of **Ostellato's main strength is represented by sport fishing activities** as the territory offers some of the best fishing experience nationally and internationally and attracts fishing anglers from across the world to its canals. These factors secure sport fishing as a signature experience for the territory. Ostellato offers **50 km of fishing canals and two main fishing competition areas**. The official name of the main fishing venue is Canale Circondariale Bando Valle Lepri, known as Campo di Gara di Ostellato populated by many early crucian carp and currently by breams, which have made and are making the joy of all fishermen and agonists who are lucky enough to attend this ring of water. **In the 80s**, the international presence on this competition field **reached 80,000 / 100,000 units**, thanks to the many competitions organized especially by Fipsas and other fishing organizations. In that period, a Regional English fishing championship with over 1800 entries in a single day entered history, races that unfortunately no longer exist today for many reasons. The current competitive numbers on the Ostellato competition field reaches 10,000 units and it is clear that when it comes to agonists, the economic and social spin-off generated by midweek tests and travel companions or spectators has undoubtedly a significant impact if we consider that Ostellato is the fourth largest municipality in the province for tourist flows after Ferrara, Cento and Comacchio. The competition field has hosted 4 world events and precisely the World Championship for Clubs, in 1993, 2011, 2016 and 2018. This has given rise to a **growth in the tourist accommodation sector** and an **increase in knowledge and professionalism in the tourism and hospitality industry**. Sport Fishing can be considered the top-performing tourism product in Ostellato in terms of visitor spending and number of trips, making it a product of key importance.

##### 3.2 Sub-products – describe the main aspects that differentiate the sub product from the main product

###### Recreational fishing

**Recreational fishing** is fishing for pleasure and it can be contrasted with commercial fishing, which is fishing for profit, or subsistence fishing, which is fishing for survival or sport fishing which is fishing for competition. Recreational Fishing can be considered an experiential activity, in contact with an ecosystem such as the marine or canals and valleys, full of suggestions and nuances; an non-competitive experience that arouses great interest for the visitor: its natural and fishing and cultural resources (lighthouse, ports, valleys, fish markets, traditional fishing systems and arts, contact with the people and their own vocabulary, a set of intense festive events associated with fishing as an inspiring setting and as a setting to be carried out, its museums and interpretation centres, gastronomy, monuments and crafts). Recreational tourists who fish





### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

during their leisure time may have purchased a trip or an arrangement focusing only on fishing - that is what we call a specialized fishing trip, while others may have fishing as one of several activities during their holiday, combining fishing with other outdoor recreational activities or with visiting attractions, museums and historic sites and other activities such as shopping or sunbathing.

#### Sea and Coastal Fishing

The Sea and Coastal / fishing tourism is an activity of recent implantation that is being promoted in different coastal areas of the world mainly motivated by the socio-environmental crisis that traditional fishing is experiencing, with significant economic and cultural costs, which is why the search for alternatives that reconcile the survival of artisanal fishing, with great roots in the coastal populations, with the necessary environmental sustainability.

### 3.3 General tourist profile of this tourism product

#### General description

The social data on angling in the UK and the USA uncovers some revealing insights. In the USA, **angling participation increases with income**, except for the very highest income bracket where it decreases only slightly. The **more educated are more likely to participate**, 92% of American anglers are white and 10% of blacks fish while 20% of all-American whites. The Environment Agency says that in the UK 'few women or people from black or minority ethnic groups take up the sport compared to the general population'. And Franklin (1999) remarks that in the UK, and Europe more generally, angling frequently express the social and spatial organisation of landscape and nature in terms of class, whereas in America they have their class components but are also deeply entwined within the American dream, expressing nation and nationhood. **Fishing is thus tied to a "countryside ideal"** (Bunce, 1994) that ascribes rural landscapes as being more natural and authentic than their urban cousins. **The angler, in order to be successful needs to know specifics about the fish pursued.** For example, the best places to catch them, the capacity to access those places, knowledge of habitat and relevant natural history, knowledge of and access to the technology to catch fish, the mores and values of the type of fishing engaged in, the codes and 'cultural capital' (Bourdieu, 1984) of the fishing fraternity that engages in the type of fishing pursued, membership rights to the fraternity, the financial capability, transportation and time. All of which must be learned, and to a large extent earned, through **studying the fishing literature**, fishing media (TV, Internet, video and DVD), practice and (often paid for) tuition from more experienced anglers. Tourism Marketing and Management research suggests that fishing tourists' lived experience is always built around the same core elements. The elements in the order of importance are the following: **emotional value, social value, and epistemic value.** This means that fishing tourists value such elements as nature, peace-and-silence (i.e. emotional value). Also, sharing the own fishing success, fishing know-how and growing the social esteem (i.e. social value) is important. As well as, new experiences and self-development (i.e. epistemic value).



**Interreg**  
**Italy - Croatia**  
**EXCOVER**  
European Regional Development Fund



### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

#### **Main markets of origin**

Although sports fishing is a popular leisure activity in most countries, the research on sports fishing in tourism and leisure fields is still maturing. With the increase in the traveling opportunities, fishing tourism has become an important cultural activity and an industry. Especially the **countries like USA, Canada, Cuba, Chili, France, Spain, UK, Slovenia, and Russia have organized many package tours and developed products for sport fishing** (Mordue, 2009, p. 529).

**Australia:** The International Visitors' Survey shows that 8.7% of international visitors to the AU indicated that fishing was one of the reasons they came. Of all holiday visitors to Australia, the **Asian markets show the highest level of interest in fishing**. However, of international holiday visitors to the AU, the UK, Germany and Other Europe account for 62% of those interested in fishing. China and other Asia (excluding Japan) account for another 21%.

**Canada:** The number of non-resident anglers (tourist anglers) in and to Canada had declined, particularly the anglers that are not from Canada. The number of non-resident anglers (tourist anglers) in and to Canada had declined, particularly the anglers that are not from Canada. In 2010, there was a total of 147,000 non-resident Canadian anglers in Canada and 406,000 non-resident foreign anglers, primarily from the U.S. Non-resident Canadian anglers had declined 2% from 2005 and the non-resident foreign anglers had declined by 35% (average of 9% per year), double the decline that occurred between 2000 and 2005;

**Usa:** There are 60 million anglers in the U.S. of which 46 million fish in any given year; one in four fish in saltwater. Angler numbers grew 11% between 2006 and 2011 with Great Lakes anglers growing by 17%; The average U.S. angler spent \$1,441 (US\$) annually on fishing.

#### **Tourism habits**

Sport fishing is not only constructed through its social history, but it is an embodied practice. It is about **travelling, joining clubs, socialising in these clubs, sensing the world within which angler and fish engage, rationalising priorities, wearing the right clothes, making or buying equipment and generally performing fishing in myriad socio-corporeal ways**.

Sport Fishing is predominantly **male** (estimated at approximately 90%), made up of groups (families or groups of mates); most often in the **35-60-year-old age group, with middle to high disposable income**. They are knowledgeable and determined, and are looking for an iconic fishing adventure, which could be a once in a lifetime holiday, or a regular pilgrimage.

Focus is on a fishing holiday, not a holiday with some fishing as part of a range of activities. They time their visit with the peak fishing season – usually March-June every year. **Trip research begins around 12 months prior to travel; booking happens around 6 months prior to travel**.

They are not generally interested in other activities but will engage in some aspects of nature and cultural tourism within the context of their fishing experience (e.g. learning about traditional owners on whose land they are fishing or enjoying wildlife during their fishing). They **consume various media including specialist fishing magazines, TV shows, and peer sourced information**, to learn about and book the BEST experience available. Social media popular platforms are Facebook and YouTube.

While fishing is a niche activity, fishing TV shows appeal to a mainstream audience.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### 3.4 International Market size of the present global demand for this tourism product and expected future trends

##### Present market size

There is no clear data about the number of sportive fishermen. Though, it is predicted that there are **225 million recreational fishermen or anglers** in the world. This number is almost twice as the number of commercial fishermen. Also, the annual expenditure for recreational fishing is approximately 190 billion \$ and the value of the equipment demanded is approximately \$15,66 billion (The World Bank, 2012, p. 38). According to European Anglers Alliance (2004) there are **25 million recreational fishermen in Europe**, and it was estimated that 25 billion Euro are expended on recreational fishing. Also, European Anglers Alliance (2015) stressed that recreational fishing is supporting approximately 437 thousand job fields.

##### Trends

Within the last 30 years, destinations as dispersed as the USA, Canada, Cuba, Chile, France, Spain, the British Isles, Slovenia, Russia and many more have developed fishing packages/products designed for the enthusiast able to afford the trip. Similarly, a new generation of tour operators has emerged in the West to offer a world of choice that was hardly imaginable a few decades. There is a great variety in the hobbies, interests and recreational activities that people want to take part in whilst on holiday. In fishing tourism this demand for diversity is not only **reflected in the demand for change in fishing localities but also in a demand for variety in fishing quality, variety in the size and number of fish and variety in desired species** (Chen et al. 2003). When anglers travel away from home to fish, they take with them their national recreational fishing traditions and this adds to the variety in fishing preferences. As providers of fishing experiences must answer to this variety in demand, international fishing tour

ism must take many forms. Fishing is enjoyed through the physical removal of oneself from the toils of city life for a direct exchange with the natural world – which is at the core of its simple appeal and rejection of the march of modernity, no matter how fleeting. There is an increasing demand for high-quality nature-based recreational activities in international travel markets. However, modern tourists demand quality and the future development of fishing products must focus on quality fishing, good fishing facilities, easy access to fishing localities through effective transportation as well as on quality booking systems, making it simple to plan and book fishing holidays.

**Canada:** The angling market is aging. Studies in both Canada and the U.S. support the notion of a declining market for fishing. As such, it is imperative that the industry put energy into reinventing itself and appealing to new and younger markets to maintain momentum into the future. Research summarized in the 2014 Northern Ontario Tourism Product Development Strategy showed that the demand for angling as a recreational and tourism activity is giving somewhat mixed messages.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### 3.5 Local size of the present local demand and expected future trends of this tourism product

##### Present market size

In the 80s, the international presence on this competition field reached 80,000 / 100,000 units, thanks to the many competitions organized especially by Fipsas and other fishing organizations. In that period, a Regional English fishing championship with over 1800 entries in a single day entered history, races that unfortunately no longer exist today for many reasons. The current competitive numbers on the Ostellato competition field reaches 10,000 units and it is clear that when it comes to agonists, the economic and social spin-off generated by midweek tests and travel companions or spectators has undoubtedly a significant impact if we consider that Ostellato is the fourth largest municipality in the province for tourist flows after Ferrara, Cento and Comacchio.

##### Trends

Changes to the way we plan vacations are inevitable after the COVID-19 pandemic. The travel bans and movement restrictions currently in place will leave a lasting effect on the travel industry and perhaps encourage a shift in the way travellers approach planning their trips. The focus on nature-based tourism and travelling at a slower pace was already gathering momentum in 2018 and 2019 thanks to environmental concerns and the need to experience the natural contests. If we look back to the events of early spring 2020 it's easy to understand why this movement will be a key focus for travellers booking holidays once the pandemic is over. **Getting back to nature has never seemed more attractive and now more than ever travellers will be looking for itineraries that avoid crowded places.** As a result of the pandemic, many more travellers will actively seek out less crowded trips, searching for privacy and a greater sense of calm and peacefulness. Off-the-beaten-track and natural destinations are sure to become even more in demand. It is also crucial that the industry and its managers include a constant evaluation of the resource situation and the sustainable management of fish stocks and their environments. There

#### 3.6 Most important criteria influencing the competitiveness in the global market for this tourism product

Fishing as tourism deploys the same type of networking capabilities. Tour operators will need knowledge of fishing and fishing lore in order to understand the market. There will need to be the capacity through guides, etc., to transfer that knowledge and its performative codes to and through an already knowing set of human actors – i.e. anglers. In material terms, transport, accommodation, fisheries, brochures and the Internet have to be enlisted and regulated to comply with a particular fishing network (e.g. fly, game, coarse or bass) so that they can be contained within a concomitant tourism network. Thus, after Appadurai (1986), fishing and fishing tourism promotes a flow of knowledge and action between producer and consumer that can be at once technical, social and aesthetic (Preston-Whyte, 2008) and dedifferentiated yet bounded.



### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

#### **3. Market analysis on tourism experiences / products: HIKING**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.

##### **Viae Misericordiae Hiking Trail**



#### **3.1 Main characteristics of the product**

Hiking is a tourist and leisure activity that involves following paths, which may or may not be signposted, on foot, for sporting and cultural purposes. They are preferably historical, paths, that run through natural/rural countryside.<sup>41</sup>

Hiking as a travel experience is not just about the journey from start to finish. It is not limited to a single point or space and instead takes place in motion across the territory. Therefore, the spatial and geographic dimension of the travel experience goes far beyond most other kinds of tourism in which the journey is a means to an end rather than an end. One of the objectives of hiking tourism is to bring tourists closer to nature and to enable them to find out more about the area through which they are walking by discovering diverse heritage and ethnographic features, situated on or near the paths or tracks.

In short, the aim is not just walking for the sake of walking but walking in order to satisfy a series of needs and urges of varying degrees of importance for different people, which evolve over time as a result of a wide range of social, economic, environmental and personal factors.

<sup>41</sup> María Belén Gómez-Martín, «Hiking Tourism in Spain: Origins, Issues and Transformations», *Sustainability* 11, n. 13 (gennaio 2019): 1, <https://doi.org/10.3390/su11133619>.



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It also promotes meaningful interactions with local people, nature and culture. Walking products can be developed anywhere that possesses a route with characteristics distinctive to the area, often intertwined with neighbouring territories – and with relatively low investment costs.<sup>42</sup>

**Hiking tourism promotes a slow consumption of territory** (an active form of slow tourism) through adapted routes, which are equipped in their immediate vicinity with heritage resources and specialized tourist services and facilities. However as various authors point out, the brief history of this form of tourism has shown that it is not enough to develop hiking holiday ideas based solely on the provision of high-quality facilities and services or involving the creation of routes through

attractive, picturesque landscapes, **it is also necessary to concentrate on the design and creation of memorable experiences within a dynamic setting.**

Walking trails passing through Ostellato and Alfonsine reflect the province's most distinguishing and memorable viewsapes, natural features, culture, and heritage and have themes consistent with the attributes of the province and the province's brand pillars of people, history, culture and natural environment. Hiking tourism holidays bring together all the basic elements required for people to enjoy a tourism experience (tourism resources, facilities and services), and they also contain the elements that enable them to be marketed and sold as a product (management, image and exchange value). After the burst of popularity of Camino de Santiago, exploded in recent years, with 277,913 certificates of completion handed out last year alone, many other walking trails are standing out all over the world, Italy included. They are **usually close to other attractions, offering complementary experiences and activities** like food, accommodations, and other visitor services and they are mainly linear walking trails offering several daily stages. The trail lengths range from about 30 to several hundred kilometres. Hiking and pleasure walking in and around communities are among the top outdoor experiences travellers participate in while vacationing and will be even more requested in the post-Covid era.

A walking route can be totally newly developed, but it is preferable to utilize existing paths, improve them and connect them into one route to maintain the environment and save investment. Following points need to be considered to develop a walking route:

1. **Attractiveness:** first and foremost, a route needs to be attractive. But it does not necessarily mean that there is something spectacular along the route. Most areas possess their own cultural and natural heritage, and some beautiful landscape in a preserved environment with good air quality. If these resources are well presented along the way, the route can be considered attractive. Asphalted roads should be minimized. At the same time, environmentally sensitive areas should be avoided so that walking tourism will not harm the environment;
2. **Safety:** a walking route needs to be safe in terms of minimum risk of walking accidents, traffic accidents and crimes. Potentially dangerous sections should be avoided;
3. **Level of difficulty:** the level of difficulty of a route needs to be considered based on the target segments in terms of appropriate physical setting, length, altitude and difference of elevation. It is preferable to maintain the same level of difficulty throughout the route;
4. **Access:** a route should be easily accessible from touristic centres (for tourists) and urban/ residential areas (for residents). It is preferable that public transport is provided since reduction of private car use is recommended for the sake of low carbon approach. If public transport is not available, tour operators, accommodation facilities or local tourism associations may need to consider providing access and parking facilities. The shape of the route (circular or linear) needs to be considered depending on the availability of transport access.

<sup>42</sup> World Tourism Organization (UNWTO), a c. di, *Walking Tourism – Promoting Regional Development* (World Tourism Organization (UNWTO), 2019), <https://doi.org/10.18111/9789284420346>.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### 3.2 Sub-products – describe the main aspects that differentiate the sub product from the main product

##### Spiritual Walking Trails - Via Romea Germanica and Viae Misericordiae

Countries across the globe are eyeing spiritual and religious tourism with intense interest. The United Nations World Tourism Organization held its first conference on “spiritual tourism for sustainable development” in 2013. It estimates that **330 million people visit religious sites each year, and spiritual tourists are among the ranks.**

The geo-psychological separation from the everyday that is embedded in spiritual travel practices, can be seen as a laboratory in which **individuals can examine, consider and practice spirituality in a way that is not always available in daily life.** This feature of the tourism experience is arguably the reason for the popularity of spiritual tourism experiences among novices to spirituality-driven endeavours, as well as to those who wish to develop and deepen their ongoing transcendent engagement through and during travel.<sup>43</sup>

**Via Romea Germanica** and **Viae Misericordiae** are linear bidirectional trails that retrace ancient journeys and are great European route of culture and religious significance which passes through several countries and touches on some of the major Italian cities which today still have an important role in history and help tourists discover how Europeans have lived since ancient times. Both trails pass through Alfonsine and very close to Ostellato and can enhance local natural and cultural heritage in order to improve the living environment and support cultural, social and economic development. They can also promote a form of cultural tourism that supports sustainable development.

<https://camminiemiliaromagna.it/it/>

##### Historical walking Trail – Trafila Garibaldina

*Trafila Garibaldina*, the linear bidirectional hiking trail that retraces the route taken by General Garibaldi in 1849 to escape from the Austrian army after the fall of the Roman Republic. The undisputed protagonists of this escape were the Comacchio Valleys and the territories surrounding Alfonsine, where Anita, Garibaldi’s pregnant spouse, died. **Today, a real cult on Garibaldi’s trail exists between Romagna and the Po Delta Park:** every city or village counts one Museum of the Risorgimento that praises the deeds and achievements of that period. From Cesenatico up to Comacchio, counting also Ravenna and Forlì, many cities hide places of great historical and patriotic importance.

##### Circular Walking Routes in Po Delta Park

There are several circular, radial, clover walking trails in Po Delta Park, that passes by Ostellato and Alfonsine, linked to thematic topics or just to enjoyment and discovery of natural environment. The Park offers a vast network of paths that allow to immerse in the history and nature of the Delta, in particular Comacchio Valleys.

<sup>43</sup> Joseph M. Cheer, Yaniv Belhassen, e Joanna Kujawa, «The Search for Spirituality in Tourism: Toward a Conceptual Framework for Spiritual Tourism», *Tourism Management Perspectives* 24 (1 ottobre 2017): 252–56, <https://doi.org/10.1016/j.tmp.2017.07.018>.



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### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

#### 3.3 General tourist profile of this tourism product

##### General description

The sociodemographic characteristics of hikers have been used to explain preferences in hiking and hiking tourism demand. The analysis of a sample of North Carolina hiking tourists indicated that middle-aged hikers and those with high education and income levels showed a preference for hiking. Similarly studied hikers visiting South Korean trails and indicated that middle-aged hikers (aged 40–60 years) were among the most experienced hikers. Nerg et al. studied hikers trekking in national parks and reported that seniors (aged 65–74 years) and people with low incomes showed high levels of preference for hiking. Additionally, male hikers demonstrated a preference for trails that require climbing skills and present a physical challenge, indicating a higher specialization level among men than women. Young people and those with children tended to be quite active.

These studies concur that hikers' sociodemographic profiles determine their preference for hiking and a desire to join hiking. It implies that sociodemographic characteristics can affect hiking tourism demand. However, limited efforts were made to empirically test the relationship between sociodemographic characteristics of hikers and hiking tourism demand. In addition, previous studies show that significance levels of these variables vary according to studies. Consequently, there is a need of examining the influence of various sociodemographic variables in estimating hiking tourism demand.<sup>44</sup>

##### Main markets of origin

In Europe, demand for adventure activities per capita is the largest in Austria, Czech Republic, Belgium, Iceland and Luxembourg; the latter two being very small markets. The number of people looking for adventure travel varies by European country. Because adventure travel has such a broad definition, there is no specific information available about it per EU country.<sup>45</sup>

##### **The United Kingdom – top market, especially on cultural adventure travel**

According to UNWTO, the United Kingdom offers the largest adventure tourism market in Europe, accounting for 19% of the world's adventure travel tourists. Among British tourists, 40% prefer active vacations. For British teenagers, this share is 45%, and for tourists in their twenties 54%. Preference for sport-related activities as the main reason to go on a holiday (3.2%), however, is below the European average of 4.4%.

##### **Germany is the second-largest adventure travel market in Europe**

Germany offers the second-largest adventure tourism market in Europe, accounting for 12% of the world's adventure travel tourists. Among German travellers, 5.5% prefer sport-related trips, which is above the European average of 4.4%. Out of all German tourists, 32% prefer an active vacation doing and seeing lots of things, compared to 57% who prefer to relax and take it easy. This means German travellers are less active

<sup>44</sup> Munhyang (Moon) Oh, Seongseop (Sam) Kim, e Youngjoon Choi, «Analyses of Determinants of Hiking Tourism Demands on the Jeju Olle Hiking Trail Using Zero-Truncated Negative Binomial Regression Analysis», *Tourism Economics* 26, n. 8 (1 dicembre 2020): 1327–43, <https://doi.org/10.1177/1354816619888337>.

<sup>45</sup> «The European market potential for adventure tourism | CBI - Centre for the Promotion of Imports from developing countries», consultato 2 gennaio 2021, <https://www.cbi.eu/market-information/tourism/adventure-tourism/adventure-tourism/market-potential>.





### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

than the British and the French and prefer pure leisure holidays. Among teenagers between 15 and 19 years, 47% prefer active vacations.

#### France

A 44% share of French tourists prefer active holidays. For French teenagers between 15 and 19, this is 50%, and for those in their twenties this is 52%. Only 2.5% of French tourists see sport activities as the main reason to go on holiday, which is below the European average of 4.4%. Almost 80% of the French tourists prepare their holidays online.

#### Austria has the second-highest percentage of personalised bookings in Europe

Austria has the highest preference for sport activities during their holidays in Europe: 8.9% of Austrian travellers see sports activities as the most important reason to go on holiday.

A significant 8.7% of the **Czech tourists** consider sport activities as the main reason to go on holiday and in Belgium, 7.6% of travellers see sport activities as the main reason to go on holiday, which means this can be an interesting market as well.

• **Spain:** more than 260.000 pilgrims a year (Camino de Santiago, Via de La Plata, Camino Ignaciano) • **France:** 50.000 pilgrims (departure from the Camino de Santiago, the Routes of Saint Michel, Chemin du Puy, Via Domizia and Via Tolosana) • **Italy:** 40,000, 240,000 overnight stays (300,000 including accompanying persons) (Via Francigena) <sup>46</sup>

#### Tourism habits

Travelers who participate in walking have different motivations and different levels of expertise. A destination needs to identify what type of walkers it wants to and can attract through developing walking tourism products. This segmentation can be drawn from profiles of current visitors or by defining new segments to the destination. Walking travelers can be loosely segmented as follows:

1. Serious/committed walkers: the main motivation of travel is walking. They want high quality products and try walking routes with relatively high level of difficulty. They may have already been to well-known walking tourism destinations and be looking for new ones. They may like to take a multi-day walking itinerary.
2. Casual walkers: walking is not necessarily a primary reason to travel, but one of the activities during the trip. When they travel for walking, it is likely to be 0.5–2 days and they are likely to prefer recreational easy/moderate walking or leisurely stroll. They do not usually consider themselves as walkers. For them, walking is a way of exploring and experiencing the destination with interaction with local people, culture and nature.
3. Walkers for health: the main purpose of walking is to maintain or improve physical and mental wellbeing rather than sightseeing. They want a walking course that matches their health conditions and that can be combined with other health-related activities. Having said that, walking with some attractive aspects are preferred.<sup>47</sup>

For some, hiking represents a pure sporting activity, while others favour it as a social event, an immersive natural experience or as an amalgamation of these aspects. European travellers tend to look for unique

<sup>46</sup> Joseph Ejarque, «Turismo dei cammini», consultato 3 gennaio 2021, <https://www.slideshare.net/SardiniaTourismC2A/turismo-dei-cammini>.

<sup>47</sup> World Tourism Organization (UNWTO), *Walking Tourism – Promoting Regional Development*, 17.





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had at least one kind of adventure experience, like staying in a cabin in nature, camping in the wilderness or travelling around the world, according to the same survey. Although above the European average of 53%, European millennials are less likely to experience new kinds of activities compared to American millennials (83%), Mexican millennials (81%) or Chinese millennials (77%).

**Together with generation Z tourists, born between 1995 and 2010, millennials are most active during their holidays, especially before having children.** Adults with younger children tend to enjoy less-active holidays, but their activity returns when the children grow older or move out. Generation Y and Z tourists without children are the most likely group to enjoy hard tourism activities.

#### Trends

According to ATTA, **customised travel itineraries is the main trend in adventure tourism worldwide in 2019.** Recent interviews with European travel experts confirmed that this was also the case for Europeans travelling to developing countries.

Hiking can be a low-risk activity for transmission of COVID-19 due to several factors. It usually takes place in well-ventilated areas, involves little to no gear, is typically done in small groups, is easy to practice while maintaining social distance, is not technical, and does not require close supervision. The resumption of travel will be slow **and European travellers are likely to travel to domestic and short haul destinations in the short term.** Options are wide and varied within Europe, but are likely to be to places that are remote, including mountainous destinations such as the Alps, so they can be sure they are able to socially distance, and to places where their governments allow them to travel to. **Building consumer confidence is key to rebuilding adventure tourism.**

WTTC's report notes that, "Traveller preferences and behaviours have shifted toward the familiar, predictable, and trusted. Domestic vacations, extensive planning, and **the outdoors will reign in the short-term, with tourism businesses and destinations already adapting.**"

This finding matches evidence from the Adventure Travel Trade Association (ATTA)'s U.S. Adventure Traveller Sentiment – June-July 2020 Report, released in late July 2020. As of June/July 2020, 63% of U.S. adventure travellers were planning on traveling domestically on their next planned trip. The same travellers are seeking safe and relaxing destinations with nature, outdoor, and adventure activities. In fact, this survey found that 72% of adventure travellers are planning on doing nature and outdoor activities on their next trip, specifically hiking/trekking/walking, cycling (road/paved surface), and camping.

The WTTC report found that "COVID-19 is proving to be an unexpected catalyst in the Travel & Tourism sector's quest for innovation and the integration of new technologies. Amid stay-at-home orders, digital adoption and consumption are on the rise, with consumers now expecting contactless technologies, among others, as a basic prerequisite for a safe and seamless travel experience."<sup>50</sup>

<sup>50</sup> «The Future of Adventure Travel in the Wake of COVID-19», *AdventureTravelNews* (blog), consultato 3 gennaio 2021, <https://www.adventuretravelnews.com/the-future-of-adventure-travel-in-the-wake-of-covid-19>.



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#### 3.5 Local size of the present local demand and expected future trends of this tourism product

##### Present market size

**Hiking tourism products are still at an embryonic stage in Po Delta Park.** Although the area is crossed by Via Romea Germanica and Vieae Misericordia, a check on the sites of local tour operators did not show any programming for the routes.

The routes are promoted on Emilia Romagna hiking trails official website <https://camminiemiliaromagna.it/it>, which is only partly translated in English and other languages. The website gives a brief description of the different routes that crosses Emilia Romagna and, with reference to Via Romea Germanica and Vieae Misericordia, there is a link to the hiking trails official websites and to the tour operators that should support the planning of the trip.

##### Trends

**After Covid 19 the best trend will be getting outside in safety.** Tourists all over the world have shown an increased interest in hiking, bicycling and other outdoor getaways. Everybody will want to breathe fresh air and get some exercise after a locked down winter, which means that there are thousands of potential tourists to be intercepted by Po Delta Park, both on a local and nonlocal level.

When choosing the holiday destination, low tourist density and sanitary conditions are the main attributes a destination needs to have. In avoiding overcrowded places, tourists show preferences for destinations with outdoor activities and contact with the nature, away from big cities. Price seems not to be the main criterion affecting the selection of destination place.<sup>51</sup>

Many destinations as Natural Parks and Natural Reserves and **destination management** organisations and **policy makers are already responding to the changing consumer preferences and therefore developing opportunities for more diversified and sustainable forms of outdoor tourism.** To be competitive in this new coming scenario and **use hiking trails as a new opportunity to attract visitors**, though diversifying a territory highly dependent on tourism, Ostellato and Alfonsine, in collaboration with Po Delta Park governance and nearby locations, have to invest on **safety and healthy environments policies, communication, development of new skills** and, last but not least, on **connecting and aligning actors, places and networks at different governance levels from regional to local, as well as connecting different 'communities of actors.** This crisis shows the relevance of citizens' collaboration and participation on new options and solutions for the tourism. The use of social platforms that involve citizens to reinforce inclusiveness and develop a localised touristic offer, combining local strengths and needs with social innovation and technology, could be an opportunity.<sup>52</sup>

#### 3.6 Most important criteria influencing the competitiveness in the global market for this tourism product

The **Via Romea Germanica** that crosses Comacchio Valleys that passes very close to Alfonsine, retraces the journey undertaken by Friar Albert of Stade in 1236 to Rome and meticulously written up in his travel diary.

<sup>51</sup> European Commission. Joint Research Centre., *Behavioural Changes in Tourism in Times of Covid-19: Employment Scenarios and Policy Options*. (LU: Publications Office, 2020), 23, <https://data.europa.eu/doi/10.2760/00411>.

<sup>52</sup> European Commission. Joint Research Centre., 32.



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It was one of the “Peregrinationes Maiores” (most important places of pilgrimage) for the pilgrims of the period and one of the routes preferred by kings, Saxon emperors and Swabian sovereigns to maintain their contact with the city of the popes. Today this ancient route of about 1022 km is a great European route of culture and religious significance which passes through several countries and touches on some of the major Italian cities which today still have an important role in history.

On the route from Argenta to Alfonsine pilgrims can visit **Madonna del Bosco Sanctuary**, which rises in an area formerly covered by a dense bush, where, according to tradition, frequent miracles were repeated. The first miracle occurred in 1714, after the deposition of an ex-voto image. The sanctuary preserves a ceramic image of the Virgin dating back to the 1500’s. The first Sanctuary was erected next to a tree, where the first miracle happened in 1714. It was rebuilt in 1928 and destroyed during WWII and there the actual Sanctuary dates to 1952. Nearby it is also possible to visit **Palazzo Tamba or Villa Sant’ Anna**, a large 19th century manor house, now abandoned.

The route passes by the **beautiful lagoon of Comacchio Valleys** and intersects the hiking trail Trafila Garibaldina, that retraces the escape of Giuseppe Garibaldi from the Austrian army back in 1859.

**Viae Misericordiae**, a total of 245 Km, 225 Km in Emilia-Romagna, is a route promoted by the Diocese of Faenza for the Extraordinary Jubilee of Mercy as an opportunity to discover a land of hard workers and, most of all, ancient faith. From the Pomposa Abbey (Adriatic coast) to the Hermitage of Gamogna (Apennines of Tuscany-Romagna), this loop route passes through the art cities of Comacchio, Faenza and Bagnacavallo and travels across lands rich in faith, culture, art, natural and fluvial parks, as well as a welcoming community and food and wine specialties. The route runs through the centre of Alfonsine, where it’s worth a visit to the **Battle of the Senio River Museum**.

### 3.7 Most representative international best practices (max 3)

#### Kyushu Olle (Japan)

**Kyushu Olle (Japan)**<sup>53</sup> – creating a new tourism attraction as a region. Kyushu is one of the four main islands of Japan located in the southwest of the country, close to the Republic of Korea. It takes around 2 hours from Tokyo and 1.5 hour from Seoul respectively by air. Kyushu consists of seven prefectures, but in order to promote the island, the Kyushu Tourism Promotion Organization (KTPO) was established in 2005, of which all the prefectures, municipalities and private companies are the members. To increase international visitors to Kyushu, the KTPO promotes the nature, history, culture, *onsen* hot springs, food and hospitality of the island. When the KTPO considered how to further increase Korean visitors, it chose the theme of Olle that had been already very popular in the Republic of Korea and started to promote hiking as Kyushu Olle. It matched Kyushu’s natural beauty and coincided with the market change from group travel to individual travel, from sightseeing to activities to experience local culture and nature. In order to develop and promote Kyushu Olle effectively, the KTPO signed a cooperation agreement with the Jeju Olle Foundation in August 2011.

The KTPO, in cooperation with the Jeju Olle Foundation, approves Kyushu Olle routes based on guidelines such as:

- Consisting mainly of unpaved, narrow natural paths;
- Safe and walkable for all including minors, seniors and women; and
- Having characteristic landscape and historic stories along the route.

<sup>53</sup> World Tourism Organization (UNWTO), *Walking Tourism – Promoting Regional Development*, 37.



