

Del 5.1.3 Cultural Touristic Management strategy

LP – Central Adriatic Ports Authority

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Introduction

This document is part of the Work package (WP) 5 Adriatic ports cultural network that aims at setting up the Adriatic ports cultural network for the cross-border valorization of Adriatic Italian and Croatian ports as a single integrated destination for cultural tourism, linked but at the same time alternative to the coastal tourism.

Activity 5.1 answers to a real need of involved partners to create added value for the territories from the cultural heritage that must be safeguarded.

Therefore, all involved partners are committed to continue the cooperation on cultural and tourism valorization also after the end of the project, in line with the existing local developing strategies and building upon existing cooperation frameworks among the PPs.

The CTM strategy has two main parts:

1. Current state of the offer in the port/city
2. CTM Strategy

Executive Summary

Part one: Current state of the offer in Ancona

Ancona is the state capital of the region Marche. The city overlooks the central coast of Adriatic Sea and it rises on the promontory formed by the northern slopes of Monte Conero (which gives origin to the gulf of Ancona). In the inner part of the city is located the main Port of the central Adriatic. The city is divided by two parts: on Monte Guasco rises the historical centre which is characterized by wonderful monuments of medieval and renaissance times with Roman, Byzantine and Venetian architectural influences, and the modern part oriented towards the coast.

Most of the territory of Ancona is included inside the Monte Conero Regional Park characterized by evergreen woods of Mediterranean scrub, cliffs overlooking the sea, wonderful beaches and a still unpolluted campaign.

Ancona (with its 2400 years of history) it's one of the main economic centres of the Adriatic coast and the main city in the Marche region for dimension and population. The city has a lot to tell and its tourist and cultural offer is linked to the ancient sailing and merchant origin of the city.

In the last years, several touristic initiatives have been promoted especially for the cruise and ferries passengers' satisfaction and needs such as the presence of an informative point near the terminal cruises, well-built signalling and thanks to the collaboration with the cultural association and religious institutions of the city it is possible to visit places otherwise visitable only from outside.

Development constraints

The constraints and the limits related to the city touristic and cultural offer can be divided into four macro categories.

Economical and financial constraints:

- **The number of tourists is limited.**

In the majority of cases, new initiatives costs are higher than the earnings that tourism manages to generate in Ancona making it economically not convenient.

In order to become economically viable, alternative initiatives should be considered, such as the

developmento of initiatives limited in space and time, and the collaboration with other projects and initiatives.

- **High competition in the use of space.**

There is a high competition in the use of space especially in the city historical centre. For this reason it's necessary to assess the costs and the opportunities linked to the use of these places.

- **High costs of reconversions and maintenance of certain structures with criticalities.** Another constraint to take into account is the amount of costs in case of conversion and/or maintenance of unsafe and damaged structures and establish whether or not it is appropriate to invest in their retraining.

- **Realization of high entity investments.**

Recently, Ancona has been through two high entity investments: the Mole Vanvitelliana renovation (funded by the State through the National Plan for the Cities with 8.7 million of euros) and the Old Port requalification (thanks to the joint work of Municipality, Chamber of Commerce and Central Adriatic Ports Authority). Now, in the tourist and cultural offer the value of the existing rather than the demand for new investments prevails.

Tourist/cultural/traditional constraints:

- The majority of Ancona tourist demand comes from the Italian territory users. On a point of detail, more than 2.2 million of Italian attendances compared to 400.000 foreign ones. It's necessary to adapt again the local offer to an international target too.
- **Reduced importance of Ancona's cultural offer for tourists.** The reopening to the tourism of the city is particularly recent history in which the flows from/to the port have had and have a determining role. For this reason, Ancona does not yet have a competitive brand identity capable of attracting the attention of tourists.
- **Local food and wine products and intangible heritage are still hardly known.** Despite their undisputed quality, local products such as the Mosciolo Selvatico of Portonovo (presidium Slow Food) and Rosso Conero DOC wine cannot find enough notoriety at national level. It is present the difficulty of combining in the immaterial cultural offer of Ancona, enough qualitative elements able to generate and feed a specific flow of tourists interested in this type of cultural and enogastronomic products.
- **Insufficient connection between the attractions of the cultural offer of Ancona.** There are some improvements in the touristic wayfinding system useful for tourists to learn historical and cultural issues and to better orient themselves in the city. The presence of modern and attractive signs and indications allow tourists to better distinguish the various points of interest.

- **High competitiveness of the Adriatic and Italian tourist-cultural offer.** Compared to other Adriatic destinations that boast such broad and intricate offerings, it's complex to stand out and promote successfully for Ancona.

Social and territorial constraints:

- **A wide variety of stakeholders attributable to the tourist and cultural offer.** Ancona destination packages are currently promoted in a very limited way and by many stakeholders at once. For these reasons, the tourists can be confused and disoriented and may not know who to first contact. At the same time, the stakeholders will have difficulties too.
- **High mixture of traffic in the Port of Ancona.** The Port of Ancona is one of the main ports in Italy and it is daily interested in leisure and commercial traffic. For this reason, the tourist and cultural offer has to take into account the presence of traffic, movement and vehicles of all kinds that crowd every day the whole area; making it less peaceful and livable for the tourist and cultural fruition.
- **Military property area.** The port area of Ancona is characterized by the presence of many military property areas that are complicated to use as they are subject to various limits, constraints, barriers and restrictions.

Exogenous, geopolitical, environmental constraints:

- **Rising sea level.** From the '50s, due to global warming effects, the sea level has gradually risen and in the last fifteen years the increase has been about twice as high as the previous ones; coastal territories such as Ancona are at serious risks. The Port of Ancona is equipped with a dock system to protect the city against this phenomenon - but only up to a certain level
- **Catastrophic and unpredictable natural phenomenon related to the sea.** As a coastal city, Ancona needs to take into account the risk of natural marine phenomena. However, the Adriatic Sea has a rather limited depth (in the central-northern part does not exceed 200 m) and within the sea there are no important seismic sources. The risk of a tsunami is remote.
- **Earthquake.** Central Italy is identified as an area of high seismicity. In relation to the seismic risk, calculated according to the PGA (Peak Ground Acceleration) and the frequency/intensity of events, the territory of Ancona is classified as Zone 2 - Medium-High Seismicity (significant damage). Moreover, Ancona is located close to areas classified as Zone 1 - High Seismicity (catastrophic damage). The facts speak for themselves, the recent earthquakes of Norcia,

Accumoli and Amatrice in 2016 and the earthquake in L'Aquila in 2009 have all exceeded magnitude 6 (richter scale).

- **Deterioration of artifacts due to weathering.** Further constraint to consider is given by the deterioration, wear and damage that the outdoor artifacts suffer over time due to the weather conditions. The Central Adriatic Ports Authority periodically carries out interventions of analysis and monitoring of the state of conservation, maintenance and restructure of the historical assets-cultural located within the Ancient Port to ensure their protection and conservation.

Development opportunities

Social opportunities:

- **Relevant stakeholders' location:** Ancona hosts relevant stakeholders for the tourist-cultural offer and port offer.
- **Presence of profile more in line with certain themes.** Ancona hosts several organizations concerning the Adriatic space and consequently, the presence in the territory of relevant personalities who are more interested in discovering the tourist offer throughout the year.
- **Make the best possible use of the relationship established thanks to the REMEMBER project.** This project allows the subjects to establish a solid and useful relationship for the development and the promotion of the tourist and cultural offer.

Tourism opportunities:

- **Cruise passengers.** Ancona represents one of the most important calls of the Adriatic Sea and it counts 100.000 cruise passengers per year; they have the opportunity to visit the historical centre and the Porto Antico.
- **Croatians, Balkans and Greeks tourists.** The port records intense flows in arrival and departure for Croatian, Balkan and Greek territories.
- **Tourists from far away, intercepted on-line.** REMEMBER project wants to realize a virtual museum in each of the eight ports involved, equipped with a shared itinerary and an app available from anywhere around the world which allow the users to discover the tourist-cultural offer of Ancona, its monuments and its history. The virtual museum and the app allow the project partners to intercept a wider target.

Territorial possibilities:

- **Welcome to Ancona Project.** Since 2005 the platform has set itself the objective of coordinating the initiatives proposed by the public and private stakeholders on occasion for the tourist port. Thanks to this project it has been possible to give life to an adequate welcoming plan for cruise passengers.
- **Wayfinding project.** The Municipality of Ancona starts a wayfinding project in which the tourists can orient themselves in a better way thanks to useful information, sign and notice boards. It is possible to use modern technologies such as the QR code.
- **New initiatives following redevelopment and restoration intervention.** The Central Adriatic Ports Authority is in charge of constantly carrying out analysis and monitoring of the state of conservation of property.

European opportunities:

- **Application for titles and awards:** Ancona can use the application for the Cultural State Capital to reinforce the value and the identity of the port, one of the most relevant local cultural aspects.

Technologic opportunities:

- **Unified tourist web portal:** it's a project that allows the birth of a new tourist web portal dedicated to Ancona and its tourist-cultural offer in collaboration with several stakeholders.

Part two: CTM strategy.

This part presents the demand analysis and the tourist-cultural offer found in the Anconitan territory, the seasonality of the visits, the number of accommodation facilities and their quality.

Tourist demand and consumption effects

In 2019 the Municipality of Ancona recorded 171.082 visitors of which 126.359 Italian tourists and 44.723 coming from abroad; 99.689 tourists preferred to stay in hotels, 26.670 tourists have chosen extra-hotel facilities. (74% Italian tourists; 81% hotel accommodation).

Concerning domestic tourism, almost 50% of arrivals come from Lombardia, Lazio, Puglia and Emilia Romagna, on the other hand, in relation to international tourism 2 out of 5 tourists come from Germany, France, United Kingdom, Swiss and Greece.

Key questions and limitations

Among all the seasons, in summer Ancona has more visitors than ever: 300.000 in three months, with a peak of 660.000 in August. During the winter months, especially between October and February, the presence varies between 50thousand and 60thousand monthly. Between June and September Ancona records 50thousand foreign presences monthly with a peak of 100thousand in July. Meanwhile, during the winter months, especially between November and February the presence varies around 10thousand monthly.

On one of the most famous review portals in the world (TripAdvisor), 17% of Ancona's accommodation facilities received a rating of 5 stars, 38% between 4 and 4,5, and 23% equal to or less than 3.

The Port of Ancona represents one of the most important destination of Italy and one of the most dynamic and functional of the Adriatic Sea in terms of vehicle and passenger traffic, freight and fishing activity. Thanks to 3.819 calls, in 2019 almost 1,2 million of passengers have passed through. The shipping lines that operate in the port of Ancona are: Adria Ferries, SNAV, Grimaldi Minoan Lines, Jadrolinija e Anek Lines Superfast Ferries. The cruise ships that have landed are: MSC Sinfonia, Marella Celebration, Marella Explorer 2, Aegean Odyssey, Sirena, Nautica, Le Bougainville, Sea Cloud.

Thanks to the port's strategic location near the city center, those who disembark from the ships have the possibility to reach it on foot in a few minutes, but on the other hand, the central position involves the fact that the exit of the port is located in an area not suitable for supporting maritime traffic. The only street that leads to the highway A14 crosses entire neighbourhoods of the city lowering the quality of life in these areas. In the last few years several projects have been presented to solve the problem of connection between the port area and the highway, but no one was finished.

The Airport "Raffaello Sanzio" is set about 18km from the historical city centre. In 2019 almost 490thousand passengers passed through of which 108thousand are Italians and 373thousand are foreign people. The summer season counts more passengers than ever with a peak of 64thousand total passengers in July, meanwhile from November to February there are fewer passengers.

The Airport is linked to the city through a bus service known as “Aerobus Raffaello” by Conerobus, available everyday from 7 a.m to 10:30 p.m. The bus service ticket is purchasable inside the bus and it costs 5,50€.

The railway station of Ancona is the main railyard of the city and lies at the junction between the Bologna-Ancona line and the Adriatic line (Ancona-Lecce). In addition to fast regional and regional trains, the railway station of Ancona offers Intercity trains, Night Intercity, Frecciabianca, Frecciargento e Frecciarossa (high speed service). The railway station is linked to the city center (2km) through the bus service.

Ancona can be reached along the Adriatic highway A14 Bologna-Taranto. The majority of the park area is managed by M&P Mobilità Parcheggi Spa society.

Development opportunities and possible actions to implement.

The “Sustainable Urban Development Strategy” proposal is located in the context of the urban waterfront, which means all the contact strips from the Porto Antico to the Torrette intersection.

Mole Vanvitelliana waterfront has been recently renovated: The Central Adriatic Ports Authority launched the dismantling of some pavilions in order to increase the service for a new maritime station equipped with spaces, activities to support millions of passengers that pass through annually.

Historic Port waterfront is characterized by the most of the archeological and historical finds of the city and port.

Target Markets

According to I.T.I Waterfront Strategy of Ancona 3.0 and to a study realized in March 2013 by National Tourist Research Institute about the cruise passengers’ flows in the Port of Ancona: 110thousand cruise passengers have visited the city in 2013 and about 55thousand of them did it autonomously, 8.500 have participated in organized excursion. Some of the highlighted trends of the cruise passengers’ behaviour:

- Some of them decided to visit the city following the “historic path” recommended by the tourist poster advertising, or the “commercial path” from Piazza Roma to Piazza Cavour.

- Some of them choose a quick tour centred in the historical area, especially a brief tour to the Duomo of San Ciriaco.

In both cases, the historical part is extremely important. The method of fruition of the Porto Antico area is the calling card for the city and for the entire regional territory.

Fields of cooperation

For many years AdSP participated in several projects often in collaboration with the Chamber of Commerce and AIC Forum and initiatives have been launched in collaboration with the local tourist chain. As already mentioned, thanks to the collaboration with local cultural associations and religious institution, nowadays it is possible to visit out the normal opening hours (on the day of arrival of cruise passengers) and with a possible guide tour, attractions such as S.Maria della Piazza Church and the Loggia dei Mercanti (normally cannot be visited inside).

Part one: Current state of the offer in Ancona

Ancona, capoluogo della Regione Marche, sorge nella costa centrale del Mar Adriatico su un promontorio formato dalle pendici settentrionali del Monte Conero, il quale dà origine al golfo di Ancona.

Nella parte più interna, si apre il principale porto dell'Adriatico Centrale, nonché uno dei maggiori porti dell'Adriatico.

Divisa in due parti, il centro storico sul Monte Guasco e la parte moderna sulla costa, Ancona è una città ricca di fascino, che fonda le sue radici nell'età romana e con un centro storico che racchiude splendidi monumenti di epoca medievale e rinascimentale, con influenze architettoniche romane, bizantine e veneziane. Tra lo storico antagonismo con Venezia e la posizione centrale, Ancona ha richiamato nel corso dei secoli artisti da tutta Italia che l'hanno decorata e impreziosita con le loro opere. Con i suoi 2400 anni di storia, costituisce oggi uno dei maggiori centri economici della costa adriatica, nonché principale centro urbano delle Marche per dimensioni e popolazione.

Gran parte del territorio anconetano rientra all'interno del Parco Regionale del Monte Conero, caratterizzato da ampi boschi sempreverdi di macchia mediterranea, scogliere a picco sul mare, spiagge meravigliose e una campagna ancora incontaminata. Città abbracciata dal mare, Ancona è cresciuta nei traffici, negli incontri, negli scambi, nella scoperta dell'altro e del nuovo, nel movimento perenne tipico di un porto. Per questa ragione, l'offerta turistico-culturale della città è legata prevalentemente alla sua affascinante origine marinara e mercantile.

Oltre a quanto presentato nelle prossime pagine e relativo all'offerta turistico-culturale di Ancona, si sottolinea come in questi ultimi anni siano state promosse con un certo livello di continuità iniziative turistiche mirate al soddisfacimento in particolare delle necessità dei crocieristi e dei passeggeri delle navi traghetto in arrivo o in attesa dell'imbarco. Tra queste scelte si segnalano ad esempio: la presenza del punto informativo presso il terminal crociere, una segnaletica ad hoc per i crocieristi, l'apertura del centro IAT presso i magazzini del sale del porto e, soprattutto, l'apertura dei siti di interesse fuori orario per permettere le visite alle escursioni guidate dei crocieristi.

Grazie alla collaborazione con le associazioni culturali cittadine e le istituzioni religiose, dunque, oggi è possibile rendere visitabili al di fuori dei normali orari di apertura, nei giorni di approdo dei crocieristi (e con possibilità di visita guidata), attrazioni quali la Chiesa di S. Maria della Piazza e la Loggia dei Mercanti, altrimenti visitabili soltanto dall'esterno.

Available cultural offer

Nella seguente tabella vengono elencati, in ordine di rilevanza, i luoghi dell'offerta turistico-culturale della città di Ancona. Inoltre, vengono riportate l'epoca di realizzazione e la distanza dal porto, prendendo come punto di riferimento Piazza della Repubblica.

LUOGHI DELL'OFFERTA CULTURALE DELLA CITTA' DI ANCONA		EPOCA DI REALIZZAZIONE	DISTANZA DAL PORTO (1)
1	Porto antico – zona Est	IV secolo a.C.	< 500m
2	Porto antico – zona Nord	Epoca Romana	500m - 1km
3	Mole Vanvitelliana	XVIII secolo d.C.	1,2 km
4	Pinacoteca Civica	XIX secolo d.C.	< 500m
5	Museo Archeologico Naz. delle Marche	XIX secolo d.C.	500m - 1km
6	Duomo di San Ciriaco	X-XI secolo d.C.	500m - 1km
7	Museo Tattile Statale Omero	Recente	1,2 km
8	Museo della Città	Recente	< 500mt.
9	Museo Diocesano	XIX secolo d.C.	500m - 1km
10	Fontana del Calamo	XVI sec. d.C.	< 500m
11	Loggia dei Mercanti	XV secolo d.C.	< 500m
12	Anfiteatro Romano	Epoca Romana	500m - 1km
13	Teatro delle Muse	XIX secolo d.C.	< 500m
14	Sala Museale G. Marconi		< 500m

(1) Distanza indicativa misurata da Piazza della Repubblica nel Porto di Ancona.

Rileggendo i luoghi dell'offerta turistico-culturale di Ancona attraverso un altro filtro di lettura, è possibile riordinarli a partire da quelli che sono di maggiore connotazione portuale per origine, funzione e/o attinenza tematica, per concludere con gli altri luoghi che possono interessare un tipo di turismo sensibile ad aspetti culturali, storici, architettonici e archeologici.

LUOGHI DI MAGGIORE CONNOTAZIONE PORTUALE	ALTRI LUOGHI DELL'OFFERTA CULTURALE
Porto Antico zona Est Porto Antico zona Nord Mole Vanvitelliana Loggia dei Mercanti Sala Museale "Contrammiraglio G. Marconi"	Duomo di San Ciriaco Pinacoteca Civica "F. Podesti" Anfiteatro Romano Museo Tattile Statale Omero Teatro delle Muse Fontana del Calamo Museo Archeologico Nazionale delle Marche Museo della Città e Museo Diocesano

Fig. 1: la vicinanza tra il porto antico e i principali punti storico-culturali della città di Ancona



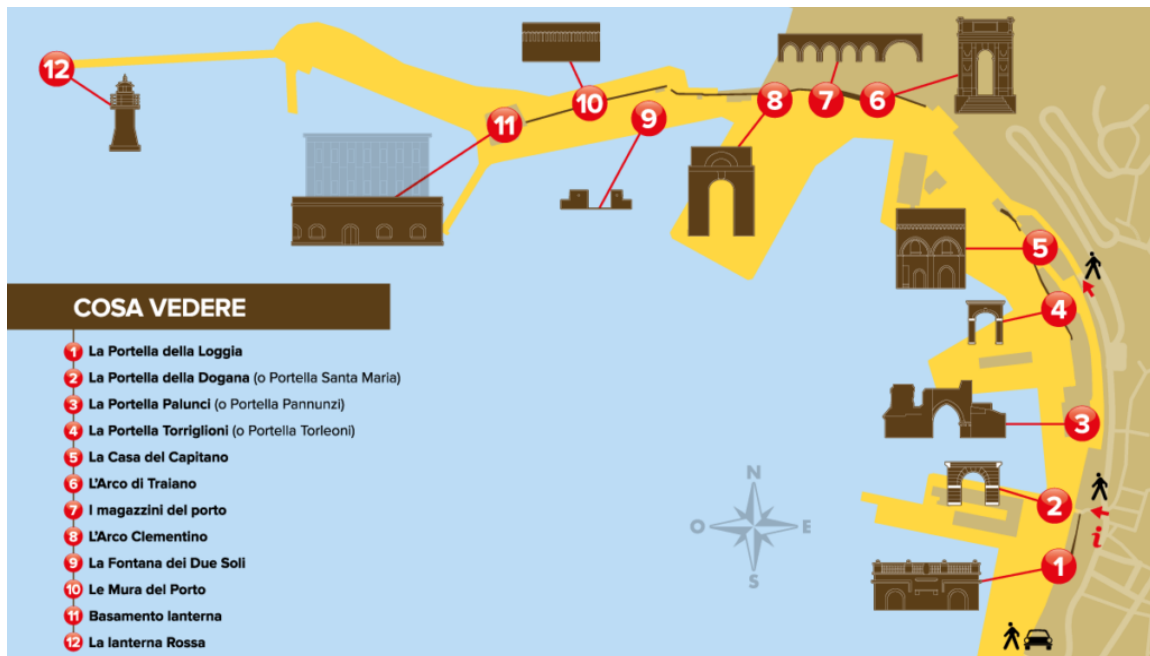
Le tabelle che seguono dettagliano le caratteristiche dell’offerta turistico-culturale di Ancona. Nella prima parte sono analizzate le attrazioni culturali a maggiore connotazione portuale prima elencate: il Porto Antico e i diversi monumenti storici presenti nell’area, la Mole Vanvitelliana, il Museo Tattile Statale Omero, la Loggia dei Mercanti e la sala museale “Contrammiraglio G. Marconi”.

Porto Antico

<i>Descrizione:</i>	<p>Il Porto Antico di Ancona ha origini antichissime: fin dalla fondazione della città, avvenuta da parte dei Dori nel 387 a.C., il porto ha avuto sempre un ruolo strategico. Nel periodo romano venne notevolmente ampliato e nel 1732 Papa Clemente XII finanziò una grande opera di ristrutturazione. Oggigiorno costituisce una delle attrazioni storico-culturali più rilevanti della città: è possibile visitarlo nella sua interezza percorrendo liberamente un percorso pedonale che inizia da Porta San Priamo ed è identificato da una linea rossa sul manto stradale che permette di raggiungere e visitare gli elementi più significativi del Porto Antico, ossia:</p> <ul style="list-style-type: none"> • le Portelle, che sono quattro: Portella della Loggia, Portella della Dogana, Portella Palunci e Portella Torriglioni. Esse in passato costituivano i punti di accesso ufficiale al porto e avevano la funzione di facilitare il carico e lo scarico delle merci. • Casa del Capitano: risalente al XIII sec., rappresenta uno dei pochi edifici di età medievale nel porto, sebbene non si sappia la sua funzione dell’epoca. Oggi sede del planetario dell’Istituto Tecnico Nautico, la casa è caratterizzata da due grandi arcate, sormontate da una fila di archetti ciechi che incorniciano l’accesso all’abitazione e ai magazzini.
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	<ul style="list-style-type: none"> • Arco di Traiano: di epoca romana, si tratta di un monumento celebrativo che venne realizzato in onore dell'imperatore Traiano, il quale realizzò a sue spese una notevole opera di ampliamento del porto, tra cui la costruzione dell'attuale Molo Nord, che all'epoca rese più sicuro l'accesso all'Italia. Alto ed elegante, dalla sua sommità spiccavano gruppi di statue che, oltre a rappresentare simbolicamente la porta a mare della città, dovevano indicare ai naviganti l'approdo. • Magazzini del Porto: risalgono al IX sec. e si tratta di locali adibiti a magazzini per lo stoccaggio di merci e armi, che risultarono di grande utilità alle attività portuali. In passato, infatti, vennero utilizzati per tutte le attività quotidiane legate alla vita di porto, contribuendo in modo significativo alla crescita e alla prosperità della città. • Arco Clementino: dedicato a Papa Clemente XII, che nel XVIII sec. incaricò Luigi Vanvitelli di progettare opere di potenziamento del porto, tra cui il prolungamento dell'attuale Molo Nord. L'arco, pensato come nuova porta d'ingresso alla città, fu posizionato parallelamente all'arco di Traiano. • Fontana dei Due Soli: inaugurata nel 2017, è opera dell'artista Enzo Cucchi ad omaggio del capoluogo marchigiano e simboleggia l'accoglienza, il sollievo. Per questo, la fontana è dotata di una seduta dove ci si può riposare e ammirare il mare. Di dimensioni 15 x 4 mt., si compone di 13 cannelle di acqua dolce riciclata e una laterale di acqua potabile. • Mura del Porto: il primo sistema di mura difensive continue risale al XIV sec.; ma nel XVI sec., a seguito del cambiamento delle tecniche belliche, le mura vennero totalmente rinnovate su opera dell'architetto G. Fontana, che realizzò un sistema di fortificazioni marine esteso fino al molo Traiano. • Basamento Lanterna: si tratta di una costruzione a base quadrata, con la parte inferiore a tronco di piramide e quella superiore con un coronamento a 4 falde con un lanternino terminale, realizzata nel XVIII sec. dagli architetti C. e F. Marchionni. Oggi sono rimaste solo le mura perimetrali e sul basamento è stato realizzato un edificio a servizio delle attività portuali. • Lanterna Rossa: simbolo romantico di Ancona, localizzata all'estremità del Molo Nord ed immortalata nel film <i>"La ragazza con la pistola"</i> di M. Monicelli, è un luogo pieno di fascino e serenità, soprattutto al tramonto. Rivolta verso il mare si trova la panchina degli innamorati, ossia un'ampia seduta a forma di mezza luna da cui si può godere di una vista unica sul mare.
Ticket:	No; visitabile liberamente
Orari:	24h/24

Fig.2: I luoghi a vocazione turistico-culturale del Porto Antico di Ancona.



Fonte: portoanticoancona.it

Mole Vanvitelliana

Descrizione:	Conosciuta anche come "Lazzaretto", è una costruzione a forma pentagonale del XVIII sec., progettata dall'architetto Luigi Vanvitelli. Localizzata su un'isola artificiale nella zona portuale e collegata alla terraferma da tre ponti, in passato ha avuto diverse funzioni: lazzaretto di sanità pubblica, fortificazione a difesa del porto, magazzino per il deposito delle merci, protezione del porto dall'azione delle onde, etc. Al giorno d'oggi è un centro culturale polifunzionale in cui si alternano mostre, esposizioni ed eventi culturali di vario genere. Ospita in maniera permanente il Museo Tattile Statale Omero. Da maggio 2016 si è rafforzata l'identità della Mole Vanvitelliana in un percorso di rilancio dello spazio con una nuova immagine e il nuovo corpo della Mole, un nuovo sito web, uno sviluppo d'immagine integrata ed una pianificazione di comunicazione coerente. Il "Progetto Mole" include diversi interventi di tipo espositivo, storico, artistico, culturale e architettonico.
Ticket:	No; visitabile dall'esterno / Mostre ed esposizioni gratuite o a pagamento
Orari:	8.00-20.00
Proprietà:	Comune di Ancona

Museo Tattile Statale Omero

Descrizione:	Situato dal 2012 all'interno della Mole Vanvitelliana, rappresenta uno dei pochissimi musei tattili al mondo (nonché unico in Italia) e permette ai visitatori di conoscere l'arte attraverso il tatto, toccando le opere con le mani, al fine di promuovere l'integrazione delle persone con disabilità visiva. La collezione include 300 opere e propone modellini architettonici, calchi e opere al vero di sculture in gesso e resina, reperti archeologici dalla preistoria all'epoca greco-romana, dall'arte romanico-gotica all'arte rinascimentale, nonché sculture originali di artisti contemporanei
Ticket:	Ingresso gratuito
Orari:	ESTIVO Luglio-Agosto: lun chiuso; mar-gio e sab 17-20; ven e dom 10-13 e 17-20 RESTO DELL'ANNO Settembre-Giugno: lun chiuso; mar-sab 16-19; dom 10-13 e 16-19
Proprietà:	MiBACT – Ministero per i Beni, le Attività Culturali e il Turismo

Loggia dei Mercanti

Descrizione:	L'edificio rappresenta uno splendido esempio di gotico fiorito veneziano ed è simbolo dell'anima mercantile della città, in quanto anticamente ospitava le attività legate al commercio e alla navigazione, e i mercanti vi trattavano i loro scambi e traffici. Disegnata dall'architetto G. Pace nel XV sec., la facciata esterna, opera di G. O. Da Sebenico, è realizzata in marmo dalmatico ed è aperta da tre arcate, le cui quattro colonne sono sormontate dalle statue della <i>Speranza</i> , <i>Fortezza</i> , <i>Giustizia</i> e <i>Carità</i> , ossia le virtù del buon mercante cristiano. Attualmente è usata come centro congressuale in cui realizzare eventi ed incontri di vario tipo.
Ticket:	No; visitabile dall'esterno (tranne che per eventi speciali ed incontri)
Orari:	Esterni 24h/24 (per eventi speciali ed incontri orari da concordare)
Proprietà:	Camera di Commercio delle Marche

Sala Museale "Contrammiraglio G. Marconi"

Descrizione:	Allestita all'interno dell'ex Chiesa di S. Agostino, nota per il suo portale in stile gotico di G. Da Sebenico, la sala museale propone un viaggio nella storia e nell'evoluzione delle radio-telecomunicazioni, dalle prime sperimentazioni di G. Marconi fino ai nostri giorni. Un tributo all'illustre fisico italiano che fu anche ufficiale della Marina Militare. L'itinerario si sviluppa su 4 ambienti caratterizzati da un'elevata multimedialità-interattività: non solo sale espositive, ma anche simulatori di sommergibili e laboratori che permettono di coinvolgere i visitatori.
Ticket:	Ingresso gratuito
Orari:	Visitabile su appuntamento dal lunedì al giovedì in orari mattinali
Proprietà:	Comune di Ancona

A seguire vengono analizzati brevemente altri luoghi dell'offerta turistico-culturale anconetana, a connotazione meno portuale ma altrettanto rilevanti dal punto di vista storico, architettonico, archeologico e religioso, nonché i musei, gli eventi e alcuni itinerari alla scoperta del centro storico.

<i>Descrizione:</i>	<ul style="list-style-type: none"> ▶ Piazza del Plebiscito. È una delle maggiori piazze del centro storico anconetano, nonché la più antica (risale al XV sec). Ha una forma rettangolare e allungata, comprende diversi livelli e vi si affacciano alcuni tra i monumenti più importanti della città quali il Palazzo del Governo, la chiesa di S. Domenico e la statua di papa Clemente XII. ▶ Anfiteatro Romano. Venne edificato nel periodo augusteo (tra il I sec. a.C. e il I sec. d.C) tra il colle Guasco e dei Cappuccini. Dotato di una cavea di 20 gradinate disposte su 3 ordini, poteva accogliere fino a 10.000 spettatori. Annessi all'anfiteatro, si trovano i locali adibiti a uso termale caratterizzati da un ampio ambiente con vasca a mosaico e pareti affrescate. ▶ Teatro delle Muse. A seguito della ristrutturazione avvenuta nel 2002, è divenuto uno dei teatri più d'avanguardia del centro Italia. Dotato di una suggestiva facciata neoclassica che ricorda l'antica struttura architettonica dell'800, all'interno è stato progettato negli spazi e nelle forme come una grande piazza, con un palco di 400 mt² e una capacità di oltre 1.000 spettatori. ▶ Fontana del Calamo. Detta anche 'delle Tredici Cannelle', si trova in P.zza Roma ed è stata disegnata dall'architetto P. Tibaldi in epoca rinascimentale. Simbolo della città, si caratterizza per la presenza di 13 maschere di bronzo raffiguranti satiri-fauni, sormontati dal bassorilievo del cavaliere all'assalto (stemma della città), dalle cui bocche esce l'acqua che si riversa nelle vasche sottostanti. ▶ Palazzo degli Anziani. Situato in Piazza Stracca di fronte alla Chiesa del Gesù, dal XIII sec. è la sede municipale della città di Ancona. Ha origini antichissime: fu eretto da Galla Placidia nel 425 d.C. ed in seguito demolito dai Saraceni nel-l'839 d.C. L'attuale edificio fu progettato nel 1270 da M. D'Arezzo in uno stile romanico-gotico. Si caratterizza per la facciata occidentale, a ridosso del porto, alta 7 piani, mentre la facciata rivolta alla piazza è di appena 2 piani. ▶ Duomo di S. Ciriaco. Cattedrale di origine medievale, dove lo stile romanico si fonde con quello bizantino, è dedicata al santo protettore di Ancona e si erge in una posizione panoramica sulla sommità del Colle Guasco, dominando tutta la città di Ancona e il suo golfo. Sorge sui resti di un antico tempio pagano e di una basilica paleocristiana i cui resti sono tutt'ora visibili dall'interno del duomo. Al suo interno, si trova lo splendido altare di Luigi Vanvitelli. ▶ Chiesa di S. Domenico. Affacciata dall'alto della sua scalinata a Piazza del Plebiscito, fu progettata dall'architetto romano C. Marchionni nel 1763. Al suo interno si conservano opere di particolare rilievo quali la <i>Crocifissione</i> del Tiziano, l'<i>Annunciazione</i> del Guercino e alcune statue di G. Varlè.
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	<ul style="list-style-type: none"> ▶ Chiesa di Santa Maria della Piazza. Notevole esempio di stile romanico, venne edificata tra il XI e XII sec. sopra i resti di una chiesa paleocristiana, i cui mosaici sottostanti sono tutt'ora visibili. Possiede un elevato valore testimoniale sulle origini del Cristianesimo nella città di Ancona. ▶ Chiesa del Gesù. Commissionata nel 1605 dal conte Nappi a Luigi Vanvitelli, è localizzata di fronte al Palazzo degli Anziani in Piazza Stracca (l'antica P.zza del Comune), e la sua facciata principale presenta un andamento curvilineo che richiama l'arco dell'insenatura del porto dorico.
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MUSEI

Museo Archeologico Nazionale delle Marche	All'interno di Palazzo Ferretti del '500 e contiene reperti della preistoria e della protostoria della Regione Marche, a partire dal Paleolitico fino all'Età del Ferro. Di particolare interesse sono le preziose testimonianze della civiltà Picena e di quella dei Galli Senoni.	
	<i>Proprietà:</i> MiBACT	<i>Biglietto:</i> 5€ intero / 2€ ridotto
	<i>Orari:</i> 8.30-19.30 (lunedì chiuso)	
Museo della Città	Nel centro storico della città occupa i locali appartenuti all'ospedale medievale di S. Tommaso da Canterbury e a una pescheria dell'800. Il museo racconta la storia di Ancona con l'utilizzo di plastici ricostruttivi, pannelli didattici e video tematici.	
	<i>Proprietà:</i> Comune di Ancona	<i>Biglietto:</i> 2€ intero
	<i>Orari.</i> Estate: lun chiuso; mar-ven 16-19; sab-dom 10-19 Inverno: mar-gio 17-20; ven 10-20; sab-dom 10-13 e 17-20; lun chiuso	
Pinacoteca Civica "F. Podesti"	Dedicata al pittore anconetano Francesco Podesti che fu l'arte-fice della sua creazione a fine XIX secolo, donando anche diverse sue opere. Ha sede a Palazzo Bosdari e raccoglie opere di eccezionale valore per la storia della pittura marchigiana dal XIV al XIX secolo.	
	<i>Proprietà:</i> Comune di Ancona	<i>Biglietto:</i> 6€ cumulativo / 3€ ridotto
	<i>Orari.</i> Estate: lun chiuso; mar-ven 16-19; sab-dom 10-19 Inverno: mar-gio 17-20; ven 10-20; sab-dom 10-13 e 17-20; lun chiuso	
Museo Diocesano	Localizzato nell'ex episcopio in fianco al Duomo di S. Ciriaco, nasce come monastero e funge per secoli da dimora dei vescovi di Ancona. Oggi il museo conserva numerosi reperti e opere d'arte, tra cui una pinacoteca di rilievo e una raccolta di monete di epoca romana e medievale.	
	<i>Proprietà:</i> arcidiocesi Ancona-Osimo	<i>Biglietto:</i> gratuito
	<i>Orari:</i> Estate: sab-dom 10-12.30 e 15-18/Inverno: sab-dom 10-12.30 e 15-19 Gli altri giorni visite guidate per gruppi su appuntamento	