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Routes are developed in consideration of local environment and culture and by making the most of the original natural environment. Signage is set up carefully in order not to spoil the landscape. The more the concept of Kyushu Olle is understood, **the more locals become interested in protecting local nature and historic culture. By receiving understanding and cooperation by residents, management costs are minimized, which also leads to sustainability.**

#### Georgia Hiking Trails (Georgia)

##### Georgia Hiking Trails (Georgia) – creating a national network of hiking routes.<sup>54</sup>

Georgia's natural environment is one of the most special in the world. Its landscape diversity is exceptional. In a mere 67,000 km<sup>2</sup> you can find 5,000-m peaks, glaciers, alpine meadows, sub-tropical coastline, high desert, semi-desert, fertile alluvial valleys, wetlands and large swathes of virgin forest.

Nature and adventure are regarded "as one of the three segments with the greatest growth in potential, based upon the country's world-class product offering, the travel motivations of current visitors, and the growth and importance of the market globally" in the Georgia National Tourism

Strategy 2025 established in May 2015. The strategy also identifies development needs in this sector: the management of circuits and itineraries including trail maintenance and marking and interpretive services. It emphasizes the importance of national trail certification criteria and mapping system. Following the national tourism strategy, the Georgian National Tourism Administration (GNTA) launched a five-year project (2015–2019) that aims to create a network of inter-regional (connecting regions of the country) hiking trails throughout the country by connecting existing trails and newly identified ones. Target markets are central and eastern European countries and Israel as well as domestic Georgians. In 2015, the GNTA spent USD 600,000 to renovate about 20 trails and seven were finished in 2016 and rest are to be completed by 2019. By developing these hiking trails, GNTA also aims at providing local communities with opportunities of economic benefits through various tourist services such as renting houses, selling local products and handicrafts, and so on.

#### Sierra Greenway (Spain)

##### Sierra Greenway (Spain) – walking tourism with accessibility<sup>55</sup>

The Sierra Greenway runs in the provinces of Cadiz and Seville at the foot of the southernmost mountains of the Iberian Peninsula. The area boasts natural landscape such as River Guadalete and the natural reserve of Peñón de Zaframagón, where there is one of the largest colonies of griffon vulture in Europe. It also has a lot of cultural heritages like historic railway facilities, churches, castles and archaeological sites in different towns. The Sierra Greenway project was drafted in 1994 as one of the Spanish Greenways. In 2000,

the Foundation of Sierra's Greenway was established to conserve, maintain and manage the Sierra Greenway. It is constituted by the provincial councils of Cadiz and Seville and six town councils.<sup>115</sup> The annual budget of the Foundation is approximately EUR 400,000 with the support of the partners including local and provincial governments. **The Sierra Greenway was chosen as one of the two pilot fields for the "Accessible Tourism on European Greenways: Greenways for All" project in 2013.** The aim was to develop and promote accessible

<sup>54</sup> World Tourism Organization (UNWTO), 28.

<sup>55</sup> World Tourism Organization (UNWTO), 50.



### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

tourism products linked to greenways. The project was coordinated by the Spanish Railways Foundation (FFE) in partnership with the European Greenways Association (EGWA), Plataforma Representativa Estatal de Personas con Discapacidad Física (PREDIF) (National Platform for Physically Disabled People), the Foundation of the Sierra's Greenways, Comunidade Intermunicipal da Região Dão Lafões (consortium of municipalities in Portugal) and four small enterprises specialized in accessible and experiential tourism. The 18-month-long project was 75% co-funded by the European Union and the total budget was EUR 166,000.



### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

#### **3. Market analysis on tourism experiences / products: BIRDWATCHING**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.



#### **3.1. Main characteristics of the product**

Birdwatching tourism or avitourism refers to travel with the main purpose of viewing birds in their natural habitat. This type of tourism takes place mainly in natural environments, with the specific purpose of viewing and experiencing the natural features of birdlife. Deciding factors when choosing a birdwatching destination are the availability and variety of birdlife, as well as the presence of specific bird groups or endemic species.

Annual migratory patterns also play an important role in choosing a destination. Some destinations are seasonal, only of interest during bird migration or breeding periods. Other destinations with diverse habitats (such as South Africa) allow for varied birdwatching opportunities through the year.

Safety is another important requirement for birdwatching. As birdwatchers often spend a lot of time alone or in small groups in isolated areas, they need those areas to be safe. This situation generally makes protected areas more attractive than unprotected ones. They are more easily accessible and considered safer. In addition, protected areas are usually home to a higher diversity and number of birds.





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A good guide is key to the quality of a birdwatching trip. Guides need to have excellent local knowledge. Birdwatchers often use local bird experts, who know the potential location and physical attributes of particular species. This situation increases their chances of seeing less common and local species.

### 3.2. Sub-products – describe the main aspects that differentiate the sub product from the main product

#### **Birdwatching for Beginners**

Birdwatchers have varying levels of knowledge, skill, interest, and satisfaction due to different degrees of involvement, or specialization, in bird watching. Research found that the intermediate and expert birders are like each other and are different from the beginners. The beginners can be considered a distinct group, from the more experienced groups, usually in their first year of bird watching, stay the least number of nights in the local area, have the lowest expenditures, participate more in activities outside the birdwatching area, use more sources of information, and participate more in non-birding activities during their trip to the birdwatching area. The research found that beginner groups require programmes aimed at an introduction to the park, the regional area, birding, and a wide range of activities and sites.

(Fonte: Birdwatchers' specialisation characteristics and national park tourism planning)

#### **Events and Festivals for Birdwatchers**

A great way to enjoy bird watching is by going to festivals—organized to get tourists to great birding spots at a great time of year, and a great way to meet people. Experts and locals help you see more birds, and you'll meet other visitors who share your hobby. **Birdwatching festivals offer additional venues for viewing, discussing, and learning about birds and** usually feature guided birdwatching tours, displays of products and information, and social gatherings at which participants may meet and discuss their experiences. The number of festivals featuring birds has grown exponentially. In 2004, there were over 200 festivals in the US and Canada. Internationally, the World Migratory Bird Day is now celebrated in some 70 countries and includes festivals, education programs, presentations, film screenings and bird watching trips, all run by hundreds of volunteers and organizations.

#### **Market Analysis of Bird-Based Tourism:**

### 3.3. General tourist profile of this tourism product

#### **General description**

Studies of birdwatchers (Scott and Thigpen, 2003) have shown that **birdwatchers tend to be well-educated, knowledgeable people of medium to high income.** A love of nature is the main reason that several respondents began birdwatching. Most participants were introduced to birdwatching by a relative, friend, or mentor. Other were introduced during their youth and encouraged in the pursuit by the gift of a guidebook. One of the most important reasons for the growth in numbers of bird watchers has been the impressive growth in wildlife photography.

Birdwatchers, especially the most dedicated, **travel great distances to watch birds** in various locations that often exhibit high species diversity and endemism (Connell, 2009). **The travel costs associated with birdwatching place avitourists amongst the wealthiest nature-based tourists in the market place** (Cordell &



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Herbert, 2002; Hvenegaard, Butler, & Krystofiak, 1989; Kerlinger, 1993; Sekercioglu, 2003). Birdwatchers can be men and women of all ages, but they are **often between 40 and 70 years old**. In a US research: People in the 55- to 64-year-old age group were most likely to participate at 48 percent<sup>135</sup> (20.1 million). People in the 18- to 24-year-old age group were the least likely to participate, with 16 percent<sup>136</sup> (4.4 million). The disparity in participation rates between people 16 to 34 years old (20 percent) and those 35 years and older (37 percent) is striking.

They are usually well educated, relatively affluent and interested in other wildlife as well. Birders often travel solo, without partners, just to focus on their hobby.

Tourists can participate in different levels of birdwatching activities depending on their travel motivations and skills. There are **three main segments of birdwatching tourists**:

**Twitchers:** This segment is a small group of birdwatching tourists, usually male. Twitchers are dedicated birdwatchers that want to see as many birds as possible. For this purpose, they bring their own equipment such as telescopes and binoculars. Twitchers travel great distances to see new or rare birds which to add to their list. Once they have seen one, they move on. Some even engage in competitions to accumulate the longest species list. They are not really interested in other activities.

**Casual birders:** This segment represents around a third of birdwatching tourists. For casual birders, birdwatching is not the main purpose of their trip. Casual birders include travellers interested in other outdoor and nature-based activities, such as hiking or wildlife watching. They could be persuaded to include birding as an additional activity.

**Birdwatching enthusiasts:** This segment represents around half of birdwatching tourists. They are birdlife and nature lovers who generally have a profound knowledge of the fauna of a destination. Weather and other circumstances are not that important to them. Birding enthusiasts are slower travellers than twitchers, as they also like to relax. They are interested in other activities as well, especially cultural. This group generally spends more on birding tours and equipment than the other segments.

#### Main markets of origin

Although there are no exact statistics, **the United Kingdom** and the **Netherlands** are widely recognised as important source markets for birdwatching tourism. Other interesting markets are **mainly northern and western European areas such as Germany and Scandinavia**. The United Kingdom is by far the main source market for birdwatching tourism. It is home to the largest bird organisation in Europe, the Royal Society for the Protection of Birds (RSPB). The RSPB has more than 1 million members, mainly representing twitchers and enthusiasts. Although the Netherlands is much smaller than the United Kingdom, it is a promising source market for birdwatching tourism. The Netherlands Society for the Protection of Birds (Vogelbescherming) has 141,000 members. This proportion is considerably higher than in most other European countries. In 2017, more than 61,000 people participated in the national backyard bird count, which is an increase of 15% since 2016.

#### Tourism habits

European birders increasingly book directly with local tour operators, especially twitchers. It is estimated that between one and two thirds of international birdwatching travellers organise their own trips. Birders often choose a destination based on its birdwatching reputation. Experiences from other birders play a



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large role. Costa Rica, for example, is an increasingly popular birdwatching destination mainly due to good word-of-mouth marketing. The birdwatching community is relatively small. Birders often run into each other when birdwatching at home, at an event or on holiday. This situation allows them to have a considerable influence on each other's destination choices. Birding clubs and organisations, social media and online communities such as BirdForum also appear to play an important role.

Most birdwatchers are members of local bird or nature organisations. They use input from these organisations to choose their destination. They also get their inspiration from bird/nature books or magazines and recommendations from other birdwatchers.

Twitchers should not be your focus segment, as their decision-making behaviour is difficult to influence. As birding is growing in popularity, casual birders are a strong potential growth category. Birdwatcher enthusiasts generally spends more on birding tours and equipment than the other segments. Identifying distinct characteristics among birdwatching tourists and satisfying different needs of the target market segments would be highly beneficial for the planning, management, and marketing of tourism products and services targeted at birdwatchers (Hvenegaard 2002). Such findings are important because they can help destination marketers to adjust their efforts on enhancing tourists' travel experiences or shaping the quality of existing or new products and services (Meng, Tapanon, and Uysal 2008).

### 3.4 International Market size of the present global demand for this tourism product and expected future trends

#### Present market size

##### Usa:

A third of the U.S. population 16 years and older enjoyed wildlife watching in 2016. Wildlife watching is defined here as closely observing, feeding, and photographing wildlife, visiting parks and natural areas around the home because of wildlife, and maintaining plantings and natural areas around the home for the benefit of wildlife. Of all the wildlife in the United States, birds attracted the biggest following. **Approximately 45.1 million people observed birds around the home and on trips in 2016.** A large majority, 86 percent (38.7 million), observed wild birds around the home, while 36 percent (16.3 million) took trips away from home to observe wild birds.

The travel costs associated with birdwatching place avitourists amongst the wealthiest nature-based tourists in the market place.

In some European countries (the United Kingdom, Germany, Holland), this recreational activity has a large number of followers, making it a new segment of tourist demand with great possibilities for growth. According to the latest statistics, and despite the difficulties in precisely defining the sector, it represents an activity that results in some 78 million trips, for a total expense of 60,000 million euros in the visited countries [21]. Considering its origin, it is not unusual that its main source markets on a global level are the United Kingdom, the United States, and Canada. So, there is a potential tourist market of approximately 10 million British [27] and 47 million American birdwatchers in 2011

#### Trends

Tourism linked to bird watching is a rapidly growing activity worldwide, mainly in developing countries. The growing number of birdwatchers and birding trips is due to factors that include declining prices for birding equipment, an increased number of bird documentaries on television, innovation and



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technological sophistication in photo and video cameras, an increase in specialized guides, the variety of books about the subject, and a growing number of bird watching festivals. Millennials are discovering birdwatching. Where birdwatching is traditionally associated with a relatively older public, it is now becoming popular among millennials and an increasing number of celebrity birders may also influence millennials' opinion of birdwatching. This trend is expected to pick up in the coming years. Birding is also a form of wellness. European travellers are increasingly interested in wellness, including mental wellness, as they look for an escape from their busy daily routines. This trend provides opportunities for birdwatching tourism, as birding can be a peaceful and relaxing activity. Both the relaxing effect of birdsong and the quiet focus of birdwatching lead many to consider it a form of meditation. In 2017, scientific research confirmed that birdwatching is good for mental health.

### 3.5 Local size of the present local demand and expected future trends of this tourism product

#### Present market size

Birdwatchers traveling in the Po Delta Park with the aim to enjoy experiences related to Birdwatching are **predominantly middle-aged and elderly** and this trend is probably due to a constant aging of the population. The number of young visitors is very low, nevertheless it is not uncommon to register the presence of families with children under the age of 18. The distribution by gender is almost equal among the ornithological tourists who visit the Park, with **a slight prevalence of women**. The tourist distribution by areas of provenance sees a strong concentration of subjects coming from the **Northern Italy (65%)**, followed by tourists originating from Central Italy (19%) and Southern Italy (8%); as far as **foreign visitors**, they mainly come from **Germany, France and Switzerland (8%)**.

National visitors mainly come from Emilia Romagna and from nearby provinces of **Bologna and Ferrara**. **The foreign component reveals a very lower presence of international tourists, if compared to the domestic ones.**

The ornithological tourist visits Po Delta Park mainly in couple (47%) or with the family (39%), and rarely with a group of friends (10%) or alone (4%).

Most of the tourists in Po Delta Park classify **Birdwatching as one of the many activities to practice while staying in the destination (91.39%)**, while those who travel with the sole purpose of dedicating themselves to Birdwatching represent the net minority (8.61%), which reflects that **the interest of a birdwatching niche segment is still relatively narrow.**

**33% of Birdwatchers visiting Ostellato and Po Delta Park have visited other national and international Birdwatching destinations** as Po Delta Park – Veneto Region, Camargue, Ebro Delta, Danube Delta, Everglades, South America.

#### Trends

It is argued that birders are **more likely to be interested in conservation for bird species** and participate in a smaller tour group while making **efforts to reduce their environment impacts** and appreciating the nature, than other ecotourists. Many birdwatchers are very conscientious on the negative effects of the practice that may include bothering the birds and damaging their natural habitat or the indirect impact of the birdwatching activity on the life cycle of the birds. Birdwatching has also to be a vehicle for community-based conservation conducted with an emphasis on the well-being of local ecosystems and human communities.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

Birding destinations that incorporate protection of both resident and migratory birds can differentiate themselves from their competitors, becoming more attractive to regional and international tourists sensitive to environmental and ecological issues. It is now evident that some activities (e.g. disturbing birds at specific breeding and roosting sites, overuse of taped vocalisations) can have serious negative environmental effects. **Protecting the birding habits and surrounding environment will be necessary in the future** for achieving the sustainable goals of birdwatching tourism:

- targeting higher value overnight tourists rather than day or stopover tourists who put little into the local economy and may have little or no environmental understanding or conscience about their impact on a country's natural resources;
- **increasing environmental awareness through education** of school children and the public to build a local constituency to support parks and protected areas as well as bird watching and other types of wildlife tourism.

### 3.6 Most important criteria influencing the competitiveness in the global market for this tourism product

#### Birdwatching

From the naturalistic point of view the territory of Po Delta, where Ostellato and Alfonsine are located, **represents one of the largest and most important complex of wetlands of Italy and it hosts an extraordinary biodiversity**. Also, from the geological point of view, the area is very interesting: it is a mixture of natural events and human intervention. The **Vallette di Ostellato** are halfway between Ferrara and the Adriatic Sea. They extend for about 280 hectares and represent the remains of the ancient wetlands of the old Valli del Mezzano before the last reclamation intervention. The oasis is a wetland of great natural value and in 1975 became an area of protection of wildlife. There are about 10 km of trails along which there are **birdwatching huts, towers and shielding, suitable for birdwatching and nature photography**. The several species of birds that can be observed at the Vallette di Ostellato make the oasis very remarkable. **Throughout the year it is possible to spot many different species typical of the Po Delta (mostly water birds)**. The most frequent species of the oasis are: Grey Heron, Squacco Heron, Little Egret and Night Heron that live in a large heronry. It is also possible to see the Great Crested Grebe, Little Grebe, Little Bittern and many Passeriformes who find shelter in the dense reeds. Finally, the Anatidae, especially Mallard, Pochard and Greylag Goose nest on islets among the reeds. Several species of birds of prey, like the Kestrel, the Marsh Harrier, the Long-eared Owl and the Little Owl also find refuge in this area. Features • **Chance to see over 40 species** • Birdwatching huts, towers and shielding.

### 3.7 Most representative international best practices (max 3)

#### EXTREMADURA - SPAIN

Extremadura, as revealed in the 2004 Nature Tourism Impulse Plan in Spain, has potential to become a top reference destination as it hosts some of the richest ornithological environments of all of Europe, given the huge quantity of emblematic species that live there as well as the ease of their observation. The maintenance of agrarian forms of traditional production of the typical landscape of this Spanish region, which together with a low population density, have made Extremadura a high-quality ecosystem for bird colonies. the Government of Extremadura has designated 69 Areas of Special Protection for Birds (ZEPA). This network is one of the most extensive of the Iberian Peninsula, representing 26.1% of the territory of the region and having a total extension of 1,089,936 hectares. In addition, 74.1% of the Extremadura territory has been included within the inventory of Important Bird Areas (IBA), being the most extensive



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

area in Europe. The resources existing in the region have been accompanied by the efforts made to offer the necessary infrastructures for the practicing of this activity, such as the construction of fixed observatories and the facilitation of areas for this purpose [https://redex.org/ficheros/archivos/2017\\_08/165-mapa-puntos-de-observacion.pdf](https://redex.org/ficheros/archivos/2017_08/165-mapa-puntos-de-observacion.pdf)

In addition to providing this area with the necessary infrastructures, communication actions are also being carried out to promote, on a national and international level, the richness of the existing resources in the region. In Extremadura, a series of events is currently being held, including the following: The Bird Festival in Cáceres, the Crane Festival in the Periurban Park of Dehesa Moheda Alta (Navalvillar de Pela), the Week of the Stork in Malpartida de Cáceres, and especially relevant, and **the International Fair of Ornithological Tourism (FIO) in the Monfragüe National Park**. The combination of all these factors has turned this region into one of the main birdwatching destinations of Spain

#### Camargue

The Camargue is the extensive delta of the Rhone river where it meets the Mediterranean. Internationally renowned for the birds that occur, and rightly so! It is probably best known for its **Flamingo colony, the only regular nesting site in Western Europe** and a species you are bound to see. Many, many other bird species breed here: **Glossy Ibis, Kentish Plover, Collared pratincole, Bee-eater, Short-toed eagle, Slender-billed gull, Spectacled warbler...** the list is enormous with interesting species in every habitat: lagoons, rice-paddies, salt pans, riverside woodland... And the rest of the year can also well be worth a visit. Many migrants occur with rarities to be found – for example, **Broad-billed sandpiper** is seen annually in the salt pans, **White-winged tern** over the marshes. Winter sees the arrival of many waterfowl, including **thousands of Red-crested Pochard**, with accompanying predators – **Spotted Eagle occurs annually**. And many species, from the **Flamingo to Sardinian warbler are resident**, and can be seen throughout the year.

When visiting the Camargue it is well worth combining a trip with the nearby Alpilles regional park to the north and with the dry, stone plain of the Crau, to the east, both within easy reach and with complementary sets of bird species.

<https://www.birdingfrance.info/birding-pnr-camargue/>

USEFUL TIPS from the Website

- [Trip report from 2019](#). Onnivers is a user-generated-content website where Users can write detailed descriptions of their favourite birding sites, including info on timing and strategy, how to get there, top species, facilities, and much more. Everybody can contribute information and changes are tracked. **On Onnivers there are useful trip information provided by birdwatchers to Camargue and no generated content for Po Delta Park**
- [Birding Camargue-Provence \(English speaking guides\)](#). Group guided tours and private guided tours in English with certified guides.
- [Ligue pour la Protection des Oiseaux PACA \(French birding organisation\)](#)
- [Pont de Gau birding reserve](#) The ornithological park is an ideal site to observe birds, which include hundreds of **Fenicottero** in their natural habitat. Permanent residents of the Parc Ornithologique de Pont de Gau include a number of species of heron, passerines and birds of prey. Large colonies of herons and egrets nest in the trees, whereas terns, gulls and **Avocetta** take up residence on the lake islands.



### D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000

#### Costa Rica

Discover The Birdwatching Republic - Pure Birding Adventures <https://www.birdwatchingincostarica.com/>

Over the past two decades, ecotourism in Costa Rica has played a meaningful role in the country's economy, mainly in low-income, rural communities. Costa Rica, with a surface of 51,100 km<sup>2</sup>, encompasses 5% of the world's biodiversity in just 0.03% of the world's land surface. The country also hosts more bird species (850) than the United States and Canada combined, and 6,000 species of butterflies, which is more varieties than in all of Africa. More than one-quarter of Costa Rica is considered to fall under some form of protected status, and Costa Rica has become a world-renowned ecotourism destination because of its extensive protected areas. With the development of the protected areas system, Costa Rica has been promoted as an ecotourism leading destination with the subsequent importance of ecotourism in the country's rural economy. We preserve more than 119 000 acres of bird ecosystems in our own network of bird reserves in the Costa Rica's Important Bird Areas (IBAs BirdLife), Biological Corridors, National Parks and other public & private conservation initiatives including the development of new hotspots and add value experiences for the birders. Though relatively small in size, Costa Rica is home to one of the highest levels of biodiversity in the world. Encompassing six birding ecozones and numerous micro ecosystems, Costa Rica's birds and wildlife are virtually on display in their natural habitat. More than 900 bird species are found in the country, so whether in cloud forest, humid lowlands, and mountain peaks, dry forest, mangroves or the shore, birds are highly accessible to visitors. **Today 27% of Costa Rica has been officially designed as protected land. It is possible to have wonderful birding the whole year round.** However, the Fall (August-Nov) when +200 bird species of North America travel to Central and South America to spend the Winter, and Feb to May (Spring) when they return to their breeding grounds are top months. May and June are wonderful months for photography too.



### **D.4.3.1 Tourism Products Portfolio: PP8 DELTA 2000**

#### **4. Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. Sport Fishing
- B. Cultural School trips





### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

#### PP9 CAMPOBASSO

Partner (name and number)	Municipality of Campobasso – N9
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#### 1. Main elements collected during WP3 and WP4.1 outlining the potential for tourism experiences in the target area(s)

##### Intangible assets

- Local traditions: The Mysteries of Campobasso on the feast of Corpus Domini, a parade of 13 floats (called Ingenuities) depicting the mysteries of faith linked to the life of Jesus, Mary and Saints; Good Friday with the procession of the Dead Christ and the Madonna Addolorata accompanied by the choir made up of about seven hundred people who intone the “Teco I would like”, a composition from the early twentieth century.
- Seasonal events: outdoor festivals that are held mainly during the Christmas period and in Summer, with Cinema (Noir, Spanish, for families, etc.), theater and concerts, the craft beer festival, Christmas markets, historical re-enactments etc.
- Musical heritage of Campobasso by the author: Fred Bongusto. In recent years, his artistic production has been celebrated through an important music festival; moreover, an artistic tribute to Bongusto was recently made through the installation of a bronze statue, made by the Pontifical Marinelli Foundry, located in the historic center, where a path of illuminations with the verses of his songs is also set up.
- Historical re-enactment of the Trinitarian Crusaders: from the sixteenth-century history of the religious congregations of the Crusaders and Trinitarians to the legend of Delicata Civerra and Fonzo Mastrangelo. In particular, through the Interreg Recolor project, the administration is devising an enhancement path to discover the history of the sixteenth century in Campobasso.
- Transhumance: rediscovery of the ancient itineraries, that is the tratturi, close to the city and to the market and trading places present in Campobasso.
- Gastronomy: possibility to experience the typical local and Molise cuisine, in the trattorias and restaurants of the historic center.



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **Tangible assets**

- Historic center and Murattian city: discovery of local history and culture through the places of interest city walls and defensive system (Palazzo San Giorgio, Palazzo Magno, Teatro Savoia, etc.); monuments (Monument to Gabriele Pepe, San Giorgio, Tree of life, etc.); Churches (Ss. Maria Maggiore, San Bartolomeo, San Giorgio, San Leonardo, Santa Maria della Croce etc.)
- Museum heritage: Museum of Mysteries, Samnite Museum, Pistilli Museum, Monforte Castle, Civic Gallery of Modern and Contemporary Art, Ex GIL Exhibition Space;
- Natural heritage: urban spaces with gardens and city villas (Villa Musenga, Villetta Flora, Villa de Capua, etc.) and the SIC Area of the Monforte Hill with Via Matris.

#### **Key attractions**

- Historical and cultural heritage
- Museums
- City gardens and villas
- Intangible heritage
- SIC area
- Handicraft
- Traditions and intangible heritage
- Contemporary history, II WW
- Artistic heritage
- Campobassan artists
- Liberty style
- Curiosity

## **2. Summary description and main characteristics of the tourism experiences that you envisage in the involved territory.**

### **2.1 Tourism experience 1 –Map with the community of Campobasso**

Creation and realization of a community map of the city of Campobasso, in paper format and linked to the digital map of the project, in which to insert the significant elements of the city (monuments, museums, places of culture, points of interest, etc.), the works of art present and created by Campobassan artists (Trivisonno, Di Zinno, Marotta, Fred Bongusto), the indication of representative points of the city traditions, of the naturalistic elements integrated with the information and experiences that the citizens themselves will provide through videos or real interactions.



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

In the path, knowledge amplifiers will be inserted, such as QR CODE, through which each user will be able to access further cultural contents (such as photos, videos, texts) or audio and video thematic insights with the citizens of Campobasso as protagonists.

Furthermore, the involvement of commercial activities in the historic center, such as newsstands, artisan shops, bars and restaurants will allow the activation of an informal, widespread, always open and accessible info point. The creation of an identifying sign (the magnifying glass, symbol of Excover), also present in the paper supports, will make urban information points easily recognizable.

It is planned to activate a small training of citizens who want to be part of the participation process of the non-formal info point (knowledge meetings, guided tours, technical info on the openings of places of culture, use of Excover products, etc.), in this so the participants will be able to support travelers by providing useful information and solving any needs or requests of the tourist.

The absence of an information office of the municipality or other institutions, becomes an opportunity to transform citizens into storytellers of the city capable of welcoming and providing exact information on the assets present, and then entrusting the tourists in the hands of expert craftsmen, tourist guides, restaurateurs etc.

Furthermore, the printed product represents an important tool for exploration and knowledge of the cultural heritage of the city, which at the moment does not have such information supports for tourists and travelers.

Keywords: Paper map, linked to the digital map of the project.

Info point disseminated with the citizens of Campobasso. unusual city itinerary.

## **2.2 Tourism experience 2 –Street Art Path**

Street Art Museum Tour in Campobasso, on foot, by bus or by bike (if you can!)

Campobasso is now known to most for its characteristic density of artistic interventions linked to the culture of Street Art. Over the years, in fact, thanks to the commitment of Associati Malatesta, street artists of national and international importance such as Blu, Peeta, Zed1 have arrived in the capital. , Ericailcane, Dado and Macs who gave the community works perfectly integrated into the urban context. The experience in the Street Art Museum begins from the city center, a path that through Excover will be guided by maps, QR codes positioned at shelters or strategic points of the path. But, as the guide will suggest, it will also be useful to do it the old way, or by asking a passer-by for information.

The mapping of the mural works will allow you to experience the center and the suburbs, as the initiative was born for the redevelopment of popular neighborhoods, thanks to the creation of a guided tour including travel times on foot and by public transport, with an indication of the lines and buses of the city urban service, timetables and ticket costs, positioning of the bicycles of the municipal project Dynamo. In addition, news on works and artists will join the suggestions to get the right point of view on the work of art or on the best time of the day in which to travel and thus have a photo shoot to share on social networks.

A new experience of urban art that will lead to the knowledge of an unexpected Campobasso. The information points will have the magnifying glass, the symbol of Excover, thus providing integrated communication.



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

Keywords: Digital Guide; construction of the city itinerary between the center and the suburbs

#### **C.3 Tourism experience 3 – The Garden City**

Following the last disastrous earthquake of 1805, much of the city perched on the Monforte hill was rebuilt. At the same time, a new urban expansion begins at the foot of the hill that involves the land that was once occupied by cultivated fields, pastures and woods. From the nineteenth century, according to the French taste of the wide and tree-lined streets, an entire new modern village was designed for the time, intended for the emerging middle class, characterized by tree-lined squares, avenues, urban villas, botanical gardens and gardens that they assigned to Campobasso the nickname of "Garden City".

The path to discover the Garden City wants to offer the visitor an original point of view on the city, to be experienced on foot or by bicycles (the municipality of Campobasso with the Dynamo project will activate points to take bicycles). From one of the most evocative places, the eighteenth-century Villa De Capoa, originally used for the cultivation of medicinal herbs, you can cross the wide streets of the Murattiano village until you reach Villa Musenga where there is the artistic installation by Gino Marotta, an artist from Campobasso, to the garden of the Mario Pagano National Convitto, an Italian garden enriched with valuable tree species from all over the world (Cedar of Lebanon, Canadian Sequoia, Ginko Biloba, etc.). Furthermore, for those who want to venture on the Monforte Hill, they can follow the path of the Via Matris, a real immersion in the SIC Monforte area where a very rare and vulnerable plant species lives, the *Athamanta macedonica*, included in the List of species at risk of extinction for Italy (linked to the Recolor project). Urban green spaces will be accompanied by stories about the places.

Keywords: tour by bike; naturalistic itinerary.

#### **3.4 Tourism experience 4 – The Map of Traditions**

Creation of a tool for the visitor through which to know and experience the major traditions of the city. The construction of an itinerary inside the historic center and the Murattian center becomes an opportunity to experience the fixed and mobile festivals of the ritual calendar, not only during the real moment in which they are celebrated but above all in the other days of the year. . The creation of panels, positioned in the routes involved in the traditions, will tell the intangible heritage and will provide additional knowledge contributions via QR CODE (photographs, videos, music, etc.) and will suggest to travelers the best point through which to take part in the event of the tradition. .

In particular, we want to enhance the following traditions:

January 17, San Antonio Abate with its spectacular fire festival, which burns from morning until late at night, and the blessing of the animals. From this tradition begins the time of Carnival, the population of the neighborhood is involved in the care of the fire, participates with the blessing of the animals and prepares the evening party enlivened by the Maiutunate, or improvised songs in rhyme.

Good Friday (movable feast) with the procession of the dead Christ and of Our Lady of Sorrows that from the Church of Santa Maria della Croce winds through the alleys and streets of the historic center accompanied by the choir composed of about seven hundred people, divided between female and male voices, which intones the poignant "Teco Verei o Signore", a composition from the early twentieth century.



### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

On May 31, the evocative tradition of the Infiorata takes place which celebrates the end of the Marian Month with the feast dedicated to the Madonna dei Monti, kept in the Church of Santa Maria Maggiore located at the highest point of the Monforte Hill. The population of the historic center welcomes the passage of the wooden statue with the preparation of carpets composed of flower petals that cover all the streets and alleys that, from the top, reach Palazzo San Giorgio, seat of the town hall.

Corpus Domini (movable feast) is the feast that represents the city of Campobasso with the procession of the Mysteries, tempered iron constructions mounted on wooden bases prepared for the parade, designed in the mid-eighteenth century by the Campobasso artist Paolo Saverio di Zinno. For almost three centuries, on Corpus Domini Sunday, the 13 Mysteries have crossed the city carried on the shoulders, telling dogmas of the faith really represented by Campobassans who interpret the role of angels, saints, devils, Mary, Joseph and Jesus according to the eighteenth-century compositional scheme designed by Di Zinno. On the metal structure are in fact placed children, adults and animals that during the procession assume the pose of the story and seem to fly over people, between the houses.

Keywords: itinerary on traditions.

### **3.5 Tourism experience 5 –Artistic Handicraft Itinerary**

Campobasso is a city of medieval origin that develops on a hill, today dominated by the Monforte Castle, a feudal symbol of the city itself. Starting from the sixteenth century, economic and demographic growth led to an expansion of the nucleus protected by the ancient walls. The city is in fact placed under the control of the Tratturo, that is the road used for the transhumance of flocks and derived products, moreover the city represented one of the seven markets of the Kingdom of Naples. Here there were wool, salt, tobacco and many quality artisanal products, in particular metals with the production of knives and scissors.

Even today, the streets of the historic center recall the artisan past of the city (Via degli Orefici and dei Ferrai) there were numerous production districts and numerous shops are still active: from the goldsmith in the window to the ancient printing works, from the steel artisans perforated for new makers who have fun with contemporary productions.

By mapping the shops and craft districts, it will be possible to experience Campobasso craftsmanship and discover stories, tales and legends of the city.