EVENTI

Fiera di San Ciriaco	Un momento di grande festa per gli anconetani: bancarelle, stand, mercatini di artigianato ed enogastronomica tipica, esposizioni, animazioni, spettacoli, eventi, concerti e luna park riempiono le strade e le piazze del centro storico per rendere omaggio a San Ciriaco, il patrono protettore di Ancona, con un'atmosfera che esalta le tradizioni e la cultura popolare locale.	
	<i>Periodo:</i> inizio maggio	Ingresso gratuito
Tipicità in Blu	Il festival del mare e della <i>blue economy</i> : il mare incontra le persone attraverso un alternarsi di mostre, eventi e laboratori creativi che mirano ad esaltare l'anima marinara e mercantile della città. Il programma spazia dalla nautica alla cantieristica, dalla pesca all'ambiente, dal cibo allo sport e dal turismo alla cultura.	
	<i>Periodo:</i> metà/fine maggio	Ingresso gratuito; eventi a pagamento
Festa del Mare	<i>Descrizione:</i> La festa del mare di Ancona consiste in un'animata processione di centinaia di imbarcazioni che, dal porto, si recano al largo per onorare i caduti del mare con una cerimonia religiosa. Nella città, e in particolare al rione degli Archi (quartiere simbolo della marineria anconetana) si tengono spettacoli, sfilate e concerti. La festa si conclude con lo spettacolo pirotecnico al Porto Antico.	
	<i>Periodo:</i> inizio settembre	Ingresso gratuito
Festival Internazionale Adriatico Mediterraneo	Esplora la ricchezza delle espressioni creative e culturali del mare, con uno sguardo particolare ai rapporti tra Italia e Balcani. Le culture che si intrecciano nel Mediterraneo vengono esaltate e valorizzate attraverso concerti, incontri e dibattiti, performance, spettacoli e cineforum, al fine di ritrovare i fili che uniscono questi popoli e culture. I temi prevalenti riguardano la vivacità dei Balcani usciti dalle guerre, lo sviluppo di un'Europa che guarda verso sud, l'attualità dell'area, l'ambiente e l'ecosistema marino.	
	<i>Periodo:</i> fine agosto	Ingresso gratuito; eventi a pagamento (10€)
KUM! Festival	Dopo l'edizione zero del 2016, dal 2017 rappresenta l'annuale occasione di riflessione aperta sul tema della cura e delle sue diverse pratiche (sia lato clinico con psicoanalisti, psichiatri, medici, pedagogisti che filosofi, antropologi, storici, scrittori e intellettuali) diretto da Massimo Recalcati. Per numerosi eventi ed in particolare Kum! festival è centrale il ruolo della Mole Vanvitelliana, la location in cui si realizza	
	<i>Periodo:</i> estate/autunno	Ingressi gratuiti (con prenotazioni e possibilità di posto garantito per sostenitori), laboratori ed altri

		appuntamenti a pagamento
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PROGETTO MIRA

Descrizione:	<p>MIRA, letteralmente <i>Musei In Rete Ancona</i>, è un progetto di comunicazione e promozione della rete museale di Ancona, che mira a creare una solida identità entro cui far riconoscere tutti i musei cittadini, pur mantenendo le caratteristiche di ciascuno di essi. L'obiettivo principale è quello di creare nuovi percorsi inediti capaci di collegare le opere dei diversi musei, per stimolare la visita da un museo verso l'altro. Con questo progetto, si vuole restituire ai cittadini la consapevolezza dei luoghi culturali di Ancona, rafforzare la collaborazione tra i diversi musei e, infine, sviluppare una nuova offerta turistica che verta su attrazioni di tipo culturale. Attraverso questi "trekking" organizzati una tantum la domenica, i partecipanti hanno l'opportunità di godere a pieno il patrimonio artistico locale:</p> <p>A. <i>Trekking dei musei</i>: percorso a piedi che parte dalla corte interna della Mole Vanvitelliana e termina al Museo Diocesano, con l'ausilio di guide turistiche professionali della Cooperativa Opera sia lungo il percorso pedonale che di fronte alle varie opere d'arte;</p> <p>B. <i>Trekking urbano</i>: percorso a piedi, alla scoperta di arti e mestieri, che permette di entrare in contatto anche con le piccole botteghe artigianali e i laboratori, nonché ascoltare la storia dei manufatti dalla voce degli stessi artigiani.</p>
Tappe trekking A:	Museo Tattile Omero > Pinacoteca Civica > Museo della Città > Museo Archeologico Nazionale delle Marche > Museo Diocesano
Tappe trekking B:	P.zza della Repubblica > Corso Mazzini > Via degli Orefici > P.zza del Plebiscito > Via S. Pietro > Via Fanti > Via Birarelli > Via Guasco > P.le del Duomo
Soggetti coinvolti:	Comune di Ancona; Curia; MiBACT
Costo:	Gratuito

Fig.4: I musei inclusi nel progetto MIRA – Musei in Rete Ancona



Fonte: www.mira-ancona.it

Development constraints

I vincoli e i limiti che si riscontrano in relazione allo sviluppo dell'offerta turistico-culturale di Ancona e che devono essere necessariamente presi in considerazione per poter prevenire ed evitare la produzione di impatti turistici negativi, possono essere raggruppati in quattro macro-aree.

Considerata la trasversalità del fenomeno turistico, tali categorie si possono anche sovrapporre sotto alcuni punti di vista; pertanto, la divisione è da considerarsi finalizzata prevalentemente a facilitare il lettore.

Vincoli di tipo economico/finanziario:

- **Numero di visitatori e turisti limitato.** Il numero di visitatori e turisti che Ancona riesce ad attrarre (si veda la seconda parte della CTM-strategy) appare ancora troppo esiguo per riuscire a portare in realistico pareggio un certo tipo di iniziative turistico-culturali locali. Nella maggior parte dei casi, i costi sostenuti per la realizzazione di nuove iniziative rimangono superiori rispetto ai ricavi che il turismo riesce a generare in quest'area, rendendolo quindi economicamente non conveniente. Per tale ragione, per realizzare queste iniziative locali e farle diventare economicamente sostenibili nel medio termine, si rende necessario valutare altre strade (es. sviluppo delle iniziative in modo più limitato, nello spazio e nel tempo; aggancio e collaborazione con altri progetti ed iniziative).
- **Concorrenza elevata nell'uso degli spazi.** Si registra un'elevata concorrenza in relazione all'uso degli spazi del territorio anconetano e, in particolar modo, nel centro storico cittadino. Ciò comporta la necessità di valutare attentamente quali sono i costi-opportunità collegati all'utilizzo di questi spazi per una fruizione di tipo turistico-culturale anziché di tipo commerciale o altro ancora. Non sempre, infatti, la destinazione turistico-culturale risulta la più conveniente e redditizia in termini economici.
- **Elevati costi di riconversione e/o mantenimento di certe strutture con particolari criticità.** Altro vincolo da tenere in considerazione per lo sviluppo dell'offerta culturale di Ancona consiste nella necessità di valutare in maniera corretta e dettagliata l'ammontare dei costi che dovrebbero essere sostenuti in caso di riconversione e/o mantenimento di edifici, strutture e impianti caratterizzati da specifiche problematiche (es. pericolanti, diroccati, instabili, danneggiati, pericolosi, etc.) e stabilire se risulta effettivamente conveniente investire o meno nella loro riqualificazione/ristrutturazione, nell'ambito della valutazione relativa all'uso degli spazi portuali.
- **Realizzazione di investimenti di elevata entità.** La ristrutturazione della Mole Vanvitelliana, avvenuta in diverse fasi a partire dal 2014 e finanziata dallo Stato tramite il *Piano Nazionale per*

le Città con 8,7 milioni di euro, nonché la riqualificazione del Porto Antico di Ancona, avvenuta a partire da 2015 grazie al lavoro congiunto di Comune, Camera di Commercio e Autorità di Sistema Portuale di Ancona, costituiscono degli interventi di elevata entità che Ancona ha dovuto richiedere/sostenere recentemente. Si è in una situazione - per quanto riguarda la proposta turistico culturale dell'offerta - in cui prevale la valorizzazione dell'esistente che la richiesta di nuovi investimenti di una certa rilevanza. Non ci si riferisce ad investimenti di altro genere (es. infrastrutturale-mobilità-accessibilità).

Vincoli di tipo turistico/culturale/tradizionale:

- **Storica vocazione della domanda turistica di tipo prevalentemente domestico.** La domanda turistica di Ancona è composta prevalentemente da utenti provenienti da territori italiani, mentre il numero di turisti stranieri è piuttosto esiguo: si pensi, a titolo d'esempio, che nel 2018 si sono registrate nella provincia di Ancona più di 2,2 milioni di presenze italiane negli esercizi ricettivi a fronte di circa 400 mila presenze straniere. Nella relazione domanda-offerta la proposta turistico-culturale si limita prevalentemente alla soddisfazione di bisogni e preferenze tipiche di un target nazionale (es. siti web, insegne turistiche e audio-guide solo in italiano, etc). Ripensare e riadattare l'offerta locale per poterla rivolgere ad un target di provenienza anche internazionale comporta, per gli operatori turistici anconetani e per la destinazione Ancona in generale, un impegno nuovo e più complesso.
- **Ridotta rilevanza dell'offerta culturale di Ancona per i turisti.** La reputazione dell'offerta turistico-culturale anconetana, il suo *appeal* e la sua forza nei mercati internazionali comportano la presenza di un esiguo numero di visitatori effettivi (attualmente) e potenziali (futuro di medio termine) interessati ad effettuare un viaggio ad Ancona prevalentemente per motivazioni di tipo culturale. La città non ha ancora un'immagine di destinazione e una *brand identity* competitiva, capaci di richiamare l'attenzione dei turisti di tipo culturale, suscitare il loro interesse e incentivare la visita. La stessa apertura al turismo della città è storia particolarmente recente ed in cui i flussi da/per il porto hanno avuto ed hanno un ruolo determinante.
- **Prodotti enogastronomici tipici locali e patrimonio immateriale poco noti.** Il territorio di Ancona propone un certo numero di prodotti tipici, quali il Mosciolo Selvatico di Portonovo (Presidio Slow Food) e il vino Rosso Conero DOC, che, nonostante la loro indiscussa qualità, non riescono a trovare sufficiente notorietà a livello nazionale, come invece succede per altri prodotti della tradizione culinaria italiana che sono divenuti famosi addirittura in tutto il mondo. Più in generale, nel breve periodo appare chiara la difficoltà di unire nell'offerta culturale immateriale anconetana una sufficiente quantità di elementi qualitativi che sia in grado di

generare e alimentare uno specifico flusso di turisti interessati alla fruizione di questa specifica tipologia di prodotti culturali ed enogastronomici anche considerando il contesto competitivo in cui insistono.

- **Scarso collegamento tra le attrazioni dell'offerta culturale di Ancona.** Nonostante Ancona vantì un'offerta turistico-culturale di valore, legata in primis alle attrazioni storico-architettoniche del Porto Antico, e nonostante siano state promosse iniziative che mirano a valorizzare l'offerta culturale della città, si registrano margini di miglioramento nella segnaletica turistica e cartellonistica di tipo esplicativo, utile ai turisti per documentarsi e approfondire ulteriormente questioni di tipo storico-culturale, nonché per orientarsi nella città e identificare più agevolmente i luoghi dell'offerta turistico-culturale locale. La presenza, ad esempio, di insegne e indicazioni moderne ed accattivanti nei vari punti di interesse permetterebbe di distinguerli meglio da tutto il resto e renderli in maniera più marcata parte di un'unica offerta culturale che si ripartisce in un'area piuttosto estesa come quella del Porto Antico.
- **Elevata competitività dell'offerta turistico-culturale adriatica ed italiana.** Ancona ha nella sua "arena competitiva" destinazioni adriatiche e italiane che contano su reciproche storie e offerte turistico-culturali ampie ed articolate. Per la destinazione Ancona è complesso distinguersi dai *competitor* ed essere in grado di promuoversi con successo.

Vincoli di tipo socio-territoriale:

- **Ampia pluralità di attori riconducibili all'offerta turistico-culturale.** L'offerta della destinazione Ancona viene attualmente comunicata in modo limitato e da una pluralità di attori. Questo comporta una frammentazione dei soggetti ai quali far riferimento, che può portare al turista confusione e disorientamento nella scelta del soggetto a cui rivolgersi per poter raccogliere informazioni turistiche, pianificare e organizzare l'itinerario di viaggio, prenotare l'alloggio e le visite ai siti turistici, etc. Questa suddivisione può causare una certa difficoltà tra gli stessi soggetti che si occupano di sviluppo, valorizzazione e promozione turistica del territorio.
- **Elevata commistione di traffici nel Porto di Ancona.** Considerato che il Porto di Ancona rappresenta uno dei più rilevanti di tutt'Italia, con più di 1 milione di passeggeri movimentati (di cui quasi 70 mila crocieristi), quasi 150 mila tra *tir* e *trailer* movimentati e quasi 11 milioni di tonnellate di merci di ogni genere movimentate, è inevitabile che sia quotidianamente interessato da traffici non solo turistici ma anche di tipo commerciale. Di conseguenza, bisogna essere consapevoli che la proposta di un'offerta turistico-culturale nella zona portuale deve necessariamente tenere in considerazione la presenza di traffici, movimenti e veicoli di ogni genere che affollano quotidianamente tutta l'area, rendendola assai meno tranquilla e vivibile dal punto di vista della fruizione turistico-culturale.

- **Presenza di aree del demanio militare.** La zona portuale di Ancona si caratterizza per la presenza di numerose aree appartenenti al demanio militare. Tali aree sono soggette ad una serie di limiti, vincoli, barriere e restrizioni di vario tipo (quali ad esempio l'*ISPS Code - International Ship and Port Facilities Security* relativo alle disposizioni di minima sicurezza delle navi e impianti portuali), i quali rendono assai più complicato e complesso il loro utilizzo, anche per adibirle ad una fruizione di tipo turistico-culturale.

Vincoli di tipo esogeno/geopolitico/ambientale:

- **Innalzamento del livello dei mari.** A partire dagli Anni "50, il surriscaldamento globale ha comportato una crescente espansione termica degli oceani (ossia l'aumento del volume di un liquido all'aumentare della temperatura), un aumento del deflusso di acqua dolce nel mare a causa dello scioglimento dei ghiacciai e una perdita di massa delle calotte glaciali continentali. Ciò ha causato un progressivo innalzamento del livello dei mari che sta destando preoccupazioni sempre più consistenti, dato che negli ultimi quindici anni l'entità dell'aumento è stata di circa il doppio rispetto agli anni precedenti. Per tale ragione, se la situazione non cambierà e la comunità internazionale non adotterà misure drastiche per contrastare questa tendenza, il rischio è che tutti i territori costieri, compresa la città di Ancona, possano subire effetti negativi dall'innalzamento. Il porto di Ancona è dotato di un sistema di banchinamento tale da proteggere la città e contrastare questo fenomeno, ma soltanto fino ad un certo livello; pertanto, risulta inevitabile prendere in considerazione gli scenari che potranno presentarsi in loco nel medio-lungo termine.
- **Fenomeni naturali catastrofici e imprevedibili legati al mare.** Essendo Ancona una città costiera, è necessario considerare, tra i possibili rischi, fenomeni naturali marini quali tsunami e inondazioni che possono verificarsi a seguito di un maremoto originato da un terremoto sottomarino o prossimo alla costa. Tuttavia, avendo il Mare Adriatico una profondità piuttosto limitata (nella parte centro-settentrionale non supera i 200 metri) e non essendo presenti al suo interno sorgenti sismiche importanti, il rischio che si produca uno tsunami di grossa entità (come quelli del Pacifico) appare in quest'area assai remoto.
- **Fenomeni sismici terrestri.** Il centro Italia è identificato come area ad elevata sismicità: in relazione al rischio sismico, calcolato in base alla PGA (*Peak Ground Acceleration*, cioè picco di accelerazione al suolo) e alla frequenza/intensità degli eventi (ex Ordinanza PCM n.3274 del 2003), il territorio di Ancona è classificato come *Zona 2 - Sismicità Medio-Alta* (PGA tra 0,15-0,25 g), dove i fenomeni sismici possono causare danni anche rilevanti. Inoltre, è bene precisare come Ancona sia localizzata piuttosto a ridosso di aree classificate come *Zona 1 - Sismicità Alta* (PGA oltre 0,25 g) in cui possono verificarsi eventi sismici assai forti, anche di entità catastrofica.

Classificazione confermata anche dai fatti, come dimostrano i terremoti che si sono verificati recentemente a Norcia, Accumuli e Amatrice nel 2016 o all'Aquila nel 2009, entrambi con magnitudo superiore a 6 (scala Richter). Sebbene finora Ancona non sia mai stata colpita da terremoti di elevata entità, la sua collocazione in una zona a sismicità medio-alta e la sua vicinanza a zone a sismicità alta comporta la necessità di considerare anche i rischi associati al verificarsi di scosse di terremoto di intensità elevata.

- **Deterioramento dei manufatti a causa degli agenti atmosferici.** Un ulteriore vincolo da considerare è dato dal deterioramento, dall'usura e dai danneggiamenti che i diversi manufatti all'aria aperta subiscono nel corso del tempo a causa dell'azione degli agenti atmosferici quali pioggia, grandine, vento, etc. Tuttavia, l'Autorità di Sistema Portuale del Mar Adriatico Centrale ha sempre effettuato interventi di analisi e monitoraggio dello stato di conservazione, nonché interventi di manutenzione, riqualificazione e ristrutturazione dei beni storico-culturali situati all'interno del Porto Antico, al fine di assicurare la loro tutela, salvaguardia e conservazione, con l'obiettivo di poterli fruire dal punto di vista turistico-culturale nel corso del tempo.

Development opportunities

Nel valutare il futuro sviluppo dell'offerta turistico-culturale di Ancona è opportuno prendere in considerazione una serie di opportunità. Varie tipologie di opportunità che permettano al futuro prodotto turistico di mantenersi soddisfacente nel medio-lungo periodo.

Tra esser quelle di tipo sociale:

- I. **Localizzazione degli stakeholder rilevanti.** Essendo Ancona capoluogo di Regione, essa ospita al suo interno una serie di *stakeholder* di primaria importanza dal punto di vista turistico-culturale e portuale, la cui vicinanza a livello spaziale risulta sicuramente strategica e vantaggiosa sia per loro stessi, sia per chi ha necessità di intrattenere rapporti con entrambi.
- II. **Presenza di personalità e profili più in linea con alcune tematiche.** Ancona è sede di numerose istituzioni dello spazio adriatico tra cui ad esempio: il *Forum delle Città dell'Adriatico e dello Ionio*, il *Forum delle Camere di Commercio dell'Adriatico e dello Ionio (AIC)* e l'*Iniziativa Adriatico Ionica (IAI)*. Ciò assicura la presenza all'interno del territorio di una serie di personalità, associati e delegati di particolare rilevanza, che sono più sensibili ad elementi di tipo culturale e, dunque, potenzialmente più interessati e inclini a scoprire l'offerta turistica nel corso di tutto l'anno (e quindi non solo nei mesi estivi) basata su elementi di tipo culturale, storico e architettonico (rispetto a proposte prevalentemente *leisure-balneare*).
- III. **Possibilità di sfruttare al meglio le relazioni instaurate grazie al progetto REMEMBER.** La realizzazione di questo progetto permette ai vari soggetti che vi partecipano e vi collaborano di instaurare rapporti e relazioni solide tra loro, che potranno risultare particolarmente utili per lo sviluppo e la valorizzazione dell'offerta turistico-culturale della città di Ancona.

Opportunità di tipo turistico:

- IV. **Crocieristi.** Il Porto di Ancona rappresenta uno dei più importanti scali dell'Adriatico con circa 100 mila crocieristi movimentati ogni anno, sia transiti che imbarchi e sbarchi che hanno l'opportunità di visitare il centro storico cittadino e il Porto Antico.
- V. **Turisti di provenienza croata, balcanica e greca.** Il Porto di Ancona registra ingenti flussi in arrivo dal e in partenza per il territorio croato, balcanico e greco, con una soglia di circa un milione di passeggeri movimentati. Sebbene siano prevalentemente flussi outgoing (ovest>est) una nuova opportunità potrebbe arrivare dalla sensibilizzazione e dal coinvolgimento di quest'utenza, un nuovo *target* di mercato a cui rivolgere l'offerta turistico-culturale cittadina.
- VI. **Turisti di provenienza lontana, intercettata on-line.** Il progetto REMEMBER prevede la realizzazione di un museo virtuale in ciascuno degli otto porti coinvolti nel progetto, dotato di un itinerario in parte condiviso nonché di un'app consultabile da qualsiasi parte del mondo, che

permetteranno a chiunque li frequenterà/utilizzerà di scoprire anche l'offerta turistico-culturale di Ancona e, soprattutto, le attrazioni storico-architettoniche del Porto Antico, la loro storia e le loro caratteristiche. Grazie al museo virtuale e relativa app, i partner di progetto hanno l'opportunità di intercettare un *target* decisamente più ampio e di provenienza più lontana, che non si limita ai cittadini anconetani, agli escursionisti marchigiani, ai crocieristi e ai turisti che imbarcano e sbarcano nel Porto di Ancona, ma anche a tutti coloro che frequentano e frequenteranno le altre città e porti coinvolti nel progetto Remember e, soprattutto, che fruiranno il loro museo virtuale, il quale permetterà di venire a conoscenza dell'offerta turistico-culturale di tutti gli otto porti: Ancona, Ravenna, Venezia, Trieste, Fiume, Zara, Spalato e Dubrovnik.

Opportunità di tipo territoriale:

- VII. **Progetto *Welcome to Ancona***. Dal 2005 la piattaforma si è posta l'obiettivo di coordinare in modo unitario le iniziative ideate e promosse dai diversi soggetti pubblici e privati in occasione degli approdi ad Ancona delle navi delle compagnie crocieristiche. Rappresenta una specifica operazione di marketing territoriale realizzata dalla Camera di Commercio di Ancona (oggi Camera di Commercio delle Marche) mediante un significativo investimento finanziario e professionale, e gestita con il supporto del Comune di Ancona, della Regione Marche e dell'Autorità di Sistema Portuale del Mare Adriatico Centrale, grazie ai quali è stato possibile dare vita a un adeguato piano di accoglienza dei crocieristi e, più in generale, dei turisti in arrivo nel porto dorico. L'esistenza di questa piattaforma di accoglienza turistica, nata inizialmente per il settore crocieristico ma sempre più estesa anche al traffico ferry, può costituire una base da cui partire per proporre nuove iniziative e inserire nuove azioni volte anche allo sviluppo e alla valorizzazione dell'offerta turistico-culturale locale. Lo stesso progetto e le consolidate relazioni vedono oggi la possibilità di estendere il campo di azione alle intere Marche con un progetto che possa diventare *Welcome to Marche*.
- VIII. **Progetto di *wayfinding integrato***. Il Comune di Ancona ha avviato un progetto di *wayfinding* delle informazioni turistiche nel centro storico, inteso come tutto ciò che risulta utile alle persone per orientarsi in maniera ottimale e trovare con facilità ciò che stanno cercando. Sono stati, dunque, installati cartelli, insegne, totem e bacheche che permettono ai turisti di orientarsi meglio nel centro storico anconetano. Un'opportunità è data dall'integrazione di questa iniziativa con il progetto Remember, in maniera tale da poter identificare più chiaramente l'offerta turistico-culturale di Ancona. Vi è inoltre la possibilità di sfruttare le tecnologie odierne, ad esempio inserendo QR code nella segnaletica, cosicché il turista possa scansionarlo e accedere in maniera facile e veloce ad informazioni virtuali aggiuntive che permettono di

approfondire ulteriormente questioni di tipo storico, architettonico e culturale sull'offerta anconetana.

- IX. **Nuove iniziative a seguito di interventi di riqualificazione e riconversione.** L'Autorità di Sistema Portuale del Mar Adriatico Centrale ha l'incarico di effettuare costantemente interventi di analisi e monitoraggio dello stato di conservazione, nonché interventi di manutenzione, riqualificazione e riconversione dei beni storico-culturali situati all'interno del Porto Antico. L'obiettivo che si cela dietro a tutte queste operazioni non è solamente quello di assicurare la tutela, salvaguardia e conservazione al fine di generare nuove opportunità di tipo turistico-culturale, ma anche quello di promuovere nuove opportunità di tipo commerciale per la città di Ancona e, quindi, dar nuova vita a determinati spazi, valorizzarli e renderli utilizzabili anche per iniziative private. Si pensi, ad esempio, all'intervento di riconversione del mercato ittico cittadino, per poterlo rendere sede di nuove attività commerciali, sempre legate all'ambiente di mare.

Opportunità di tipo europeo:

- X. **Candidature a titoli e riconoscimenti.** Ancona ha la possibilità di utilizzare iniziative quali la candidatura a prossima *Capitale della Cultura* (o altre opportunità di questo genere) per rafforzare il valore e l'identità dell'elemento portuale quale aspetto culturale locale di fondamentale importanza per l'area, mediante il suo inserimento all'interno dei dossier di presentazione dell'offerta turistico-culturale di Ancona e l'illustrazione dettagliata di tutti gli elementi culturali, storici ed architettonici che lo rendono unico nel suo genere.

Opportunità di tipo tecnologico:

- XI. **Portale web turistico unificato.** Considerata l'attuale mancanza, si ritiene il portale una opportunità più che un limite. Si tratta di lavorare ad un processo che permetta di ideare e dar vita ad un nuovo portale web turistico dedicato interamente alla destinazione Ancona, nonché all'offerta turistico-culturale del centro storico e del porto, che possa essere implementato applicando le tecnologie più moderne e sfruttando la collaborazione di diversi stakeholder di rilievo per l'obiettivo informativo, comunicativo e promozionale che si vuole raggiungere. Si tratta di processi che aiutano e supportano in modo concreto la (ri)organizzazione dell'offerta turistica locale, la selezione e scelta degli elementi, la produzione di nuovo materiale audio-video, il dialogo tra i diversi attori e l'auspicabile collaborazione tra essi per ridurre le sovrapposizioni.

Part two: CTM strategy

La seconda parte è dedicata, come previsto dalla *methodology* approvata, all'elaborazione di ulteriori contenuti funzionali all'impostazione della strategia turistico culturale territoriale.

Questa sezione si apre con l'analisi della domanda, seguita dall'offerta turistico-culturale presente nel territorio anconetano: il numero di visitatori, l'ordine di grandezza dei flussi di persone nei luoghi a maggiore connotazione portuale e le visite nei musei cittadini (confrontate con altre realtà museali situate lungo il versante Adriatico legate al panorama marittimo).

Per meglio comprendere lo stato attuale e possibili spazi di azione ed intervento, si mostra la stagionalità delle visite nella provincia di Ancona, il numero di strutture ricettive presenti nel territorio comunale e il giudizio medio relativo alla qualità delle stesse.

Si illustrano a seguire le infrastrutture e, più nel dettaglio, i punti di accessibilità esterna (aeroporto, porto, stazione ferroviaria, autostrada) con alcuni dati sul traffico turistico di aeroporto e porto.

Sempre con l'obiettivo di poter impostare una coerente ed efficace strategia vengono riepilogati i principali elementi degli attuali strumenti di programmazione presenti ad Ancona.

Il documento esplicita le azioni che potrebbero essere intraprese per poter cogliere le opportunità legate allo sviluppo e alla valorizzazione dell'offerta turistico-culturale anconetana, con relative criticità, ed i target di mercato che la nuova offerta turistico-culturale potrebbe intercettare.

La rilettura dei mercati viene proposta in una divisione - e descrizione - tra mercato esistente, mercato potenzialmente acquisibile e il mercato di difficile acquisizione ad Ancona. Una opportuna consapevolezza tra le diverse potenzialità è alla base di una strategia vincente. Chiude la sezione una descrizione delle collaborazioni con i diversi stakeholder ad Ancona.

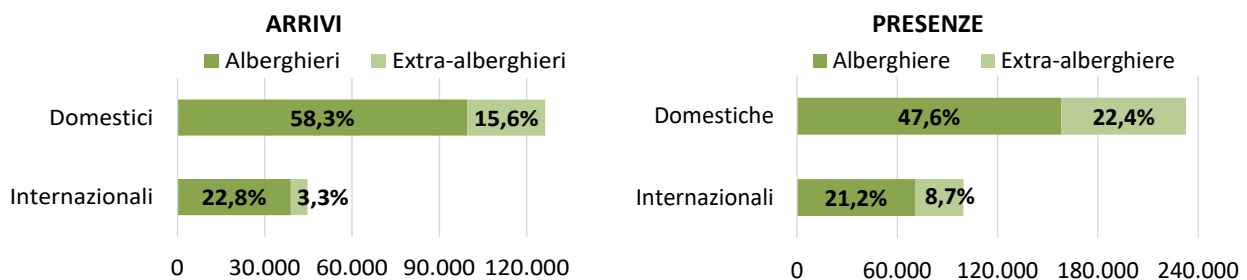
Tourist demand and consumption effects

L'impostazione di una strategia efficace prevede come punto di partenza la ricognizione di alcuni elementi di base, tra cui la situazione lato domanda (e successivamente offerta).

Nelle pagine che seguono si illustrano: il numero di visitatori (arrivi e presenze) della città di Ancona, suddivisi tra visitatori domestici-internazionali e poi suddivisi per tipologia di strutture ricettive (alberghiere-extraalberghiere). Dopodiché viene illustrato l'ordine di grandezza dei flussi di persone presenti nei luoghi a maggiore connotazione portuale dell'offerta culturale di Ancona e, successivamente, il numero di visitatori nei musei della città dorica nell'ultimo decennio.

Infine, questi numeri vengono confrontati con quelli di altre realtà italiane legate al panorama marittimo presenti in alcune destinazioni dell'Adriatico.

Graf. 1: Arrivi e presenze totali nella città di Ancona, suddivisi tra domestici e internazionali, nonché tra alberghieri ed extra-alberghieri, anno 2019



Fonte: Statistiche Regione Marche.

Nel 2019 il Comune di Ancona ha registrato in totale 171.082 arrivi, di cui 126.359 provenienti dall'Italia e 44.723 provenienti dall'estero. Tra i turisti domestici giunti nella destinazione, 99.689 hanno preferito alloggiare presso strutture alberghiere, mentre i restanti 26.670 hanno scelto strutture extra-alberghiere. Mentre la maggior parte dei turisti internazionali (38.992) ha alloggiato presso strutture alberghiere, e solo in 5.731 hanno optato per una sistemazione presso strutture extra-alberghiere. In totale, dunque, gli arrivi registrati negli esercizi alberghieri sono stati 138.681, mentre quelli negli esercizi extra-alberghieri sono stati 32.401. In termini percentuali, si evince pertanto che il 74% degli arrivi ad Ancona provengono dall'Italia, così come l'81% degli arrivi sono concentrati nelle strutture alberghiere.

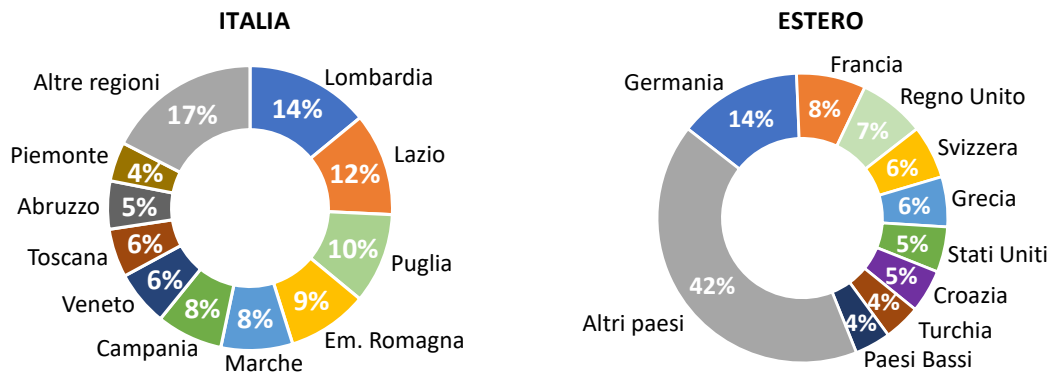
Sempre nel 2019 il Comune di Ancona ha contato in totale 332.331 presenze, di cui 232.772 di provenienza italiana e 99.559 di provenienza estera. Più nel dettaglio, le presenze domestiche nelle strutture ricettive alberghiere hanno raggiunto il valore di 158.197, mentre in quelle extra-alberghiere sono state 74.575; dall'altra parte, i turisti internazionali hanno totalizzato 70.538 presenze negli esercizi

alberghieri e 29.021 in quelli extra-alberghieri. In totale, quindi, le presenze registrate nelle strutture ricettive alberghiere sono state 228.735, mentre quelle nelle strutture extra-alberghiere sono state 103.596. In termini percentuali, pertanto, si può notare come quasi il 70% delle presenze si riferiscano a turisti italiani, così come il 69% delle presenze siano concentrate negli esercizi alberghieri. Complessivamente, Ancona appare una destinazione frequentata prevalentemente da turisti italiani che preferiscono alloggiare in strutture ricettive alberghiere.

In relazione alla permanenza media, nel 2019 gli italiani sono rimasti ad Ancona in media 1,8 notti (in particolare 1,6 notti negli esercizi alberghieri e 2,8 notti in quelli complementari), mentre gli stranieri in media 2,2 notti (nel dettaglio 1,8 notti negli esercizi alberghieri e 5,1 notti in quelli complementari). È chiaro come la permanenza media maggiore venga raggiunta dagli stranieri che alloggiano nelle strutture ricettive extra-alberghiere.

A questo punto, si vogliono analizzare più specificatamente quali sono le principali regioni di provenienza dei turisti italiani e quali i principali paesi di provenienza dei turisti stranieri. Per quanto riguarda il turismo domestico, poco meno del 50% degli arrivi totali provengono da Lombardia, Lazio, Puglia ed Emilia Romagna. In relazione al turismo internazionale, poco più di 2 turisti su 5 provengono da Germania, Francia, Regno Unito, Svizzera e Grecia.

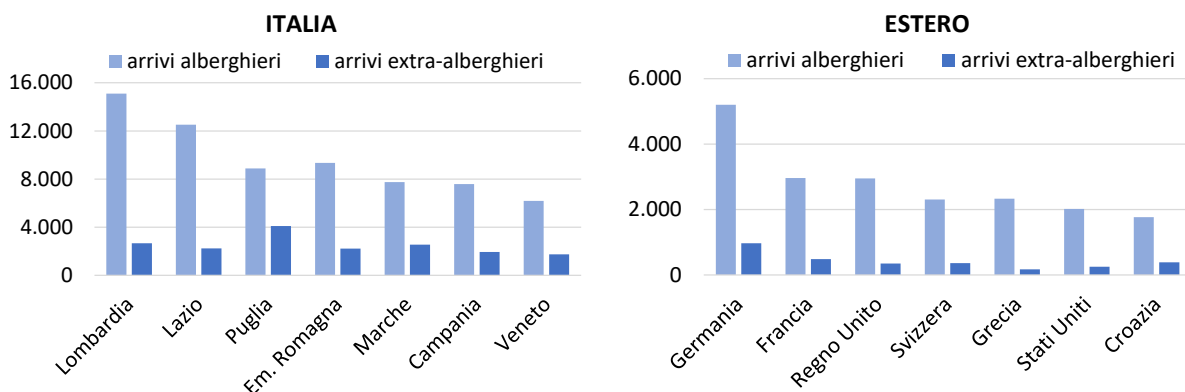
Graf. 3: Arrivi totali nel Comune di Ancona, suddivisi per regione italiana e paese estero di provenienza, 2019



Fonte: Statistiche Regione Marche

Entrando più nello specifico in merito ai sia ai turisti di provenienza italiana che di provenienza straniera, si può notare come i turisti di ciascuna regione e di ciascun paese preferiscano in tutti i casi alloggiare negli esercizi alberghieri.

Graf. 5: Arrivi totali nel Comune di Ancona, suddivisi per regione italiana di provenienza e per paese straniero di provenienza, per tipologia di esercizi ricettivi (alberghieri ed extra-alberghieri), anno 2019



Fonte: Statistiche Regione Marche

In riferimento al numero di visitatori dell'offerta culturale di Ancona, vengono ora analizzati i flussi turistici nelle attrazioni storico-culturali a maggiore connotazione portuale.

Tab. 1: Flussi di visitatori nei luoghi a connotazione portuale di Ancona (ordini di grandezza medi 2018-2019)

	INGRESSO	VISITATORI
Mole Vanvitelliana	Gratuito	60 mila
Museo Tattile Statale Omero	Gratuito	35 mila
Loggia dei Mercanti	Gratuito	8 mila
Sala Museale "G. Marconi"	Gratuito	400

Fonte: MiBACT Ufficio Statistica per Museo Tattile Statale Omero; rilevazioni dai singoli musei per gli altri.

La Mole Vanvitelliana viene visitata annualmente da circa 60 mila persone, delle quali più della metà interessate alla visita del Museo Tattile Statale Omero (34.533 nel 2018): un museo che ha acquisito sempre più notorietà nel corso degli anni, registrando nel 2018 un aumento delle visite dell'11,7% rispetto all'anno precedente e addirittura del 250,9% rispetto al 2010. Metà dei visitatori proviene da Ancona ed aree limitrofe, il 10-15% è straniero. Ma la Mole organizza ed ospita anche numerosi festival, convegni e mostre temporanee che permettono di ampliare l'offerta culturale con iniziative diversificate nel corso di tutto l'anno: il festival di Recalcati ad ottobre, eventi legati al cinema tra novembre e dicembre, mostre temporanee tra settembre ed aprile.

La Loggia dei Mercanti, normalmente non visitabile poiché adibita a sala per convegni ed eventi, in occasione degli sbarchi estivi di crocieristi al porto di Ancona viene tenuta aperta e, quindi, resa

visitabile non solo esternamente ma anche internamente: questo la porta a registrare intorno alle 8.000 visite annuali, di cui 70-80% provenienti da visitatori stranieri e concentrate nei mesi estivi.