Keywords: Map of craftsmanship



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **3. Market analysis on tourism experiences / products: CITY TOUR BASED ON CYCLING**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.



#### **3.1 Main characteristics of the product line**

New tourist routes of sustainable mobility and intelligent transport in Campobasso.

This is the goal of the Campobasso City Bike Tour, born as part of the DynaMOB 2.0 (DynamicMOBILITzation 2.0) project which aims to promote the use of environmentally friendly forms of transport, focusing on the sharing of scooters and electric bicycles.

Even in a city in the Apennines, with many differences in height and unusual routes, it is possible to experience a bicycle excursion through the installation of electric columns and eco-services for road transport. Low-cost eco-innovative technologies are introduced and citizens' awareness of smart and green mobility is increased.

The desired result is to integrate the two interreg projects and make Campobasso and its landscapes more attractive and sustainable and with a new tourist offer.

Cycle tourism is a way of discovering the area slowly and directly, an economic way of traveling that escapes the canons and the usual itineraries of mass tourism and that through new technologies is also suitable for less experienced tourists in the segment making the product shareable and more palatable on the market.

#### **3.2. Sub-products – describe the main aspects that differentiate the sub product from the main product line**



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#### A2.1 Street art by bike: from the center to the outskirts of Campobasso

Visiting Campobasso by bicycle will make you fall in love with its public works of art and its hidden corners: a slow way to discover the city, with extra attention to what surrounds us. This daily itinerary in particular leads to the discovery of the murals that color the city both in the center and in the peripheral areas redeveloped by these interventions carried out mainly on the facades of large buildings. The street art tour is mainly carried out on foot but for sports lovers a type of bicycle tour has also been designed that will allow users to reach the very distant suburbs with more ease.

#### Discovering the garden city

The nineteenth-century urban development of the center of Campobasso with its countless villas and gardens has given it the nickname of "garden city". The possibility of crossing the city by bicycle and reaching various green points, including the SIC area of the Monforte Hill is one of the offers for slow tourism to visit the city. Bicycles and scooters are the only public transport that allows tourists to reach the highest point of the city where is located the Monforte Castle, national monument and symbol of the city that rises 790 m a.s.l. and is surrounded by the park of Via Matris, and enjoy a view of the city and the surrounding mountainous landscape.

### 3.3. General tourist profile of this tourism product

#### B1.1 General description

##### *Demographic description of tourist*

In the latest Isnart Legambiente report on cycling tourism in Italy "Traveling with the bike" a profile of the typical cyclist is outlined: preferences and behaviors before and during the stay in a comparative key with those of the "average" tourist who visited our country in 2019 .

The report considers both the tourist cyclist, who considers the bike the means of locomotion to experience the holiday, and the cyclist tourist, for whom the bike is not the end of the trip but a means to carry out physical activity on vacation, excursions, etc. .

From a socio-demographic point of view, according to the data collected by Isnart, cyclists are mainly male (80% on average), especially among foreigners. It tends to be younger than the average of tourists, even if the share of over 60s among Italians is 11%. The degree of education is slightly lower than the average: the share of graduates is around 30% while at the average level it is 34%.

#### Main markets of origin

##### *Geographical point of view - both international and domestic markets*

A first trace concerning **cycle tourism** dates back to the **end of the 19th century** by Joseph Pennell (illustrator) and Elizabeth Robins Pennell (writer), they published travelogues of their journeys framed as



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

literary pilgrimages; they "wheeled" a **tandem tricycle from Florence to Rome**, attracting more attention than she was comfortable with, as possibly the first female rider that the Italians had ever seen. The cycle tourism gained from the outdoor movement of the **1930s**. In Britain, the **Cyclists' Touring Club** advertised a week's all-in tour, staying at hotels recommended by cyclists, for £ 3 10s. The Cyclists Touring Club grew to **70,000 members by 2011** and is now the biggest body campaigning for cycling and cyclists' rights in the UK. It continues to organise group touring events including day rides through its local groups and CTC holidays in many countries led by experienced CTC members. The new models of tourist consumption recall the territories to the construction of a new type of tourist attraction based on experiential paths that, starting from places, values, heritage identities, landscapes, are able to build and / or re-propose resources and itineraries "others" linked to local tradition. The promotion and use of historical-landscape-cultural heritage cannot be separated from the presence of an efficient and sustainable transport network to support the tourist offer.

#### B1.3 Tourism habits

*Preferred means of transport Group / Single  
Organized / not organized Etc.*

There are many different types of bicycle touring:

##### **Lightweight touring**

Informally called credit-card touring, a rider carries a minimum of equipment and a lot of money. Overnight accommodation is in youth hostels, hotels, pensions or B&Bs. Food is bought at cafes, restaurants or markets.

##### **Ultralight touring**

Differs from credit card touring in that the rider is self-sufficient but carries only the bare essentials and no frills.

##### **Fully loaded touring**

Also known as self-supported touring, cyclists carry everything they need, including food, cooking equipment, and a tent for camping. Some cyclists minimize their load, carrying only basic supplies, food, and a Bivouac shelter or lightweight tent.

##### **Expedition touring**

Cyclists travel extensively, often through developing nations or remote areas. The bicycle is loaded with food, spares, tools, and camping equipment so that the traveler is largely self-supporting.

##### **Mixed Terrain Cycle-Touring / Bikepacking**

Also called rough riding, cyclists travel over a variety of surfaces and topography on a single route, with a single bicycle. Focusing on freedom of travel and efficiency over varied surfaces, cyclists often adopt an ultralight camping approach and carry their own minimal gear (bikepacking).

##### **Supported touring**

Cyclists are supported by a motor vehicle, which carries most equipment. This can be organized independently by groups of cyclists or commercial holiday companies. These companies sell places on guided tours, including booked lodging, luggage transfers, route planning and often meals and rental bikes.

##### **Day touring**





### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

These rides vary highly in their size of the group, length, purpose, and methods of support. They may involve solo cyclists, group rides, or large organized rides with hundreds to thousands of riders. Their length can range from a few miles to century rides of 100 miles (160 km) or longer. Their purpose can range from riding for pleasure or fitness, to raising money for a charitable organization. Methods of support can include self-supported day rides, rides supported by friends or small groups, and organized rides where cyclists pay for support and accommodation provided by event organizers, including rest and refreshment stops, marshalling to aid safety, and sag services.

#### S240

The Sub-24-hour Overnight, or S240, is focused less on cycling and more on camping. Typically, one would depart on their bicycle in the late afternoon or evening, ride to a campsite in a few hours, make camp, sleep, and then ride home or even to work the next morning. This type can require very little planning or time commitment. If one lives in a large urban metropolis, this sort of trip might also be extended, taking a train or coach to get to a more convenient starting point, and may in fact take a lot longer than 24 hours, making it a weekend tour, otherwise still works on the same planning principles. As a term, "S240" was coined by Grant Petersen of Rivendell Bicycle Works.

### 3.3 International Market size of the present global demand for this tourism product and expected future trends

#### Present market size

The scale of bicycle touring and its economic effects are difficult to estimate, given the activity's informal nature. Market research indicates that in 2006 British cyclists spent £120m on 450,000 organized cycling holidays, and a further 2.5 million people included some cycling activity in their annual holiday that year. The total economic benefit to communities visited during the nine-day long Great Victorian Bike Ride was estimated at AU\$2 million in 2011, which does not include costs paid directly to ride organizers and ongoing benefits to towns. Sustrans estimate that the total value of cycle tourism in the UK in 1997 was £635m and they forecast £14bn for the whole EU by 2020. Among examples of current activity given by Sustrans are 1.5m cyclists using the 250 km (160 mi) Danube Cycle Route each year and 25% of holiday visitors in Germany using bicycles during their visit.

#### Trends

The main interest associated with a cycling holiday is the opportunity to experience the natural beauties of the place (for 63% of foreign tourists interviewed, against 30% of the average tourist)

Another important reason for the stay is the practice of sporting activity. Furthermore, the cyclist is no stranger to cultural contents related to the artistic heritage and the food and wine offer. In the first places services such as spa treatments, cinema, visits to museums and monuments.

As we read in the report, while the use of bicycles remains the underlying motivation of the holiday, in fact this is combined with the satisfaction of various other interests in a similar way to other forms of tourism. The cyclist is dedicated to a range of collateral activities that touch areas of interest that are also very different from each other and, if possible, can be integrated or combined with the practice of sporting activity.

Most of the cyclists (83% of the total) show a widespread curiosity for the area in which they stay and intend to satisfy it through excursions conducted mostly by bicycle, which frequently include a visit to the historic center and / or villages close to the place in where you stay, or a boat trip, the knowledge of areas



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

of naturalistic value (this type of activity is carried out by a share of just over 40% in the case of the average tourist).

The share of cyclists who purchase services related to personal well-being (spas, saunas, etc.) is double that recorded on average among other tourists. In particular, the foreign cyclist shows a "cultural" attention - aimed at museums / exhibitions or even the local food and wine production - relatively more contained than the average foreign visitor. A rather varied scenario, therefore, which confirms the existence of a multifaceted and complex profile of the cyclist.

### 3.4 Local size of the present local demand and expected future trends of this tourism product line

#### B3.1 Present market size

The **electric mobility service on two wheels** offered by the municipality of Campobasso was **very appreciated by the citizens** who immediately began to take advantage of pedal assisted bicycles and electric scooters; covering **short and long distances** within the urban area of the city. The target audience that has focused more on the use of this service is certainly that of **young and very young people**. By **expanding the service** with a series of **tourist packages**, the interest of potential users would increase significantly.

The tourist packages would include a series of routes within the urban area of Campobasso such as: the tour of the green areas (Garden City Tour); Street Art Path; etc...

#### Trends

Researches on the net showed a particular attention towards Molise by cycling and hiking websites and blogs. We find several itineraries that accompany the user to discover the entire region from the sea to the mountains, such as that of the Matese Lake, the Sangro cycle path or the Regio Tratturo path but also specific proposals on the city of Campobasso and its surroundings. In addition to visiting the city, you can move towards the hinterland by pedaling along a ring route of 100 kilometers with an altitude difference of 1,000 meters. These are the stages starting from Campobasso - Selvapiana - Oratino - Roccapromonte - Casalciprano - Frosolone - Busso Spinete - Boronello - Valle del Biferno - San Polo Matese - Sam Giuliano del Sannio - Busso.

For the less experienced or for families, urban routes are also recommended for the possibility of stops and supplies, cultural and food and wine attractions.



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### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

#### 3.5. Most important criteria influencing the competitiveness in the global market for this tourism product line

##### Cultural city tour based on cycling

Some characteristics and aspects that qualify the tourist offer of Campobasso in the cycle tourism market:

- The **morphological conformation** of Campobasso is characterized by many stretches with sudden differences in height, this is a feature that does not stimulate users to move by bicycle. Thanks to the **electric bike service with pedal assistance** this problem is solved, it will therefore be **more attractive to visit the city in this way**.
- The urban area of the city in which the tourist routes to be tackled by bicycle are planned is almost entirely **circumscribed** in the **Old Town** (Medieval Era) and in the **Area Murattiana** (Nineteenth Century). The routes will be very fast and usable by all types of target, from the youngest to the oldest and also by organized groups made up of many people who move together.

#### 3.6. Most representative international best practices (max 3)

##### BIKE THE CITY (MILANO – TORINO – VERONA)

Bike The City is an Italian Bike Tour Company, born in 2011 in Milan, as the first and authentic bike tour of Milan, and now present in Turin, Verona and Rome.

Bike The City main purpose is to offer an active, lighthearted, informative and amusing overview of the city by bike and a real opportunity to take in its authentic atmosphere.

Bike The City inspiring idea is that people don't want to just visit a city but also want the opportunity to blend in.

##### CYCLE CITIES

Cycle Cities is a partnership of quality recreational cycling companies, in cities all over the world!

Director Steve Kopandy started Cycle Cities with Rob Graham from London Bicycle Tour Company, and a handful of partners in 2011. Since then the partnership has since grown to include tour operators from over 50 different cities on four continents!

At [cyclecities.tours](http://cyclecities.tours), you will find the best city bike tour companies in the world and their contact details.

Direct booking with bicycle tour operators is promoted, rather than through the online travel agents of big brands, because this helps to create a more equal tourism industry for small tour operators.



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **3. Market analysis on tourism experiences / products: CULTURAL TOURISM BASED ON STREET ART**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.



#### **A1. Main characteristics of the product line**

**Campobasso** is well known for its **characteristic density of artistic interventions linked to the Street Art culture**.

Back in the years, thanks to the commitment of **Associati Malatesta**, **national and international street artists** as **Blu, Peeta, Zed1, Ericailcane, Dado and Macs** have landed in the town to offer to the citizens art works properly fitting in the urban contest.

It is a path that develops on **many building's facades** in different areas of the city, especially in the suburb of San Giovanni dei Gelsi.

It is an **experience of knowledge** of the city and its **urban development** beyond the area of the historic center. The tour can be done using **public transport** or **electric bike and scooter rental service** offered by the Municipality of Campobasso.

Today it is an **open-air gallery** of unique artworks that made the city famous in the world of art lovers.



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

#### A2. Sub-products – describe the main aspects that differentiate the sub product from the main product

##### A2.1 Sustainable discovery

This route represents an **opportunity to discover areas of the city that do not normally represent a tourist attraction**. Urban areas far from the center and **more difficult to reach on foot**. A real discovery, which can be undertaken in an **ecological and sustainable** way thanks to the **electric bike and scooter rental service offered by the Municipality of Campobasso**.

##### A2.2 Street Art Events and Festivals

###### Draw the Line | Street Art Festival

**Organized and promoted by Malatesta Associati** (Campobasso) the first edition was in **2011** and was born with the aim of **redevelop the most deprived areas of the city** and to show to guests the beauty of our region: **clean air, good food, quietness, outdoor sports and art**.

The first edition was funded with public money; from the second edition till now, the festival is self-financed by Malatesta Associati.

The festival takes place at **various times of the year** and is often correlated with **sporting events, workshops, concerts and conferences**.

#### BRIEF MARKET ANALYSIS OF THE TOURISM PRODUCT LINE

##### B1. General tourist profile of this tourism product line

###### B1.1 General description

###### *Demographic description of tourist*

Thanks to its recognition by the art world and the work of artists such as **Fairey** and **Banksy**, Street Art has become more easily accepted by people who previously associate it exclusively with **vandalism**.

Nowadays, **in most of the largest cities in the world** there are **tours** that present street art: in the simplest cases they are visits to the city streets conducted mainly on foot or by bicycle; in some other cases the **institutions or organizations** present in the area propose **maps** created to identify the works of art in the area.

Street Art can even contribute to the **creation of a real brand for the locality**, which if properly promoted can become one of its **distinctive features**: a striking example is **Bristol, Banksy's hometown**, immediately associated with street art, but originally was an industrial city.

**Festivals** also create an immediate association with the host city, and are also able to generate an important **tourist attraction** in certain temporal spaces, **thus being able to place them in periods in which the locality receives less attention**.



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

Finally, galleries and museums have also opened their doors to street art, once they understand the interest generated in the public. The presence of Street Art in this type of exhibition space means that the city has an extremely positive image return given by the opening towards this kind of art.

#### B1.2 Main markets of origin

*Geographical point of view - both international and domestic markets*

The global success of Street Art can also be ascertained from its entry into the world of travel publishing. In addition to having entered the minor local tourist guides, street art has also managed to conquer some of the best known titles in the world.

In **routard.com**, the complementary site of the famous French tourist guide **Guide du routard** born in 1975, we find many examples of articles aimed at street art curious as a source of travel inspiration. In some cases, such as the **Upfest in Bristol**, the site dedicates real guides, while in other cases it includes Street Art among the recommended itineraries, for example in cities like **Berlin** and **New York**.

**Rough Guides**, one of the leaders in travel publishing, founded in 1982 in the United Kingdom, publishes articles (more than 200 results containing the words "street art") that trace the stories of movements and representatives of street art and graffiti, suggesting local tours and creating photo collections.

**Lonely Planet**, the largest travel guide publishing house in the world, founded in Australia in 1972, presents countless articles dedicated to Street Art and the site's forum is very active on the subject, with numerous interventions by members, who recommend the best routes to discover the art present in their cities. In addition, Lonely Planet made in 2017 the first tourist guide dedicated exclusively to Street Art. The volume is intended as a visual guide to the hot spots of world street art. Inside we find a hundred places belonging to thirty different cities, interviews with some artists and protagonists of the international scene and the presentation of a dozen of the most important festivals in the world.

There are numerous cases in which various cities promote on their official tourist websites maps showing the Street Art works scattered around the city, with routes highlighted to facilitate their discovery.

A first case is the city of **Bristol**, which on its official tourist site promotes Street Art as one of its must-do cultural experiences. The guided tours last about two hours and are managed by the independent organization **WHERE THE WALL**, which invests all proceeds from projects aimed at promoting the creative culture of the city.

In **Australia**, the city of **Melbourne** "recognizes the importance of street art in contributing to a vibrant urban culture" and is listed as one of the street art capitals of the world. Research has revealed that most locals don't like tags and graffiti without permission, however, many enjoy street art instead, meaning larger, artistic pieces or murals placed in appropriate locations with the necessary permission.

Also on the official website of the city there is a link to **Melbourne Street Art Tours**, which organizes guided tours led by some street artists who collaborate with the official institutions of the city as consultants to develop a sustainable strategy regarding urban art.

The tours and workshops present (respectively at 69 and 89 Australian dollars) are in great demand, on the **TripAdvisor platform** 91% of the evaluations, out of 305 overall, give it the maximum score.

The **United States**, the place where it all began. In **New York**, there are dozens of organizations that offer a guide to the discovery of graffiti and street art in the city, some of which can cost hundreds of dollars. The



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### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

same goes for **Philadelphia** which, alongside the tours offered by associations or private individuals, allows the visitor to discover the works scattered around the city through official visits.

#### B1.3 Tourism habits

*Preferred means of transport Group / Single  
Organized / not organized Etc.*

Street Art is carving out an important space between **non-conventional activities** and **interests** that can **both create new tourist flows in less known places**, and **decongest places where tourism is focused on standardized and overloaded paths**.

It can be said that, except in rare cases, street art will never be able to compete with the major attractions, but it can have the **task of filling those spaces that canonical tourism cannot cover**.

It is a type of contextual art that can be considered an integral part of the culture and therefore of the cultural offer of the locality. **Street art shows what animates the populations of the places where they are performed: social scenarios, cultural references, political opinions**. By painting the walls, street artists allow tourists to get closer to the culture they visit in an immersive and authentic way.

This makes the **tourist participate in an art that is innovative**, alive and in need of his contribution, an art different from the traditional one, "locked up" in museums.

The element of **discovery** also contributes to making the traveler feel an active part of the experience, **challenging him to search for the works and allowing him to go to places where he would otherwise hardly venture**.

Organized tours, museums and festivals offer the chance to learn while having fun: it's about **edutainment**. **With workshops and courses** run by experts, the participant not only has fun, but learns **to appreciate a different and often misinterpreted culture**.

#### B2 International Market size of the present global demand for this tourism product and expected future trends

##### B2.1 Present market size

The tourist market linked to the street art phenomenon has an extremely vast public. However, it is possible to identify some types of tourism that may include the concept of urban art, or cultural, experiential and creative tourism.

*Cultural tourism: UNWTO United Nations World Tourism Organization* coined two definitions. The first, restricted, attests that this may include movements of people driven by different cultural motivations, such as **"study trips, cultural and artistic tours, trips to festivals and other cultural events, visits to archaeological sites and monuments"**. However, according to the broader definition, **"all movements of people should be included in the definition because they satisfy the human need for diversity, tending to increase the cultural level of the individual and involve new knowledge, experiences and encounters"**.



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Observing the phenomenon of Street Art, it is clear how this can be included among the destinations of the so-called cultural tourist. Wanting to associate street art with possible travel motivations in relation to the first definition provided, these are:

- **the presence of festivals and exhibition spaces whose theme is Street Art;**
- **the search for artistic and cultural enrichment.**

*Experiential Tourism:* For the tourist, travel is indeed an **opportunity and a means to get in touch with a specific culture**, but he wants to go home with a memorable, **unique memory**, with an **activity that has allowed him to know something new and not experimentable**.

In the case of Street Art, **this is certainly innovative and can be replicated in a few other places**, and the addition of workshops and activities carried out in person further enriches the experience.

The theme of the **development of practical skills through active participation** also makes Street Art approachable to *Creative Tourism*.

Creativity is a process that is capable of developing innovative cultural products that communicate with an image of dynamism and change; this strategy responds to the need to counter the risk of the serialization of the tourist experience, which can occur as a result of the competitiveness between localities and globalization. In this way, not only the artist, **but also the tourist, produces a work, and this adds value to the lived experience**.

#### B2.2 Trends

The birth and spread of urban art and street art practices that we are witnessing today lead to the experiences of a new museum form defined as "the open-air museum" which mainly attracts a young public but which also increasingly intrigues other tourist target.

The "instagrammability" of the works created, understood as the natural predisposition to generate a story of a social addicted visit, and the possibility of always having murals available means that street art has become a new alternative for cultural tourism. The experience of discovering the city through the street art tour, made with organized visits or individually, leads to the discovery of the places of city street art which, by definition, are located in the peripheral areas or outside the usual traditional tourist flows. as it wants to let tourists empathize with an unusual place. The possibility of being outdoor exhibitions has favored the experience of art and the discovery of peripheral neighborhoods or small villages even during the Pandemic. In Campobasso the street artist Blu has also created a work during the period of restrictions due to Covid and dedicated to the particular historical moment. The work "Pandemic", in which many Pandas live on a dissolving planet, is thus an art story shared with the entire local and global community and thanks to its virtual diffusion it has brought together every point of the earth, sensitizing to respect for it. and of every living being.

### **B3 Local size of the present local demand and expected future trends of this tourism product line**

#### B3.1 Present market size

About **20 years ago** most of the population of Campobasso experienced the phenomenon of graffiti as a real **act of vandalism against the urban decor**. With the passage of time, both due to the media and the commitment of the associations in the area, **this vision has changed completely**. In the **last 10 years**, the





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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

world phenomenon of street art has also arrived in Campobasso with the **primary objective of redeveloping some of the most disfigured areas of the city**. Outlying and popular neighborhoods that were often the scene of episodes of illegality. The redevelopment of these neighborhoods has been gradual, since 2011 about **10 buildings have been decorated as well as dozens of walls and streets**. Thanks to the interventions of the artists, these neighborhoods have begun to live and be frequented again. The **inhabitants** of the neighborhoods **immediately appreciated** this movement and are committed to **helping, trying to keep the areas clean and giving directions to potential visitors who have come from the surrounding areas of the city**. Currently there are works scattered in all areas of the city and both young people and adults are potentially interested and appreciate this type of operation. During the decoration, **various events and workshops are always organized** which over the years are increasingly frequented by people of all ages and social backgrounds. During the year, **Associati Malatesta**, organizes days dedicated to **guided tours** on foot or by bicycle, they are also involved in organizing **volunteer days** in which citizens help to keep clean the areas where the decorations are scattered. However, these events are still too few to cover the potential interest on the part of users, which constantly increase every year. **The Street Art Path guide represents a further tool that will help users to live this experience independently with an adequate dose of technical and logistical information.**

During the **research and meeting phases with the community of Campobasso**, a strong recognition of the cultural and touristic value emerged towards the artistic interventions that build the Street Art Path. Not only young people have expressed this thought, **adults are also strongly motivated to want more artistic interventions in the city**. All this certainly happened thanks to the **meeting actions between artists and inhabitants of the neighborhoods that host the works.**

#### B3.2 Trends

Currently in Molise there are many cases of urban redevelopment interventions through works of art in particular belonging to the field of street art through the involvement of national and international artists. Several small villages have adopted this artistic trend to redevelop houses and degraded areas bringing them to light, transforming themselves into tourist attractions.

Campobasso remains the only specific case in which interventions are carried out also and above all on large facades of residential buildings involving entire suburbs and popular neighborhoods.

#### **B4. Most important criteria influencing the competitiveness in the global market for this tourism product line**

##### B4. Cultural tourism based on the Street Art

The main feature that distinguishes Campobasso in the street art field is the **rich density of works by internationally renowned artists in a relatively small and easily accessible urban area** without necessarily using a vehicle. A tour of all the over **60 decorations** can be completed in about **2 hours and a half by walking**. In other cities (national and international) the decorations are scattered in areas very distant from each other and it is therefore necessary to spend much more time to undertake a complete tour.

#### **B5. Most representative international best practices (max 3)**



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

#### B5.1 BRISTOL

There are two different types of guided tours: **Bristol Street Art Tour**, is generally dedicated to all the street art of the city and takes place throughout the year, while the second, **The Banksy & Historic Harbor walking tour**, focuses on the history of Bristol and the works of the famous street artist and takes place during public holidays and school holidays.

Tickets according to the tour and the type of buyer:

	Adults	Students	Up to 16 years	Families
<b>Bristol Street Art Tour</b>	£9.20	£7.20	£4.80	£24.80
<b>The Banksy &amp; historic harbour walking tour</b>	£12.50	-	£5.50	-

These guided tours are a huge success: on the TripAdvisor platform, a travel web portal, there are more than 500 reviews of users who have used this service, 90% of which rate it as excellent.

The WHERETHEWALL organization also proposed an interesting case of offering creative tourism, creating Street Art workshops for visitors: during these seven "spray sessions", organized in July and August 2017, at a cost of 15 pounds ( 12.50 in presale), participants were able to learn how to use a spray can and create their own work of Stencil Art.

#### B5.2 BUENOS AIRES

Buenos Aires also proposes itself as one of the main cities in the world in which to admire Street Art. In its government site there are two itineraries that the visitor can freely follow, one dedicated to the northern part of the city and one to the southern one. On TripAdvisor there are numerous guided tours run by private companies. Graffitimundo, a non-profit organization that organizes tours in close collaboration with local street artists, is indicated as an example. The cost of the visits, lasting 2-3 hours, varies between 20 and 33 dollars; it is one of the most successful tours in the Argentine capital and boasts 659 ratings, 85% of which are excellent and 13% very good.

#### B5.3 LONDON

Alternative London, a social enterprise offers numerous themed walking and cycling tours, from food to street art. Street Art tour prices start from 8 pounds for a simple two-hour walking tour up to 16 pounds for a two-hour bike tour. The organization also offers guided tours that end with workshops: in this case, prices range from 20 pounds for a two and a half hour experience, up to 32 pounds for a four-hour session. The London project is also very successful: again on TripAdvisor, the tours offered by the association received 93% of reviews with maximum points, out of a total of more than 3600 votes.



### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **3. Market analysis on tourism experiences / products: INTANGIBLE CULTURAL HERITAGE TOURISM BASED ON HISTORICAL TRADITIONS (FESTIVAL DEI MISTERI)**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.



#### **A1. Main characteristics of the product line**

The festival is definitely one of the most engaging experiences to do in Campobasso, it is interesting to follow the procession for all the time and appreciate the evocative perspective games that Misteri create passing through the narrow alleys of the Old Town. Between the euphoria of the crowd and the impetuosity of the carriers, funny moments arise in which the sense of belonging to one's Mistero is highlighted. The fight between the devils who try to make the charming and impassive Tonzella smile is one of the most famous and waited moment of the whole event.

Misteri are structures made in tempered iron and assembled on wooden bases on which people, mostly children, are placed to represent angels, devils, scenes from the life of saints and sacred figures of Christianity. These structures are carried on men's shoulders during the parade that takes place on Corpus Domini's day. While waving, the structures give the sensation that the children who interpret the sacred figures are flying over the heads of the spectators.



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Today the parade has almost the same characteristics of the ancient one that took place in 1700. In the morning of Corpus Christi, the actors, the carriers and the marching bands meet at the Museum, where the structures are kept. At 10 o'clock the carriers raise the Misteri and begin to march swaying to the rhythm of the musical motif. The thirteen Misteri cross the old town following a precise order, touching the balconies, stopping and continuing to parade among thousands of people. At Around 1 pm, in Piazza Municipio, the procession receives the solemn blessing of the Bishop and returns in the museum rooms where the structures are kept.

#### **A2. Sub-products – describe the main aspects that differentiate the sub product from the main product**

##### **A2.1 Museum of Misteri**

The Museum consists of two exhibition rooms and a projection room. In the "Entrance Hall" some costumes are exhibited along with photographs, variously dated, which portray some highlights of past events and catalogues with the names of the most famous characters who have animated the parade in the last 40 years. The "Projection Room" with 40 seats, allows you to view footage of the Processione dei Misteri, shot in various years, relating to the preparation and development of the event and capable of recreating the atmosphere that is lived in Campobasso on the day of Corpus Domini. Inside the "Sala degli Ingegneri" it is possible to see in detail the thirteen structures that parade in procession through the streets of Campobasso on the day of Corpus Domini, thus discovering the structural and artistic peculiarities that make them unique in the world.

##### **A2.2 Festival dei Misteri**

The parade of the Misteri takes place on the Sunday of Corpus Domini, but throughout the weekend the city of Campobasso comes alive with many of the most varied activities. Street food, street markets and musical concerts. Every restaurant, pub and shops of all kinds pay homage to the most important tradition of the city by setting up themed spaces and offering temporary and limited specialties.

#### **BRIEF MARKET ANALYSIS OF THE TOURISM PRODUCT LINE**

##### **B1. General tourist profile of this tourism product**

###### **B1.1 General description**

###### *Demographic description of tourist*

The Misteri Parade can be stylistically associated with the network of religious festivity linked to large machines carried on the shoulder, this official network mainly involves 4 Italian festivity (the Macchina di Santa Rosa di Viterbo, the Festa dei Gigli di Nola, the Varia di Palmi and the Faradda di li candareri di Sassari) and since 2013 it has been included in the intangible cultural heritage of humanity by UNESCO. The demographic characteristics of the tourists who participate in the Festival dei Misteri indicate the presence of different categories of travelers such as young people (20-40), families and adults (50 - 75)



### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

coming mainly from neighboring regions, but thanks to a matured interest in the Molise region in recent years there has been a presence from northern Italy and other nations. We mainly find visitors with medium-high income, this is a figure in line with the trends and costs of the Molise region. In general, this cultural destination shows no preference for gender or age.

#### **B1.2 Main markets of origin**

*Geographical point of view - both international and domestic markets*

Italy is a country with a long history of traditions and cultural events and even more specifically of great festivals that entirely involve the city in which they take place. Depending on the time of the year or the region, there are different folkloristic events. Some Italian cities are indeed famous nationally and internationally thanks to these events that characterize them and have made them famous and, over the years, even transformed into real tourist destinations. Often within these events it is possible to experience truly characteristic food and wine experiences, with tastings of typical products or, sometimes, of dishes made only for the specific occasion.

To name a few of the most famous:

- The Venice Carnival: is an annual festival held in Venice, Italy. The carnival ends on Shrove Tuesday (Martedì Grasso or Mardi Gras), which is the day before the start of Lent on Ash Wednesday. The festival is world-famous for its elaborate masks.
- Presepi Viventi (Living Nativities) in the Sassi of Matera: A Nativity play or Christmas pageant is a play which recounts the story of the Nativity of Jesus. It is usually performed at Christmas, the feast of the Nativity. For about 10 years, the living nativity scene has been taking place in the evocative natural setting of the Sassi di Matera.
- Scoppio del Carro in Florence: is a folk tradition of Florence, Italy. On Easter Sunday, a cart, packed full of fireworks and other pyrotechnics, is lit and provides a historic spectacle in the civic life of the city.
- Festival della Notte della Taranta in Melpignano (Lecce): The Night of Tarantula is focused on Pizzica, a popular folk genre in Salento, and takes place in various municipalities in the province of Lecce and the Grecia Salentina, especially in Melpignano. It gives great importance to the folk music tradition of Taranta and Pizzica, and it is a great resource for tourism in Apulia.
- Infiorate of Spello (Umbria): is a manifestation which takes place every year in the small Umbrian town of Spello (Italy) on the occasion of the Corpus Domini feast, on the ninth Sunday after Easter. On that night, almost a thousand people work incessantly to create carpets and pictures made of flowers along the town's narrow streets. Floral creations cover streets throughout the historical centre in preparation for the passage of the Blessed Sacrament carried in procession by the bishop on Sunday morning. The result is a unique, one mile-long path of beautiful floral creations with an explosion of colors and scents.



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **B1.3 Tourism habits**

*Preferred means of transport Group / Single  
Organized / not organized Etc.*

The data provided by ISNART (National Institute of Tourist Research) provides us with a clear situation of tourist flows.

In 2018, the main reason that drives tourists to visit the city is linked to participation in an event (39.7%). As regards accommodation, the average daily expenditure per person is € 52, and the average occupancy of rooms in accommodation facilities (average annual%) 43.2%. The excellences of the territory are the food and wine products (58.6%) and the naturalistic beauties (41.9%).

Tourists show a high degree of satisfaction in the Festival dei Misteri and in general for the whole city, but at the same time indicate a lower satisfaction with tourist hospitality (operators with little knowledge of the English language, few possibilities for targeted or specific menus for intolerances, trattorias and restaurants closed or overcrowded on public holidays) and for the difficult understanding of the many activities organized on the days of the festival.

#### **B2 International Market size of the present global demand for this tourism product and expected future trends**

##### **B2.1 Present market size**

Analyzing the last 10 years the potential of the fest has drastically increased, in fact it has turned into a real festival, thanks to the choral commitment of the municipal administrations and associations collaborating in the event.