La collezione della Sala Museale Contrammiraglio G. Marconi, temporaneamente esposta in un luogo privato a seguito del terremoto del 2016, viene visitata annualmente da circa 400 persone, che si avvalgono di visita guidata. Si tratta prevalentemente di gruppi scolastici locali (60%), ma anche di privati appassionati (30%) e gruppi di turisti stranieri (10%) che partecipano alle iniziative promosse dal Comune per visitare i musei locali oppure crocieristi sbarcati nel porto dorico.

Per quanto riguarda il Porto Antico, il flusso medio non è mai stato rilevato mentre sono stati registrati picchi di 30.000 persone in occasioni speciali quali la Festa del Mare, la Festa della Marina Militare, il concerto dei Subsonica per l'apertura del Porto Antico (2019) e l'approdo della nave Vespucci (2016 e 2019). Complessivamente, si può affermare che l'offerta culturale anconetana a maggiore connotazione portuale presenta cifre piuttosto contenute e legate prevalentemente a visitatori locali e a crocieristi in visita a seguito dello sbarco nell'approdo dorico nel corso dei mesi estivi.

Nella seguente tabella viene illustrata l'evoluzione nel numero di visitatori nei musei della città di Ancona, dall'anno 2011 all'anno 2019. Si tenga presente che per gli anni 2014, 2015 e 2016 sono mancate le rilevazioni per alcuni musei, pertanto la somma totale finale ne risente.

Tab. 2: Numero di visitatori nei musei della città di Ancona, anni 2011-2019

ANNO	MUSEO DELLA CITTÀ	MUSEO DIOCESANO	PINACOTECA CIVICA	MUSEO OMERO	MUSEO ARCHEOLOG.	TOTALE
2011	3.599	3.000	7.728	10.005	16.642	40.974
2012	6.669	2.627	6.080	17.097	13.566	46.039
2013	5.421	3.198	7.224	26.989	13.170	56.002
2014	3.344	n.d.	n.d.	23.226	15.260	41.830 (1)
2015	n.d.	2.853	n.d.	24.198	13.195	40.246 (2)
2016	n.d.	2.924	n.d.	24.769	12.803	40.496 (3)
2017	2.479	2.981	8.138	31.500	14.316	59.414
2018	3.497	2.672	9.637	35.143	12.714	63.663
2019	4.031	5.326	8.417	34.533	16.752	69.059

Fonte: MiBACT – Ufficio Statistica per i musei statali, rilevazioni dai singoli musei per gli altri

(1) numero di visite totali annuali, escludendo il Museo Diocesano e la Pinacoteca Civica.

(2-3) numero di visite totali annuali, escludendo il Museo della Città e la Pinacoteca Civica.

I musei che offre la città di Ancona sono il Museo della Città, il Museo Diocesano e la Pinacoteca Civica, che negli ultimi dieci anni hanno registrato un numero di visite compreso tra 2-9 mila, comunque sempre inferiore alle 10.000 unità; il Museo Archeologico ospitante un numero di visitatori che, nell'ultimo decennio, si è assestato sempre attorno ai 15 mila, con picco positivo di 16.752 nel 2019. Ed infine, il Museo Omero che ha registrato l'ascesa più rilevante di tutti, passando da 10 mila visitatori nel 2011 a 35 mila nel 2019. Per tale ragione, complessivamente il numero di visite totali nei musei della città dorica è andato aumentando di anno in anno, fino a raggiungere quasi le 70.000 unità lo scorso anno.

A questo punto si ritiene interessante illustrare alcuni esempi di musei legati a tematiche di interesse marittimo presenti lungo la costa italiana dell'Adriatico, al fine di poterli confrontare con l'offerta anconetana sia dal punto di vista del contenuto espositivo che in termini numerici.

FOCUS: I MUSEI DEL MARE LUNGO LA COSTA DELL'ADRIATICO

Il *Museo della Marineria di Pesaro*, aperto nel 2007, ha sede a Villa Molaroni, pregevole edificio in stile *liberty* immerso in un parco a 200 metri dal mare. Esso si pone l'obiettivo di promuovere l'identità marittima di Pesaro, delle comunità costiere e della civiltà adriatica, nonché valorizzare i molteplici paesaggi culturali che possiedono una stretta connessione con l'Adriatico. Oltre ai percorsi di visita guidata, il museo organizza anche mostre documentarie, laboratori didattici rivolti alle scuole, conferenze, eventi e incontri organizzati nel parco esterno. Tutte queste iniziative sono funzionali anche alla concretizzazione dell'“*Ecomuseo del litorale*”, strategia museale innovativa ideata nel 2011 e promossa dalla provincia di Pesaro-Urbino all'interno di *AdriaMuse* (progetto cofinanziato dall'UE), volta alla valorizzazione turistica del patrimonio culturale sulle due sponde dell'Adriatico. Negli ultimi anni, il museo è stato visitato da una media di 3-4 mila visitatori l'anno, di cui più della metà si sono concentrati nei mesi estivi. Si prenda d'esempio l'anno 2017, che in totale ha registrato 3.516 visitatori, di cui 1.923 nella sola stagione estiva. Durante la stagione primaverile, vengono ospitate numerose scolaresche, provenienti per la maggior parte dal centro Italia; mentre nel periodo estivo si accolgono diversi gruppi di turisti, sia italiani che stranieri, i quali spesso prenotano la visita guidata mesi prima. L'ingresso al museo è totalmente gratuito, così come i diversi servizi offerti quali visite guidate, laboratori, conferenze, seminari, eventi, etc.

Il *Museo della Marineria di Cesenatico* costituisce uno dei pochi esempi museali al mondo che propone, oltre alle raccolte esposte nel padiglione della sezione “a terra”, anche una sezione “galleggiante” con undici barche in acqua complete di vele, e una sezione “navigante” con tre barche mantenute operative al fine di conservare il patrimonio intangibile delle antiche pratiche di navigazione. Oltre a visite guidate, si organizzano periodicamente anche mostre temporanee,

iniziative, eventi e incontri di vario tipo. Negli ultimi tre anni, il museo ha registrato mediamente 28-30 mila presenze annuali. Esso viene visitato prevalentemente da studenti (circa il 50% dei visitatori totali), che si concentrano nelle stagioni autunnale e primaverile, e da turisti (circa il 40% dei visitatori totali, di cui il 30% proveniente dall'Italia e il 10% dall'estero) che visitano il museo soprattutto nei mesi estivi e nel periodo natalizio. Il restante 10% dei visitatori è rappresentato dai residenti. L'ingresso intero al museo costa 2€, quello ridotto 1€.

Il *Museo del Mare* di San Benedetto del Tronto è composto da sei musei collegati tra loro dal tema comune del mare. All'interno del complesso del mercato ittico all'ingrosso, presso il molo nord del porto, si trovano quattro musei: il *Museo della Civiltà Marinara delle Marche*, il *Museo delle Anfore*, il *Museo Ittico "Augusto Capriotti"* e l'*Antiquarium Truentinum*; mentre gli altri due musei, ossia la *Pinacoteca del Mare* e *Villa Marittima*, sono localizzati nel Paese Alto: il primo a Palazzo Piacentini, il secondo nelle immediate vicinanze. Il polo museale appartiene, dal 2014, all'Associazione dei Musei Marittimi del Mediterraneo con sede in Barcellona e, dal 2016, alla rete territoriale "Sistema Museale Piceno" con sede in Ascoli Piceno. Ogni anno aderisce ad iniziative internazionali, nazionali e regionali in materia di valorizzazione delle raccolte museali e di quanto attiene la cultura immateriale che da sempre caratterizza la civiltà marinara ed il mondo ad essa collegato. Negli ultimi anni il polo museale ha registrato tra i 17 e i 19 mila visitatori; fa eccezione il 2019 che ha totalizzato quasi 13 mila visitatori, poiché il Museo Ittico è rimasto chiuso tutto l'anno per ristrutturazione. È stato stimato che il 70% dei visitatori provenga da zone limitrofe, mentre il 30% sia costituito da turisti.

Di recente apertura, il *Museo Nazionale di Archeologia del Mare* di Caorle, situato presso gli edifici di un'ex azienda agricola di inizio Novecento trasformata in museo, va a ricostruire la storia, nella mostra permanente "TerredAcque", dal villaggio protostorico di San Gaetano al Portus Reatinum citato da Plinio Il Vecchio, dall'antica Caprulae sino alle testimonianze di epoca medievale e moderna della città e il suo territorio. Dopo l'apertura avvenuta nell'estate 2018, il museo ha totalizzato l'anno seguente poco più di 3 mila visite. Tra queste, si segnala un elevato pubblico di tipo scolastico: scolaresche in gita, bimbi accolti in museo nell'ambito delle attività e dei centri estivi della Parrocchia di Caorle ed in occasione di un progetto didattico elaborato con la Capitaneria di Porto in occasione della Festa del Mare a Caorle. Il museo ha avviato progetti di valorizzazione del museo in sinergia con l'Amministrazione Comunale, con lo IAT di Caorle, con il Consorzio Spiagge e il Consorzio Alberghi, oltre ad altri *stakeholder* territoriali. Nei mesi di chiusura a seguito dell'emergenza sanitaria legata al Covid-19. Nei mesi di chiusura a seguito dell'emergenza sanitaria è stato svolto un costante contatto con il pubblico adulto e con i bambini attraverso attività divulgative a distanza diversificate: visite virtuali, focus su temi e reperti di notevole rilevanza, video tutorial pubblicati sul sito web e sui social media ufficiali (Facebook e Instagram).

Infine, si cita il *Museo del Mare* di Porto Recanati, situato nel complesso dell'ex mercato ittico, moderna struttura edificata tra il 1975-1980 a fianco della vecchia pescheria, ubicata nel nord del centro urbano. Nonostante sia attualmente in allestimento, si pone l'obiettivo di fungere da strumento di formazione e rafforzamento dell'identità sociale per la comunità locale e strumento di "socializzazione con il luogo" per i turisti. Museo che conserva ed espone reperti legati alle tradizioni marinare del paese, si rivolge prevalentemente a scuole e turisti, in particolar modo famiglie. La gestione precedente era affidata ad un'associazione locale, il "Comitato Pescatori di Porto Recanati", che ne garantiva un'apertura sporadica. Non era previsto un biglietto d'ingresso. La riapertura è programmata per la fine di quest'anno.

Quelli appena illustrati sono alcuni esempi di musei legati alla cultura marinara dell'Adriatico che, dalla loro apertura, sono sempre stati fortemente impegnati nella valorizzazione delle tradizioni e della cultura adriatica, attraverso iniziative lodevoli quali l'ecomuseo del litorale, che si estende per 40 km tra Gabicce Mare e Marotta, o il museo diffuso che espone non solo all'interno dei classici edifici museali, ma anche in più luoghi all'aperto e direttamente in mare.

Ma anche attraverso la partecipazione ad importanti progetti di livello europeo quali *AdriaMuse* o instaurando reti di collaborazioni sia sul territorio nazionale che internazionale. Il tutto, con l'obiettivo di conservare la memoria e il prezioso patrimonio culturale intangibile marinaro, nonché di far emergere le identità locali antiche e recenti, recuperare il senso di appartenenza, favorire il turismo e altre forme di economia legata ad un buon uso dei beni culturali.

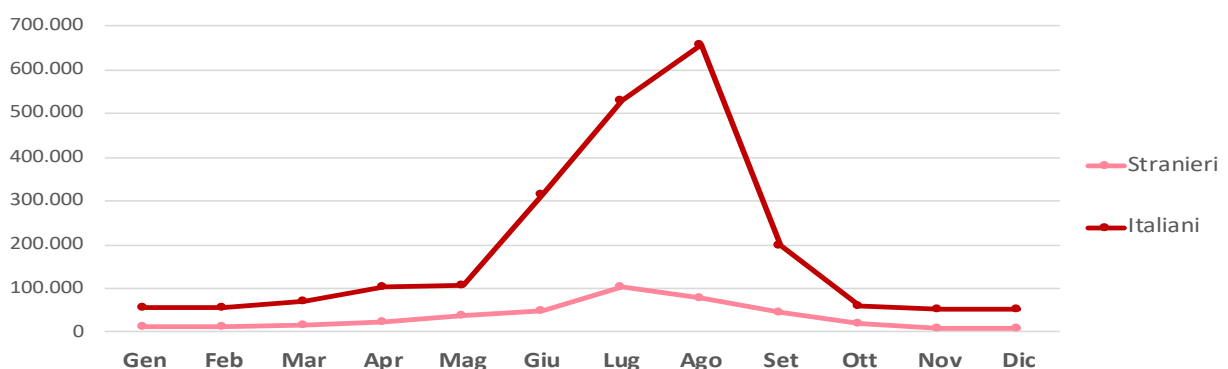
Tuttavia, nonostante questi ottimi propositi, i dati mostrano che i musei vengono di fatto visitati annualmente da un numero piuttosto contenuto di visitatori, che rischiano di non essere in grado di ripagare gli ingenti sforzi sostenuti dal punto di vista economico dai musei per predisporre un'offerta di qualità e divenire competitivi nel mercato. Pertanto, nella proposta di nuove iniziative turistico-culturali, risulta fondamentale tenere presente che non sempre un'offerta innovativa e di qualità corrisponde ad elevati ingressi, con il rischio che i costi sostenuti rimangano superiori rispetto ai ricavi generati, in quanto i fattori da tenere in considerazione sono innumerevoli e coinvolgono diverse sfere (economica, sociale, geografica, etc).

Key questions and limitations

In questo paragrafo si descrive se si registra una certa **stagionalità** nelle visite, ancor più evidente estendendo la riflessione all'intera provincia di Ancona, potenziale bacino per visitatori dell'offerta turistico culturale in città, e l'estate a trainare i mesi dove si concentra il maggior numero di visite.

La distribuzione delle presenze nella Provincia di Ancona per mese dell'anno, suddivise tra turisti italiani e stranieri, fa emergere l'elevata stagionalità estiva della domanda turistica che si concentra prevalentemente nel periodo estivo. Analizzando più nel dettaglio la distribuzione delle presenze italiane, si registrano tre mesi in cui risultano essere più di 300 mila (giugno, luglio e agosto), con un picco di quasi 660 mila presenze nel solo mese di agosto. Nei mesi invernali, ed in particolar modo tra ottobre e febbraio, le presenze oscillano tra le 50 mila e le 60 mila mensili. Per quanto riguarda le presenze straniere, sebbene in termini assoluti siano nettamente inferiori, in termini distributivi risultano essere molto simili a quelle italiane: infatti, tra i mesi di giugno e settembre si registrano da circa 50 mila presenze mensili in su, con picco positivo a luglio che supera le 100 mila presenze. Mentre nei mesi invernali, soprattutto tra novembre e febbraio, le presenze oscillano attorno alle 10 mila mensili. Complessivamente, dunque, la Provincia di Ancona è soggetta ad una stagionalità della domanda turistica che si concentra prevalentemente tra i mesi di luglio e agosto, che nel 2018 hanno misurato rispettivamente più di 600 mila e più di 700 mila presenze mensili totali. Questi dati confermano come, attualmente, Ancona attiri per la maggior parte turisti balneari che frequentano la località esclusivamente nei mesi più caldi dell'anno.

Graf. 7: Stagionalità delle presenze nella Provincia di Ancona, anno 2018



Fonte: Statistiche Regione Marche.

Per valutare la **ricettività** di Ancona, la tabella che segue mostra il **numero di strutture ricettive alberghiere ed extra-alberghiere** presenti nel territorio Comunale, suddivise per tipologia e numero di camere e posti letto. Dopodiché, viene presentato il **giudizio medio relativo alla qualità** delle strutture ricettive di Ancona, attraverso le recensioni e i commenti su TripAdvisor.

La città di Ancona accoglie in totale 20 esercizi alberghieri, i quali possiedono 1.058 camere e 1.829 posti letto. Più nello specifico vi sono 8 hotel a 4 stelle, 9 hotel a 3 stelle, 2 hotel a 2 stelle e 1 hotel a 1 stella; interessante notare come non siano presenti né hotel a 5 stelle, né residenze turistico-alberghiere. Mentre, in riferimento agli esercizi complementari Ancona accoglie 204 strutture extra-alberghiere, per un totale di 2.528 posti letto. Tra queste, le tipologie più diffuse sono i bed&breakfast (71), gli alloggi in affitto (47) e gli agriturismi (25). Complessivamente, dunque, le strutture ricettive registrate nella città di Ancona risultano essere 224, le quali offrono 4.357 posti letto totali.

Tab. 4: Numero di esercizi alberghieri ed extra-alberghieri ad Ancona, anno 2018

ESERCIZI ALBERGHIERI	<i>Num. hotel</i>	<i>Num. posti letto</i>	<i>Num. camere</i>
<i>Hotel a 4 stelle</i>	8	854	430
<i>Hotel a 3 stelle</i>	9	608	360
<i>Hotel a 2 stelle</i>	2	324	245
<i>Hotel a 1 stella</i>	1	43	23
TOTALE	20	1.829	1.058
ESERCIZI EXTRA-ALBERGHIERI			
<i>Campeggi</i>	2	600	-
<i>Alloggi in affitto</i>	47	677	-
<i>Agriturismi</i>	25	302	-
<i>Ostelli per la gioventù</i>	1	56	-
<i>Case per ferie</i>	3	109	-
<i>Altri esercizi ricettivi n.a.c.</i>	55	493	-
<i>Bed & Breakfast</i>	71	291	-
TOTALE	204	2.528	-
TOTALE OFFERTA RICETTIVA	224	4.357	1.058

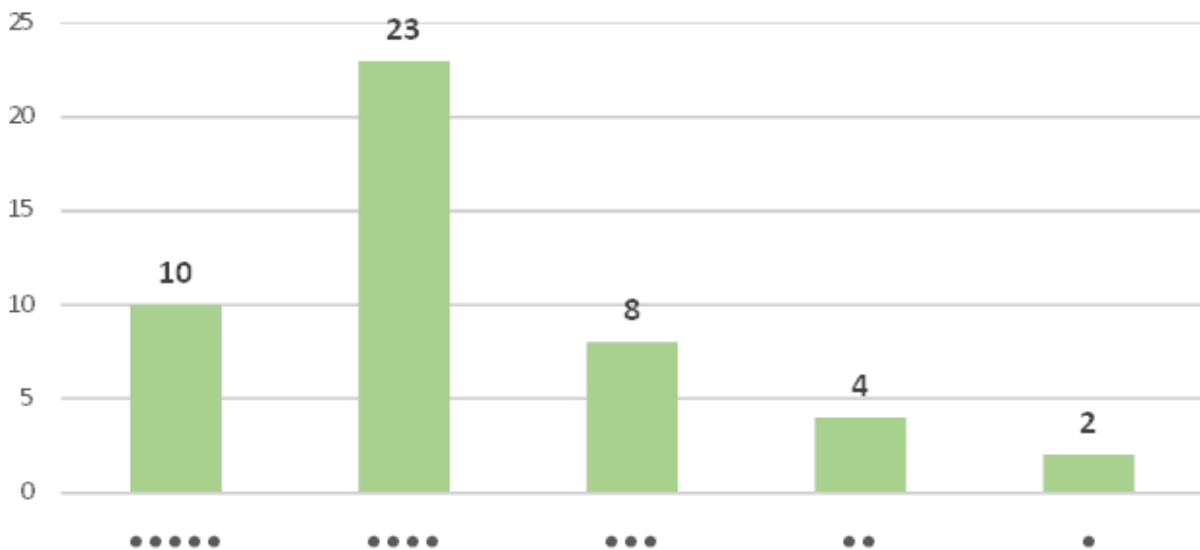
Fonte: Statistiche Regione Marche. Dato riferito al Comune di Ancona.

Nota: Tra gli esercizi alberghieri, non sono presenti strutture nelle categorie: hotel a 5 stelle e residenze turistico-alberghiere (residence). Tra gli esercizi extra-alberghieri, non sono presenti strutture nelle categorie: villaggi turistici, campeggi-villaggi turistici (misti), rifugi di montagna, altri alloggi privati.

Per cercare di comprendere la percezione da parte dei turisti della qualità della ricettività ad Ancona, si sono analizzate le recensioni contenute su uno dei portali di recensioni più celebri e diffusi al mondo (TripAdvisor). Al suo interno, sono presenti 60 strutture ricettive, che corrispondono al 26,8% degli esercizi ricettivi totali presenti nel territorio anconetano. Ogni struttura possiede una valutazione da 1 a 5 che è data dalla media dei giudizi rilasciati da ciascun utente per quella struttura.

Dall’analisi di tali recensioni, è risultato che quasi il 17% delle strutture hanno ricevuto una valutazione pari a 5 mentre il 38% tra 4 e 4,5. Completa il totale il 23% delle strutture con valutazioni pari o inferiori a 3. Vi sono poi 13 strutture (pari al 22% delle strutture anconetane registrate su TripAdvisor) che non hanno ancora ricevuto valutazioni all’interno della piattaforma. Alla luce di quest’analisi, si può affermare che la maggior parte dei turisti giudica gli alloggi di Ancona con una valutazione di 4 su 5, che corrisponde ad una qualità “buona”.

Graf. 8: Valutazioni delle recensioni relative alle strutture ricettive del Comune di Ancona, novembre 2020



Fonte: Rielaborazione di Risposte Turismo su dati di TripAdvisor (valutazioni rilevate a marzo 2020).

Per quanto riguarda le **infrastrutture** si descrivono a seguire i **punti di accessibilità esterna** (aeroporto, porto, stazione ferroviaria, autostrada), illustrando alcuni dati sulla **quantità di traffico giornaliero** dell'aeroporto e del porto (in particolare, per quanto riguarda l'aeroporto: il numero delle rotte dirette attive nel 2019, i numeri del traffico aereo totale nel 2019, diviso per mese... e anche dei passeggeri in entrata / in uscita – idem per il porto). Una rilettura dell'offerta infrastrutturale, completa la sezione.

In merito alle infrastrutture e ai punti di accessibilità esterna, Ancona è dotata oltre che del porto, anche di un aeroporto, di una stazione ferroviaria (nel centro storico) e di due uscite autostradali lungo la A14 Bologna-Taranto.

Il **Porto di Ancona**, dislocato nella parte più interna del golfo naturale di Ancona, si affaccia nella parte centrale del Mar Adriatico, assumendo una funzione strategica nella macro-regione Adriatico-Ionica. Con le sue 27 banchine e i suoi terminal passeggeri e traghetti, terminal container e impianti per rinfuse solide, il porto di Ancona costituisce uno degli scali più rilevanti d'Italia, nonché uno dei più vitali e attivi dell'area Mediterranea, in termini di traffico veicoli e passeggeri, merci e attività peschereccia. In relazione ai flussi di passeggeri e turisti, nel 2019 nel porto di Ancona sono transitati quasi 1,2 milioni di passeggeri (quasi 1,1 milioni su navi traghetto e 100 mila crocieristi) grazie a 3.819 scali.

Tra i passeggeri su navi traghetto, più di 550 mila si sono imbarcati mentre quasi 540 mila sono sbarcati. Le navi traghetto approdate ad Ancona sono in arrivo dalle/dirette verso le sponde dell'Europa Orientale e, in particolare, le città di Durazzo (Albania), Spalato, Zara e Lesina (Croazia), Igoumenitsa, Patrasso e Corfù (Grecia).

Le compagnie di navigazione che operano nello scalo di Ancona sono: Adria Ferries, SNAV, Grimaldi Minoan Lines, Jadrolinija e Anek Lines Superfast Ferries.

Invece, dei circa 100 mila crocieristi registrati, quasi 85 mila sono risultati in transito, mentre poco più di 15 mila hanno imbarcato/sbarcato nel porto di Ancona.

Le navi da crociera che sono approdate sono state: MSC Sinfonia, Marella Celebration, Marella Explorer 2, Aegean Odissey, Sirena, Nautica, Le Bougainville, Sea Cloud.

La tabella che segue riepiloga le statistiche di traffico per veicoli, merci. Il porto di Ancona comprende anche una zona peschereccia chiamata Mandracchio che offre tutto il necessario per l'attività di pesca in mare tra cui tre scali di alaggio, un pontile, un magazzino per le forniture ai pescherecci e molto altro.

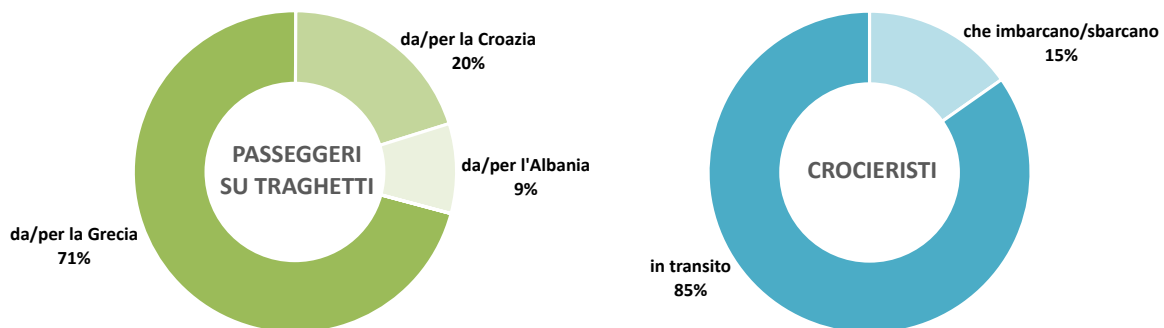
Tab. 4: Principali statistiche di traffico porto di Ancona.

PORTO DI ANCONA	IMBARCHI	SBARCHI	TOTALE 2019	VAR. % SU 2018
NUMERO PASSEGGERI MOVIMENTATI	552.014	537.318	1.089.332	0%
- di cui da/per Grecia	400.032	372.508	772.540	0%
- di cui da/per Croazia	104.087	114.412	218.499	- 1%
- di cui da/per Albania	47.821	50.334	98.155	+ 8%
- di cui da/per Italia	74	64	138	+ 66%
NUMERO CROCIERISTI MOVIMENTATI	-	-	100.109	+ 49%
- di cui in transito	-	-	84.863	+ 57%
- di cui in imbarco/sbarco	7.273	7.973	15.246	+ 19%
TOTALE PERSONE MOVIMENTATE	559.287	545.291	1.189.441	+ 3%
NUM. VEICOLI (AUTO) MOVIMENTATI	137.468	124.079	261.547	+ 5%
NUM. MOVIMENTI (NAVI)	1.909	1.910	3.819	- 4%
NUMERO TIR MOVIMENTATI	65.290	66.245	131.535	- 1%
- di cui da/per Grecia	50.357	53.086	103.433	- 2%
- di cui da/per Croazia	2.940	3.295	6.235	- 7%
- di cui da/per Albania	11.992	9.864	21.856	+ 7%
- di cui da/per Italia	1	0	1	-
- di cui da/per Turchia	0	0	0	-
NUMERO TRAILER MOVIMENTATI	6.544	5.795	12.339	- 15%
- di cui da/per Grecia	6.121	5.384	11.505	- 9%
- di cui da/per Croazia	0	0	0	-
- di cui da/per Albania	423	411	834	- 55%
- di cui da/per Italia	0	0	0	-
- di cui da/per altri Paesi	0	0	0	-
TOTALE TIR + TRAILER MOVIMENTATI	71.834	72.040	143.874	- 3%
Merci liquide movimentate	1.096.269 lt.	3.338.237 lt.	4.434.506 lt.	- 4%
Merci solide (rinfuse + tir/trailer + container)	3.146.495 kg	3.186.181 kg	6.332.676 kg	+ 2%
TOTALE MERCI MOVIMENTATE	4.242.764	6.524.418	10.767.182	0%
ROTTI DIRETTE ATTIVE	Durazzo (Albania); Spalato, Zara e Lesina (Croazia); Igoumenitsa, Patrasso e Corfù (Grecia).			
COMPAGNIE DI NAVIGAZIONE (TRAGHETTI)	Adria Ferries; SNAV, Grimaldi Minoan Lines; Jadrolinija; Anek Lines Superfast Ferries.			
COMPAGNIE DI CROCIERA	MSC Sinfonia; Marella Celebration; Marella Explorer 2; Aegean Odyssey; Sirena; Nautica; Le Bougainville; Sea Cloud.			

Fonte: Autorità di Sistema Portuale del Mar Adriatico Centrale

Con l'obiettivo di meglio impostare l'intera strategia un'ulteriore analisi dei flussi di persone transitate nel porto si ricorda come dei quasi 1,1 milioni di passeggeri movimentati su navi traghetto ad Ancona, il 71% ha navigato su traghetti da/per la Grecia, il 20% su traghetti da/per la Croazia e il 9% su traghetti da/per l'Albania. Invece, dei 100 mila crocieristi movimentati su navi da crociera, l'85% sono crocieristi in transito che sbarcano dalla nave, visitano la città e poi risalgono nella nave per riprendere la crociera; mentre il 15% sono crocieristi che imbarcano nel porto di Ancona per iniziare la loro crociera (e, al termine della stessa, vi sbarcano).

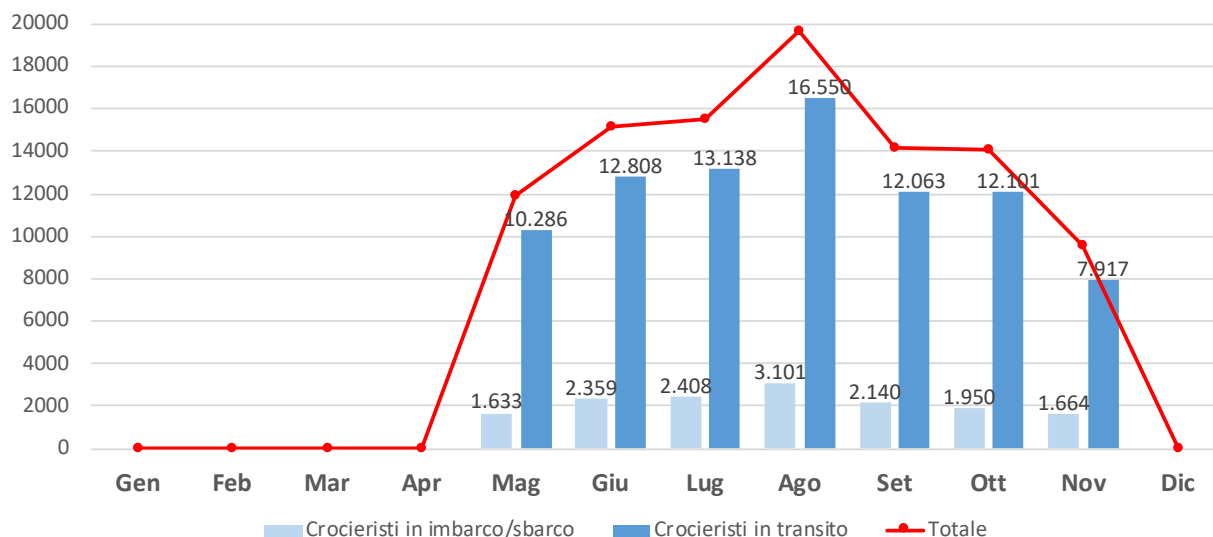
Graf. 10: Numero di passeggeri su navi traghetto e numero di crocieristi in valori percentuali, anno 2019



Fonte: Autorità di Sistema Portuale del Mar Adriatico Centrale

Studiando in maniera più approfondita il numero di crocieristi movimentati nel porto di Ancona tra gennaio e dicembre 2019, la distribuzione dei crocieristi movimentati registra una stagionalità piuttosto forte nel periodo estivo, in particolare tra giugno ed agosto, con un picco positivo di circa 16,5 mila crocieristi in transito e più di 3 mila crocieristi in partenza/arrivo nel solo mese di agosto. Mentre, tra i mesi di dicembre ed aprile, il numero registrato di movimenti di crocieristi risulta pari a zero. Infine, le distribuzioni dei movimenti appaiono abbastanza simili tra crocieristi in transito e quelli in imbarco/sbarco: in ambedue i casi, il picco positivo si registra ad agosto, mentre il mese in cui si registra il minor numero di movimenti è novembre per quanto riguarda i crocieristi in transito (meno di 8 mila), e maggio per i crocieristi in partenza/arrivo (poco più di 1,6 mila).

Graf. 11: Numero di crocieristi che imbarcano/sbarcano, che transitano e totali movimentati nel Porto di Ancona, suddivisi per mesi, anno 2019



Fonte: elaborazione di Risposte Turismo

Il porto di Ancona si trova nel cuore pulsante della città, a poche centinaia di metri di distanza dal centro storico. Dunque, tutti coloro che sbarcano dalle navi hanno la possibilità di raggiungere in pochi minuti a piedi le principali attrazioni storico-culturali della città, così come coloro che necessitano di imbarcarsi possono rimanere nel centro storico fino a pochi minuti prima dell'imbarco, considerata la distanza pressoché minima. D'altra parte, la posizione così centrale comporta il fatto che la stessa uscita del porto sia collocata in una zona non adatta a sostenere il notevole traffico generato dallo scalo marittimo: infatti, l'unica strada che porta all'Autostrada A14 attraversa interi quartieri della città d'antica, abbassando la qualità della vita di queste aree. Per tale ragione, negli ultimi anni è emerso il problema relativo alla carenza di infrastrutture di collegamento tra l'area portuale e la rete autostradale. Nel corso degli anni sono stati presentati diversi progetti per la soluzione di tale problema, sebbene nessuno di questi sia stato finora portato a compimento. Inizialmente si era pensato di realizzare un collegamento dal porto al casello autostradale Ancona Sud mediante la realizzazione della SS 681 "Asse Attrezzato del Porto di Ancona"; tuttavia, il progetto è stato abbandonato e il collegamento non è stato completato a causa dell'elevato impatto ambientale che avrebbe comportato. Successivamente, si è pensato di concretizzare il collegamento costruendo una nuova arteria che avrebbe dovuto congiungere il porto con un nuovo casello autostradale (Ancona Ovest) attraverso una

lunga galleria capace di diminuire notevolmente l’impatto ambientale. In un ottica di medio termine appare opportuno non contare sull’ultimazione di questo progetto.

L’**Aeroporto delle Marche “Raffaello Sanzio”**, detto anche Aeroporto di Ancona-Falconara (codice IATA: AOI), è localizzato a Castelferretti (Comune di Falconara Marittima), a circa 18 km a Ovest dal centro storico di Ancona. L’aeroporto è gestito dalla società di handling Aerdorica Spa ed è dotato di due terminal passeggeri (arrivi e partenze), nonché un terminal merci. In relazione al trasporto di passeggeri, nel 2019 ne sono transitati quasi 490 mila, di cui 108 mila italiani e 373 mila stranieri. Il numero di movimenti di aeromobili è stato pari a 11.644, di cui 1.428 nazionali e 4.529 internazionali. Vi operano diversi vettori di linea e compagnie charter internazionali tra cui Ryanair, EasyJet, Volotea, Lufthansa, AirBaltic, Windrose, GetJet, Blue Panorama, Transavia, le quali permettono di collegare Ancona alle città di Cagliari, Olbia, Catania, Palermo, Londra, Parigi, Bruxelles, Dusseldorf, Berlino, Monaco, Tirana, Kiev, Vilnius, Riga e Sharm el-Sheikh. Mentre, in relazione al trasporto di merci, nel 2019 ne sono state movimentate più di 7 mila tonnellate; vi operano regolarmente DHL, UPS, B3, Air France-KLM-Martinair Cargo, AirChina Cargo, Cathay Pacific Cargo, Qatar Airways Cargo, MBE MailBoxesEtc.

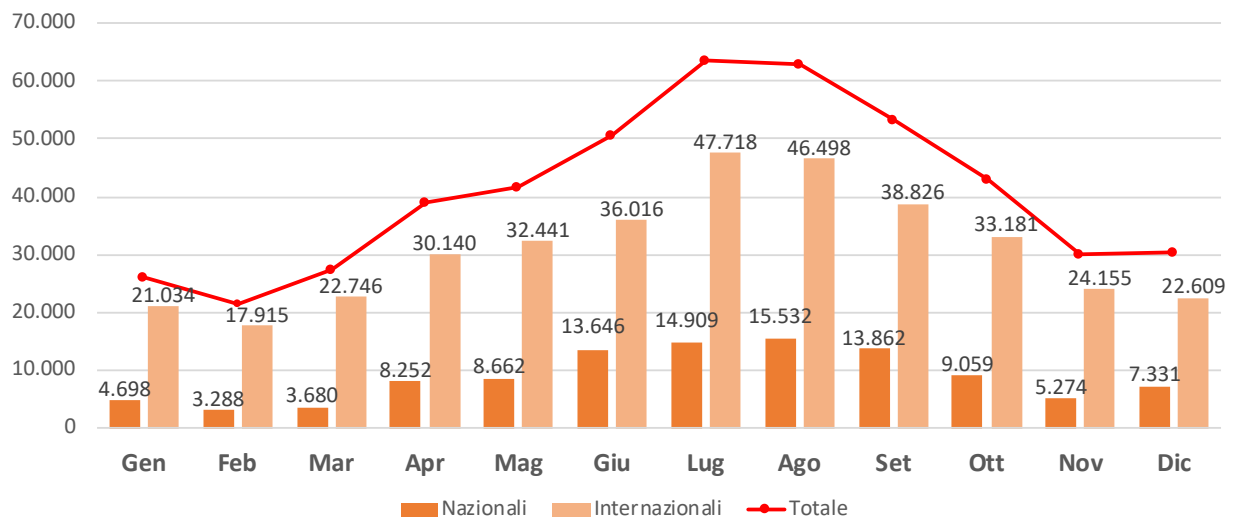
Tab. 3: Numero di passeggeri movimentati (anno 2019), numero di movimenti di aeromobili (anno 2019), numero di merci movimentate (anno 2019), rotte dirette attive (anni 2019-2020) e compagnie aeree di linea, charter e cargo (anno 2020) nell’Aeroporto delle Marche “Raffaello Sanzio”.