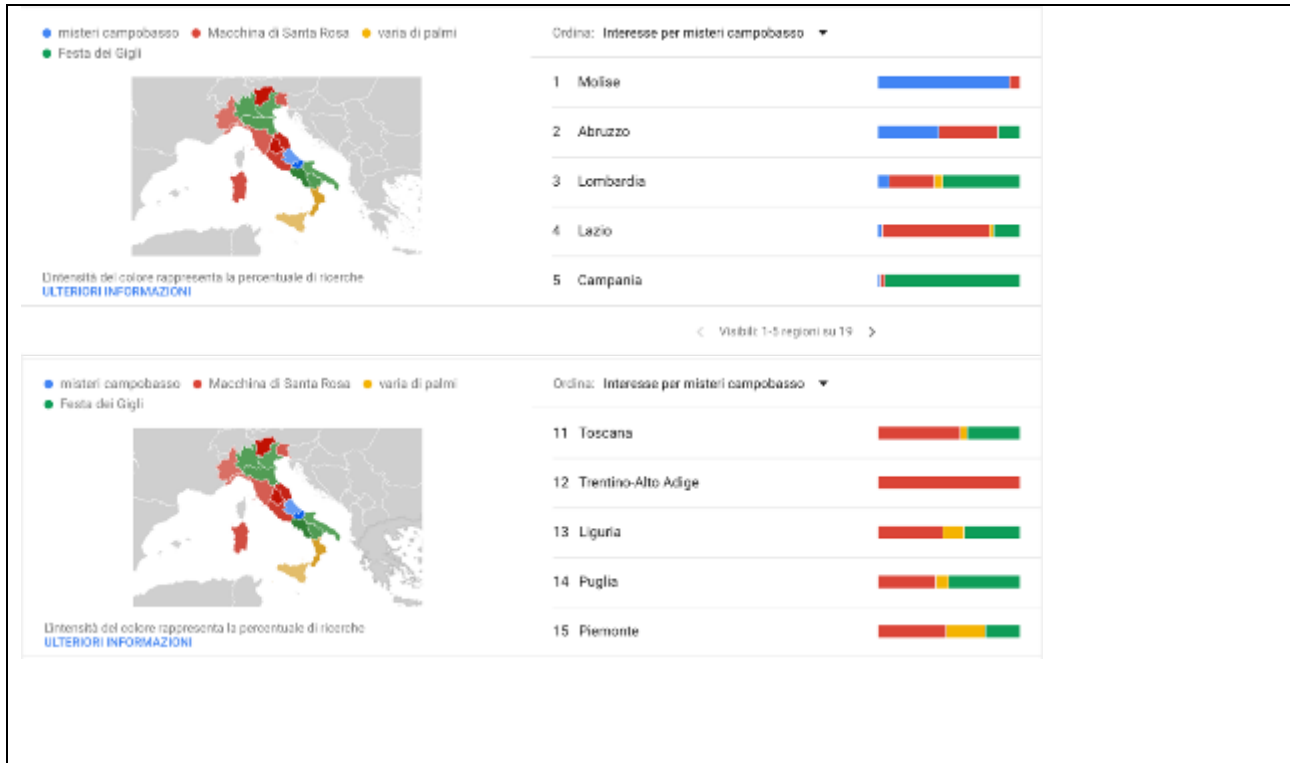
The data show a boom in attendance in Campobasso in the summer of 2020 and 2021, the years of the pandemic in fact made Molise one of the most visited destinations in Italy and consequently the Museum of Misteri recorded about 7,000 between June and August. A significant figure considering that in the last two years the Misteri parade has not taken place due to the restrictions related to Covid-19. In general, all the places of culture in Campobasso registered about 16,000 visitors in the summer of 2021.

##### **B2.2 Trends**

Data emerged from the Google Trends platform by comparing the Misteri Festival with similar events in the neighboring Italian territory, there is a peak of interest among some neighboring regions. These data are for the last 5 years.



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO



### B3 Local size of the present local demand and expected future trends of this tourism product line

#### B3.1 Present market size

In the research phase we have amply confirmed our expectations towards the Festival dei Misteri product. By interviewing citizens, submitting questionnaires and thanks to moments of direct confrontation, it emerged that there has been and will always be interest in this celebration that brings everyone together, which culturally and spiritually unites the inhabitants of the city and those coming from surroundings. The last years of the pandemic did not allow the physical celebration of the Festival but everyone, starting from the municipal administration up to the individual citizens, on the days of the festival paid homage with a contribution to keep the memory alive, even if in some cases in a virtual way. Last but not least, during the summer of 2021 a new and printed tourist guide of the city of Campobasso was made official, identified as "The City of Misteri", precisely to enhance its identity and the desire to associate the brand Campobasso to the suggestive and unique manifestation of the Misteri.

#### B3.2 Trends

Despite being a centuries-old tradition, it has been for about twenty years that it has been transformed from a city festival into one of the representative events of the entire region, certainly the most awaited and followed by the Molisani. An interesting fact is that many Molisani residing in other regions or nations return every year to participate in the Festival dei Misteri, with them they first involved friends and relatives to then get to the creation of trips organized by regional and extra-regional tour operators. An indicator of appreciation of the event by tourists is certainly the data coming from the reception (Hotels, B & Bs and



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

Restaurants) which attests to being sold out during the days of the festival.

#### **B4. Most important criteria influencing the competitiveness in the global market for this tourism product line**

##### **B4. Cultural heritage tourism based on the historical traditions (Festival dei Misteri)**

The Misteri parade turns out to be unique in its kind, despite the presence of events that may be similar, some fundamental details characterize it and make the experience meaningful and unique. In fact, analyzing the event specifically, it can be said that it is a stylistic and conceptual crossover between two major categories of experiences such as: large shoulder-mounted machines and tableau vivants. (French for "living picture", is a static scene containing one or more actors or models. They are stationary and silent, usually in costume, carefully posed, with props and/or scenery, and may be theatrically lit.) The fundamental detail is that the actors who play the different characters represented in the Misteri get on the machines carried on their shoulders and in some cases interact with each other and with the spectators. Festival dei Miseteri which coincides with the sacred feast of the Corpus Domini is a mobile festivity that can be held from the end of May to mid-June, it represents the great fest that introduces summer period in Campobasso and in Molise region.

#### **B5. Most representative international best practices (max 3)**

##### **B5.1 LA MACCHINA DI SANTA ROSA (VITERBO)**

The Macchina di Santa Rosa is a tower lit by torches and electric lights, made of light metals and modern materials such as fiberglass, about thirty meters high and five tons heavy. On the evening of September 3 of each year, in Viterbo, the machine is lifted and carried in procession on the shoulders of men called "Facchini di Santa Rosa" along a path of just over a kilometer through the streets and squares of the city center. During the transport, which begins at 9 pm and which many thousands of people attend, the streets are darkened to bring out the light of the machine. The transport symbolically recalls the translation of the body of Santa Rosa, which took place in Viterbo in 1258 at the disposal of Pope Alexander IV, from the Church of Santa Maria in Poggio to the church of Santa Maria delle Rose.

##### **B5.2 LA VARIA DI PALMI (PALMI)**

The Varia di Palmi is a popular Catholic festival that takes place in Palmi in honor of Maria Santissima della Sacra Lettera, patron saint and protector of the city, on the last Sunday of August every year, it is probably the main festival of the Calabria Region. The Varia is a huge chariot representing the universe and the assumption into heaven of the Virgin Mary. Above the chariot, 16 meters high and carried on the shoulders by 200 Mbuttaturi (bearers), there are human figures representing the Madonna, the Eternal Father, the Apostles and the angels.

##### **B5.3 FESTA DEI GIGLI (NOLA)**

Festa dei Gigli is a popular Catholic festival held every year in Nola on the occasion of the patronal feast dedicated to San Paolino. With this event, the Nolans celebrate the return to the city of Ponzio Meropio Paolino from imprisonment by the barbarians in the first half of the 5th century.





### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

On the Sunday following June 22 of each year the festival takes place, the dancing procession of 8 Lilies plus a lower structure in the shape of a boat that symbolizes the return to his homeland of San Paolino. The wooden obelisks are named after the ancient guilds of arts and crafts, in the order Ortolano, Salumiere, Bettoliere, Panettiere, Beccaio, Calzolaio, Fabbro and Sarto.

The Lilies and the Boat dance along a traditional path identified in the oldest part of the town to the rhythm of original songs and reinterpretations drawn from the Neapolitan, Italian and international musical tradition performed by a musical band placed on the base of the structure.

The event covers the entire day. During the morning, the Lilies and the Boat are transported to Piazza Duomo, the main square of Nola, where the solemn blessing by the bishop takes place. From early afternoon to dawn on Monday the structures and the rockers that carry them face spectacular tests of skill and strength.



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

#### 3. Market analysis on tourism experiences / products: SPORTS TOURISM BASED ON FOOT RACE (SU E GIU')

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.



#### A1. Main characteristics of the product line

Increasing the presence of visitors in the city by leveraging sports tourism linked to running events is the goal of the annual "SU E GIU" race held every year, in November, in Campobasso. With sports tourism we mean that sector that combines two great social phenomena, namely sports and tourism, which overlap and integrate, determining a market segment with specific and peculiar characteristics. There are three main definitions when we talk about sports tourism: the first is that provided by Standeven and De Knop (Sport Tourism, Human Kinetics Europe, 1999) "all forms of active or passive involvement in sporting activities, carried out casually or in an organized way for non-commercial or commercial reasons, which require you to leave your home or place of work ". The second definition is that proposed by Gibson (1998 and 2002), namely "leisure-based travel that takes individuals temporarily out of their communities of residence in order to participate, or as spectators of sporting activities or shows based on sporting activities" and, finally, the last definition is that indicated by Pigeassou (2002), who identifies sports tourism as that fringe of tourism based on three basic pillars: "a tourist experience that has a bond of subordination towards a main activity that constitutes a cultural experience in the field of sport". From the analysis of the three different definitions, we can identify the movement linked to the motivation to participate or attend a sporting experience as the fundamental characteristics of this sector.



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **A2. Sub-products – describe the main aspects that differentiate the sub product from the main product**

##### **A2.1 A cultural walk**

The “SU E GIÙ” race that takes place in Campobasso on the second Sunday of November is now in its 48th edition. The main feature of this event, which is divided into three levels of difficulty (includes routes of 7 km, 14 km and 21 km) in order to allow the participation of less trained runners, is that it takes place almost entirely for the historic center of Campobasso bringing runners to see all the most evocative places in the city. It is up to the runners to climb the steps leading to the Monforte Castle, passing in front of the tower where the unfortunate Delicata Civerra (a well-known story of identity of the city) was imprisoned and other fascinating corners of the city. The experience that the runner lives during the event allows to grasp glimpses of ancient places and daily life of the city, inviting him to dig deeper into the traditions, uses and customs of the locality and allowing him, in addition to the healthy physical movement given by the participate in the race, also to enjoy an authentic, unique and personal experience.

#### **BRIEF MARKET ANALYSIS OF THE TOURISM PRODUCT**

##### **B1.1 General description**

###### *Demographic description of tourist*

The sports tourist has different souls, sometimes cohabiting, made up of those who practice a sport in an amateur or competitive manner and those who travel everywhere to follow, as a fan, their team or their favorite athlete. He is the enthusiast who also lends himself to long journeys, willing to spend, even a lot, in specialized magazines and equipment for a holiday dedicated to his favorite sport. Look for particular places, special places, to be able to tell how much value they have given to "his companies", live on their social channels, once back from vacation.

Sport combines well with several other tourism products. This explains why tourists who have vacationed in Italy in the last period indicate it as the main travel motivation for 6.4% of cases. Italians are the tourists who move in the name of sport to practice or sporting events to attend - Lombardy, Trentino Alto-Adige and Emilia-Romagna are the regions with the highest number of sports travelers, reaching 23.2%, 17, 7% and 14.1% respectively. Instead, it is Germany that climbs the foreign rankings, contributing 29.7% of sports tourists to the total flows from abroad, followed by Austria (14.3%) and France (14.1%). From the identikit of the sports tourist who participates or attends competitions and sporting events on the Italian territory, according to the data collected, it emerges that he tends to belong to generation Y (the generation that includes all those born between 1981 and 1996), lives in Italy (therefore he mainly moves



### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

on the national territory), has an average length of stay between 4 and 6 nights, has particular affinities with the naturalistic tourist and the cultural tourist and is also particularly "social addicted" and spends a lot in specialized magazines and equipment.

Among the differences between Italian and foreign patrons is the choice of creating a mix of the tourist products chosen. For Italians, it meant combining excursions into nature and a favorite sporting activity (14%). For foreigners it is important to fully embrace the exclusivity of the Italian Lifestyle (12.8%), looking for places where they can rest or enjoy the beauties of our country (8.5%). 56% of foreign tourists are looking for information on how to move around our territory. In addition to information on local transport, they are also looking for niche tourism products. Italians, on the other hand, focus more on finding information regarding the practice of sporting activities of interest, starting with excursions (26.1%), to get to how and where to get the professional equipment they need (22.7%). With regard to accommodation, over half of tourists (55.9%) preferred 3 and 4 star hotels, but the data on B&Bs (15.7%) is also interesting. To underline the figure of Italians, who choose more private rental accommodation (11.4%, compared to 9.7% on average), in order to save on accommodation. The main activities of sports tourists, once at their destination, are excursions and trips (43.5%), visits to historic centers (27.9%), wellness activities in special centers (12.6%), shopping (12, 2%), tasting of local food and wine products (9.5%).

Overall, almost 9 out of 10 tourists were satisfied with the experience spent in Italy. Among the most appreciated aspects are the quality of food and drink (score 8.5), the catering, the courtesy and hospitality of the people, the quality and hospitality in the accommodation facilities (8.4) and the cost housing (8,2).



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **B1. General tourist profile of this tourism product**

##### **B1.2 Main markets of origin**

*Geographical point of view - both international and domestic markets*

Sports tourism generates from 12 to 15 million international arrivals each year, with growth forecasts of approximately 6% per year in the short term and represents 10% of the world tourism industry, for a turnover generated of approximately 800 billion dollars. The main countries of origin of sports tourists are the United Kingdom, Germany, Italy, Spain, Denmark, Sweden and Finland. In some countries the induced activity generated by sports tourism has exceeded the threshold of 25% of the total, reaching the record share in Australia equal to 55%.

The market in which sport motivation holds the greatest weight is the Austrian one, with a share of about one third of the total (32.3%). It followed by the Swiss (25.2%) and the Germans (18.5%).

It is interesting to note that even for long-haul markets, Italy is an attractive destination for sports holidays: 16.9% of Japanese and 8.5% of Americans in Italy are attracted by the possibility of practicing sports.

As regards the national territory, of the more than 20 million Italians who practice one or more sporting activities, more than 11 million have made a tourist transfer. In recent years the sector has recorded a + 25% linked to tourist flows and a + 20% in spending, generating a turnover of 9 billion euros and about 60 million total overnight stays.

The number of sports for which tourism is also increased, if in the first decade of 2000 winter sports determined about 49% of trips, today the share has dropped to about 42%.

##### **B1.3 Tourism habits**

*Preferred means of transport Group / Single  
Organized / not organized Etc.*

The sports tourist mostly belongs to Generation Y (born between 1981 and 1996) and is characterized by a high spending capacity and longer average stay times than other categories (between 4 and 6 nights). Furthermore, once he returns to his place of origin, he usually recommends the destinations of his recent travels to his network of acquaintances. Suffice it to say that 90% of those who traveled to Germany to attend the 2006 World Cup subsequently recommended the same destination to others.

Among the sports practiced by those who travel to Italy for tourism, skiing prevails, especially among foreigners (18.7%). In second place is cycling (11.4%), thanks to the prestigious tradition, both in terms of practice, and of technical and accessory production. In the third we find trekking (8.5%), a sport that has a strong connection between sports, mountains and nature.

When choosing a destination, the natural beauty of the place has a significant impact (30.4%) as does the possibility of finding suitable places for relaxation (28.8%), leisure (16.7%) and shopping ( 10.3%). The "novelty" component is also very important for foreign tourists (25.3%).

The sports holiday has an average cost per capita of 97.43 euros for the return trip (75.41 euros for Italians and 122.83 euros for foreigners). Accommodation requires an average of 44.57 euros per day (42.03 euros



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

for Italians and 46.86 euros for foreigners), while 68.59 euros (67.26 euros for Italians and 69.99 euros for foreigners ) are intended for the remaining daily expenses. More than half of this expenditure (52%) concerned hospitality and catering businesses, but important repercussions are also had for recreational, cultural and entertainment activities (24%). The agri-food sector receives 13% of the expenditure incurred from this segment and, finally, approximately 3% is dedicated to transport.

#### B2 International Market size of the present global demand for this tourism product and expected future trends

##### B2.1 Present market size

The Ciset (International Studies Center for Tourism Economics) has found, through the study of various sources, that world sports tourism today corresponds to a market of 1,400 billion dollars. It should be emphasized, in the data collected, that as much as 740 billion dollars, therefore about half, derive from passive sports tourism and there is great hope of an increase in the coming years: a 41.45% growth in sports tourism is expected, within 2025. Eurosport has also demonstrated, with other data collections, the trend and importance that sports tourism has on a global level. The survey carried out by the television network itself is important, from which it has come to understand that sports tourism is worth 10% of international tourism and in some countries, such as New Zealand, it reaches 50% of total tourism. Furthermore, again from the surveys carried out by Eurosport, it appears that sports tourists originate mainly from the United Kingdom, Germany, Italy, Spain, Denmark, Sweden and Finland.

##### B2.2 Trends

As we have seen above, Central-Western Europe and Northern Europe represent very important markets for the sports tourism system, whose presence has not yet been registered during the “Su e Giù” in Campobasso. The countries of greatest origin of runners such as the United Kingdom, Germany, Spain, Denmark, Sweden and Finland did not register significant attendance during the event. However, a communicative approach more careful to highlight the peculiarities of the race, perhaps integrating the tourist offer with an invitation to explore the surrounding area, to visit the nearby villages, to participate in food and wine tours or visit the museums in the area it could considerably increase the attendance of sportsmen. The same discourse for attracting potential runners also from Italy, in fact, as we have seen, there are few participations of athletes who come from the national territory, except for some sporadic cases of members from neighboring regions.



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **B3 Local size of the present local demand and expected future trends of this tourism product line**

##### **B3.1 Present market size**

In the last year the “Su e Giù” of Campobasso has seen the participation of about 6,000 runners, mostly from Molise and to a lesser extent from other regions of Italy. Even the presence from the neighboring municipalities is not particularly massive, considering that more than 50% of the members in recent years are resident in the city of Campobasso. With regard to gender differences, the participation of male athletes is predominant to the detriment of the female one, even if the gap decreases with increasing age. The highest percentage of runners is that which includes those born between 1981 and 1996 (generation Y), followed by the population group born between 1997 and 2010 (generation Z), while there is a lower participation in the older population.

##### **B3.2 Trends**

The activities that fall within what is defined as "sports tourism" are numerous, among which particular attention has been given to running sports tourism. The amateur runner often needs to reconcile participation in races and events (which are usually scheduled on weekends) with spending time with their family and often the weekend is the only time they can share with loved ones. Research on this type of tourist has found that runners feel the need to try their hand at competitions and sporting events accompanied by their loved ones and then look for opportunities to explore the surrounding area, visiting characteristic villages, taking part in food and wine tours or visiting exhibitions and museums.

#### **B4. Most important criteria influencing the competitiveness in the global market for this tourism product line**

##### **B4. Sports tourism based on the Foot Race**

Some characteristics and aspects that qualify the tourist offer of Campobasso in the sports tourism market and mainly in that linked to running:

- The running event of the “Su e Giù”, despite its nearly 50 years of age, is few known outside the region since, as seen from the previous analyzes, most of the participants are made up of city residents. This limit could be objectively overcome by a timely communication campaign in which the running sports federations are involved, in order to increase the attractiveness of the event even outside the regional borders.
- The urban area of the city where the event takes place is almost entirely circumscribed in the Old Town (Medieval Age) and in the Murattiana Area (19th century) and, as mentioned, presents remarkable characteristic views. For this reason, a correct communication campaign should aim not only at the sporting aspect of the event but also at its relationship with the places and the history of the trails. The possibility to choose between different degrees of difficulty, as described above, in fact allows the participation of athletes who are not trained or not trained at all who are only interested in taking a simple walk in the historic heart of Campobasso to discover its artistic and architectural treasures.



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **B5. Most representative international best practices (max 3)**

##### **B5.1 La Sciacchetrail - Cinque Terre Park, Liguria**

Sciacchetrail is a race of 47 km with 2600 meters of altitude difference that takes place in the Cinque Terre Park in Liguria. The race is not only a sporting competition, but also a cultural project, through which sportspeople come into contact with those elements that, over the centuries, have given life, in harmony with the environment, to the terraced landscape. A breathtaking environment located 800 meters above sea level that can be considered unique in the world. The race passes through five villages, some wineries and churches and about eighty hectares of vineyards, where about twenty winemakers produce Sciacchetrà, the raisin wine of the Cinque Terre that sets the tables of kings, as the organizers of the event like to repeat.

##### **B5.2 La Francigena Running - via Francigena, Tuscany**

The Francigena Running is a foot race, which has the declared purpose of promoting the territory that hosts it. The race is certainly a sporting event with prizes up for grabs for the athletes, but also and above all an important moment of promotion of the territory through the Via Francigena. The Francigena Running route winds through the hills of Pietrasanta (for example Val di Castello and surrounding areas) until it reaches the slopes of Monte Magno through Camaiore. From here continue to the historic villages of Valpromano and Piazzano. Following via delle Gavine we finally reach the river park along the Serchio until to the Foro Boario.

##### **B5.3 La Firenze Marathon - Florence, Tuscany**

The Firenze Marathon is the main race running event that takes place in Tuscany and, together with Rome, is now by right the most important international marathon in Italy, among the top 20 in the world for number of participants and for quality. The Florentine trails moves through landscape views and monuments of unique beauty, which have made the city famous throughout the world. A new track that touches the most fascinating places in Florence, such as Piazza del Duomo, Piazza della Signoria, Ponte Vecchio and many other streets and squares rich in history and culture. The trail is without gradients, as required by the IAAF regulations.

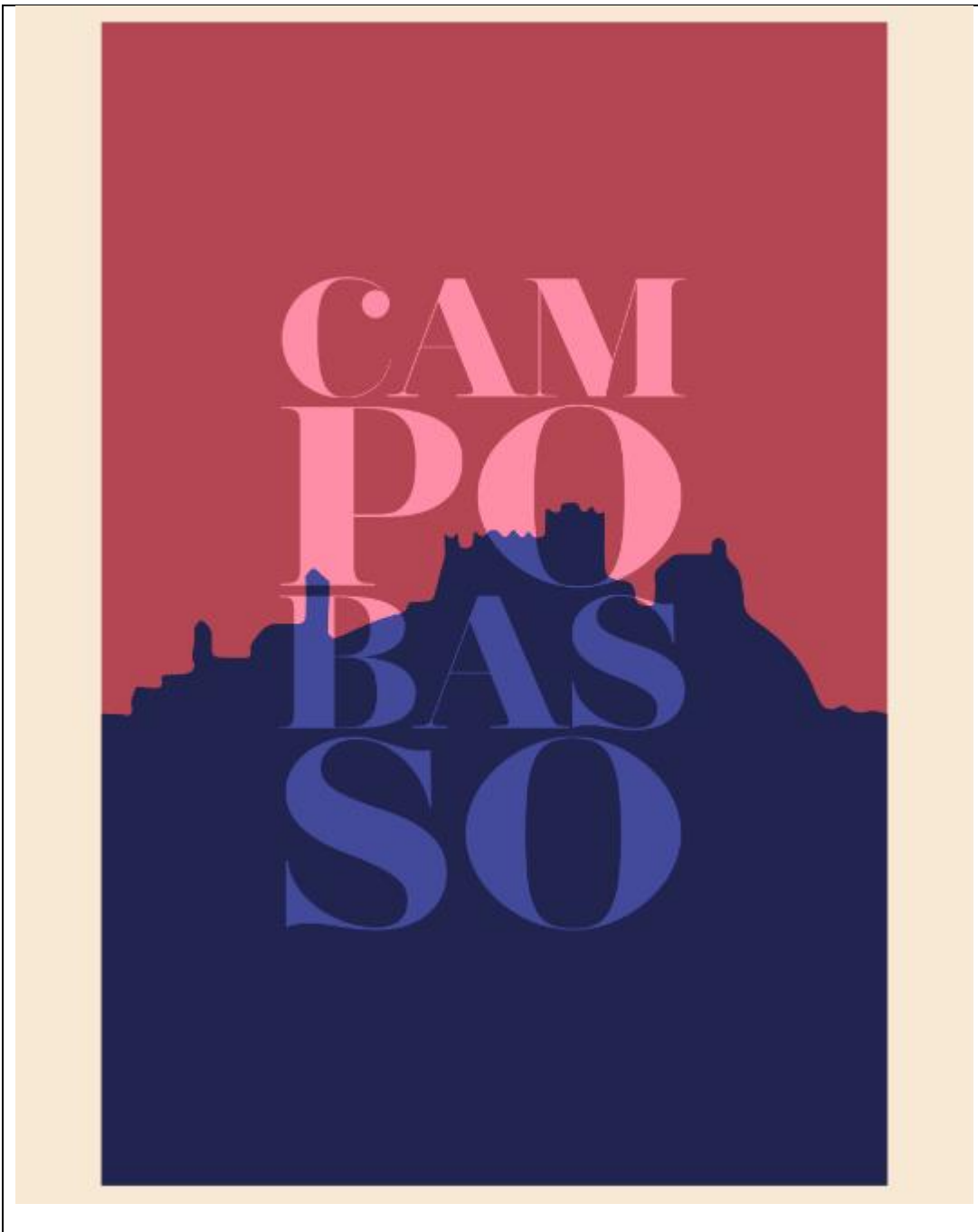




### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **3. Market analysis on tourism experiences / products: CULTURAL HERITAGE TOURISM BASED ON URBAN TREKKING (COMMUNITY MAP)**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.





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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **A1. Main characteristics of the product line**

The tourist map of the city is the first tool to immerse yourself in a journey of knowledge and exploration of the place you want to visit. In the last two years, after the pandemic and the consequent restrictions, thanks to the choice made by Italians, who preferred to spend their holidays in Italy and in the less frequented regions, Campobasso has discovered itself as a tourist destination and has been chosen by organized groups, families, single people attested by a high number of tourist presences especially in the summer months. In the absence of tourist reception tools capable of guiding travelers to the knowledge of local history and culture, it was decided to create the first tourist map of Campobasso, a tourist product developed in paper and digital format, with texts in Italian and English, capable of promoting sustainable tourism. A tool to discover the city through the significant elements (monuments, museums, places of culture, etc.), the works of art created by local artists, the indication of representative points of the city traditions and the naturalistic elements described in collaboration with citizens who have provided travel tips or curiosities about their city. The classical information will therefore be integrated with the experiences that the citizens themselves will provide through videos or real interactions.

The map will be accompanied by knowledge amplifiers, with QRcodes inserted at the indicated points of interest, from which each user (tourists and resident citizens) will be able to access additional cultural content (photos, videos, podcasts, texts) and audio and video thematic insights starring the citizens of Campobasso. For this reason it could be a flexible product used by individual travelers or families, but it could also involve larger organized groups who will also be able to access the contents from their digital devices. The map will be created in two formats: the traditional paper format, in which the textual information can be read from the city plan, and the digital one available via the Google Earth platform which can be consulted through a postcard of the city. The choice of the postcard also wants to be an invitation to get to know the city, a particular word of mouth that can be sent to friends who have not yet visited Campobasso. Both products will be pocket-sized and easily accessible by each user.

#### **A2. Sub-products – describe the main aspects that differentiate the sub product from the main product line**

##### **A2.1 From the tourist map to the widespread info point**

The paper tourist product represents an important tool for exploration and knowledge of the cultural heritage of the city. The tourist map, in addition to providing information on itineraries to follow, easily adapts to the traveler's times, is easier than a guide but contains suggestions and information that also lead to exploring the places with the right curiosity. In the absence of municipal tourist support or other institutions, the commercial activities of the historic center (such as newsstands, artisan shops, bars and restaurants) were involved in order to activate an informal, widespread, always open and accessible info point. The creation of an identification sign (the magnifying glass, symbol of Excover), also present on the tourist map, will make urban information points easily recognizable. Through the training of citizens who want to be part of it, the residents will be transformed into storytellers of the city able to welcome and provide exact information on the present assets and solve any needs or requests of the tourist, and then entrust the travelers in the hands of expert craftsmen, tourist guides, restaurateurs etc.

##### **A2.2 The map and itineraries**



### D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO

Tourist maps are the first encounter with the city, a means that facilitates movement in unknown environments and which one intends to know, which makes the history and heritage of a place known by providing useful suggestions. The map helps to have an overview, especially when the digital format is integrated into the paper version, which will facilitate the exploration of the places and the identification of landmarks to move easily following the urban road layout. The route is designed to cross the city on foot, following the urban conformation starting from the lower and flat part until reaching the top of the hill on which stands the Monforte Castle, symbol of the city.

The map will provide the key indications for visiting Campobasso, it will also indicate technical information for mobility (train station, bus terminal, city buses, etc.) and suggestions for historical, cultural and naturalistic itineraries that the municipality intends to activate with others. Interreg projects. The community map developed with the Excover project will therefore become the synthesis tool through which to know and explore Campobasso. In some points of interest, in fact, the other projects will be integrated with the proposal of thematic itineraries produced: on the architecture of the twentieth century, on the history of Crociati and Trinitari, on the naturalistic and cultural themes.

The map will be the tool to accompany tourists (individuals or groups) on an evocative urban trek that will make them know and get in touch with the resident community.

## BRIEF MARKET ANALYSIS OF THE TOURISM PRODUCT LINE

### B1. General tourist profile of this tourism product line

#### B1.1 General description

##### *Demographic description of tourist*

In the cultural journey, tourists choose to travel and get to know a destination starting with organized groups, with family, friends, school, as a couple or alone. Choosing who to travel with also determines how to travel and how to plan the itinerary. Often, the traveler who travels alone or in small groups (couple, family, friends) organizes their trip alone by consulting online digital tools to research, plan and above all book their trips (84% of tourists book online). Otherwise, when you decide to travel in a group, the organization of the trip is entrusted to a tour operator who plans the destination including accommodation, food and places to visit, often including other intermediaries for knowledge as a tour guide, tourist guides for use. destinations.

Tourists who come to Campobasso belong to both categories of travelers, those who rely on third parties to organize the trip and those who organize the trip themselves. The tourist map is certainly a tool that is most easily applied with people who organize their trip independently, who have read reviews and comments on the web or who have relied on advice received from friends and relatives. This target of tourists imagines finding further means of knowledge once they reach the destination, suggestions that the same destination offers as a method of reception. The tourist product of the map of Campobasso is mainly aimed at this target of travelers, however it lends itself to represent the city even for larger groups, who are usually accompanied by local guides, but who want to keep memory of the route traveled to inside the urban fabric. For this reason, the paper map and postcards will be distributed in B & Bs, hotels, bars, restaurants, newsstands, etc.



### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

Without a regional tourist office capable of officially registering tourist presences in the two-year period 2020/2021, the study of the Demoskopika Institute and Unisannio is reported which indicate a growth in presences for the months June - October 2021 in which about 234 thousand have been estimated. Tourists in Molise, an increase of 11.8% compared to summer 2020, many of whom have chosen the accommodation of the regional capital, rich and varied and above all close to the major cultural centers of the region. To these data, moreover, we must add the tourists who do not stay overnight in Molise but visit it during the day without staying overnight.

#### **B1.2 Main markets of origin**

*Geographical point of view - both international and domestic markets*

The regional and urban settlement features make Campobasso an ideal destination for tourism in the cities of art but also for tourism in the villages. The rediscovery of villages and small towns have won a great consensus among tourists, managing to compete with the great traditional tourist destinations. Visiting cities for various reasons (cultural, events, exhibitions, business and conferences, etc.) has always been one of the main tourist activities in Europe. Urban tourism has shown a constant growth rate with a generalized increase in demand and supply, while traditional and more well-known destinations are joined by lesser-known destinations that nevertheless arouse interest and curiosity. The growth of experiential tourism, in which time cannot be fast but presupposes living in the place and not just crossing it, favors small towns, such as Campobasso, which can be an urban destination but at the same time also a "minor place", such only for the size but not for the cultural heritage preserved. The city map will highlight the urban experiences that Campobasso offers, between past and present, to enter national and international circuits.

#### **B1.3 Tourism habits**

The 2020/2021 data confirm that the period between spring and early autumn represents the moment of greatest interest for travel to Molise and therefore Campobasso. Tourist flows concern local, national and international school groups (thanks to the various Erasmus projects) who mainly prefer the spring months for educational trips, but also trips organized by tour operators and individual ones for individuals and families. The duration of the trip is variable, normally includes several regional destinations but generally half or full day is spent in Campobasso. The case in which you choose to sleep in the city is different; in this case in the evening you return to the city and this allows you to visit it in the evening to make purchases, dine at typical restaurants or trattorias, participate in cultural events etc.