AEROPORTO DELLE MARCHE	2019	VAR. % SU 2018
NUMERO PASSEGGERI MOVIMENTATI	489.835	+ 8,2%
- di cui su rotte nazionali	108.193	+ 29,7%
- di cui su rotte internazionali	373.279	+ 3%
- di cui transiti diretti	3.892	+ 385,9%
- di cui altri (es. voli privati)	4.471	- 3,3%
NUMERO MOVIMENTI (AEROMOBILI)	11.644	+ 18,2%
- di cui su rotte nazionali	1.428	+ 17,4%
- di cui su rotte internazionali	4.529	+ 7,1%
- di cui altri	5.687	+ 29,2%
NUMERO MERCI MOVIMENTATE	7.021.300 kg	+ 4,2%
- di cui merci avio	6.946.000 kg	+ 5%
- di cui merci superficie	75.300 kg	- 38,8%
- di cui posta	0	-
ROTTE DIRETTE ATTIVE	<ul style="list-style-type: none"> per l’Italia: Cagliari; Olbia; Catania; Palermo. per l’estero: Londra; Parigi; Bruxelles; Berlino; Dusseldorf; Monaco; Tirana; Kiev; Vilnius; Riga; Sharm el-Sheikh. 	
COMPAGNIE AEREE DI LINEA E CHARTER	Ryanair; EasyJet; Volotea; Lufthansa; AirBaltic; Windrose; Blue Panorama; GetJet; Transavia.	
COMPAGNIE AEREE CARGO	DHL; UPS; B ³ ; Air France-KLM-Martinair Cargo; AirChina Cargo; Cathay Pacific Cargo; Qatar Airways Cargo; MBE MailBoxesEtc.	

Fonte: Aerdorica Aeroporto delle Marche; Assaeroporti

Studiando più nel dettaglio il numero di passeggeri movimentati tra gennaio e dicembre 2019, emerge come il numero di passeggeri movimentati su rotte internazionali sia decisamente superiore rispetto al numero di passeggeri movimentati su rotte nazionali. Inoltre, la distribuzione dei passeggeri movimentati registra una stagionalità accentuata nei mesi estivi, in particolare tra giugno e settembre, con un picco di quasi 64 mila passeggeri totali movimentati nel solo mese di luglio. Invece, i mesi in cui si registra il minor numero di passeggeri movimentati son quelli che vanno da novembre a febbraio, con picco negativo di appena 21 mila a febbraio. Le distribuzioni dei movimenti sono piuttosto simili tra rotte nazionali e internazionali: in entrambi i casi, il picco negativo si registra nel mese di febbraio, mentre per quanto riguarda il picco positivo, per le rotte internazionali risulta essere a luglio (quasi 50 mila), invece per quelle nazionali si registra ad agosto (più di 15 mila).

Graf. 9: Stagionalità passeggeri movimentati per rotte nell'Aeroporto delle Marche, 2019



Fonte: Assaeroporti

Nota: Il valore totale (linea rossa) tiene conto non solo del numero di passeggeri su rotte nazionali e internazionali (indicati nel grafico), ma anche del numero di transiti diretti e di passeggeri nei voli privati (che comunque costituiscono valori esigui, quindi trascurabili).

L'aeroporto delle Marche è collegato alla città di Ancona grazie a un servizio di bus navetta denominato *Aerobus Raffaello* by Conerobus, che opera tutti i giorni dalle 7.00 alle 22.30 ed effettua in circa 30 min. varie fermate in città (inclusa la stazione). Gli orari sono programmati in modo tale che passeggeri in partenza possano raggiungere il terminal delle partenze un'ora prima del decollo; mentre per i

passaggeri in arrivo, la navetta parte circa 25 min. dopo l'arrivo di ogni volo. I biglietti del servizio navetta si possono acquistare direttamente all'interno del bus e costano 5,50€ a tratta.

Altrimenti, dall'aeroporto è possibile raggiungere la città di Ancona (e viceversa) anche col treno: la stazione di *Castelferretti-Falconara Aeroporto delle Marche*, posta lungo la linea ferroviaria Roma-Ancona, è ubicata di fronte al terminal delle partenze dell'aeroporto e consente di raggiungere altrettanto comodamente la Stazione Centrale del capoluogo dorico, utilizzando treni regionali. La frequenza è di circa un treno ogni 30 min., il tempo di percorrenza è di circa 15 min. e il biglietto costa 2,15€ a tratta. L'aeroporto delle Marche è servito da due compagnie, *CTF Consorzio Taxi Falconara* e *TAXI Falconara*, che mettono a disposizione, nella piazzola di sosta al di fuori del terminal degli arrivi, un servizio taxi che permette di raggiungere agevolmente il centro storico della città dorica. Nei loro siti web è anche possibile prenotare trasferimenti privati con diverse autovetture; i 18 km di distanza vengono coperti in circa 25 min., in condizioni di traffico regolare.

La **stazione ferroviaria** di Ancona, denominata Ancona Centrale, costituisce lo scalo ferroviario principale della città dorica ed è posta sulla congiunzione tra la linea Bologna-Ancona e la linea Adriatica (Ancona-Lecce). È, inoltre, capolinea della linea Roma-Ancona, che si dirama dalla linea per Bologna in corrispondenza della stazione di Falconara Marittima. La stazione è formata da dieci binari per il servizio viaggiatori, tre binari per il servizio merci e due binari passanti (non abilitati al trasporto viaggiatori). Oltre ai treni *Regionali* e *Regionali Veloci* (la cui offerta produce una percorrenza media annua di circa 4 milioni di treni per km, che corrispondono a oltre 14 mila treni per km nel giorno ferialo medio, a fronte di circa 150 treni in circolazione), la linea ferroviaria di Ancona è servita anche da treni *Intercity*, *Intercity Notte*, *Frecciabianca*, nonché *Frecciargento* e *Frecciarossa* rientranti nel servizio Alta Velocità. La stazione è collegata al centro città, situato a circa 2 km di distanza, grazie alla rete urbana ed extra-urbana degli autobus, nonché alla rete filoviaria, gestite entrambe dalla società Conerobus.

Dopo aver descritto i punti di accessibilità più rilevanti della città di Ancona – aeroporto, porto e stazione ferroviaria. Ancona può essere raggiunta percorrendo L'Autostrada Adriatica A14 Bologna-Taranto e uscendo in uno dei due caselli autostradali tra Ancona Nord al km 213,5 oppure Ancona Sud al km 230,4.

La maggior parte dei parcheggi nella città dorica sono gestiti dalla società *M&P Mobilità Parcheggi Spa*, la quale ha in affidamento sia le aree di sosta a pagamento lungo la strada (strisce blu), le quali contano 9.000 posti auto, sia i 6 parcheggi coperti, i quali contano 1.178 posti auto, per un totale di 10.178 posti auto complessivi a sosta mista per i residenti. In città sono stati realizzati parcheggi multipiano che aiutano a soddisfare le esigenze non solo dei residenti, ma anche degli escursionisti giornalieri e dei turisti (tra cui i crocieristi che si imbarcano nel porto di Ancona), riducendo notevolmente l'ingombro di

veicoli nei bordi strada, nelle piazze e negli spazi verdi. Tutti loro possono essere utilizzati 24h/24, anche oltre l'orario di apertura, grazie alla presenza di moderni impianti di automazione e casse automatiche. Oltre a quanto presentato nella tabella che segue, va ricordato come i turisti pernottanti possano contare sui parcheggi talvolta disponibili dalle stesse strutture alberghiere così come in occasione di eventi ed altre occasioni si attivino servizi valet parking, alcuni dei quali all'interno delle stesse aree portuali (tariffa settimanale convenzionata per i crocieristi).

Tab. 5: lista dei parcheggi (coperti + strisce blu) nella città di Ancona, numero di posti auto, orario e prezzo

PARCHEGGI DI ANCONA	POSTI AUTO	ORARIO	PREZZO
PARCHEGGI COPERTI	1.178		
• Park Torrioni	110	Riservato abbonati	- Abbonam. mensile: 20-80€
• Park Cialdini	70	Lun-Sab 7.00-21.00 Ritiro auto: 24h/24	- Tariffa oraria: 1,40€ - Tariffa giornaliera: 38,40€ - Abbonam. mensile: 30-140€
• Park Umberto I°	98	Lun-Sab 7.00-21.00	- Tariffa oraria: 1,00€ - Abbonam. mensile: 30-120€
• Park Scosciacavalli	158	Riservato abbonati	- Abbonam. mensile: 25-120€
• Park Traiano	152	Lun-Sab 7.00-21.00 Ritiro auto: 24h/24	- Tariffa oraria: 1,20€ - Tariffa turistica giornaliera (da 1 a 16+ giorni): 28,80-8,00€ - Abbonam. mensile: 25-190€
• Park Scambatore "Degli Archi"	587	Lun-Sab 5.30-21.00 Ritiro auto: 24h/24	- Tariffa oraria: 0,50€ - Tariffa giornaliera: 8,00€ - Tariffa turistica giornaliera (da 1 a 16+ giorni): 8,00-6,00€ - Abbonam. mensile: 15-70€
STRISCE BLU	9.000		
• Settore Centro		24h/24	Zone miste:
• Settore Rione Adriatico			- Residenti e autorizzati: gratuito
• Settore Archi		Orario a pagamento: Lun-Sab 8.00-20.00	- Altri: 0,60-1,20€/h
• Settore Tiziano Marini			Zone a pagamento:
• Settore Piano Stazione		Orario gratuito: Lun-Sab 20.00-08.00 e domeniche	- Residenti e autorizzati: 0,60-1,20€/h - Altri: 0,60-1,20€/h
			Zone a sosta veloce:
			- Residenti e autorizzati: 0,50€-2,50€/h - Altri: 0,50€-2,50€/h
TOTALE	10.178		
• Park Valet crocieristi	n.d.	24h/24 (settimanale)	8 giorni 90€

Fonte: M&P Mobilità Parcheggi Spa

Development opportunities and possible actions to implement

Prima di entrare nel merito di alcune opportunità, azioni e criticità appare utile considerare e riepilogare i principali elementi degli attuali strumenti di programmazione presenti ad Ancona.

La proposta di *Strategia di Sviluppo Urbano Sostenibile* del Comune anconetano è localizzata nell'ambito del waterfront urbano, ossia della fascia di contatto che si estende lungo tutto il porto antico fino allo snodo di Torrette. Si tratta di una strategia per lo sviluppo della città che è stata il punto di riferimento dei progetti più rilevanti dell'ultimo decennio e che tuttora rappresenta un luogo estremamente complesso, in quanto al suo interno si susseguono situazioni urbane estremamente diversificate:

- 1) Il waterfront del litorale Nord, nel quale si prevede di realizzare uno "smart park" costituito dall'interramento dell' o specchio d'acqua del piede di frana;
- 2) L'ingresso Nord della città – Periferia storica e l'area ZIPA (Zona Industriale Portuale) caratterizzata dalla presenza della cantieristica navale di lusso e di Marina Dorica, porto turistico tra i più qualificati e capienti della Regione Marche;
- 3) Il waterfront della Mole Vanvitelliana, luogo simbolico della città dorica attorno al quale è stata realizzata la prima periferia storica della città (Rione degli Archi);
- 4) La passeggiata da mare a mare
- 5) Il waterfront del porto antico, che collega il porto al centro città.

Fig 3 - i Cinque grandi progetti che ridisegnano il futuro di Ancona secondo il Comune di Ancona.

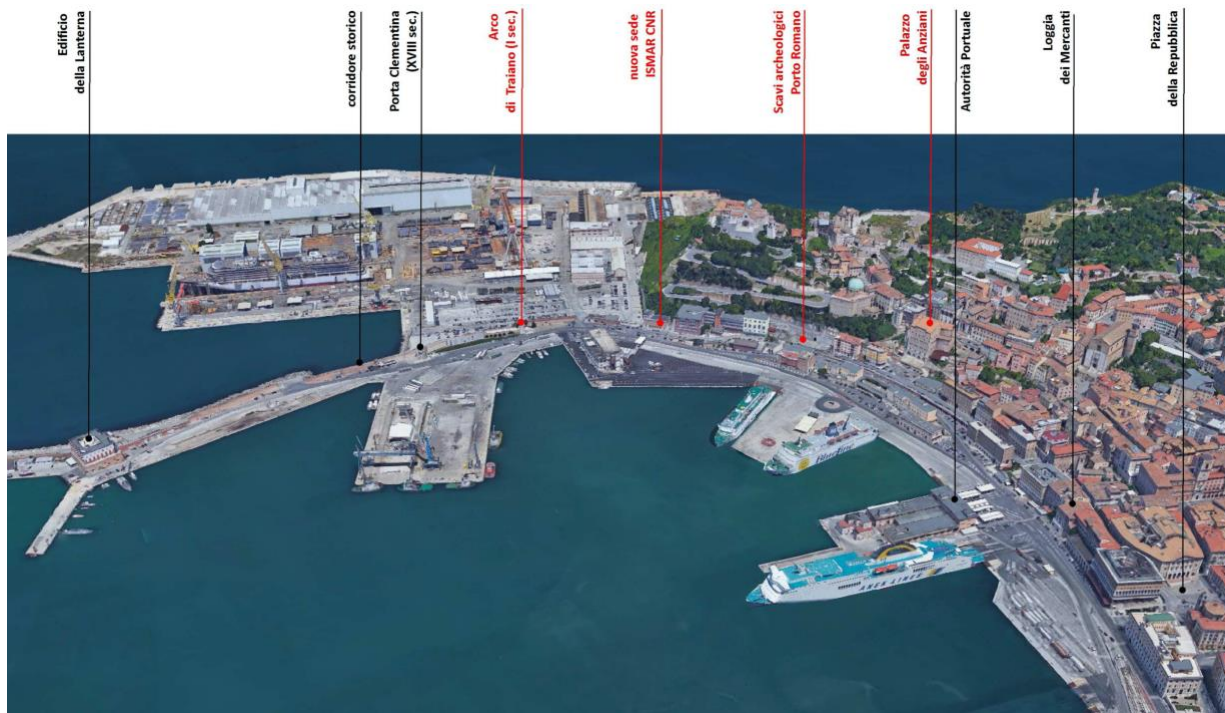


Il **waterfront della Mole Vanvitelliana (3)** è riconosciuto come polo di rango metropolitano in grado di configurarsi come catalizzatore di reti di conoscenze, saperi, economie legate ai diversi ambiti dello sviluppo culturalmente evoluto. Si tratta quindi di una realtà complessa ad alto valore rappresentativo il cui grado di potenzialità è stato riconosciuto dallo stanziamento di circa € 8.700.000 finalizzati al completamento del restauro da parte del Piano nazionale per le Città e dall'insediamento della sede dell'Adriatic Innovative factory – Incubatore e Agenzia per lo sviluppo dell'impresa culturale e creativa nella Macroregione Adriatico-Jonica nell'ambito dei progetti dei Distretti Culturali Evoluti promossi dalla Regione Marche. L'immediato intorno urbano, anche in ragione di queste due importanti progettualità incentrate sulla Mole, è divenuto recentemente oggetto di una complessiva rivalutazione: l'Autorità Portuale ha avviato lo smantellamento dei padiglioni della ex Fiera della Pesca con l'obiettivo di implementare i servizi per una nuova stazione marittima dotata di spazi, attività e funzioni che sia di supporto ai milioni di passeggeri che annualmente transitano dallo scalo dorico e contemporaneamente riesca a costituire una nuova centralità urbana integrata all'edificio storico vanvitelliano.

Il **waterfront del Porto Storico (5)**, è caratterizzato dalla presenza della maggior parte dei reperti archeologici e storico-architettonici della città e del porto. Questa porzione di centro storico, oltre alla strutturale cesura con il porto, da cui è diviso anche altimetricamente, soffre di un evidente deficit funzionale, in quanto è ai margini del centro città caratterizzato dalla presenza dei servizi e del terziario sia pubblico che privato, localizzato lungo la spina dei corsi ottocenteschi. L'area quindi deve essere non solo riqualificata fisicamente, ma rifunzionalizzata attraverso l'inserimento di strutture di carattere urbano capaci di delineare un percorso in quota rispetto al livello delle banchine portuali. L'elemento più critico è rappresentato dalla separazione tra città e porto e dalla incapacità della città di intercettare in maniera efficace i flussi che vi transitano, con il risultato che Ancona viene annualmente transitata circa 1 milione di passeggeri che non trovano naturale visitare la città. La consapevolezza delle grandi potenzialità di questo ambito trova testimonianza nella recente convergenza tra Autorità Portuale e Comune di Ancona: nel 2015, infatti, l'impegno congiunto dei due enti ha consentito la rimozione delle barriere di security ed il conseguente riassetto per la fruizione libera e pubblica del tratto più ricco di monumenti storico-architettonici ed archeologici all'interno del porto. Questa operazione da una parte ha rafforzato il ruolo delle istituzioni locali come soggetti chiave in grado di "preparare condizioni" per contesti attrattivi anche sotto il punto di vista degli investimenti, dall'altro ha generato nella comunità locale un cortocircuito di opinioni, confronti, sinergie aventi come tema centrale la riappropriazione del rapporto città-porto-mare in chiave turistico-culturale. In tale senso è bene evidenziare l'importanza del processo StrategicAncona 2025 – Piano Strategico della Città, da cui è emerso con forza e chiarezza la volontà di concentrare sul sistema fronte-mare, ed in particolare sull'arco portuale storico, interventi finalizzati al rilancio complessivo del capoluogo. È indubbio, quindi, che il waterfront del porto antico

possa considerarsi l'ambito di azione più indicato della città di Ancona per attivare una strategia integrata per uno sviluppo urbano sostenibile condiviso e partecipato.

Fig: vista aerea del waterfront del Porto Antico e indicazione dei luoghi di maggior interesse storico-culturale.