Depending on the organization of the trip, there are different types of groups: schools of all types of school usually move with one or two classes of students (for a maximum of 65 students plus accompanying persons); families, couples without children or groups of friends move in a more agile and autonomous way (2-5 people); organized groups have different characteristics that vary according to age, the type of experience chosen (cultural, trekking, historical travel, etc.) and comprise from 20 to a maximum of 55 participants.

The means of transport chosen by small groups of tourists is their own means, but groups prefer private buses, in this way it is also possible to reach other destinations in Molise otherwise difficult to reach with scarce public transport and binding timetables. The railway stations or the buses are only partially used for



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### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

the holiday trip which however remain a permitted opportunity to reach the destination Campobasso. Finally, there is no shortage of business trips or conferences, these users stop for one or two nights and often conclude their working days with a guided tour to get to know the city.

## **B2 International Market size of the present global demand for this tourism product and expected future trends**

### **B2.1 Present market size**

The market for tourist guides and tourist maps is growing rapidly. The formats, types and supports are many and often come together to provide greater quality and an amplified experience. The tourist guides in paper format still retain a particular charm for lovers of the sector and for this reason they continue to be created and expanded with unique details. For the classic tourist it is not always necessary to have every little detail and situation under control, the charm of discovery remains the very essence of the trip and for this reason it does not work through the super updated tools that the web provides.

Furthermore, for this type of tourists the relationship with the printed guide is obsessive: notes, underlining, post-it notes before, during and after the trip; but above all the paper guide preserves over time more than anything else the sensations and memories in an indelible way.

However, we cannot ignore the new technologies that run at the speed of light and the tourism market that is influenced accordingly; which is why the tourist guides are expanded with apps, websites and multimedia contents that provide super-precise and always up-to-date information regarding the destination concerned.

### **B2.2 Trends**

A recent survey revealed that Italians love paper maps and tourist guides and also know how to travel without smartphones. Despite the fact that more and more travelers make use of the technological devices before and during the trip with which they respond to any need during the holiday. A trend that in recent years seems to have become an established habit.

The survey conducted by eDreams, one of the largest online travel companies in the world, reveals how much Italians still appreciate paper travel guides. A figure that proves to be among the highest of the European average and highlights how Italy does not give up the charm of the printed word when it comes to finding out about travel destinations.

The Italians who prefer paper maps and tourist guides are 21%. Against Portugal which holds the lowest percentage, 7%. An important fact comes from Millennials; travelers between the ages of 20 and 29 purchase paper guides. Standing at 44%, against 36% of the average of European peers. Men are the most inclined to use printed maps and guides. It is in fact 49% compared to 40% of women. The generation over 60 is surprising. They prefer the smartphone. They don't buy paper maps and guides. And even before leaving, they plan their entire vacation exclusively online. This is 39% of Italian travelers in this age group.

## **B3 Local size of the present local demand and expected future trends of this tourism product line**

### **B3.1 Present market size**

The creation of a dissemination tool such as the city map is essential both for citizens and for all those who come from the surrounding areas. Over the years, the data have revealed that many people do not know certain historical and traditional characteristics of the city of Campobasso but at the same time curious and determined to investigate these issues. Thanks to the commitment of professional



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associations in the area, many initiatives have been activated that have satisfied these needs. Therefore an intuitive and above all interactive tool such as the map will be significant from the point of view of the request from potential regional users. Furthermore, the expectation is to expand the widespread info point by including a whole series of personalities on the city territory that will make the visit experience unique and unforgettable.

#### **B3.2 Trends**

In the last years of the pandemic, coinciding with a greater direct and indirect promotion of the Molise region, Campobasso has discovered itself as a tourist city and in particular in the summer period it has been possible to detect a greater influx of tourists in the city who have begun to choose it not only as a base for moving to other destinations within the region, but also as a choice of exploration thanks to its cultural heritage. Campobasso was chosen both by extra-regional tourists due to the slight incidence rate of Covid being an almost unknown destination and out of the major flows (less subject to the risks caused by the pandemic) but also rediscovered by the Molisani and by the segment of returning tourists who have chose to visit the city to discover the places of their origins.

#### **B4. Most important criteria influencing the competitiveness in the global market for this tourism product line**

##### **B4. Cultural heritage tourism based on the urban trekking**

An unusual Urban Trekking, an authentic journey to be lived slowly, as the shape of the city that gradually rises from the valley suggests: Campobasso surprises the traveler with the many faces of history and the spontaneity of its community. A thousand-year history that from the Samnite era, with the first settlement nucleus, leads to the birth of the medieval center which later became a fief of important noble families, such as the Monforte's, thanks to which the city was redesigned. From the winding alleys, between colorful houses and suggestive stairways, typical of the upper town perched around the Monforte Castle, opens the new village built in the Napoleonic age and recognizable as a city - garden and designed for the will of King Joachim Murat, and for this reason defined Murattian center, which had it built according to the nineteenth-century urban ideal. From village to town that over time has grown to become the most important administrative center of Molise in modern times. The nineteenth-century and contemporary city with gardens and villas, places of craftsmanship, artistic productions, art galleries and museums, or art painted on the buildings with the street art project represents the bourgeois and elegant part in which the citizens love to spend their free time and where public events and manifestations often take place.

#### **B5. Most representative international best practices (max 3)**

##### **B5.1 INFOPOINT DIFFUSO (SCIACCA)**

Bars, tobacconists, shops in the center that become infopoints. The beauty of a territory that is rediscovered, narrated, shared. Which becomes the cure to generate well-being and happiness for



### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

everyone, without exception, for those who travel and for those who stay. The project sees the creation of the largest Infopoint in Italy in terms of the number of operators and branches in relation to the population. To do this, we focus on three distinct but interconnected areas: economic development, cultural growth, social inclusion. The mission is to transform Sciacca into a Tourist Destination that aims at high quality tourism through a cooperative, participatory and inclusive ecosystem. The operators will provide ideas, answers, proposals for experiences and itineraries. But above all, they will welcome temporary fellow citizens and show them the best of their community.

#### **B5.2 PISA URBAN TREKKING E COMMUNITY MAP**

A different approach, therefore, which allows you to work on the physical and mental well-being of people, but which at the same time invites you to visit the city away from the areas most crossed by traditional tourist flows.

There are three routes proposed by Piedi in Cammino to discover a less known Pisa but equally full of suggestions and history:

- Along the walls: the areas touched by the trekking will allow you to embrace different themes related to the territorial and historical evolution of the city of Pisa.
- Discovering the Medici fountains: the Medici fountains are scattered throughout the historic center of Pisa, both in the Tramontana and Mezzogiorno part.
- From the "Old Citadel to the New Citadel": the protagonist of this path is the Arno, the city's urban development axis. Mirror on which historical monuments and palaces are reflected, and therefore an opportunity to tell the many historical events of the city also through the re-enactment of the characters who made Pisa famous.

The community narrative map of the city of Pisa was created by 16 students from the Santoni Institute and the Liceo Carducci in Pisa after participating in experiential lessons and workshops and after having discovered lesser-known places in their territory. It is a paper and digital map that will be distributed by the "Walking in the City" tourist office and will remain at the disposal of the Municipality in order to promote Pisa focusing on lesser-known aspects of the city's cultural heritage.



### **D.4.3.1 Tourism Products Portfolio: PP9 CAMPOBASSO**

#### **4. Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. Urban Trekking
- B. Mystery & Festivals





### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

#### PP10 PARCO SASSO SIMONE SIMONCELLO

Partner (name and number)	Sasso Simone and Simoncello Natural Park Authority - 10
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1. Main elements collected during WP3 and WP4.1 outlining the potential for tourism experiences in the target area (s)

#### *The ancient Stamperia Carpegna (Carpegna)*

Antica Stamperia is an artisan activity focused on rust printing on fabrics. It is an ancient tradition typical of Romagna carried on by a few artisans. Mr. Francioni belongs to this group of small entrepreneurs who keep this tradition alive. It is singular that its activity is located beyond the borders of Romagna.

Mr. Francioni is quite young, after his studies he has transformed a skill that has been handed down in the family for 6 generations into a small business that involves him completely. He takes care not only of production but also of all the other activities of his company : from the conception of products to their marketing. Mr. Francioni has created innovative products compared to the traditional printed sheets used to decorate the table: tablecloths, napkins, table centers, etc. He also carries out social activities by collaborating with the schools that often visit his company.

The production unit is located a few steps from the Pieve di Carpegna. A chance to visit both of these attractions.

[www.anticastamperiacarpegna.it](http://www.anticastamperiacarpegna.it)

#### *Il Certello (Frontino)*

Il Certello is one of the first bakeries, not only locally, to produce organic bread. Mr. Larghetti has created and still manages this oven and at the same time carries out the activity of farmer.

It mainly produces cereals based on biological criteria which constitute the raw material of the bakery. Certello 's products are of the highest quality and going to the company to buy them is an experience in itself .

The company has no indications and a normal farmhouse appears on the outside, so even with GPS it is very difficult to identify.

Finding the company and visiting it therefore constitutes a small challenge since that of concealing oneself has the rank of a corporate value: emblematic of the fact that a company sign has been made but is placed in the basement.



### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

#### *Nursery Il Sorbo (Frontino)*

The nursery is managed by Mr. Antonio Santini. The company is of great interest because alongside "commercial" plants there are also particular crops. In fact, Mr. Santini is very interested in the fruits that the market has "forgotten". These are fruits that the current market refuses but which in the economy of the traditional farm performed precise functions.

Mr. Santini through his own network of contacts identifies the territory where these fruit trees are located, for which he has built over time a map of these rarities. Some of these plants are grown directly in his nursery. This activity is conducted in collaboration with the University of Bologna. The nursery also manages the Garden of Forgotten Fruits in Pennabilli wanted by Tonino Guerra. The "forgotten" fruits can be tasted and purchased at the nursery. This simple experience alone is worth the visit and the trip.

In addition to this activity, Mr. Santini is an expert in truffles and is able to organize guided tours in search of these tubers for groups of tourists.

[www.ilsorboviva.it](http://www.ilsorboviva.it)

#### *Go up Pantani*

Marco Pantani, one of the greatest cyclists of all time, despite having been born and lived in Cesenatico on the Romagna coast, was a great climber (by bicycle) thrilling millions of spectators. To train he faced the climbs that lead to the top of Monte Carpegna in particular the 6km with a 10% gradient.

It is a path that among road cycling enthusiasts receives a lot of attention as it ideally challenges an absolute champion still not forgotten.

[www.romagnabike.com/percorsi/le-salite-di-marco-pantani](http://www.romagnabike.com/percorsi/le-salite-di-marco-pantani)

#### *Panoramas*

The park area has magnificent views that embrace the Adriatic coast of the Marche and Romagna up to the highest peaks of the Eastern Apennines. Views that constantly change passing from one to the other of the park's notable points. These panoramas were the backdrop to Renaissance paintings by famous authors such as Piero della Francesca, as can still be recognized today. In order to recognize and enjoy them, the "Montefeltro Vedute Rinascimentali" project was launched which has given rise to two paths for now.

Route 1 : the *Portrait of Battista Sforza and San Girolamo and a devotee* ; inside it has two "balconies" from which you can appreciate the landscapes that were the background to the *Portrait of Battista Sforza* (Florence, Uffizi), and to that of *San Girolamo and a Devoto* (Venice, Gallerie dell'Accademia)

The second route instead refers to Alta Valmarecchia: *Baptism of Christ, Resurrection of Christ, Nativity.*



### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

[www.itinerariinromagna.it/route/50/i\\_balconi\\_di\\_pierodellafrancesca\\_montefeltro\\_vedute\\_rinascimentali\\_itinerari\\_valmarecchia](http://www.itinerariinromagna.it/route/50/i_balconi_di_pierodellafrancesca_montefeltro_vedute_rinascimentali_itinerari_valmarecchia)

#### a1.2 Tangible assets

##### *Museums and Art Installations*

At least 22 museums and art installations are distributed among the 5 municipalities of the Sasso Simone and Simoncello Natural Park. Among these there is a bit of everything: from contemporary art museums in Pietrarubbia, Frontino and Pennabilli, to historical museums, such as that of Sacred Art of Montefeltro also in Pennabilli, there are also naturalistic museums, herbaria or a Museum of Calculation but also art installations<sup>56</sup>and more.

Some of these museums collect works of great value by contemporary artists such as Arnaldo Pomodoro and Tonino Guerra but there are also minor artists worthy of attention.

##### *Woods, groves and beech woods*

The Sasso Simone and Simoncello park is a very green and wooded area. The naturalistically most interesting areas are three and they occupy almost half of the park itself:

The cerreta of over 800ha that extends from the Sassi Simone and Simoncello to the Cantoniera pass and develops between an altitude of 950 meters and an altitude of 1150m

The Pianacquadanio beech forest where there are beech specimens of considerable size and age. It constitutes a strip of the ancient forest that once covered the summit of Mount Carpegna. The appearance is sometimes imposing with large beech trees associated with mountain maple, curly maple (*Acer platanoides*), Neapolitan maple, field maple, lime (*Tilia platyphyllos*), yew (*Taxus baccata*), mountain ash (*Sorbus aria*).

The state-owned forest of Monte Carpegna (415 ha) has been the subject of reforestation activities to heal the damage caused by deforestation and to prevent hydrogeological instability.

##### *Charming villages*

Inside the park, or in the immediate neighboring areas, there are a series of small villages of great charm both for their urban structure and for the natural context within which they are inserted. The main among

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<sup>56</sup> We define in this way the so-called "**Places of the soul**" by Tonino Guerra, that is: *The Refuge of the Abandoned Madonnas*, *The road of the Sundials*, *The angel with the mustache*, *The sanctuary of thoughts*, *the petrified garden*, *The Madonna of the snow rectangle*. To this list of art installations, the *Lhasa Bells* deserve to be added, albeit of a completely different origin <https://visitmontefeltro.it/pennabilli-campana-lhasa/>



### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

these is certainly Frontino whose historic center belongs to the network of the most beautiful villages in Italy.

Other small towns of great charm are scattered around the area, although sometimes they are not just inside the park but on its edges. In this case we are dealing with hamlets or ghettos of houses sometimes gathered around the ancient rectory. Examples are: Cavoletto (Piandimeleto), Mulino di Bascio (Pennabilli), etc.

#### *Path network*

The whole area of the park is crossed by an extensive network of trails that allow you to visit the places of greatest interest. The signs nearing completion also indicate the means of transport suitable for the path itself: on foot, horseback, mountain bike.

Maintenance is managed by the Park itself with the support of the CAI.

#### *Pontevecchio mill*

In ancient times the mill was used to supply bread to the castle, but it grew in importance and became a point of reference for communities other than Frontino. A high tower was erected for defensive purposes, on the model of that of the historic center.

Today the mill consists of many rooms and bottaccio for the water reserve. Two milling apparatuses are active with old stone millstones and related equipment, powered by electricity. In another room an ancient water-powered milling plant is in operation, as in tradition, for educational purposes.

A series of 21 panels illustrates the history of bread and milling art. In this complex is being set up the Museum which collects equipment and tools of the ancient artisan and agricultural activity and inside the Mill.

#### *Palace of the Princes of Carpegna*

It is a majestic building designed as a palace - fortress. Its construction was started in 1674 by Count Gaspare di Carpegna Cardinal and Bishop. The building is located in the center of Carpegna and dominates the town itself. It is owned by the descendants of the Princes of Carpegna and can be visited upon request from the public .

It can be considered as a real living museum as it is still inhabited by the owners and can be visited even with some understandable restrictions.

#### *The historic village of Pennabilli*

Archaeological finds date the first human settlements in the Pennabilli area back to the Etruscan and Roman times. During the barbarian raids of the mid-first millennium AD, the two hills on which the town stands



### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

served as a refuge for the populations settled in the surroundings. Thus the communities of "Penna" and "Billi" originated.

Penna developed as a village, Billi was the fortress of the Malatesta family. The union between the village and the nearby castle took place in 1350 with the laying of the "stone of peace" in the market square built between the two towns. The town passed several times under the influence of the Malatesta, Montefeltro, Medici and Papal States. In 1572, with the transfer of the bishopric from San Leo, Pope Gregory XIII awarded it the title of "City". Pennabilli is still the seat of the diocese of San Marino-Montefeltro.

In united Italy, the municipality of Pennabilli belonged to the Marches until August 2009, when it was detached from it to join Emilia Romagna.

Pennabilli has a strong link with Tibet, which dates back to the 18th century, when Father Orazio Olivieri left to found a Catholic mission in Lhasa. In the Tibetan capital he brought the first printing press with movable type and wrote the first Italian-Tibetan dictionary. In 1994, the Dalai Lama visited Pennabilli to celebrate the 250th anniversary of the missionary's death. In 2005 there was a second visit by the Dalai Lama, during which a bell was placed on the hill overlooking the town flanked by three Tibetan prayer mills. The bell is the cast of the original bell of Father Horace's mission in Tibet.

Pennabilli has numerous cultural resources:

the widespread museum "The places of the soul" conceived by Tonino Guerra, consisting of seven installations.

Bargello Palace

Palazzo della Ragione, known as Le Logge.

Ex-Palazzo Comunale with the characteristic portico.

Ancient village of Molino di Bascio

Cathedral of Pennabilli, cathedral of the diocese of San Marino-Montefeltro;

Sanctuary of the Madonna delle Grazie (XII - XVI centuries);

Hermitage of the Madonna del Faggio, located in the locality of Bascio. The church of San Lorenzo deacon and martyr is also part of the complex.

#### *Historic village of Pietrarubbia*

Perched on a rock, on the southern slopes of Monte Carpegna, the village of Pietrarubbia is one of the oldest in the whole of Montefeltro. Its origins can be dated around the year 1000.

In the centuries following the time of the battles between Malatesta and Montefeltro Pietrarubbia underwent a phase of decline and progressive abandonment. The inhabitants gradually moved downstream to a place more suited to a commercial economy.



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The ancient village was completely depopulated around 1960 going into a phase of further decline. Nowadays the village is completely renovated and, although it is not permanently inhabited, it is very popular with tourists or onlookers attracted by this real open-air museum.

In the seventies of the last century, Arnaldo Pomodoro discovered the now abandoned historic village which fascinated him to such an extent that it became a source of inspiration for one of his most famous sculptures "Pietrarubbia Work" (1975) a work in progress which later became a "Pietrarubbia Group" cycle, completed in 2015.

In 1990 the Municipality of Pietrarubbia decided to restructure the village and to follow up on Arnaldo Pomodoro's desire to bring it back to life through art. Thus was born the Centro Tam, a specialization school in sculpture, jewelry and design that could avail itself of the financial support of the Marche Region and the generous collaboration with Arnaldo Pomodoro who, for many years, not only directed it but was its very soul.

The works donated by Arnaldo Pomodoro to the Municipality of Pietrarubbia, some located inside the museum dedicated to him and others installed in the open spaces of the village and at the beginning of the municipal territory such as the Great Obelisk for Cleopatra (1989-2008) testify to the fort the artist's link with the territory and make the village of Pietrarubbia a unique place for the combination of history, culture, art and landscape beauties.

#### *Wildlife Park*

The Wildlife Park is located in Pian dei Prati and is included in an area of 5.5 hectares and has meadows, areas with hawthorn bushes, brooms and blackthorns, hedges and small groves, next to the Seminico stream.

The path inside the Wildlife Park includes three fundamental stages: the first concerns the domestic animals from the low court from which once, the peasant families of the area obtained milk, meat and workforce, fundamental resources for daily sustenance. The second stage allows close observation of wild animals kept in the wild. The route ends with the arrival at an observation point outside the Wildlife Park from which it is possible to observe wild boars in complete freedom in search of bulbs, tubers and acorns in the ground or engaged in mud baths. Inside the Wildlife Park, observation points have also been set up for passerines which find a great variety of berries in the bushes of the area.

#### *Botanical Garden*

The botanical garden of San Silvestro is located in Ponte Cappuccini, in the Municipality of Pietrarubbia. It is a small area that for several years has hosted an indigenous plant heritage consisting of arboreal and shrub plants as well as various herbaceous essences.

The Park Authority has added, in addition to those already present, other plant species typical of the natural environment of the Protected Area. A series of didactic panels are positioned, able to immediately provide



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some information on the main plants present in order to stimulate research within the garden, and the tags useful for the recognition of the various species. In the botanical garden there are therefore a great variety of plant essences that offer a small view of the plants that can be encountered while walking in the paths of the Park. Several bird nest boxes have also been placed inside the botanical garden; these find an ideal nesting environment, rich in fruits and berries to feed on.

#### **a1.3 Key attractions**

- Panoramas:
  - of Monte Carpegna, of Sasso Simone and Simoncello and of cerreta.
  - Of the Romagna coast from the Cippo del Monte Carpegna
- The mild climate during the summer
- The Historic Center of Frontino
- The village of Cavoletto
- Tonino Guerra's museum and art installations in Pennabilli
- The Arnaldo Pomodoro museum and the Mancini family church in the historic village of Pietrarubbia
- The truffle
- The trail network for walkers and bikers
- The historic village of Pietrarubbia
- The historic village of Pennabilli



### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

2. Summary description and main characteristics of the tourism experiences that you envisage in the involved territory.

#### 2.1 Tourism experience 1 - Natural Park - Cultural Park - The museum park

Target: Climate tourism, Cultural tourism, School tourism



The attractive factors of this tourist experience are the more than 20 museums and installations distributed among the 5 municipalities of the park, to which the possibility of visiting part of the Palazzo dei Principi di Carpegna and its park will soon be added.

These attractions cover a wide range of interests from natural aspects, to ancient art, to contemporary art.

Some of these resources can also be seen as examples of the multiple interactions that can be established between a great artist and the territory in which he resides. Exemplary in this regard are the experiences of Tonino Guerra with Pennabilli and of Arnaldo Pomodoro with the historic village of Pietrarubbia.

Museums and installations also lend themselves to gamification experiences to stimulate and make the visit more interesting.

The number and variety of possible experiences that a stay for cultural purposes can offer the visitor to the park is able to motivate both an excursion and a stay lasting a classic week.

This experience lends itself perfectly to integrating with climatic stays which by their nature tend to be rather passive and static.

This type of resource can arouse the interest of school tourism which has two classic destinations a few kilometers away, namely the Republic of San Marino and San Leo.





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To make these resources usable, however, it is necessary to create a series of services (transport, guides, accessibility to attractions, etc.) which are currently almost entirely paid for by the tourist himself. These shortcomings are one of the main reasons that discourage this experience.

#### 2.2 Tourism experience 2 - Long Stay Stays

Target: Family tourism



The pandemic, among the many effects we experience every day, has contributed to decisively loosen the link between the worker and his workplace in the physical sense of the term. The processes that were slowly leading to smart working and virtual meetings have in fact undergone a dramatic acceleration. All this is especially true for those who are engaged in intellectual pursuits.

This phenomenon pushes many workers to rethink their relationship with urban agglomerations to re-evaluate the small towns of the hinterland that are less crowded and risky as contagions and at the same time with greater contact with nature.

As a result, a significant flow of people settle inland, or stay longer in inland areas, well beyond the week or two of the traditional vacation.



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It is a new market that has opened up in which the presence of certain services, such as fast connections to the Internet, take on a strategic and decisive value.

The phenomenon is located on the border between tourism and demographic mobility and has potentially very significant impacts on the mitigation of the depopulation of inland areas. Paying close attention to long-term stays can have impacts that go well beyond the tourism sphere alone.

#### 2.3 Tourism experience 3 - Community experience in charming villages

Target: Family tourism



In the park and its borders there are a series of small villages of great beauty both for their urban configuration and for the nature they are surrounded by, not to forget the views that form the scenery.

These are assets that are not adequately valued and a possible way to do this is to integrate them with a series of services that convey the perception that the village is not a simple agglomeration of houses but a community.

From cleaning to baby sitting , from purchases to replenish the pantry to the possibility of enjoying the catering of a local restaurant, from the possibility of participating in card games to spend afternoons or evenings to personalized transport, there are many services that can be activated to enrich content stays in charming villages and make it a unique experience.

In this regard, we should not overlook the fact that they can constitute an income supplement for residents in the area who provide the indicated services.



### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

#### 2.4 Tourism experience 4 - Knowledge and flavors of the Park

Target: Climate tourism, School tourism

As described in the previous pages in the park area and also in the immediate neighboring territories there are entrepreneurs with skills of great interest for those who want to know unusual aspects compared to the traditional tourist attractions of the area.

Previously mentioned: the producer of organic bread, the nurseryman, the truffle expert, to these we can add others with different skills, the naturalist guide who knows the most hidden paths of the Park, the manufacturer of printed sheets in rust, the cheese producer, the truffle digger and the mushroom hunter, the shepherd, the dairy, etc.

These are people and activities capable of giving rise to moments of encounter or guided tours of great interest. The combination of these activities is probably not able to motivate a prolonged stay in the park, but they can certainly be occasions for meetings, memorable excursions, perhaps associated with moments of shopping for typical products and food and wine tastings,

In this latter respect, the presence in the territory of the park of typical products of luxury gastronomy should not be forgotten: black truffle, Romagna blackberry, mushrooms, Chianina.



#### 2.5 Tourism experience 5 - Active conscious tourism. The activity you practice is not an end but the means to get to know the territory.

TARGET: Bikers, Trekkers





### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

Trekking and biking are two of the most successful tourist products of the Sasso Simone and Simoncello Natural Park. Both activities are practiced as moments of sport where the focus of the tourist is on physical performance and on the parameters that quantify it.

The park, with the support of a youth cooperative, is developing an alternative way of practicing these two activities. The focus is not on sports performance but on knowledge of the territory: sport as an instrument of knowledge of what surrounds us.

This way of practicing trekking and biking makes these two activities interesting also for school tourism and more generally for outdoor learning.

Currently, with the support of the Park and the commitment of a cooperative of young people, it is already possible to practice "didactic" trekking where the routes are planned on a weekly basis having as a reference target both physical performance and knowledge of the territory.

The same approach can be developed for bicycle lovers.



### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

#### **3. Market analysis on tourism experiences / products: MUSEAL TOURISM**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.





### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

#### **A1. Main characteristics of the product line**

##### *Max 1 page*

Museum tourism is a key component of cultural tourism and in particular of heritage tourism. In recent years, the need has been felt to specify this further subset that identifies those who travel being interested only in the historical identity aspects of a country's culture and not also in its contemporary culture in its multiform expressions (ways of life, cuisine, events, etc. ).

For both categories of tourists, museums are the qualifying element and constitute the major attraction.

In the literature there are two ways of classifying museums, one based on their contents (art, history, science and technology, etc. ), the second refers instead to the size and ultimately to their attractive strength. In this case the parameters adopted are various: the number of visitors, the turnover, the number of staff employed or even the exhibition area.

The classes in which the museums are grouped in this case vary from 3 (large, medium and small) to 5 in this case two intermediate categories are included.

Obviously in the first class there are the great international museums (the Louvre, the British Museum, the Ufizi, the Vatican Museums, the Prado, etc.) which in themselves motivate the tourist experience. These museums are veritable cultural industries with iconic works on display, millions of visitors, turnover in the amount of millions of euros and numerous staff.

Generally as the size decreases, the attractiveness of the museum also decreases. In the case of small museums the situation is reversed compared to the larger ones: in this case it is the territory that attracts tourists that pushes, or should push, the latter visit them. If properly valued, the small museum, in fact, can offer tourists a particular and stimulating vision of the territory they are visiting as well as being an opportunity to increase the satisfaction of their stay.

Valuing small museums presents a series of problems, the first of which is to create value tourist chains in the area that include them. Once this is done, the obstacles are not over, on the contrary, two other difficulties arise, perhaps the most difficult to overcome: accessibility to the museum (materially the possibility of entering it) and the satisfactory use of it. Both are determined by the chronic lack of funds and personnel of these structures.

In the case of the Simone and Simoncello Park, there are over 20 small museums and art installations, not counting the historical monuments. The offer is therefore not lacking and it is also very qualified. From the point of view of demand: cultural tourism as such has never been a target of the area but it is certainly a potential to be exploited, first of all by systematizing the existing attractions.



### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

#### BRIEF MARKET ANALYSIS OF THE TOURISM PRODUCT LINE

##### B1. General tourist profile of this tourism product line

###### B1.1 General description

Figure 1: Cultural traveler's profile



Source: <https://www.cbi.eu/market-information/tourism/cultural-tourism/market-potential#what-makes-europe-an-interesting-market-for-cultural-tourism>

###### B1.2 Main markets of origin

###### *Geographical point of view - both international and domestic markets*

Germany is the largest European source market in terms of market size, followed by the United Kingdom, Italy, France, the Netherlands and Spain. The table below shows the percentage of residents per country who gave culture or a city trip as a reason for going on holiday , and the number of tourists leaving the country for a holiday abroad . The third column gives an indication of the market size of each country for a cultural holiday abroad. The figure clearly illustrates that the top market (Germany) is over five times larger than the smallest market (Spain).

Table - Key statistics of the 6 most important European markets

	% of residents per country with culture or a city trip as a reason for going on holiday in 2015	Outbound tourism, no of overnight stay tourists in 2018 (in millions)	Estimated number of overnight stays of tourists traveling for a cultural reason or city trip in 2018 (in millions)



### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

Germany	50%	109	54
UK	48%	70	34
Italy	66%	33	22
France	62%	27	17
Netherlands	65%	24	15
Spain	50%	19	10

Source: <https://www.cbi.eu/market-information/tourism/cultural-tourism/market-potential#what-makes-europe-an-interesting-market-for-cultural-tourism>

#### B1.3 Tourism habits

*Preferred means of transport*

*Group / Single*

*Organized / not organized*

*Etc.*

The dimensions of the museum experience are little studied and the segmentation of visitors remains merely descriptive and the analysis unsophisticated.

The literature has shown that the motivation for the visit is not correlated with the depth / intensity of the experience. Therefore, it becomes interesting to understand not so much the reasons for visiting a museum but the visiting experience or the desired dimensions of the experience resulting from the individual attributes of the visitors (level of education, exposure to art in childhood, level of interest in particular cultural products) and the attributes of the museum or context (services, location, explanation of the works, lighting, level of visitor involvement proposed by the museum, technologies offered).

The proposed visitor profiling is based on five desired experiential dimensions: aesthetics, learning, entertainment, escapism and socialization. Through a cluster analysis algorithm from the combination of these dimensions, five groups of visitors emerge:

Occasional (9.5 %) - *New visitors*

Aesthetics (19%) - *New visitors*

Routine -breakers (21%) - *New visitors*

Global experientials (35.75%) - *Traditional visitors*

Aesthetic learners (14.75%) - *Traditional visitors*





### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

The study highlights an interesting and unexpected picture of the museum only 50.5% of the sample adapts to the traditionally intended visitor image, and they are the Global experientials (35.75%) and the Aesthetic learners (14.75%), while the remaining 49.5% includes "new targets". Going into more detail, among the top 50.5% of the sample, global experientials are those visitors who are looking for all kinds of museum experiences, therefore, in addition to learning and having the pleasure of being in a beautiful place, they also want to enjoy the other experiential dimensions of the visit (entertainment, evasion and socialization) to achieve complete satisfaction with the visit. These visitors are the most satisfied of all. The Aesthetics learners, on the other hand, constitute a niche of visitors very interested in aesthetics and learning; they are the "real visitors" in the strictest and most traditional sense of the term, as they are educated individuals with a high level of education and with no expectation of entertainment, escapism or socialization.

The remaining half (exactly 49.5%) of the sample includes two new types of visitors (40% of the sample) represented by subjects who conceive and live the museum experience in an innovative way: they are not really interested in the aesthetic aspects and learning, they conceive the museum as a recreational place where they can play an active role and spend time in the company of others. This half of the sample also includes the smallest cluster, the Occasional (9.5%), made up of visitors who come to a museum only occasionally and who are unlikely to ever become more regular visitors. These findings disprove the myth about the type of museum visitor being well educated, educated, whose first desire is to learn new things in a museum, etc. Thus our evidence confirms the findings of recent literature on cultural consumers and museum visitors which state that visitors are not only looking for cultural enrichment, but also want to experience thrills, have fun and socialize. " *Museum Visitors' Profiling in the Experiential Perspective, Value Co-creation and Implications for Museums and Destinations: an Exploratory Study from Italy*" Emanuela Conti, Tonino Pencarelli and Massimiliano Vesci

## B2 International Market size of the present global demand for this tourism product line and expected future trends

### B2.1 Present market size

There are no reliable estimates of the global dimension of cultural tourism. Taking as a reference the global volume of international arrivals in 2014, UNWTO estimated that 40% of tourists move for cultural reasons. In absolute terms, reported in 2019, it was about 600 million people.

### B 2.2 Trends

The pandemic has led to a collapse in tourist flows worldwide.

From 1,530 million international travelers in 2019, the flow collapsed to 400 million in 2020 and 427 million in 2021

The forecasts formulated by the research centers indicate a curve of international travelers in the shape of a double W as indicated by the following graph formulated by the UNWTO. The forecast suggests that in the absence of other shocks, we should return to the levels of 2019 towards 2025 but the war in Ukraine with the explosion in the prices of energy raw materials, of which tourism is a major consumer, does not bode well.



### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

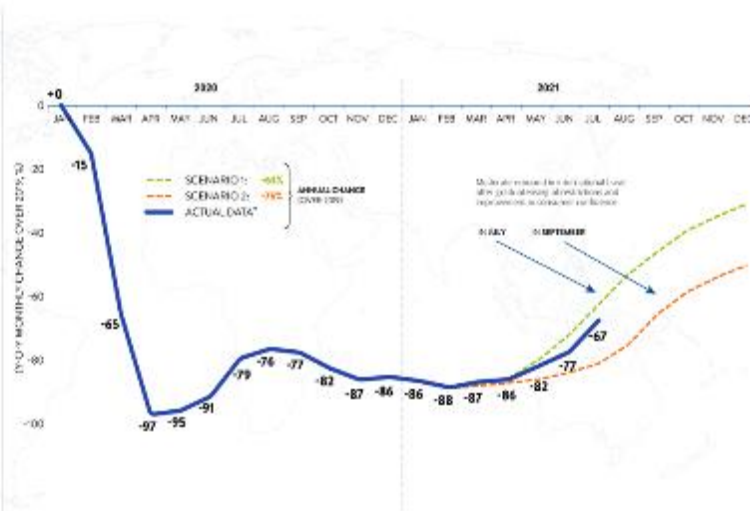
As far as cultural tourism is concerned, no specific statistics are available so it can be assumed that it has closely followed the trends of the global market, perhaps with worse data. These are conjectures but the forced closure of the great museums and cultural attractions and the escape from the crowded places of urban centers have probably made an already uninspiring picture even more negative.

#### INTERNATIONAL TOURIST ARRIVALS: SCENARIOS FOR 2021

YOY MONTHLY CHANGE OVER 2019 (%)

\* Actual data for 2021 is preliminary and based on estimates for destinations which have not yet received monthly results.


  
 SOURCE: UNWTO
   
31/10/21 08:08:59 (GMT+02:00)



#### B3.1 Present market size

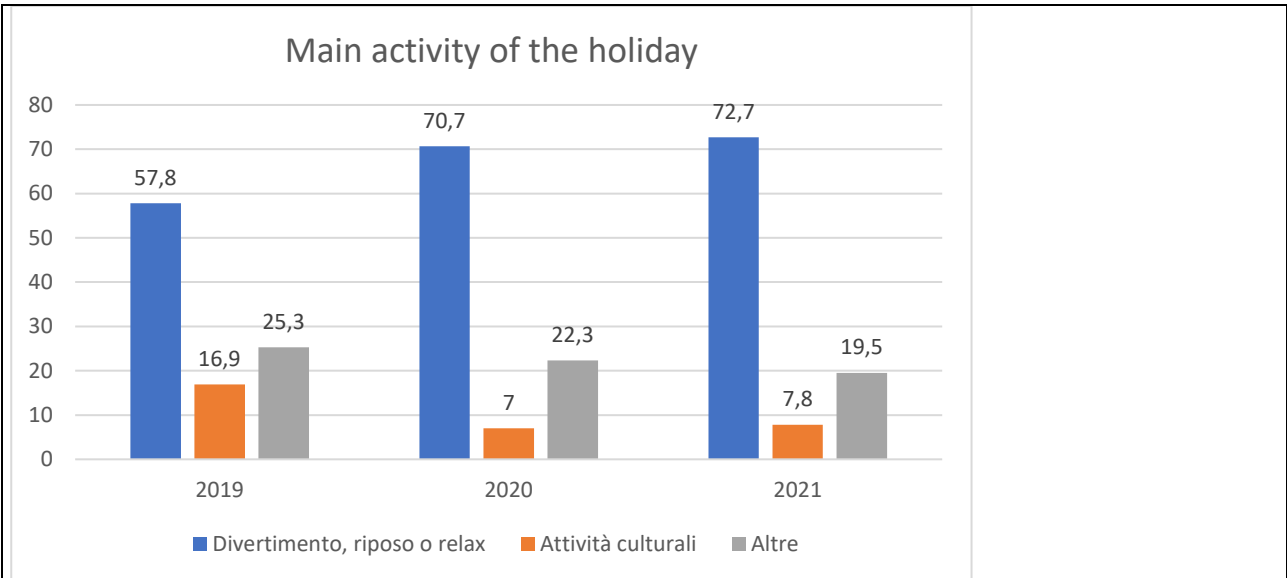
Max 1 page

In 2021, 38.685 million holiday trips were recorded in Italy, slightly recovering from the collapse of 2020 (35.024) and still very far from the 2019 prepandemic (63.457)

In addition to a collapse in the flow of tourists, the activities carried out by them during the holiday have also changed substantially. As shown in the graph below, the play component went from 57.8% in 2019 to 72.7% in 2021.



### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO



Source. ISTAT - Travel and holiday brochures

Conversely, cultural tourism fell from 16.9% to 7.8%.

The interesting fact, however, is that what has collapsed is the percentage of those who define their holiday as "cultural" while the share of trips with at least one cultural activity has grown. As well illustrates the table below.

TRAVEL WITH AT LEAST ONE CULTURAL ACTIVITY BY TYPE OF ACTIVITY - SUMMER QUARTER.

CULTURAL ACTIVITY	2019	2020	2021
Cities, towns, villages	78.7	85.7	86.4
Museums, exhibitions	25.7	22.1	23.8
Monuments, archaeological sites	45.6	44.0	42.6
Typical local markets	33.8	28.6	31.5
Shows, events	29.6	11.3	13.7
wine tour / tastings	19.7	20.0	17.0
Factories / sites for the production of goods	5.2	4.0	4.0

Source. ISTAT - Travel and holiday brochures

In particular, visits to villages, towns and cities have increased by almost 10 points in just two years, while visits to museums and historical sites have slightly decreased.

We find in the ISTAT data the two groups of tourists who visit the museums highlighted in paragraph B1.3 Tourism Habits . As will be remembered in the Urbino museum, these represent about 40% of visitors grouped in Aesthetics (19%) and Routine - breakers (21%). Their motivations for visiting are not eminently cultural but related to entertainment in which they can play an active role and spend time in the company of others.



### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

#### **B3 Local and National size of the present demand and expected future trends of this tourism product line**

##### **B3 .2 Trends**

The emergence of this tendency to visit places of culture linked to socialization and entertainment motivations belie the myth that the visitor to the museum is well educated, cultured, whose first desire is to learn new things, etc. In fact, there is a group of visitors of the same consistency as the first whose purpose is to visit the museum to experience emotions, have fun and socialize.

There will probably be a change in museum policy in which more resources will be allocated to offer these types of experiences to visitors, such as the creation of meeting areas along the museum's visit path; enrich the bookshop and improve the bar / restaurant services sector and also by organizing ad hoc events.

Complementary external resources could be used and collaboration with its stakeholders and the local community stimulated. The management implications that arise are expressed in the following lines of action:

- improve the basic tourist services of the city and the surrounding area (catering, tourist information office, adequate accommodation facilities, commerce, etc.) and of the services supporting the Museum (museum transport services, parking, etc.)

visitors looking for entertainment and socializing would likely appreciate the evening events held in or around the city;

- encourage the creation of networks between the Gallery and other museums or local cultural institutions and build relationships and networks between the Gallery and the stakeholders (schools, transport companies, restaurants, hotels, public administration, etc.) and with the local community

Ultimately, the quality of the services offered in the destination where the museum is located can affect visitor satisfaction with the museum experience.

At the same time, the experiential offer of the museum can produce value for the territories and influence the perception and satisfaction of the tourist experience. It can be concluded that a good museum experience and good design should be part of the broader planning, marketing and management of a destination, so that a broad spectrum of actors / users can reap the benefits.

#### **B 4. Most important criteria influencing the competitiveness in the global market for this tourism product line**

##### **B4.**

The competitiveness of museums changes substantially according to the size and quality of the contents of the museum itself. The factor that highlights this difference in status between the various museums is the relationship that links the museum with the other components of the tourism supply chain: in the case of large museums, the entire supply chain is driven or even depends on the museum, while in the case of small museums it is check the other way around. It is the museum that must find its own place within the tourism supply chain, bringing to it a significant share of added value.

Making your contribution to the attractiveness of the territory in which the small museum is located is easy to say but very complicated to implement since a series of constraints immediately manifest themselves:

- short and occasional opening times to the public,
- poor knowledge of the resource even of the residents
- shortage of staff
- poor maintenance



### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

concrete risks of vandalism

All of which can be traced back, if you like, to the chronic lack of economic but also human resources. Wanting to react to this situation that involves a painful under-use of often very significant resources, there are several actions that can be implemented. We limit ourselves to indicating them.

- 1 - networking museums by centralizing a series of services whose small size imposes significant diseconomies (cleaning, maintenance, promotion, marketing, security, etc. )
- 2 - promote the digitization of the Museum: ticket sales, accessibility of visitors to the museum, control and security of exhibitions, guidance and information, etc.
- 3 - create new tourism products or insert the museum into existing products in order to make the visit to the museum "obvious" as a component of the value chain linked to the specific product
- 4 - Focus on the growing number of visitors who visit the museum to experience emotions, have fun and socialize. This means making the visit to the museum an active moment in which the visitor does not just attend but becomes an actor of the museum himself.
- 5 - Connect the museum to restaurants, more generally to catering without forgetting shopping. These are three strategic components for these visitors with strong hedonistic orientations.

#### B5. Most representative international best practices (max 3) regarding this tourism product line

##### B5.1 *Cave del Predil Museum Complex - Friuli Venezia Giulia*

The Cave del Predil Museum Complex consists of the Military History Museum, the new permanent exhibition on the mining tradition and the Cave del Predil International Geomining Park .

##### Social management

The Facebook profile has been transformed into a page and constantly updated on events and activities. Twitter is used for specific events.

The web profile is constantly updated in particular the contacts and connection links. Verification and updating of translations of web pages .

Google Maps and Google Business improved the information for better reachability

Activation of Google Analytics and SEO features that make the page more performing on search engines.

Acquisition of the "authorship" of TripAdvisor profiles concerning the Polo Museale, this allows you to update information about the structure (opening hours, contacts, etc.), check comments, views and be able to respond to requests for information or user evaluations .

Creation of an Instagram profile updated biweekly and also enriched with visitor photos;

Creation of a newsletter to update schools, traditional media, hotels, the tourism consortium about events and activities.

##### Laboratories

LABORATORY 1.1 - UNDER THE GROUND TO PLAY AND DISCOVER



### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

Introduction to the world of the mine. Through the visit of the mine either by walking or transported by the electric train.

#### LABORATORY 1.2 SMALL MINERS FOR A DAY

Experience what the miners of Cave del Predil did and how they lived and the product they extracted.

#### WORKSHOP 2.1 QUARRIES NOT ONLY MINE BUT PEOPLE AND THE ENVIRONMENT

The Cave del Predil are the result of the encounter between man and the environment. Environment that in some areas has been completely adapted to human needs but which in other parts is preserved intact.

#### LABORATORY 2.4 THE LAYER WELL: A WINCH FROM OTHER TIMES IN THE MINE

Inside the Cave mine it is still possible to observe the Layer shaft, an elevator moved thanks to hydraulic power ...

1.4 SPELEOTHERAPY Speleotherapy, as the name implies, is a cure carried out in a cave. exploiting the properties of the air present in the cave to treat different types of respiratory diseases.

#### B5.2 *The Valdera Museum Network* (Prov. Pisa)

The Valdera Museum Network covers the Municipalities of: Bientina, Buti, Calcinaia, Capannoli, Casciana Terme Lari, Palaia and Pontedera.

The networked museum structures have a strong heterogeneity: archaeological museums, contemporary art museums, museums of peasant civilization, ceramist culture, a real castle and finally a company museum.

The Network was born in 2000 . As it stands today, it was established by a memorandum of understanding between the municipalities concerned. Subsequently - in 2006 - the Municipalities implemented the associated management for cultural services, establishing a single reference office for museums and archaeological areas in the Municipality of Pontedera. The objective of the Valdera Museum Network has always been to be able to offer greater visibility to the museum structures present in the Valdera district, as well as to promote the resources of the territory in a coordinated manner, also with a view to greater tourist development in the area.

#### *The museum network of Carnia*

CarniaMusei " cross-border museum network project in Carnia was launched in 1998 thanks to European funds. The main objective of the project was to create a system that identified the cultural reality of Carnia in a single, more visible structure, reducing costs and encouraging services and initiatives aimed at families, schools and tourists. Over time, the objectives have diversified and the initiatives multiplied.

Among these, the creation of informative material, didactic supports and informative works that are distributed in museums, studies and researches; the design and management of didactic laboratories in the Museum for the classes of the Infant, Primary and Secondary School of First Grade and special didactic activities aimed at the elderly and disabled.

Other initiatives are carried out jointly with operators in the tourism sector, with collaborators already active in the exhibition itineraries and with the scientific managers of the same.

In recent years, the CarniaMusei Museum Network has also participated in cross-border projects financed



### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

under the Interreg IV Italy-Austria 2007-2013 program ( Transmuseum , AdMuseum . Also thanks to these initiatives, the Museum Network has upgraded the facilities and services with a view to universal accessibility both physical and cultural.

B5.3 Innovation in museums: when technology renews art - [https://www.insidemarketing.it/in Tecnologia-nei-musei-esempi/](https://www.insidemarketing.it/in-Tecnologia-nei-musei-esempi/)

The Bolzano Civic Museum already in 2015 launched " *Sounds to see* ", a project that recreates an all-round sound environment to improve the enjoyment and understanding of some of the works on display: eight in total, belonging to different periods from the Middle Ages in the early twentieth century and with very different subjects, they have been associated with a three-dimensional sound track that the visitor can listen to through headphones and only by closing his eyes and which he reconstructs thanks to songs and hymns religions, street noise, chatter, etc. the typical environment of the time in which the work was created.

If it is difficult to find a direct correlation between these initiatives and the increase in visits - and therefore in revenues, it is easier to observe the scalability of the technologies used. It is no coincidence that, together with the great museums and in some cases perhaps more of these, it was above all the smaller realities with a strong link with the territory that experimented with new technologies and digital. Some have done so by trying to exploit even one more element: gamification .

ChatbotGame is, for example, an interactive game that has tried to take advantage of the wave of bots that have invaded [instant messaging apps](#) such as Telegram or Messenger to make the visit of four Milanese art houses more participatory: a virtual character, with whom communicating precisely through [chatbots](#), in fact leads visitors who wish to through a guided tour, made up of clues, curiosities, small mysteries to be solved in order to really enjoy the visit to the museum.

The National Archaeological Museum of Naples - MANN instead released in March 2017 " *Father and Son* ", a real video game - in 2D, horizontal scrolling, with missions to be accomplished and objectives to be achieved starting from an engaging storyline , that of a son who tries to reconstruct the life of his archaeologist father - who has the halls of the museum as its setting and who, in its development, leads the user to better discover the precious collections inside, thus enriching the visit experience in case it is played by real visitors or by making it live in a virtual and vicarious way in case it is instead of people who are not at the MANN.

... ... Interesting examples of application of [augmented reality in museums](#) however come from both Italy and the international scene.

The Museum of Celtic Heritage in Hallein , for example, has thought of a project aimed above all at the youngest visitors: by pointing the tablets available in the rooms on the specially marked objects in the collection, the speaking Celtic *appears* , a special guide that leads the little ones to discover of the civilization in question.

In the archaeological park corresponding to the ancient Roman fortress of Carnuntum , in Austria, on the other hand, an augmented reality application allows you to discover how the site was originally.



### D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO

A similar operation was carried out in Rome with " *L'Ara com'era* ", a temporary project that, using 3D reconstructions and virtual videos, allowed visitors to see the original appearance of the Ara Pacis and even witness a sacrificial rite in Campo Marzio.

When art and museum collections meet virtual reality , however, the result is a project like the one that at the Museum of Oriental Art - MAO in Turin allows you to visit the Forbidden City in Beijing and learn more about the ancient dynasties of the Ming.

If operations such as these disregard museum planning and destroy, in some ways, the very sacredness of a museum and a place of art, the uses that up to now have been made of artificial intelligence within artistic-cultural sites are instead decidedly more *institutional* and formalized. According to the American Alliance of Museums, using AI in a museum could be useful for several reasons. To better organize catalogs and collections and to seek continuity and *organicity* even between collections of different entities, for example: for an artificial intelligence algorithm it is extremely simple in fact to recognize recurring visual or chromatic elements, associate them with a current or an artistic expression and thus create collections and catalogs more consistent. This is what the Norwegian National Museum tried to do, using machine learning and neural networks to add meta-data to the paintings in the collections that could prove to be very functional especially for those who study them.

there is the whole area of logistics and management of a museum , which could derive many advantages from the use of artificial intelligence: from entrance tickets to practical information for the visit, the artificial component could replace the human one. speeding up and making many processes more efficient. However, AI could make the experience of visiting a museum not only more practical but also and above all more pleasant.

One of the fields of greatest experimentation would seem to be, for example, that of audio-guides and, once again, artificial intelligence could make listening and therefore the visiting experience more *immersive and engaging*. The Pinacoteca of Sao Paulo in Brazil collaborated with IBM in this sense and the result was " *A Voz da Arte* ", a project that uses artificial intelligence and voice recognition to literally give voice to some selected works of art, in able not only to speak and provide information to the visitor, but also and above all to answer his questions.





### **D.4.3.1 Tourism Products Portfolio: PP10 PARK SASSO SIMON SIMONCELLO**

#### **4. Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. Museums Network**
- B. Stays in charming villages and experiential encounters**



### D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO

#### PP12 PREDAPPIO

Partner (name and number)	Predappio Municipality PP12
Main editor/s	Tristana Randi
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#### Main elements collected during WP3 and WP4.1 outlining the potential for tourism experiences in the target area(s)

*(Attractive components, and other components)*

##### a1.1 Intangible assets

WP3 – SWOT, REPUTATION AND GOOGLE TRENDS: Predappio’s main strength from residents’ point of view is undoubtedly connected with its historical heritage. A former rural town of modest size called Dovia, during Italy’s Fascist period (1922-1943), it underwent a total transformation, with the construction of Predappio Nuova, on the site of Mussolini’s birthplace.

Predappio area is rich in ecological and natural diversity and local community is aware of the potential opportunities offered by natural environment and landscape, intended as a cultural construct in which sense of place and memories inhere.

Safety and quietness and strategic position are key words in the light of the Covid 19 pandemic both for visitors and residents. Safety and security will be the most important priority for everybody, for both destinations and travelers and there will be a universal hunger for wide-open spaces and time spent in nature will be felt to be an antidote to risks of crowded cities.

Ideology and perception of the place in relation to its historical facts is one of the main intangible assets, also considered, by locals, the main thread that can damage Predappio as a touristic destination. As the birthland of Mussolini, Predappio’s image and perception are inevitably connected with Fascism and the town is considered a sanctuary for the cult of the Duce.

Many online researches related to Predappio reflect a concentration of popularity for terms and keywords connected with historical characters and facts, which led us to affirm that Predappio’s reputation is strongly related to Mussolini.

##### a1.2 Tangible assets

WP4.1 – IDENTIFICATION OF LOCAL HERITAGE: Predappio is an authentic open-air museum and the town displays the whole spectrum of architectural styles of the Fascist period employed by some of the most important Italian architects of the time. The monumental Church of St. Antonio was designed by Cesare Bazzani. With the construction of the former Casa del Fascio e dell’Ospitalità, Arnaldo Fuzzi added the monumental and celebrative stile littorio.

Predappio Alta is a quaint medieval village characterized by an agglomeration of houses, cobblestone streets, narrow alleyways, the square (now Piazza Cavour), two churches, the Rocca, the ancient access door and an ancient wine cellar, now a wine museum, located



### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

under the restaurant Vecia Cantena d'la Pre'. The imponent Rocca (fortress) rises 247 meters. above sea level on a rock called Spungone (natural conglomerate of pebbles and limestone siliceous concrete), on the first hills of Forlì.

In Predappio and its surrounding there are many small independent producers that produce organic bread, honey, cheese and local piadina made with Sangiovese Wine, just to cite a few, using traditional, organic, sustainable and locally-based methods.

Romanic Religious architecture and local artists (living and passed) are considered potential tangible assets by residents (WP3 – SWOT and WP4.1). Sant 'Agostino Church, one of the oldest buildings in Predappio, is very suggestive and represents one of the rare examples of Romanesque architecture in the Forlì valleys. Gherardo Chiadini and Franco Grota are local artists very different in style and works, who have their workshop and studio very close to Predappio Alta cozy main square.

#### **a1.3 Key attractions**

WP3 SWOT & REPUTATION: Benito Mussolini's legacy, his figure and his birthplace and crypt are, at present, Predappio's key attractions. Many online researches related to Predappio reflect a concentration of popularity for terms and keywords connected with historical characters and sites, which led us to affirm that Predappio's reputation is strongly related to Mussolini, but also the term Rocca delle Caminate is a very popular and searched keyword.

Rocca delle Caminate is a medieval castle located around 5km from Predappio, built in the 10th century, most likely on the site of a Roman fort. In 1927, the castle was donated to Benito Mussolini and underwent a project of renovation by interior designer Guido Malagola Cappi.

WP3 SWOT and WP4.1 IDENTIFICATION OF LOCAL HERITAGE: Predappio can be visited following Mastro Lupo incredible works: the whole territory is marked by his touch in an ideal itinerary that passes through Fiumana, the Pandolfa estate, the center of Predappio, Rocca delle Caminate and ends with the six vast canvases of the Battesimo di Cristo in the church of Predappio Alta.

Hiking and bike trails around Predappio guarantee active holidays all year round and offer diverse hiking and cycling options perfect for discovering its stunning natural landscapes. The trails connect several historical vineyards and offers an insight into life and work on the hill's farmsteads.

The vineyards are glorious places to taste terrific wines and to learn about winemaking and grape-growing. Situated in panoramic locations and therefore offering stunning and superb views, they produce wine with the unmistakable stamp of the valley's terroir, characterized by the presence of the spongy rock, the called Spungone, that gives a particular and distinctive character to the local Sangiovese.



### D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO

Summary description and main characteristics of the tourism experiences that you envisage in the involved territory.

#### C.1 Tourism experience 1 – The Wine Experience (Wine Tourism)



Predappio, land of Sangiovese, has plenty of wine excellences, with both small and big local companies producing the famous local wine. The 11 vineyards, all different in size, concept and management, offer myriad wines of fantastic value and quality produced with a policy of control over the environmental impact and through the recovery of autochthonous vine variety and of long-standing cultivation. Food and wine can play a key role in influencing the overall branding and positioning of a destination and should be considered part of the destination marketing mix, because they contribute to give a sense of place and allow tourists to literally taste the destination, coming directly into contact with local culture.

The vineyards of Predappio are glorious places to taste terrific wines and to learn about winemaking and grape-growing. Situated in panoramic locations and therefore offering stunning and superb views, they produce wine with the unmistakable stamp of the valley's terroir, characterized by the presence of a spongy rock, the called Spungone, that gives a particular and distinctive character to the local Sangiovese. Among wine producers, Alessandro Nicolucci is the owner of Fattoria Nicolucci, that has been producing vintage wines in Predappio Alta since 1885, Francesco Zanetti Protonotari Campi is the owner of Villa I Raggi, an historical canteen awarded during the Universal Exhibition in Paris in 1889 and Emanuele Cover of Condè resort, that offers to guests hospitality, traditions and local traditional food and wines.

Combined flexible itineraries characterized by food and drink tasting sessions of cheeses, wines, local gastronomy etc. and food and drink tours and trails represent a good way to taste a small part of the culture, support local businesses and the local economy, and establish connections between the local people and travelers. Here are some itineraries that offer wine and cultural experiences:

[Vineyards, Rocches and Tales](#)

[The 2 Predappio, the Wine Museum and the General Vineyard](#)

The experience can also be enhanced with a visit to the millenary basement of the restaurant La Vecia Cantena d'la Prè, and the historic Zoli cellars, dating back to 1400. The cellars are used as a Historical Museum and house wine equipment from the past, the huge barrels paying homage to the old winemakers of the place with special plaques bearing names and nicknames of people involved in winemaking. The Wine Museums also hosts art exhibitions of contemporary local artists. An evocative Museum of Wine Civilization where visitors can observe, walking among the fragrant and centuries-old barrels hanging on the walls, some of the wine making equipment used in different historical periods. Predappio Sangiovese wine production is



### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

considered among main strengths for tourism development and wine tourism (Sangiovese vineyards tours and wine tasting) is also considered an opportunity for further tourism development by Predappio residents. Today, wine and food are relevant component in travel choices and tourists take into consideration the presence of food and wine experiences when choosing the destination. Niche scale food and wine products can represent a route to the future, but cannot be taken for granted and need experience and economy strategies and policies to be adopted, as: collaboration across different stages of wine-food value chains, exploration of niches in the wine-food sector that have potential to generate new innovative products and services and last, but not least, a strong and long-lasting collaboration and cooperation among local stakeholders.

Reputation analysis confirms that tourists and visitors visiting Predappio for Wine and Food motivation represent the category with higher score referred to relax and excitement, followed by visitors with cultural purposes. The ratio relax dimension/ excited dimension and food and wine tourists might be related to the fact that wine tourism services offer experiences which are delivered in an exciting but also comfortable and authentic atmosphere. To develop its full potential as a wine tourism destination and to improve its image and increase its recognition, Predappio should put in place measures from the hardware point of view (landscape, cultural heritage, etc.) and from the software point of view (services, utilities, etc.) together with the contribution of local institutions and communities in particular, combined with the entrepreneurial energy of the local wine producers, in order to provide the impetus for the further development of wine tourism.

### **C.2 Tourism experience 2 – Historic & Spiritual Hiking Trails (Active Tourism)**



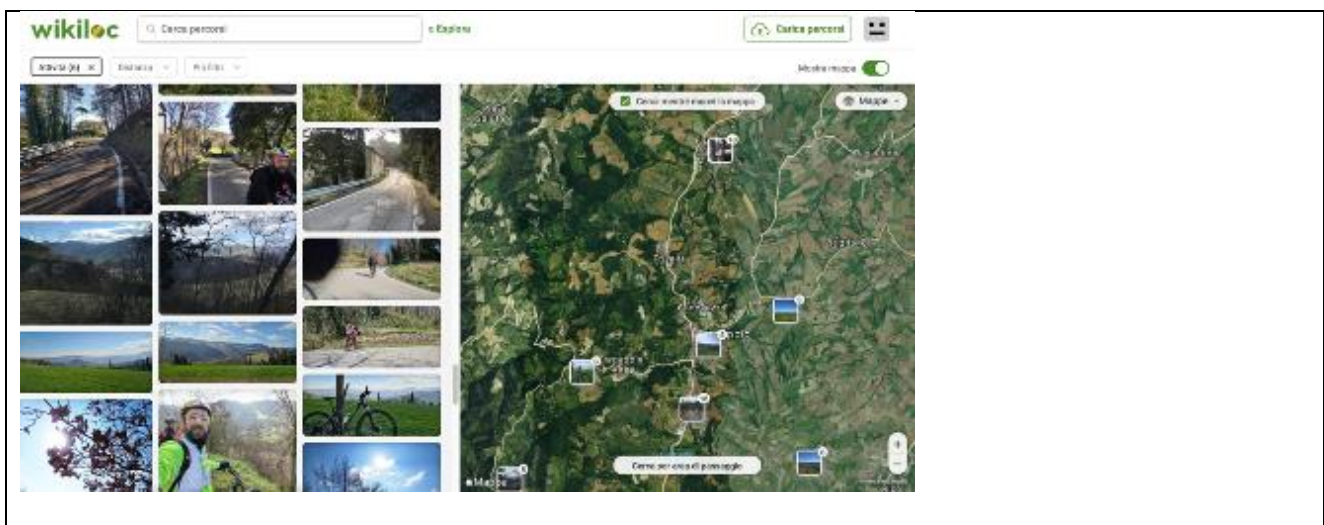
Predappio area is rich in ecological and natural diversity and local community is aware of the potential opportunities offered by natural environment and landscape, intended as a cultural construct in which sense of place and memories inhere. Hiking trails around Predappio guarantee active holidays all year round and offer diverse hiking options perfect for discovering its stunning natural landscapes. The trails connect several historical vineyards and offers an insight into life and work on the hill's farmsteads. Walking is probably the best way to visit Predappio territory, because the trails offer an experience of nature, history, landscape, at the right pace. Walks are generally not too difficult or excessively long, because distances are short, and in most of cases you can choose how long an experience you desire. With plenty of kilometers of tracks, there are walking and hiking options to suit all levels of fitness and experience. Many residents met and



### D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO

interviewed for the mapping and identification of local heritage identified hiking and walking trails as a huge opportunity for tourism development, as Giacomo Lolli, from Apicoltura Predappiese, Rita Bertini from Predappio Alta and Barbara Brunelli, owner of KePizza, who described different and various walking trails and experiences around Predappio. For example, Speranza path was named after the nickname of a dear friend of all the people of Predappio: Lorenzo Facibeni, who left us on 9 May 2020. Lorenzo, who worked so hard for his community, had this ambitious project: to introduce everyone to the wonderful natural environment that surrounds the city of Predappio. The route winds for 18.5 km on the first hills around the Rabbi valley, offering magical views, characteristic of Predappio Municipality. The deeper meaning to which our friend Lorenzo was inspired, is to ideally unite our whole community in a big embrace, developing the path on both sides of Rabbi river. The [Rabbi River](#) was mentioned several times during the meetings and in the interviews with residents. The Rabbi is a tiny river that passes through Tuscany and Romagna regions, weaving its way through towns, villages and beautiful countryside. Francesco Zanetti Protonotari Campi talked about the Trafila Garibaldi, the hiking trail that passes across his property. The trail La Trafila is the route taken by General Garibaldi in 1849 to escape from the Austrian army after the fall of the Roman Republic. The undisputed protagonists of this escape were the Tuscan-Romagna territories. Despite Predappio's close proximity to Emilia Romagna's main pilgrim routes (St. Anthony's Way, a trail which retraces some of the most important stages of the saint's life through the places where he played a prominent role and Romea Germanica Way, an ancient route that retraces the stages of the journey undertaken in the 12th century by Friar Albert of Stade to Rome), there is a lack of direction signs to hiking and walking trails along with a low consideration of the potential of hiking in tourism development. Route management should be established and it implies the capacity to create unique tourism experiences on the move, while mediating a dialogue with local attractions. Routes can be windows along which destinations are discovered, and destinations can be treasures that enhance the value of routes.

### C.3 Tourism experience 3 – Bike and Rocche Experience (Active Tourism)



Predappio is rich in ecological and natural diversity and local community is aware of the potential opportunities offered by natural environment and landscape. Nature tourism is a growing key segment together with active tourism and travellers are interested in new and authentic experiences in natural landscapes. Bike trails around Predappio guarantee active holidays all year round and offer diverse cycling options perfect for discovering stunning natural landscapes disseminated with old historic and sometimes



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hided Rocches, medieval churches and old vineyards All main attractions in Predappio and its surrounding are very close to each other and can be easily visited by bike, offering a unique opportunity that will help visitors to experience the famous excellences of the territory: mediaeval Rocches, Romanesque churches and food and wine traditions. For example, the Spungone Trail, an itinerary for trained legs, takes on a journey of discovery of a number of the most famous medieval fortresses of the Forlì hinterland. The itinerary enables to discover the hills around Predappio and one of its key attractions, Rocca delle Caminate, an 11th century castle situated on a hill: easy and suitable for all lovers of pleasant rides through the countryside, this loop tour winds along pleasant dirt roads, but with a number of climbs that should not be underestimated. Bike itineraries around Predappio are assorted, numerous and adapt for different levels of training and offer the chance to discover historical places displaced along main biking routes, that deserve a stop by. They give the opportunity to explore the different facets of Predappio and familiarise with the territory. The best bike tour suggestion for first time travellers is one that takes them to most of the iconic attractions like:

- Sant 'Agostino Church, one of the oldest buildings in Predappio, the church is very suggestive and represents one of the rare examples of Romanesque architecture in the Forlì valleys. Built in the twelfth century and made of large blocks of local stone, the so-called "spungone", it belonged to Augustinian monks dependent on the canons of Ravenna. The inside consists of one trussed nave with a semi-circular apse surmounted by four mullioned windows. Despite the passing of time, the church still contains interesting frescos among which the "Dance of the skeletons" or "Triumph of Death", a medieval warning to the poor and the rich. Rocca Sant'Elmici, Rocca delle Caminate and Predappio Alta and its Rocca

- The Rocca d'Elmici, located on the left bank of the Rabbi river, facing Rocca delle Caminate. The ruins of the ramparts of the ancient fortress and the traces of what was once a disputed and repeatedly destroyed fortification are the only testimonies of the old castrum. The Rocca have fallen victim to the forces of nature and now the glorious fortress is overcome by greenery, which scales the stone walls and forces its way through the remaining haunting structure. The gentle chatter of birds, rustling leaves and the flavour of middle age legends replace the city drone. The smell of wildflowers fills the air in the warmer months and in autumn the fruits of nature abound in the row of grape vines. At all times of the year, a variety of views from this walk's position offer new perspectives of Predappio, nestled among the softness of surrounding hills.

- Predappio Alta, a quaint medieval village characterized by an agglomeration of houses, cobblestone streets, narrow alleyways, the square (now Piazza Cavour), two churches, the Rocca, the ancient access door and an ancient wine cellar located under the restaurant Vecia Cantena d'la Pre'. The imponent Rocca (fortress) rises 247 meters. above sea level on a rock called spungone (natural conglomerate of pebbles and limestone siliceous concrete), on the first hills of Forlì. On opening days, you can climb and get an aerial view. Overflowing with old-world romance and handsome medieval architecture, this delightful little spot seems made for meandering along time-worn cobbled lanes framed by blushing bougainvillea, feasting on sublime Sangiovese local wine, and watching the world go by in picturesque piazza where the sweetness of doing nothing reigns supreme. Though consisting of little more than a single street, this off-the-radar Emilia Romagna village is a showcase of Spungone stone architecture and remarkable historical monuments, with everything from Medieval Rocca to fabulous places to sip superlative wine.

[Medieval Buildings & Bike in Predappio](#) – itinerary sample

Even if the reputation analysis revealed that culture is the main reason for visiting Predappio, other assets, as nature and sports, which show lower values and are not considered a primary motivation for visiting the territory, provide implications for the diversification of primary tourism in order to attract different targets of tourists, especially during Covid emergency. Proximity tourism, understood it as doing tourism and travelling near home and in less crowded destinations, is the new entry trend in Covid 19 era and local community, involved during previous activities, is well aware of this scenario and consider proximity an opportunity for future tourism development. This prediction is based on the fact that with greater social and environmental



### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

awareness, post-crisis tourists will probably choose to travel to destinations closer to their place of residence and away from crowded locations.

#### **C.4 Tourism experience 4 – Mastro-Lupo Experience (Cultural Tourism)**



Benito Partisani, in art Mastro Lupo, was born in Predappio in 1906 where he lived and worked until his death in 1969. Mastro Lupo, who lived in the middle of the twentieth century, spectator of a very complex historical period, has always shown that art can help overcome divisions and hostility. An artist linked to his territory, documented by many artworks in the public spaces of Predappio, which can be considered a true open-air museum of the artist. As a matter of fact, Predappio can be visited following Mastro Lupo incredible works: the whole territory is marked by his touch in an ideal itinerary that passes through Fiumana, the Pandolfa estate, the center of Predappio, the cemetery of San Cassiano, Rocca delle Caminate and ends with the six vast canvases of the Battesimo di Cristo in the church of Predappio Alta. Monica partisan, the nephew of Mastro Lupo and Gherardo Chiadini, an internationally renowned artist, who was a scholar his scholar, talk about the simple life he led in Predappio, his passion for the arts and his feelings of attachment and belonging to the territory. Many people in Predappio possess a work of art of Mastro Lupo (paintings or ceramics) that he used to donate to his friends. The Mastro Lupo experience allows to visit all the remarkable and appealing sites of Predappio, which includes the fascinating paintings in Predappio Alta Church, the Via Crucis ceramics in the small church of Santa Rosa, the wall paintings that adorn the halls of Villa Pandolfa (a wine producer that could offer to guests an “art & wine experience), the paintings of the semicircular apse of Chiesa delle Caminate, unusual for its decorative technique and sacred theme, just to cite a few.

The itinerary can be made by car, by bike or by foot, as all the works of art are at a short distance from the town center and offers an experience that associate cultural values with history, nature and landscape, wine and tradition and Predappio society.





### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

The Municipality of Predappio, on request of Monica Partisani, is promoting the map of the itinerary on Visit Predappio website.

#### **C.5 Tourism experience 5 – The Rational Architecture Experience**



Predappio's main strength from residents' point of view, is undoubtedly connected with its historical heritage. A former rural town of modest size called Dovia, during Italy's Fascist period (1922-1943), it underwent a total transformation, with the construction of Predappio Nuova, on the site of Mussolini's birthplace. Along the county road, the new town developed between two symbolic focal points, the house where Mussolini was born and Palazzo Varano, connected by a whole spectrum of rational styles buildings designed by some of the most important Italian architects of that time. Predappio is an open-air museum, offering unique eclectic and rational architecture which have come to us almost unchanged. Today, the buildings left on the streets of the small town represent a historical and artistic heritage of great value that offers a unique cultural experience linked to the Atrium Cultural Route, that connects several countries of Europe with a focus on the architectural heritage of the different totalitarian regimes.



### D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO

All the buildings are on Predappio main street, except for Officine Caproni and Rocca delle Caminate, that are a few kilometers out of town and the walking itinerary is an interactive experience to discover Predappio Urban Museum with English audio guide. <http://www.visitpredappio.it/museo-urbano/> Casa del Fascio e dell’Ospitalità, the symbol of Predappio Rational Architecture, is a monumental L-shaped building located in the main square at the crossroads between two main highways. Its monumentality is enhanced by the massive tower as well as by the contrast between white Roman travertine and local red bricks. Given the unique situation of the town of Predappio as a pilgrimage site, the huge Casa del Fascio e dell’Ospitalità of the small town fulfilled another important role: a sort of welcoming centre for the numerous visitors, featuring recreational rooms, a “tourist office”, a bar and restaurant as well as a daytime hotel. Today, this enormous building is abandoned and in a state of gradual degradation. There are projects for a new use of the complex under discussion.

Officine Caproni was an Italian aeronautical industry founded in 1910 by Giovanni Battista Caproni. The Predappio factory was built on a pre-existent factory built by the Zolfi company for the processing of sulphur extracted on site.

The construction of the factory began in 1933 and ended in 1941. The industry is now in ruins. Giacomo Mariani d’Altri wrote a dissertation that contains an interesting chapter dedicated to *public history*, a project to search for unknown sources and at the same time to actively involve citizens to rediscover their roots and memories and legacies that still persist. Through the research, the community acquires a primary role as it actively collaborates and rediscovers papers and stories that were in danger of being lost permanently.

Ideology and perception of the place in relation to its historical facts is one of the main intangible assets, also considered, by locals, the main thread that can damage Predappio as a touristic destination. As the birthland of Mussolini, Predappio’s image and perception are inevitably connected with Fascism and the town is considered a sanctuary for the cult of the Duce.

Being Predappio a dissonant cultural heritage site, the strategic promotion of what it is considered a strength, but also a thread (Mussolini’s birthplace, Predappio history and rational architecture) has to be planned not to enhance “dark and nostalgic tourism”, but to promote and encourage a wider view of uncomfortable and contradictory aspects of the twentieth century history.



### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

#### **3. Market analysis on tourism experiences / products: WINE TOURISM**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience.





### D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO

#### A1. Main characteristics of the product – Wine Tourism

Wine as a cultural product has become a main theme in tourism development. As suggested by Asero and Patti (Asero and Patti), wine, like many regionally typical products, can be defined as a “territorial intensive product” (TIP) since it contains a strong reference to the identity of the territory in which it is produced. Wine regions provide the consummate “destination branding” through their designation of appellation and claims of terroir.

According to Hall & Macionis (Hall), wine tourism is defined by visits to vineyards, wineries, festivals and wine shows and the main motivation of the tourists are wine tasting and / or experiencing the attributes of the wine region. Hall emphasizes the cultural aspect of wine tourism by maintaining that it is a form of tourism which is characteristic of modernity with ancestral roots related to the cultivation of vines and wine and combines culture, territory and lifestyle in the context of the rural universe, although it may exist in the urban context. A hedonistic wine tourism perspective is highlighted by Getz (Getz) who states that it has different characteristics from other forms of tourism in that it heavily involves all the senses: taste, smell, touch, sight and hearing.

UNWTO (*5th UNWTO Global Conference on Wine Tourism | UNWTO*) defines Wine Tourism as tourism whose purpose is visiting vineyards, wineries, tasting, consuming and/or purchasing wine, often at or near the source - wine, gastronomy, traditions and local culture comprise thus the core elements of the wine tourism product and provide the lifestyle package that wine tourists seek to experience.

Wine tourism represents an excellent opportunity for destinations to diversify and enhance the tourism value chain, promote rural development and the revitalization of many areas which may be affected by depopulation and social exclusion. The development of wine tourism further creates opportunities for income through its linkages to handicrafts, nature, gastronomy and agro-tourism. Having identified its competitive edge, more and more destinations around the world are looking to position themselves as destinations for wine tourism.

#### A2. Sub-products – describe the main aspects that differentiate the sub product from the main product – Wine Tourism

##### A2.1 Open Cellars Wine Tourism

Open cellars” is the concept of a Festival. The wineries literally open their wine cellars and offer to the public the possibility to visit, many times with a free guided tour. Some of them will take you among the vineyards and explain their methods of cultivation. Others will prefer make you enter the wine cellars while explaining the whole process of making wine, and all of them will be glad to present you their own wines, their characteristics, peculiarities, aroma. Each bottle of wine is unique. Many wineries organize stands al fresco as you can go one by one to taste the wine and listen to the explanations. Together with the event itself, the local governments and local community will also organize many side events involving food, culture, folklore, handicrafts. the case of *Cantine Aperte*, the most important wine tourism event in Italy, created in 1993 by the association *Movimento Turismo del Vino*: every year, in the last week-end of May, the members wineries open their doors to personally meet people. During the years, *Cantine Aperte* has become a way to travel and discover Italian wine territories, which has seen an increasing number of



### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

tourists, wine wonderers and wine lovers visiting wineries from year to year hoping for a unique experience

#### **A2.2 Wine routes tourism**

Within wine tourism there has been a marked expansion in so-called "wine routes" intended for tourists, particularly in European countries, where different routes have been designed and developed in rural areas to consolidate wine tourism (Lopez-Guzman et al.). Wine routes are usually proposed as the most comprehensive and successful way for organizing thematic networks able to increase the potential of wine tourism, in relation to the local cultures. They may provide economic and sociocultural benefits within a tourist destination and promote wine tourism business practices, according to sociocultural and economic sustainability. Wine routes can be considered a way of acquainting consumers with the various stages of wine production, the differences between wine types, and general knowledge about wine culture.

A certain number of companies gather around a key product (wine) that characterizes them and generally gives them the name. The services offered are composed of a variety of product-related activities (i.e., visits to production sites, wine tasting, participation in harvesting, and winemaking). These thematic routes can therefore be considered as an integrated project that allow stakeholders to recognize and exploit a production process for the purpose of attracting tourists in a more structured way. They create a network that links together the various actors of a territory, producing structural coherence between a variety of symbolic elements and material goods, such as wine products, culture and landscape. Its overall organization is determined by collective action and by the engagement in relationships with other hospitality operators (Duarte Alonso).

## **BRIEF MARKET ANALYSIS OF THE TOURISM PRODUCT**

### **B1. General tourist profile of this tourism product - Wine Tourism**

#### **B1.1 General description**

There has been a lot of research on the profiles of wine tourists, with much of this research occurring in Italy, Australia, and New Zealand, with a spattering done in other regions of the world, including the United States. Taking the birds' eye view of things, wine tourists can be generalized into two categories: the specialist winery tourists and the generalist tourist. The specialist winery tourist's prime motivation for travel is to visit a winery or go to some event that is decidedly wine-centric. The generalist tourist, on the other hand, is more motivated by other attractions or events and who happens to visit a winery or other wine-related event while they are in the region.

Getting more specific, Mintel cited a 2014 paper from Griffith University in Australia that categorized wine tourists into four different categories: wine lovers (very knowledgeable about wine; 15% of all wine tourists), wine interested (enjoys wine but takes a more relaxed attitude toward wine education; 55% of all wine tourists), wine curious (satisfied with a basic knowledge of wine and enjoys doing other things while on vacation; 17% of all wine tourists), and wine disinterested (along for the ride; 12% of all wine tourists).

Mintel also cited a 1996 study from Bocconi University in Milan, Italy, which categorized wine tourists in slightly different ways: the professional (very knowledgeable about wine), the impassioned



### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

neophyte (not so knowledgeable about wine, but loves hanging around those that are), the hanger-on (thinks that knowing something about wine gives them some sort of greater status in society), and the drinker (hit me up, bartender).

#### **B1.2 Main markets of origin**

Foreign visitors of Italian wineries are estimated at between 4 and 6 million per year with an annual rise of 3.6% – clearly higher than general Italian tourism that is currently going through a difficult time.

Italy is the prime destination for tourists whose holidays focus on wine-tastings and cuisine. Their destinations vary by culture. German-speakers gravitate to the northeast of the country – Trentino and the Alto Adige, Friuli, Venezia Giulia Veneto – whereas English-speakers definitely prefer Tuscany. Wine is also an important consideration for tour operators – 66% of them. Statistics compiled in 2010 indicate that 23% of the Europeans and 43% of the Americans featured “tasting” destinations in their brochures.

#### **B1.3 Tourism habits**

Tourists are looking for variety, they are no longer satisfied with the traditional tasting proposals, but they want to experience local food and wine in all its facets according to their tastes and needs, as revealed by the latest survey signed by Roberta Garibaldi, president of the Italian Association of Food and Wine Tourism. Psycho-culinary profiles are the set of expectations, tastes and personal needs towards food and wine proposals while traveling. Every tourist tends to identify himself/herself in a predominant profile and in 43% of cases it is the eclectic one, that is the one who makes the variety of the offer an essential prerogative in travels. This profile is the most widespread among travelers from Canada, the United States, Mexico, China and the United Kingdom; only among the French does the theme of authenticity prevail. The eclectic profile cuts across generations, with 53% of Boomers, 45% of Generation X, 38% of Millennials and 37% of Generation Z, as well as genders, with 42% of women and 41% of men. This desire to search and live different food and wine experiences is also confirmed by the actual behavior: foreign tourists participated on average to 3.9 different types of proposals during the journeys made in the last two years, a value which increases to 4.7 considering those who traveled with the primary motivation of food and wine. Italians are eclectic with 85% of them stating they participated in five or more experiences, showing the strong desire to discover and experience local food and wine in all its facets. Among the most popular proposals there are, besides tasting typical products, visiting a market and going to historical bars and restaurants. Great interest is aroused by the experiences of visiting production places, especially in farms which register a higher interest rate than wineries. There is interest in trying dishes from cuisines other than the local ones, with 58% going to ethnic restaurants, however this is less interest than foreign tourists. This is also because the food and wine tourism of Italians is mainly domestic, and the richness and variety of the regional food and wine panorama is such that it overshadows the desire for foreign cuisines.



### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

#### **B2 International Market size of the present global demand for this tourism product and expected future trends – Wine Tourism**

##### **B2.1 Present market size**

In the United States, it is estimated that wine tourism generated nearly \$20 billion in revenue, with Mintel estimating increases between 10% and 15% just three years later in 2016 (Mintel data) wine tourism in Italy: 14 million people, totaling 2.5 billion euros turnover for the entire industry, an average of 85 euros spent per day, increasing to 160 euros for overnight stays.

France: There were 7.5 million in 2009, but it is now estimated that 10 million came in 2016 to discover French wines and vineyards. This represents a growth of more than 30% and a total spend of 5.2 billion euros. This range of products attracts French visitors (58%) as much as foreigners (42%). It is in this latter group however that the increase in visits has been the most spectacular: +40% since 2009, as opposed to +29% for the French clientele. Belgian and British tourists make up the largest groups of wine tourists in France (almost half of the international visitors) but a new clientele from more distant markets, in particular from Asia, are showing a growing interest in the sector and are also contributing to the dynamic.

The latest figures on wine tourism in Australia show that 5.5 million visitors went to a winery in year ending September 2020, they spent \$5.9 billion in Australia during their trip and stayed for an average of 6 nights. Australian (ie domestic) visitors staying overnight in destinations made up half (51 per cent) of all visitor numbers, while internationals made up 9 per cent. COVID-19 has brought much uncertainty when it comes to travel in 2020. Despite the bumpy road, many Australians have been able to continue travelling within the limitations set by each State and Territory Government. International travel on-the-other-hand has virtually halted. The top 3 GI regions where Australian travellers went to a winery were Margaret River, Hunter and Mornington Peninsula. When it comes to internationals, the top 3 were Yarra Valley, Margaret River and Hunter.

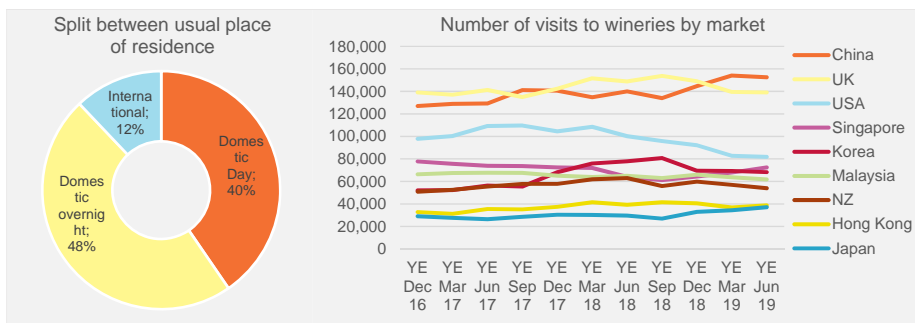


### D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO

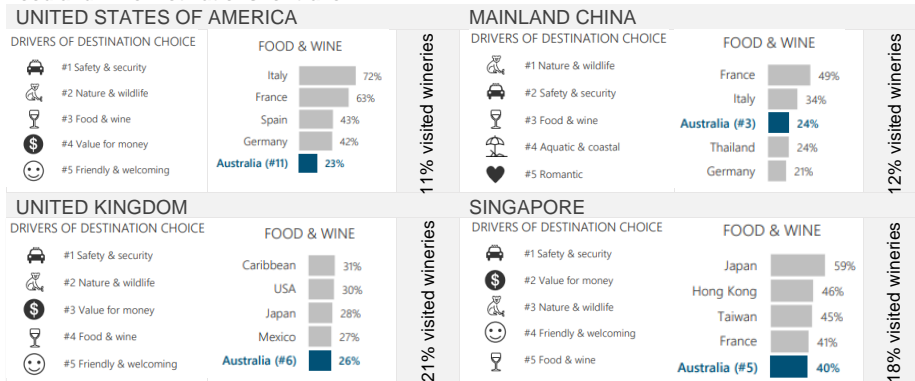
## Wine Australia providing insights on Australian Wine

WINE TOURISM SNAPSHOT 2018 – 19<sup>^</sup>

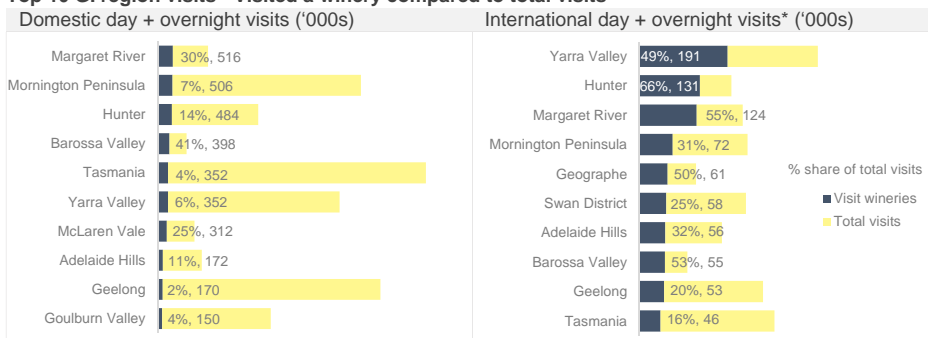
8.4 million visits	7 nights average length of stay	2% of Australians visit wineries
\$9.6 billion spend	\$1,136 average spend per trip	1 in 8 internationals visit wineries



### Food and wine motivations for travel<sup>^^</sup>



### Top 10 GI region visits - Visited a winery compared to total visits



<sup>^</sup> Data sourced from Tourism Research Australia' National and International Visitor Surveys (NVS and IVS) unless otherwise stated

<sup>^^</sup> Tourism Australia's Consumer Demand Project

\* Note: Visits to wineries is an estimate based on supplementary questions in the IVS – Wine region visited, Visit winery, brewery, distillery, Location of winery visited (e.g. Other VIC). For NSW regions, the supplementary question 'Did you visit a NSW winery' was also used.





### D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO

#### B2.2 Trends

The food and wine tourist is increasingly demanding. Tourists will be looking for destinations with beauty and integrity of the landscape, culture and traditions, a welcoming local community, as well as a quality food and wine. They will love to connect shopping, cultural visits and sport to food and wine experiences.

Trekking among the vineyards, bicycle rides along graveled roads and increasingly well-equipped cycle paths, interconnections with rail transport and journeys in full freedom. Driven by the trend of well-being, the active approach of the enotourist is destined to grow, as well as the involvement of the tourist in the daily activities with local wineries.

#### Collaboration

Collaborating with other wineries, but also with restaurants, museums, hotels, tourist offices, wine shops, etc., to create a flexible network with all the stakeholders operating in tourism sector in the area.

#### Storytelling

Stories are able to appeal both to the logical and emotional cores, meaning they tend to be more memorable than other marketing tools. It is not important having a beautiful cellar or a perfectly organised tasting room; visitors will expect that wineries share their stories with them; let's tell to visitor authentic, clear and memorable stories about your work, your winery and your products. This will be your uniqueness element!

#### Experience

Wine tourism is all about giving people a memorable experience. Experience based tourism, in fact, allows tourists to be fully involved in the visit and to be a leading actor in the choice. It is also able to start up a process, gradually increasing the tourist's awareness to become an active tourist.

#### Authenticity

The trend to the local and the search for authenticity in food tourism are becoming increasingly important. Tourists want to be different and want to experience places and their food and drinks the same way locals do.

### B3 Local size of the present local demand and expected future trends of this tourism product

#### B3.1 Present market size

Even if Predappio, land of Sangiovese, has plenty of wine excellences, with both small and big local companies producing the famous local wine, the number of tourists visiting the destinations for a wine experience are not comforting. The survey conducted among visitors in 2020 shows that only 9% of interviewed tourists visited Predappio for wine and food motivations. Moreover, several owners of the local wineries have confirmed, that the number of tourists visiting the wineries are in low numbers.

#### B3.2 Trends

Wine tourism is in increasing demand as consumers look for more open-air experiences in rural areas in the post-pandemic era. The 5th UNWTO Global Conference on Wine Tourism, held in Alentejo, Portugal, around the theme "Wine Tourism, stressed the importance of developing the whole tourism value chain to complement the activities at the wineries as a means to create more jobs and



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businesses, promote local products and improve the visitor experience (5th UNWTO Global Conference on Wine Tourism | UNWTO).

Many locations in Romagna, located at a short distance from Predappio, have seen a growth in wine tourism demand, due to a proper marketing of their products and the creation of packages and experiences related to wine tourism.

Roberta Garibaldi, in her latest report on food and wine tourism in Italy, *Trend e Tendenze*, highlighted the following trends to be of the utmost importance for the coming years:

*Neverending Food Tourism*

*Well-being*

*New spaces and new places to be discovered*

*Active, demanding, innovative food and wine tourism*

*The taste of value*

The dynamics of consumption will change, especially the ones related to the world of food & beverage, and new needs and expectations will develop. The tourist's attention will focus on factors such as health safety and operators in the sector will have to align themselves with what will be a complete new demand.

The task of eno-gastro-tourism will therefore be to drive the recovery in the world to come, through the sustainability and authenticity of the food and wine culture that characterizes each destination. Consumers, even if forced into their homes, thanks to the use of new technologies, have continued to be interested and passionate about the stories of operators and producers and their food and wine culture, discovering and rediscovering the passion for cooking and tradition.

The experience, emotions and sensations experienced during the food and wine "journey" are becoming increasingly important in the mind of the tourist.

#### B4. Most important criteria influencing the competitiveness in the global market for this tourism product

##### B4. Wine Tourism

Predappio, land of Sangiovese wine, has plenty of wine excellences, with both small and big local companies producing the famous local wine. The different vineyards, all different in size, concept and management, offer myriad wines of fantastic value and quality produced, with a policy of control over the environmental impact and through the recovery of autochthonous vine variety and of long-standing cultivation. The vineyards and the vineyards experiences are the hearth of Predappio, glorious places to taste terrific wines and to learn about winemaking and grape-growing. Situated in panoramic location and therefore offering stunning and superb views, they produce wine with the unmistakable stamp of the valley's terroir, characterized by the presence of a spongy rock, the called Spungone, that gives a particular and distinctive character to the local Sangiovese. Wine tourism involves more complex experiences than wine tasting alone because this sector is the convergence of various services, facilities and activities included in wine tourism products. Wine experience can be entangling with the discovery of Predappio terroir and its rich cultural heritage spanning from the Romanesque Sant 'Agostino church, one of the oldest buildings in Predappio to



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the Rational buildings and monuments scattered throughout the town. The small church of Sant' Agostino is very suggestive and represents one of the rare examples of Romanesque architecture in the Forlì valleys, still contains interesting frescos among which the "Dance of the skeletons" or "Triumph of Death", a medieval warning to the poor and the rich. The "Urban Museum", real open-air museum, offers a whole spectrum of architectural styles of the Fascist period employed by some of the most important Italian architects of the time.

## **B5. Most representative international best practices (max 3)**

### **B5.1 THE SHERRY WINE PROJECT - SPAIN**

The history of wine-production in the Jerez region dates back thousands of years. This was confirmed by the professor of ancient history Don Diego Ruiz Mata when he pointed out that "What we want to now do is disinter this tradition, properly appreciate it and make it a symbol of the Jerez region and of its wine, recognizing it as the world's oldest and most complete wine-producer (Compés and Szolnoki). The various towns, that over time were established in this part of Andalusia, maintained their tradition of grape cultivation until they were producing the exceptional and internationally renowned wine that we know today. The most significant period for the region was between the end of the 18th century and the entire 19th century since it is during this period that the region's traditional winegrowing was transformed into the modern vintner agroindustry that it is today. Since the incorporation of Jerez into ACEVIN, the Spanish Wine Towns Association, and its tourist product Wine Routes of Spain, the Sherry Region Wine and Brandy Route has become the most visited in Spain with a total number of 582,351 visitors in 20184. This placed Jerez at the top of the wine tourism league tables for the third year in a row. 95 % of tourists in the Jerez area visited one of its wineries and Spanish tourists (340,480) outnumbered by far tourists from other countries (241,871). Conversely, there was a marked fall in visitor numbers to the wine museums whose 28,565 visitors saw them to only 7th place in the rankings. For its part, the Sherry Region Wine and Brandy Route is developing an interesting initiative called "The Sherry Vineyard Districts". This is a project that is aiming to showcase the rural winemaking areas that surround Jerez and to ensure that the region's wine tourism takes full advantage of its natural environment and landscape along with the cultural, historic and gastronomic assets associated with their vineyards.

The objective of the initiative is to create a unique and authentic product that is true to the history and culture of the Sherry Vineyard Districts and that provides an alternative to urban wine tourism. An offer has been designed that revolves around three main itineraries that are, in turn, located in three of the Jerez region's historic districts: Carrascal, Macharnudo and Balbaína.

<https://rutadeljerezybrandy.es/en/>

### **B5.2 Seppeltsfield Road Business Alliance Inc -Australia**

The Seppeltsfield Road Business Alliance Inc. (SRBA) which was incorporated in 2004 and currently recognized by industry bodies as a prime example of a collaborative practice of businesses and individuals to enhance tourism and sense of community in Seppeltsfield Road, which is a significant historic tourism precinct within the Barossa Valley. The Alliance was formed to provide an opportunity for businesses and individuals located adjacent to Seppeltsfield Road, to work together



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to promote this unique, premium part of the Barossa Valley, increase visitation, network and foster community spirit and its heritage. It comprises over 40 businesses, organizations and interested individuals (e.g., wineries, accommodation providers, restaurants, bike rental companies) working together in a voluntary capacity on various projects (community events, co-operative marketing) to meet tourism and community objectives.

The case of wine tourism in Australia shows how by embedding the socio-cultural elements of winescapes in the design of wine tourism experiences, one cannot only enrich the wine tourism experiences but also achieve sustainable impacts improving the financial and socio-cultural well-being of all wine tourism stakeholders.

Seppeltsfield is a multi-award winning cellar door at Barossa (South Australia). It offers a variety of multi-sensorial, learning and transformational experiences that enable visitors not only to taste, but also to connect with and develop themselves by interacting with and learning from the local socio-cultural elements and the humanware (i.e. local artists, producers and residents) of the winescape. The wine tourism experiences of Seppeltsfield expand beyond its cellar door wine tasting. To achieve this, the estate is the home of three other organizations with which it has built collaborations and synergies: Fino Seppeltsfield (the restaurant); the Vasse Virgin (beauty products creator); and the Jamfactory (an arts and craft organization). By co-locating these organizations, the wine estate has developed a wine ecosystem and platform enabling various stakeholders to exchange and integrate (socio-cultural, physical and knowledge) resources for co-creating various types of values that in turn contribute to the economic, socio-cultural and psychological well-being of the estate's stakeholders and their communities.

<https://www.seppeltsfieldroad.com>

#### **B5.3 Sonoma County – Certified 99 % Sustainable - USA**

In January of 2014, the Sonoma County Winegrowers of California did something amazing. They set a goal to become a 100 % sustainably certified wine region by the end of 2019. With 60,000 vineyard acres spread over 18 AVAs (appellations) and 1800 grape growers this was an incredibly audacious goal to set, but they were able to achieve 99 % sustainability by September of 2019. So how did they do this? It started with strong leadership amongst the executive team of the Sonoma County Winegrowers (SCW), led by President Karissa Kruse. With a mission to increase the value of Sonoma County wine grapes and nurture and protect agriculture resources for future generations, the SCW is a commission funded by a local grape grower assessment. The majority of the member vineyards are small family run operations, with some owned by multiple generations, because winegrowing was first established in Sonoma County in the 1820's. The SCW leadership team approached their members about the 100 % sustainability goal, and found that many embraced it immediately, because they had been farming that way for decades. However, there were some outliers who did not want to be pressured to become certified, due to a variety of reasons, including the additional time and costs to do so, as well as a difference in philosophy. The SCW leadership team was able to provide grants and other financial support to those vineyard owners who needed assistance, and slowly, each year, more vineyards became certified. As more vineyards became certified sustainable, the owners of those vineyards would share their success stories and offer to mentor other vineyard owners who had not yet been certified. This was inspirational to many people, and some of the success stories were shared on the website and in the annual report of the SCW. Furthermore, when a vineyard was certified they were given a sign to place next to the vineyard in recognition of their



### D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO

achievement. This proved to be a great motivator to many people, and began to capture the attention of newspapers, magazines, trade media, and other wine regions around the world. This resulted in many published articles, and even television news programs, commenting on the amazing 100 %

The many positive stories about the progress towards the 100 % sustainability goal were communicated to wine tourists, who were inspired to visit Sonoma County's more than 500 wineries. Upon arrival, not only were they impressed by the signage in vineyards about the sustainable certification, but this message was echoed in the wineries as well. Many winery tour guides and hospitality reps were trained to tell the story of the goal, as well as their own individual winery sustainability efforts. Some Sonoma County wineries, such as Benziger, Jordan, and Deloach, organized special tours to teach consumers about their sustainability efforts – similar to the tour described by Honig Winery in Napa Valley. In addition, eight different wineries organized self-paced sustainable vineyard walks for wine tourists so they could stop by the tasting room, get a map and explore the vineyard on their own. Plaques were set up in the vineyard to explain the various types of sustainable practices that were being used, such as water conservation, bird-boxes, native plants for cover crop, and other environmentally friendly practices. Also, signs explained how the vineyard trellising was designed to make vineyard work more ergonomically safe for workers.

<https://sonomawine.com/wine-community-impact/>

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### **D.4.3.1 Tourism Products Portfolio: PP12 PREDAPPIO**

#### **4. Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. Wineries Tours
- B. Cultural Hiking Trails



### D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO

#### PP13 GAL MONTEFELTRO

Work Package	WP4 – WIDEPREAD WELCOMING		
Deliverables	D.4.3.1.		
Deliverable name	Tourism Products Portfolio (TPP)		
Document History	Version	Issue Date	Distribution
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Partner (name and number)	PP13 GAL Montefeltro		
Main editor/s	Gianluca Sarti		
E-Mail contact for further information	<a href="mailto:gianlucasarti@gmail.com">gianlucasarti@gmail.com</a>		

1. Main elements collected during WP3 / SWOT & Reputation Analysis and WP4.1 / Participatory Planning Processes for the identification of Points of Interests, outlining the potential for tourism experiences in the target area(s)

#### 1.1. Intangible assets

- Leggenda della maga foglia: Legend of the Foglia sorceress - Orazio immortalizes in poetry the meeting between two rivers, the Foglia and the Mutino, the story of the two lovers - the sorceress Foglia and the young Mutino - in the wooded Montefeltro.
- In 1874 a noble Prussian Baron Hermann De Tenneret - baron of Beaufort -, convinced that in the past the castle had belonged to his ancestors, searched it, and then donated it definitively to the municipality of Belforte all'Isauro.
- 

#### 1.2. Tangible assets

- Castello di Piagnano: Piagnano is a small fortified medieval village with a castle inside it. This recently renovated village presents itself to the visitor as an imposing oval structure perched on a rocky outcrop 400 meters high.
- Convento di San Francesco del Monte Illuminato: It is said that around 1300 St. Francis during his pilgrimage in the Foglia and Marecchia valleys, using the water from the well, returned the sight of a blind boy in the place where the Convent of San Francesco del Monte Illuminato stands.

#### 1.3. Key attractions

- Rocca Ubaldinesca di Sassocorvaro: turtle-shaped fortress, was commissioned by Duke Federico da Montefeltro - astrologer, magician, and alchemist – and represents a unique landmark in the territory.



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

- Castello di Belforte all'Isauro: the castle stands to protect the town that lies between the hills of the Marche Apennines precisely in that strip of land that is wedged between Umbria and Tuscany.
- Sentiero spirituale del Beato Lando: the spiritual path of Blessed Lando is one of the most beautiful routes in Montefeltro to be done on foot, by bicycle or on horseback, because of its characteristics of biodiversity, of great landscape value and its important historical monuments.
- Il Logo: Mystical spot hosting a variety of birds and of wildlife, as well as (medicinal) wild herbs.
- Reliquia di San Valentino martire patrono degli innamorati (Ss.mma Trinità): the relic of St. Valentine martyr, patron saint of lovers, represent an iconic attraction for couples in search for romantic spots.
- Lago di Mercatale: the lake provides various opportunities for soft activities, being an excellent destination for rowers, fishermen and visitors looking for relaxation, tranquillity.

#### **1.4. Intangible assets NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences**

- Ghost in the Rocca Ubaldesca in the night between August 25<sup>th</sup> and 26<sup>th</sup>. It is said that screams and strange noises of chains are heard under the main arch of the fortified town. Some argue that presences from the afterlife are perceived due to a curse inflicted after a tragic battle.

#### **1.5. Tangible assets NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences**

- Antico castello di Lupaiolo: Ancient castle of Lupaiolo was already present in the 13th century, now a ruin immersed in a landscape of dense woodlands.
- Castello di San Donato in Taviglione: it was an important castle. The top of the hill (490 m a.s.l.). appears surrounded by the ruins of the ancient sandstone walls, mostly collapsed.
- Mulino Rattini: mill in Sassocorvaro in good condition. It was a very important mill also equipped with a sawmill that was driven by the force of the water coming from the millpond. It still has the original millstones among its rooms.
- Casino La Madonna del Giardino: the "Casino Doria di Mercatale", known as "Casino della Madonna del giardino", is an example of fortified court built between the 16th and the 17th centuries and hosts the Church of St. Michele Arcangelo di Mercatale built at the end of the 16th century with many wonderful paintings (among them the "Lady of the Rosary and Saints" attributed to Giovan Battista Urbinelli).
- Centro ippico Macallan: the Macallan Equestrian Center. The club has always been affiliated with the FITE-Trec Ante (Italian Federation of Equestrian Tourism-Trec), supporting the activities proposed to facilitate the spread of recreational and competitive activities. The Macallan Equestrian Club carries out horse riding, boarding, and taming of horses, riding lessons for children and adults with qualified and professional staff.
- Circolo ippico Ecomont: (Escursioni COLLINE MONTefeltro) Ecomont equestrian club is an association born from the need to enhance the Montefeltro territory, and by the passion for horse riding. In the small village of La Pieve (Belforte all'Isauro), immersed in the quiet of the green of Montefeltro, an equestrian center has been built to house horses.
- Santa Maria in Silvis: The isolated and fascinating place, the simplicity of the church and the functionality of the house makes the Church of Santa Maria in Silvis ideal as a hermitage, a place of prayer and meditation, of refreshment for the soul. Surrounded by woods, as the name implies, this church is available to those seeking a little peace. A path about one kilometre long, with wooden niches bearing





### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

images of the mysteries of the Rosary, leads to the parish church and the camping house. Other three paths lead off for beautiful excursions in the woods and meadows, totally immersed in nature.

- Valle Avellana dei noccioli: Valle Avellana covers an area of 1,729 ha, in the middle Foglia valley in the province of Pesaro and Urbino; it is entirely included in the “Badlands and arid grasslands of the middle Foglia valley”. The territory is characterized by the widespread presence of gullies that give life to lunar landscapes with overhangs and deep canyons interspersed with blades of earth and vertical sandstone walls with scarce herbaceous or shrubby vegetation. The species present are: Cerambyx cerdo; Harrier; Have it small; Peregrine Falcon; Ortolano; Tottavilla.
- Castello di Campo: hills and woods hide an ancient castle, a group of houses undecided whether to feel more akin to the Marche or Tuscany: it is Campo di Belforte. It is a hamlet with few houses and, probably, even fewer inhabitants. Already seeing it from afar this place arouses contrasting emotions of amazement and veiled sadness.

#### **1.6. Key attractions NOT collected during WP3 and WP4.1 strategic for increasing the attractiveness of the tourism experiences**

- Museo Storico Internazionale della Linea Gotica di Casinina: The International Historical Museum of the Gothic Line of Casinina is the first and most important museum of its kind in central Italy: library, video store, historical archives, "Memorial" theme park, documentation centre on the Twentieth Century.
- Gourmet food, excellences at regional, national, and even international, level:
  - artisanal craft beer production: "La Cotta"
  - Production of fossa cheese, fresh pecorino, pecorino with walnuts, seasoned, fresh ricotta: farm "Cau e Spada"
  - Continuous cycle oil mill that processes olives of local and national origin: "Oleificio Venturi Agape di Guerra Nilvana"
  - sour cherry wine "visner" (visciole): Azienda "Mauri Maurizio"
  - Truffles (cavatori, truffe hunting): Il Tartufeltro di Mattia Biagini e Massimo Bonopera, Veronica Tartufi di Matteucci Gianni"
  - Chestnut: "i Castagni della Pianella"
  - Honey fest and city of honey (Belforte: Festa del Miele, panforte coi fichi)



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

#### **2. Summary description and main characteristics of the 5 tourism experiences envisaged in the involved territory**

Based on findings from 1. (WP3 / SWOT & Reputation Analysis and WP4.1 / Participatory Planning Processes for the identification of Points of Interests), the project partner identified the following **LONG LIST of 5 tourism products / experiences**:

- CULTURAL TOURISM
- GASTRONOMY TOURISM
- RECREATION / ADVENTURE TOURISM
- WELLNESS TOURISM
- DARK TOURISM

#### **2.1 Tourism experience 1 –"Cultural itineraries through castles, churches and historic villages" (CULTURAL TOURISM: landscapes and charming villages)**



Cultural rural tourism fits perfectly with the trend of European travellers to seek unique experiences, traditional local lifestyles, iconic sites, protected natural areas, unspoiled landscapes and stays in authentic accommodation.



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

Included assets:

- Rocca Ubaldinesca di Sassocorvaro: turtle-shaped fortress, was commissioned by Duke Federico da Montefeltro - astrologer, magician, and alchemist – and represents a unique landmark in the territory.
- Castello di Belforte all'Isauro: the castle stands to protect the town that lies between the hills of the Marche Apennines precisely in that strip of land that is wedged between Umbria and Tuscany.
- Reliquia di San Valentino martire patrono degli innamorati (Ss.mma Trinità): the relic of St. Valentine martyr, patron saint of lovers, represent an iconic attraction for couples in search for romantic spots.
- Castello di Piagnano: Piagnano is a small fortified medieval village with a castle inside it. This recently renovated village presents itself to the visitor as an imposing oval structure perched on a rocky outcrop 400 meters high.
- Convento di San Francesco del Monte Illuminato: It is said that around 1300 St. Francis during his pilgrimage in the Foglia and Marecchia valleys, using the water from the well, returned the sight of a blind boy in the place where the Convent of San Francesco del Monte Illuminato stands.
- Museo Storico Internazionale della Linea Gotica di Casinina: The International Historical Museum of the Gothic Line of Casinina is the first and most important museum of its kind in central Italy: library, video store, historical archives, "Memorial" theme park, documentation centre on the Twentieth Century.
- Leggenda della maga foglia: Legend of the Foglia sorceress - Orazio immortalizes in poetry the meeting between two rivers, the Foglia and the Mutino, the story of the two lovers - the sorceress Foglia and the young Mutino - in the wooded Montefeltro.
- In 1874 a noble Prussian Baron Hermann De Tenneret - baron of Beaufort -, convinced that in the past the castle had belonged to his ancestors, searched it, and then donated it definitively to the municipality of Belforte all'Isauro.



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

#### 2.2 Tourism experience 2 - "Food and wine tasting itineraries for foodies" (GASTRONOMY)



Gourmet food, excellences at regional, national, and even international, level:

Included assets:

- Artisanal craft beer production: "La Cotta"
- Production of fossa cheese, fresh pecorino, pecorino with walnuts, seasoned, fresh ricotta: farm "Cau e Spada"
- Continuous cycle oil mill that processes olives of local and national origin: "Oleificio Venturi Agape di Guerra Nilvana"
- Sour cherry wine "visner" (visciole): Azienda "Mauri Maurizio"
- Truffles (cavatori, truffe hunting): Il Tartufeltro di Mattia Biagini e Massimo Bonopera, Veronica Tartufi di Matteucci Gianni"
- Chestnut: "i Castagni della Pianella"
- Honey fest and city of honey (Belforte: Festa del Miele, panforte coi fichi)



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

#### **2.3 Tourism experience 3 – “Soft active & adventure holidays in Montefeltro” (RECREATION / ADVENTURE)**



Montefeltro, where life follows the rhythm of nature and is in symbiosis with nature, is an ideal place to spend an active holiday, to practice sports in the name of soft adventure.

Included assets:

- Sentiero spirituale del Beato Lando: the spiritual path of Blessed Lando is one of the most beautiful routes in Montefeltro to be done on foot, by bicycle or on horseback, because of its characteristics of biodiversity, of great landscape value and its important historical monuments.
- Lago di Mercatale: the lake provides various opportunities for soft activities, being an excellent destination for rowers, fishermen and visitors looking for relaxation, tranquillity
- Centro ippico Macallan: The Macallan Equestrian Center has always been affiliated to the Italian Federation of Equestrian Tourism (Trec), supporting the activities proposed to facilitate the spread of recreational and competitive activities. The Macallan Equestrian Club carries out horse riding, boarding, and taming of horses, riding lessons for children and adults with qualified and professional staff.
- Circolo ippico Ecomont: (Escursioni COLLINE MONTefeltro) Ecomont equestrian club is an association born from the need to enhance the Montefeltro territory, and by the passion for horse riding. In the small village of La Pieve (Belforte all'Isauro), immersed in the quiet of the green of Montefeltro, an equestrian center has been built to house horses.
- Santa Maria in Silvis: A path about one kilometre long, with wooden niches bearing images of the mysteries of the Rosary, leads to the parish church and the camping house. Other three paths lead off for beautiful excursions in the woods and meadows, totally immersed in nature.



### D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO

#### 2.4 Tourism experience 4 - "Experiences and treatments for the spirit, the mind, detox and with medicinal herbs" (SPIRITUAL WELLNESS)



Psycho-physical, emotional, and spiritual practices and therapies, forest bathing, phytotherapy, aromatherapy, rebirthing, yoga, medical treatments with herbs, etc. in mystical and magic spots in the natural landscape of Montefeltro.

Included assets:

- Sentiero spirituale del Beato Lando: the spiritual path of Blessed Lando is one of the most beautiful routes in Montefeltro because of its characteristics of biodiversity.
- Il Logo: Mystical spot hosting a variety of birds and of wildlife, as well as (medicinal) wild herbs.
- Valle Avellana dei noccioli: The territory is characterized by the widespread presence of gullies that give life to lunar landscapes with overhangs and deep canyons interspersed with blades of earth and vertical sandstone walls with scarce herbaceous or shrubby vegetation.



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

#### 2.5 Tourism experience 5 - "Mystery in Montefeltro: alchemical paths in the Montefeltro" (DARK)



Alchemy, secret societies, intrigues: discovering some of the secrets of the Montefeltro and what this territory has to offer in terms of mystery and alchemy.

Included assets:

- Rocca Ubaldinesca of Sassocorvaro - turtle-shaped fortress:
  - Ottaviano degli Ubaldini della Carda.
  - "Green men".
  - Night of the ghosts between 25<sup>th</sup> and 26<sup>th</sup> August at the castle. It is said that screams and strange noises of chains are heard under the main arch of the fortified town. Some argue that presences from the afterlife are perceived due to a curse inflicted after a tragic battle.
- Fortress of San Leo: Musleo / new interactive-multimedia exhibition also dedicated to alchemist Cagliostro.
- Pietrafagnana (Pietrarubbia): 'little Italian Stonehenge'
- (Civic Museums of Pesaro: Medusa by alchemist Ferruccio Mengaroni)
- Mercatello sul Metauro scoprirete uno dei luoghi dell'esilio di Dante Alighieri: il Castello della Pieve.



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

#### **3. Market analysis on tourism experiences / products: CYCLING TOURISM**

Based on findings from 1., the partner prepared a brief market analysis regarding the following tourism product line / experience:

#### **3. CYCLING tourism**



#### **3.1. Main characteristics of the product line**

CYCLING tourism refers to leisure trips where cycling is the main purpose. The bicycle in this context is therefore not just a means of transport, but an integral part of the travel experience. Biking tourism can be centre based, where people are based in a particular location for several days and go out for day rides from there. It can also be a tour, where cyclists stay at different locations along the way. The intensity varies from soft biking, enjoying the scenery while gently pedalling on a bicycle, to hard-core biking, where physical fitness is the main goal. Cycling tourism is considered a form of soft adventure.

Research on cycle tourism identified three types of products<sup>57</sup>:

<sup>57</sup> Lumsdon, 2000. Sustrans 2003





### D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO

1. Cycling holidays (Holidays **by** bike): holiday lasting at least one night of which the main reason is to use a bicycle. The routes can be aligned, they can change logistics reference daily, or be centred to just one destination with different ring cycle tracks. Cycle holidays can be organized by tour operators or by the tourist himself.
2. Holiday cycling (holidays **with** the bike): Bike tours are just one part of the holiday, but not the main one. The tourist stays in the same accommodation for the entire holiday and goes on different tours.
3. Cycle day excursions (cycle tourist **excursion**): bike tour, to relax and have fun, that lasts at least three hours and does not require an accommodation different from one's own home.

### 3.2. General tourist profile of this tourism product line

#### 3.2.1. General description

##### *General Tourist Profile*

The general profile of cycling tourists is the following:

- are slightly more often male
- are often aged 40–60 years' old
- are generally well-educated with higher incomes
- usually enjoy cycling as a form of sport or physical exercise
- like to be close to nature
- often travel in couples or small groups
- often arrange their travel and accommodation themselves.
- while on holiday, the burned calories of road bikers and mountain biker are best spent in deli food, mountain biker seek for adventure also in hiking and trekking bikers will learn all they can.

##### *Sub-segmentation of cycle tourists*

This product is segmented and grouped as follows:

#### **1. Road bikers - Road cycle tourism**

For those who see cycling more like a sport.

Road bikers are likely to be oriented towards urban lifestyles.

While on holiday, the burned calories of road bikers are best spent in deli food.

Road bikers use different kinds of bicycles: Road bikes, Cyclocross bikes, Gravel bikes

#### **2. MTB bikers - Mountain bike cycle tourism, that combines in cycling the ideas of sport and nature**

The mountain bike guests' profile remains oriented on the lifestyle of people living in rural areas/ countryside.

While on holiday, the burned calories of mountain biker are best spent in deli food.

Mountain bikers seek for adventure also in hiking.

The mountain bike "world" encompasses a plethora of different kind of mountain bikes and MTB bikes users which potentially are hyper niches: Cross Country Mountain Bikes, Trail Bikes, Enduro or All-Mountain Bikes, Downhill Bikes, Freeride Mountain Bikes, Dirt Jump Bikes, Observed Trials Bikes, Fat bikes

#### **3. Trekking / slow bikers - Slow or leisure cycle tourism**

Practiced by those tourists who prefer to travel slow, so to enjoy all that is related to travelling as nature, landscape, culture, wine, and food.

Trekking bikers are likely to be oriented towards urban lifestyles.

While on holiday, trekking bikers will learn all they can.

Travelling by reducing the impact of emissions.



### D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO

The trekking bikers' satisfaction is inspired also by ethical issues.

#### 4. E-bikers - Slow or leisure cycle tourism

E-bikes are particularly suitable for holidays, as they allow people who do not share the same level of fitness to enjoy cycling activities together. They help bikers ride longer distances per daytrip and navigate routes with uphill sections more easily. This makes a wider range of destinations accessible to a wider range of bikers, including senior cycling tourists.

#### 3.2.2. Main markets of origin

The main source markets for bike tourists are not only those where most bicycles are sold, but also those countries with the highest shares of people usually using bikes.

##### Bicycle use in Europe is highest in smaller markets:

The use of bicycles indicates the importance of cycling in a country. Bicycles are the most frequently used mode of transport for around 8.0% of Europeans, representing around 41 million people. This share varies considerably between European countries.

People in the Netherlands are by far the most likely to use a bicycle, followed by Nordic countries such as Denmark. Although these countries are relatively small, their cycling habits make them interesting target markets for cycling tourism.

- As most people (56–71%) in the Netherlands, Denmark and Finland cycle several times per week, these countries are especially interesting source markets for occasional or frequent cyclists' holidays.
- In Hungary, Sweden, and Poland, 43–45% of people also cycle more than once a week.
- Although cycling trips are popular with infrequent leisure cyclists as well, countries such as Spain, Portugal, and Greece, where most people never use a bicycle, may be difficult source markets.

##### Volume makes larger markets interesting:

Around 20 million bicycles are sold in Europe every year.

- The highest sales are in Germany. This is a large market where cycling is relatively popular. Some 44% of Germans cycle more than once a week, and an additional 26% cycle less often. As such, Germany is a promising source of both infrequent and occasional or frequent leisure cyclist travellers.
- Other large countries, such as the United Kingdom, Italy, and France, may also be interesting target markets in Europe. However, around two thirds of all British never cycle, and more than half of those that do cycle only a few times a month or less. The French and Italian show a similar pattern. This makes these countries particularly suitable for cycling tourism packages aimed at infrequent leisure cyclists.

##### The largest worldwide markets for bike sold, are naturally key target market for any kind of bike tourism offer:

- It is estimated that more than a billion bicycles are present in the world, with nearly half of them in China (450,000 - Bicycle Market Research Institute).
- The United States is the second largest market with over 100 MM bicycles
- Japan follows with over 72 million bikes

Besides the typology of bicycle used, there are four main segments of cycling tourists, based on the frequency of their leisure cycling:



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#### 3.2.3. Tourism habits

##### Booking habits

##### *Through smaller specialized tour operators*

Adventure travellers, such as cyclists, are more likely to use professional services like tour operators and guides than non-adventure travellers, especially when it comes to lesser-known developing countries, or more challenging activities. Tour operators therefore are the most important selling channel trade, especially smaller European tour operators specialized in biking tourism.

##### *Through associations*

Some bikers are members of associations or clubs for cyclists, especially travellers in the cycling enthusiast segment. These associations offer direct access to their members and organize periodically cycling tourism trips holidays.

##### *Direct booking*

Cycling travellers increasingly research and plan their trip online. Although bike travellers still prefer to book through more traditional channels, some cycling tourists do organise their own cycling holidays, especially in the cycling enthusiast segment.

#### 3.3. International Market size of the present global demand for this tourism product line and expected future trends

##### 3.3.1. Present market size

This segment is based on almost 110 million bikers worldwide grouped as follows:

- Road bikers: 15.75 million
- MTB bikers: 18.66 MM.
- Trekking bikers: 40.43 MM.
- E-bikers: 34.75 MM.

##### 3.3.2. Trends

According to the UNWTO “Global Report on Adventure Tourism”, biking tourism is growing very fast worldwide, with an increasing number of adventure tourists embarking on both road and mountain biking tours or participating in cycling events.

Bicycle trips are also increasingly added to city trips as one-day excursions, or longer.

##### Growth of e-bikes

The introduction of electric bicycles, or e-bikes, using rechargeable batteries to assist bikers with a small electric motor e-bike, opened interesting new scenarios enlarging this market to additional segments that before were less interested to biking tourism (example: baby boomers, etc.).



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According to Statista Research Department (2019), in 2016 almost 35 million electric bicycles) with pedal support of up to 25 kilometres per hour (also called “hybrid” bicycles were sold worldwide, some 32.8 million electric bikes in the Asia-Pacific region and 1.6 million in Europe.

In 2023, global sales of such e-bikes are forecast to reach approximately 40 million units. China is expected to remain the most important market for electric bikes worldwide, as 34.3 million units are predicted to be sold here.

#### Cyclotour

There will be a growing market called “cyclotour” based on bikers, that like to combine sport, cultural visits, gastronomy, shopping etc. These cyclists are a hybrid between road bikers and traditional trekking bikers.

#### Family or multi-generational trips

Family-friendly trips are in high demand among adventure travellers, including bike travellers. A popular type of family holiday is multi-generational travel, where grandparents, parents and children travel together.

The aging Western population and the better physical shape of seniors encourage this trend. Many seniors see travel as an excellent way to create unforgettable memories with their children and grandchildren.

E-bikes make cycling holidays especially suitable for family travel.

#### Cycling experiences as an add-on

Bike tourism experiences are increasingly added as part of a holiday programme. Travelers like to combine cycling with other (adventurous) activities, wellness experiences or cultural holidays.

River cruises for example, take along bikes to offer passengers the chance to explore the shores.

### 3.4. Local and National size of the present demand and expected future trends of this tourism product line

#### 3.4.1. Present market size

#### 4.7 million cycle tourists and 4.1 billion euro in expenditure

In summer 2020, according to Isnart surveys on a sample of Italian and foreign hospitality businesses and tourists, 4.7 million Italians made use of bicycles during their holidays, equal to 17% of tourists, spending a total of 4.1 billion euro.

In the survey "Traveling by bike, characteristics and economy of cycle tourism in Italy"<sup>58</sup>, we read that in 2020, the Italians who practiced activities in the summer 2020 holiday contexts emerge above all trekking (39%) and cycling in its various forms (31%, with an incidence of 76% for Mtb, 15% for e-bikes and 9% for racing bikes).

The goal of "practicing sports" (32%) has taken on the same weight as the traditional reasons for a holiday in Italy, the presence of natural beauty and cultural heritage.

<sup>58</sup> Alberto Bazzucchi e Flavia Coccia di Isnart, a integrazione del 2° Rapporto sul cicloturismo presentato nella primavera del 2020 su dati 2019



### D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO

Cycle tourism is confirmed as an expanding phenomenon: almost half of the hoteliers interviewed recorded a general increase in attendance linked to two wheels, particularly in Valle d'Aosta, Friuli-Venezia Giulia, Umbria, and Lazio, while in areas with a more consolidated cycling tradition such as Trentino - Alto Adige, Veneto and Tuscany, signs of stability of the phenomenon prevailed. In general, the regions mainly chosen by the cyclist were Trentino - Alto Adige, Veneto, and Emilia-Romagna, with Calabria, Abruzzo and Puglia showing signs of vitality.

In Italy, cycle tourism is rooted and structured especially in the north, with the north-eastern area between Friuli-Venezia Giulia, Lombardy and Emilia-Romagna which intercepts almost 70% of the overall cycle tourism movement on the national territory.

In total, two types of cyclists were distinguished:

1. The hard and pure or hard-bikers, equal to 47% of cyclists, made up of those who used the bicycle as the main motivation for a holiday and those who took holidays using the bicycle as a means of moving from one location to another.
2. Soft or soft-bikers, equal to 53% of cyclists for whom the use of bicycles involved excursions and short trips to the place of destination.

Recent surveys have found that the largest number of tourists focus on the Trieste-Lignano Sabbiadoro cycle paths, the Garda cycle route, the Tyrrhenian "Liguria-Tuscany-Lazio" cycle route, the Adriatic, and the Apulian Aqueduct cycle route.

### 3.5. Most important criteria influencing the competitiveness in the global market for this tourism product line

*for example: number of cultural attractions, uniqueness of cultural activities, authenticity of cultural activities, UNESCO world heritage site certification, etc.)*

#### 3.5.1. Cycling infrastructure

Good cycling infrastructure is a main requirement of cycling travellers. This includes such things as:

- a variety of cycling routes and tracks
- good road surfaces
- clear and consistent route signage
- route maps
- information material regarding sightseeing
- cycling maintenance shops

#### 3.5.2. Health and safety measures

When adventure tour operators and travellers consider new destinations, they first check the safety. This is one of the most important requirements of cycling travellers. Safety includes aspects such as safe equipment, safe cycling areas and safe cycling routes. For example, traffic-free routes or routes with low traffic density are a plus.

#### 3.5.3. Good-quality material

Cycling tourists are used to high quality standards. They expect bicycles and related material of a good quality at their holiday destination.

#### 3.5.4. Cycling-friendly accommodation and luggage transport

Cycling travellers prefer to stay in accommodation with cycling-friendly facilities. This includes facilities such as secure bicycle storage and bicycle repair, as well as specific route information. They also appreciate



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

breakfast options with a lot of calories, such as oatmeal, pancakes, pasta, bacon, and eggs. In case of cycling tours where travellers stay at different locations, they expect their luggage to be transported from accommodation to accommodation.

#### **3.5.5. Knowledgeable guides**

For guided cycling trips/tours, cycling tourists require their guides to be knowledgeable on topics such as first aid and bicycle repair. They should also be able to share information about the local nature and culture.

### **3.6. Most representative international best practices (max 3) regarding this tourism product line**

#### **3.6.1. Neusiedler See cycle path (DE)**

The Neusiedler See cycle path around lake Neusiedl is particularly suitable for families and leisure cyclists. Since the cycle path runs all around the lake with mild slopes and optional ferry crossings, this renders the journey through nature and the national park comfortable as well as diverse.

Along the path, multiple opportunities for culinary pleasures arise, as numerous vineyards provide refreshments and a taste of the region.

The cycle path runs through the national park “Neusiedler See – Seewinkel”, which consists of a natural reserve zone untouched by the public and five conservation zones accessible to visitors.

The national park is one of the most famous bird habitats in Europe. Its unique flora and fauna can be discovered by guided tours in different languages. Throughout the conservation zones outlooks provide a wonderful panorama and are ideal for a short break from time to time.

The German organization ADFC rated this cycle path with 5 out of 5 stars, as one of only 4 routes in Europe. “The 5 -Star quality can be experienced across the whole route. The package stands out for its attractive routing along the lake and its high infrastructural standards.” (ADFC, <https://www.adfc-radtourismus.de/neusiedler-see-radweg/>).

#### **3.6.2. Danube cycle path – part of EuroVelo 6**

EuroVelo 6 starts at the Atlantic Ocean at Saint Nazaire and follows several rivers through France and Switzerland, before following the river Danube from its source in Donaueschingen in Germany through Austria, Slovakia, Hungary, Croatia, Serbia, Bulgaria and flowing into the Black Sea at Tulcea in Romania.

Probably the most famous section from Passau to Vienna is known for its beautiful scenery, the romantic landmarks like the Schlägener bend, the city of Linz and the world heritage Wachau region with its abbeys, castles, and vineyards.

In general, there is a multitude of touristic offers to choose from, e.g., boat cruises, museums, culinary tastings, cycle friendly accommodations (bett+bike) or complete packages provided by tour operators. Operators often offer to luggage transport from one accommodation to the next, so you can enjoy the trip without wasting energy.

The Austrian and German sections are well connected by bus and train, for either returning to the starting point or skipping a section during the trip.

Decades of developing the section led to an almost entirely paved surface. Ideal for cyclists and away from motorised traffic, along the riverbanks.

Apart from the section Passau to Linz, the cycle track is equipped with EuroVelo signposting.

According to the “Radreiseanalysen” (ADFC and Travelbike), the Danube cycle path was rated as the most popular route outside of Germany for the past ten years in a row. In 2015 the Austrian section of the Danube cycle path was awarded with 4 out of 5 stars as a high-quality cycling route.

<https://www.adfc-radtourismus.de/donauradweg/>



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

#### **3.6.3. Adventure Cycling Holiday in Chile and Argentina**

For longer bicycle treks, cross-border trips are also popular. Examples are cycling tours of the Patagonian Lake district of Argentina and Chile, and tours from Vietnam to Laos.

Superb cycling holiday in Chile and Argentina, journey through the Lake District - a landscape of snow-capped volcanoes, deep valleys, lakes, and monkey puzzle tree forests set against the awesome Andes.

Well-paced, our route is on a combination of quiet gravel tracks and earth roads that skirt immense lakes and pass-through sleepy villages, allowing us to absorb ourselves fully in the Lake District, its people, and their way of life. Accommodation along the way is a combination of small hotels, lodges, cabanas, and family run hospedajes (South American guesthouses), chosen for their location, hospitality, and friendly welcome.

#### Highlights

- Majestic Volcan Osorno and its snow-capped peak
- Tasting the chocolates of Bariloche
- Biking the Seven Lakes Route to San Martin de los Andes
- The monkey-puzzle tree forests of Conguillio
- Sampling a tasty Malbec or Carmanere after a day's biking
- Hiking the lofty heights of Volcan Villarica

[https://www.skedaddle.com/uk/adventures/holiday/Cycling\\_Adventures/Chile\\_and\\_Argentina -  
\\_Lake\\_District\\_-\\_Cycling\\_Holiday/815/view.rails](https://www.skedaddle.com/uk/adventures/holiday/Cycling_Adventures/Chile_and_Argentina_-_Lake_District_-_Cycling_Holiday/815/view.rails)



### **D.4.3.1 Tourism Products Portfolio: PP13 GAL MONTEFELTRO**

#### **5. Prioritisation: Short list of 2 tourism products- experiences**

Based on findings from 1. + 2. + 3., the partner selected the following **SHORT list of 2 tourism products / experiences**:

- A. Cultural escapes in rural landscapes, castles & alchemy
- B. Soft active holidays: hiking, biking, horse-riding, kayaking





### D.4.3.1 Tourism Products Portfolio: Conclusions

#### Conclusions / Recap

The partners selected 50 potential products, converging to overall 20 tourism products to be prioritised:

PP	N.	LONG lists of Potential Tourism Experiences/Products <b>5 each PP</b>	SHORT List of Potential Tourism Products <b>2 each PP</b>
LIRA	LP	1 – The route of Nikola Tesla 2 – Discover Gospić 3 – Discovering Lovinac / springs, peaks, and hidden villages 4 – Perušić, land of water and caves 5 – Bike in Lika	1) Nikola Tesla (historical figure) 2) active holidays
Primorje Gorski Kotar	PP2	1 – Along the Roads of Grobnik’s Noblemen 2 - Chillout Platak 3 - A walk along the Milky way 4 - Bird’s Eye Grobnik 5 - Speed Day Grobnik	1) Historic Buildings 2) Platak: mountain fun
JURRA Karlovac	PP3	1 – Fortresses of Karlovac County 2 - The route of Frankopan family 3 - Bike through Karlovac County 4 - Nature of Karlovac County 5 - Gastronomy of Karlovac County	1) Fortresses 2) Beer Tourism
CM Carnia	PP4	1 - Cuisine and gastronomy 2 - Ancient fires 3 - Music 4 - Handicraft 5 - Narrated paths	1) Music 2) Traditional Handicraft
Rive D'Arcano	PP7		1) Day trips
GAL Delta 2000	PP8	1 – Sport Fishing Competitions 2 – Birdwatching in Po Delta Park 3 – Bike Experience 4 – Cultural Experience for schools 5 – Cinema, Cultural Heritage, and Museums	1) Sport Fishing 2) Cultural School trips



### D.4.3.1 Tourism Products Portfolio: Conclusions

Campobasso	PP9	1 –Map with the community of Campobasso 2 –Street Art Path 3 – The Garden City 4 – The Map of Traditions 5 – Artistic Handicraft Itinerary	1) Urban Trekking 2) Mystery & Festivals
Sasso Simone	PP10	1 - Natural Park - Cultural Park - The museum park 2 - Long Stay Stays 3 - Community experience in charming villages 4 - Knowledge and flavors of the Park 5 - Active conscious tourism. The activity you practice is not an end but the means to get to know the territory.	1) Museums Network 2) Stays in charming villages and experiential encounters
Predappio	PP12	1 – The Wine Experience (Wine Tourism) 2 – Historic & Spiritual Hiking Trails (Active Tourism) 3 – Bike and Rocche Experience (Active Tourism) 4 – Mastro-Lupo Experience (Cultural Tourism) 5 – The Rational Architecture Experience	1. Wineries Tours 2. Cultural Hiking Trails
GAL Montefeltro	PP13	1 –"Cultural itineraries through castles, churches and historic villages" (CULTURAL TOURISM: landscapes and charming villages) 2 - "Food and wine tasting itineraries for foodies" (GASTRONOMY) 3 – “Soft active & adventure holidays in Montefeltro” (RECREATION / ADVENTURE) 4 - "Experiences and treatments for the spirit, the mind, detox and with medicinal herbs" (SPIRITUAL WELLNESS) 5 - “Mystery in Montefeltro: alchemical paths in the Montefeltro" (DARK)	1) Cultural escapes in rural landscapes, castles & alchemy 2) Soft active holidays: hiking, biking, horse-riding, kayaking

Within the scope of the identification of the priority products, the 10 territorial partners carried out **16 market analysis studies**:

1	CULTURAL HERITAGE TOURISM BASED ON A HISTORICAL FIGURE
2	HISTORICAL BUILDINGS
3	BEER TOURISM
4	EVENT TOURISM
5	CULTURAL SCHOOL TRIPS / EDUCATIONAL TOURISM
6	SPORT FISHING



### **D.4.3.1 Tourism Products Portfolio: Conclusions**

7	HIKING
8	BIRDWATCHING
9	CITY TOUR BASED ON CYCLING
10	CULTURAL TOURISM BASED ON STREET ART
11	INTANGIBLE CULTURAL HERITAGE TOURISM BASED ON HISTORICAL TRADITIONS
12	SPORTS TOURISM BASED ON FOOT RACE
13	CULTURAL HERITAGE TOURISM BASED ON URBAN TREKKING (COMMUNITY MAP
14	MUSEAL TOURISM
15	WINE TOURISM
16	CYCLING TOURISM