Fonte: I.T.I. Waterfront di Ancona 3.0

È a partire da tali presupposti che il Comune di Ancona, coerentemente con *StrategicAncona2025 – Piano Strategico della Città*, ha avviato un processo di sviluppo e valorizzazione incentrato sul porto antico che si prefigge di trasformare Ancona da città sul mare a città di mare contemporanea. In tal senso è importante condividere ed attivare le opportunità incentrate sulla capacità del waterfront di configurarsi come luogo effettivo di una città-capoluogo in grado di:

- indurre nuovo senso di identità e appartenenza da parte della comunità;
- intercettare esigenze e progettualità dei soggetti in grado di interpretare le dinamiche sociali ed economiche contemporanee;
- valorizzare il patrimonio storico-culturale di Ancona in relazione al porto e al rapporto col mare;
- incentivare collaborazione tra soggetti ad alta intensità di conoscenza operanti sul territorio per lo sviluppo di tecnologie innovative applicate a temi legate al mare, al porto e alla città storica;
- sperimentare azioni concrete volte all'incremento della qualità urbana in termini di sostenibilità ambientale.

Sulla base di queste linee d'orientamento, vengono delineate le seguenti opportunità a cui si dovrà dare risposta:

<i>Visione guida</i>	Ancona città di mare contemporanea
<i>Contesto d'azione</i>	Waterfront del Porto Antico
<i>Opportunità</i>	Riattivare il centro storico di Ancona e il suo tessuto sociale, produttivo ed economico attraverso una valorizzazione del patrimonio storico-archeologico-culturale integrata ad una innovativa promozione territoriale incentrata sulle qualità ed eccellenze del territorio.
	Implementare l'attrattività turistica della città di Ancona e dell'area metropolitana Medio Adriatica (AMMA) coniugando in un'offerta integrata e qualificata i cluster tematici Porto-Mare-Archeologia.
	Sviluppare, sostenere e promuovere l'innovazione "intelligente" e la ricerca tecnologica applicata supportando progetti integrati in un ambito (waterfront) capace di rappresentare la complessità del sistema urbano anconetano nelle sue molteplici identità e funzioni.
	Promuovere una gestione efficiente e un uso <i>smart</i> dell'energia nelle infrastrutture pubbliche all'interno di un contesto come il waterfront del porto antico di Ancona.
	Formare, supportare e incentivare competenze professionali e manageriali per lo sviluppo occupazionale in ambiti legati ai cluster integrati Porto-Mare-Archeologia.

A partire dalle opportunità individuate nella prima parte del documento e gli attuali strumenti di programmazione, vengono presentate e descritte a seguire azioni che dovrebbero essere intraprese per poter cogliere le opportunità legate allo sviluppo e alla valorizzazione dell'offerta turistico-culturale anconetana. Per ogni azione, vengono poi associate alcune questioni e criticità che potrebbero verificarsi a seguito di tali azioni e che, quindi, è bene tenere a mente per poter eventualmente individuare la soluzione migliore.

Non rientrano dettagliate in tabella ma possono essere considerate di contesto le opportunità delle relazioni instaurate grazie al progetto REMEMBER, la localizzazione strategica ad Ancona di stakeholder rilevanti e la presenza di personalità di spessore internazionale-diplomatico nello stesso capoluogo.

Tab. 5: Opportunità, azioni da intraprendere e criticità legate allo sviluppo dell'offerta turistico-culturale di Ancona

OPPORTUNITÀ	COSA FARE PER COGLIERE L'OPPORTUNITÀ?	QUESTIONI E CRITICITÀ
<i>I.e II I passeggeri movimentati nel porto (crocieristi e utenza croata, greca e balcanica)</i>	Informare, sensibilizzare e coinvolgere i crocieristi e i turisti che transitano da/per il porto con diverse modalità on-line e off-line, prima e durante la crociera/traversata, della presenza di un rilevante patrimonio culturale visitabile nel centro storico e nel porto di Ancona.	Possibilità che i crocieristi di siano già organizzati per conto loro o tramite altri soggetti (es. propria agenzia di viaggio) su altre attività da effettuare durante la loro permanenza ad Ancona.
<i>III. Turisti potenziali intercettabili on-line</i>	Utilizzare la parte del museo virtuale e l'app in comune per intercettare tutti coloro che visitano le altre città e porti coinvolti nel progetto Remember, al fine di fargli conoscere l'offerta culturale di Ancona e spronarli a visitarla nel futuro prossimo.	Ridotto interesse, eccessive informazioni disponibili vs.vantaggi di fruizione in loco
<i>IV. Progetto Welcome to Ancona</i>	Utilizzare il progetto <i>Welcome to Ancona</i> e la relativa app per proporre e comunicare ulteriori nuovi progetti e iniziative finalizzati alla valorizzazione e promozione del patrimonio culturale di Ancona. Una ipotesi aggiuntiva ed integrativa può essere quella di sfruttare le relazioni consolidate ed estendere al momento opportuno il progetto alle intere Marche (<i>Welcome to Marche</i>)	Da valutare l'entità, il costo e la fattibilità economica di tali progetti.
<i>V. Progetto di wayfinding integrato</i>	Utilizzare il progetto di <i>wayfinding</i> avviato dal Comune di Ancona, per integrarlo con la segnaletica e cartellonistica necessaria per identificare e fornire informazioni sull'offerta culturale di Ancona, utilizzando anche nuove tecnologie (es. QR code) per	Realizzazione di segnaletica e cartellonistica chiara e riconoscibile, dotata di elementi che permettano di distinguerla nettamente da tutte le altre

	trasmettere informazioni aggiuntive di tipo virtuale.	tipologie di segnaletica.
<i>VI. Interventi di manutenzione, riqualificazione e riconversione</i>	Possibilità di sfruttare gli interventi di manutenzione, riqualificazione e riconversione dei beni storico-architettonici effettuati dall'AdSP (es. mercato ittico), incentivando e promuovendo nuove iniziative e opportunità non solo di tipo turistico-culturale, ma anche commerciale, dando nuova vita a determinati spazi utilizzabili anche per iniziative private.	Possibilità di allungamento delle tempistiche di realizzazione delle nuove iniziative commerciali e imprenditoriali private (per questioni burocratiche, etc.)
<i>VII. Candidature a titoli e riconoscimenti</i>	Sfruttare iniziative quali la candidatura a <i>Capitale della Cultura</i> per rafforzare il valore e l'identità dell'elemento portuale ad Ancona, nonché valorizzarlo e promuoverlo, inserendolo nei dossier di presentazione dell'offerta turistico-culturale di Ancona quale attrazione primaria.	Lavoro sulla sensibilità e sulla percezione degli altri soggetti: può risultare complicato riuscire a trasmettere agli altri il valore aggiunto che si vuole dare all'elemento portuale.
<i>VII. Portale web turistico unificato</i>	Realizzare un portale web unico che contenga tutte le informazioni necessarie ad un turista per la pianificazione e l'organizzazione di un soggiorno di tipo culturale ad Ancona (es. info sull'offerta culturale, orari di apertura e alloggi, distanze e mobilità, etc.), utilizzando le tecnologie più moderne per mettere in contatto i turisti con i diversi soggetti interessati, nonché i soggetti interessati tra loro.	Coinvolgimento di soggetti diversi all'interno del portale: non tutti potrebbero essere d'accordo sulle strategie ed azioni, avere idee diverse, oppure voler rimanere autonomi.

Nella selezione delle azioni che potranno far parte della strategia vede in particolare due direttrici principali da seguire: (a) il supporto e (b) la valorizzazione dell'offerta turistico culturale locale.

Nel primo caso ci si riferisce ad azioni che supportino l'esistenza e favoriscano la costruzione di uno o più prodotti turistico-culturali (azioni che vadano in primis a favorire una migliore accessibilità fisico-informativa ovvero l'adeguata manutenzione cura dei beni) mentre nel secondo al poter ottenere i migliori risultati a partire da quanto esistente (troppo spesso infatti pur a fronte di prodotti turistici pronti o quantomeno set di fattori di attrattiva già disponibili manca l'ultimo miglio, la messa a terra che colleghi l'offerta con la domanda).

Target markets

Quali sono i target di mercato che la nuova offerta turistico-culturale di Ancona potrebbe intercettare? Chi potrebbero essere coloro che attualmente visitano il centro storico e il porto di Ancona ma che si potrebbe incrementare in termini quantitativi ovvero coloro che attualmente non visitano il centro storico e il porto di Ancona, ma che costituiscono un mercato potenzialmente acquisibile mediante la nuova offerta turistico-culturale? Va riconosciuto infine come ci siano turisti che potrebbero essere interessati all'offerta turistico-culturale di Ancona, ma che per motivazioni di vario genere costituiscono mercati di difficile acquisizione. Nella seguente tabella vengono identificate queste tre categorie (mercato esistente, mercato potenzialmente acquisibile e mercato di difficile acquisizione) ed elencati nello specifico le tipologie di visitatori che appartengono a ciascuna di queste.

Tab. 4: le tipologie di visitatori attuali, potenziali e immaginabili del Porto di Ancona

MERCATI	TIPOLOGIA DI VISITATORI
<i>Mercato esistente</i>	<ul style="list-style-type: none"> • Crocieristi in transito ad Ancona • Crocieristi che imbarcano e sbarcano ad Ancona • Passeggeri ferry che utilizzano i traghetti in modo ricorrente (per lavoro) • Passeggeri italiani che imbarcano sui traghetti ad Ancona per andare in vacanza altrove • Passeggeri stranieri che imbarcano sui traghetti ad Ancona per andare in vacanza altrove • Passeggeri stranieri che sbarcano dai traghetti ad Ancona per venire in vacanza in Italia • Passeggeri italiani che sbarcano dai traghetti ad Ancona per tornare a casa dalle vacanze • Passeggeri stranieri che sbarcano dai traghetti ad Ancona per tornare a casa dalle vacanze • Escursionisti locali, residenti nelle zone limitrofe e nel territorio marchigiano, che visitano Ancona in giornata
<i>Mercato potenzialmente acquisibile</i>	<ul style="list-style-type: none"> • Personalità, delegati e rappresentanti che frequentano Ancona per motivi istituzionali • Persone sensibili a motivazioni di tipo culturale, che vengono a conoscenza dell'offerta turistico-culturale di Ancona per motivi vari (es. museo virtuale delle città coinvolte nel progetto Remember) • Turisti balneari che alloggiano nella zona marittima di Ancona e nelle località balneari limitrofe, alla ricerca di un'escursione giornaliera alternativa in caso di maltempo
<i>Mercato di difficile acquisizione</i>	<ul style="list-style-type: none"> • Appassionati di mare, pesca e portualità, interessati a visitare il porto di Ancona • Turisti nautici, che navigano nell'Adriatico e sono interessati al porto di Ancona • Turisti che partecipano a tour europei, ed Ancona è una delle tappe • Turisti che decollano dall'aeroporto di Ancona per raggiungere altre destinazioni in Italia o all'estero • Turisti che atterrano all'aeroporto di Ancona per raggiungere altre destinazioni in Italia • Turisti spinti da motivazioni eno-gastronomiche, interessati a degustare le specialità locali quali il Mosciolo Selvatico di Portonovo e/o il vino Rosso Conero DOC • Persone che, per motivi diversi, percorrono l'Autostrada Adriatica A14 Bologna-Taranto per intero e desiderano effettuare una sosta a metà percorso per riposarsi dalla guida

Fonte: elaborazione Risposte Turismo per AdSP MAC

Come illustrato nella strategia *I.T.I. Waterfront di Ancona 3.0*, a partire da uno studio realizzato nel marzo 2013 dall'Istituto Nazionale Ricerche Turistiche sui flussi crocieristici nel porto di Ancona, dei circa 110 mila crocieristi che hanno visitato la città nel 2013, circa 55 mila lo hanno fatto in modo autonomo, mentre circa 8.500 hanno partecipato ad escursioni organizzate. Tali dati forniscono utili informazioni per comprendere meglio il livello di fruibilità turistica del porto-destinazione, anche in virtù degli aumenti del traffico crocieristico. In particolare, sono emerse alcune tendenze specifiche nei comportamenti dei crocieristi che decidono di visitare la città durante la sosta al porto:

- Optare per una visita lunga della città da Piazza della Repubblica al Duomo, seguendo sia l'itinerario "storico" suggerito dalla cartellonistica turistica cittadina, sia l'itinerario "commerciale" fino a Piazza Roma e Piazza Cavour;
- Scegliere una visita breve che si concentra sull'area storica e, in particolare, sull'area del Duomo.

In entrambi i casi la parte storica della città è di fondamentale importanza per l'esperienza di visita e, mentre il Duomo di S. Ciriaco e P.zza della Repubblica sembrano soddisfare i turisti, molti di loro lamentarono delle criticità nella zona dell'Arco di Traiano e la parte archeologica. Considerando che l'esperienza del crocierista influenzerà non solo i suoi eventuali comportamenti futuri in termini di scelta di destinazioni turistiche (decidere o meno se tornare in regione per una visita più approfondita) ma, potenzialmente, anche quelli di coloro a cui racconterà tale esperienza, le modalità di fruizione di tutta l'area del porto antico da parte del turista che viene dal mare rappresentano un "biglietto da visita" di cruciale importanza non solo per la città ma per l'intero territorio regionale.

Tipologie di visitatori appartenenti al mercato attualmente esistente e al mercato potenzialmente acquisibile con la nuova offerta turistico-culturale di Ancona: peculiarità che caratterizzano tali visitatori nella destinazione Ancona.

Tab. 5: le tipologie di visitatori del Porto di Ancona

TIPOLOGIA DI VISITATORI	DESCRIZIONE
<i>Crocieristi in transito</i>	Sono coloro che arrivano nel porto di Ancona con la nave da crociera, hanno la possibilità di visitare il porto e il centro storico a piedi o con mezzi pubblici, dopodiché ritornano nella nave alla volta della destinazione successiva
<i>Crocieristi che imbarcano/sbarcano</i>	Sono coloro che si imbarcano nella nave da crociera (e, al termine della crociera, sbarcano) nel porto di Ancona poiché, nella maggior parte dei casi, si tratta di persone residenti ad Ancona, nelle zone limitrofe oppure nel Centro Italia e scelgono di effettuare una crociera sull'Adriatico.
<i>Passeggeri ferry che utilizzano i traghetti</i>	Si tratta di persone che si imbarcano in modo ricorrente (a frequenza

<i>in modo ricorrente</i>	settimanale, mensile, etc.) nei traghetti in partenza dal porto di Ancona per motivi di lavoro.
<i>Passeggeri italiani che imbarcano sui traghetti ad Ancona per andare in vacanza altrove</i>	Si tratta di turisti italiani che imbarcano nel porto di Ancona per raggiungere via mare la destinazione della loro vacanza, che nella maggior parte dei casi si trova in Croazia, in Grecia e in generale nella regione balcanica.
<i>Passeggeri stranieri che imbarcano sui traghetti ad Ancona per andare in vacanza altrove</i>	Si tratta di turisti stranieri (soprattutto tedeschi, francesi, etc.) che imbarcano nel porto di Ancona per raggiungere via mare la destinazione della loro vacanza, che nella maggior parte dei casi si trova in Croazia, in Grecia e in generale nella regione balcanica.
<i>Passeggeri stranieri che sbarcano dai traghetti ad Ancona per venire in vacanza in Italia</i>	Si tratta di turisti stranieri (soprattutto croati, greci e, in generale, provenienti dalla regione balcanica) che raggiungono l'Italia via mare e sbarcano nel porto di Ancona per raggiungere la destinazione italiana della loro vacanza.
<i>Passeggeri italiani che sbarcano dai traghetti ad Ancona per tornare a casa dalle vacanze</i>	Si tratta degli stessi turisti italiani che, qualche settimana prima, si erano imbarcati nel porto di Ancona per raggiungere via mare la destinazione della loro vacanza. Ora, invece, sbarcano nello stesso porto per tornare a casa al termine delle loro vacanze.
<i>Passeggeri stranieri che sbarcano dai traghetti ad Ancona per tornare a casa dalle vacanze</i>	Si tratta degli stessi turisti stranieri (soprattutto tedeschi, francesi, etc.) che, qualche settimana prima, si erano imbarcati nel porto di Ancona per raggiungere via mare la destinazione della loro vacanza. Ora, invece, sbarcano nello stesso porto per tornare a casa al termine delle loro vacanze.
<i>Escursionisti locali che visitano Ancona in giornata</i>	Sono tutti i cittadini anconetani, i residenti nei territori circostanti e, più in generale, in tutta la Regione Marche che vengono a visitare in giornata la città di Ancona.
<i>Persone di particolare rilevanza che frequentano Ancona per motivi istituzionali</i>	Si tratta di personalità, delegati, associati e rappresentanti che frequentano Ancona per motivi istituzionali, essendo Ancona sede di numerose istituzioni dello spazio adriatico, i quali sono più sensibili ad elementi di tipo culturale e, quindi, più inclini alla fruizione di un'offerta storico-culturale più diluita nel corso dell'anno.
<i>Persone sensibili a elementi di tipo culturale, che vengono a conoscenza dell'offerta turistico-culturale di Ancona per motivi di vario genere</i>	Si tratta di persone sensibili ad elementi di tipo culturale, che vengono a conoscenza dell'offerta storico-culturale, archeologica e architettonica di Ancona per motivi di vario genere (ad esempio, grazie al museo virtuale che verrà realizzato nei porti delle altre città coinvolte nel progetto Remember).
<i>Turisti balneari che alloggiano ad Ancona e nelle località limitrofe</i>	Si tratta di turisti che alloggiano nella zona marittima di Ancona e nelle località balneari limitrofe per motivazioni di tipo balneare, ma che in caso di maltempo sono interessati a svolgere un'escursione giornaliera nel centro storico o nel porto di Ancona per visitare il patrimonio storico-culturale locale.

Fonte: elaborazione Risposte Turismo per AdSP MAC.

Fields of cooperation

Su scala europea ed internazionale, l'AdSP partecipa da anni a numerosi progetti ed è già interlocutore affidabile e presente nei partenariati (spesso in tandem o collaborazione con Camera di Commercio e Forum AIC). Per quanto riguarda la cooperazione su scala locale/territoriale si è già menzionato come il tessuto ed il dialogo tra interlocutori locali sia attivo da tempo, soprattutto nell'ambito istituzionale (Ad esempio AdSP-Camera Commercio ovvero AdSP e Comune di Ancona o AdSP e Regione Marche). Sono inoltre state tentate e lanciate alcune iniziative in collaborazione con la catena turistica locale che potranno essere ulteriormente sostenute e rilanciate. Il tessuto turistico locale, seppur non forte in termini quantitativi rispetto ad altre destinazioni, si è dimostrato attento e pronto ad intervenire.

Come ricordato nella prima sezione del documento è proprio grazie alla collaborazione con le associazioni culturali cittadine e le istituzioni religiose che oggi è possibile rendere visitabili al di fuori dei normali orari di apertura, nei giorni di approdo dei crocieristi (e con possibilità di visita guidata), attrazioni quali la Chiesa di S. Maria della Piazza e la Loggia dei Mercanti, altrimenti visitabili soltanto dall'esterno.

Le fonti di finanziamento delle singole attività future sono da stabilirsi anche in base ai progetti che verranno identificati come meritevoli di attenzione (tra risorse proprie, risorse pubbliche, risorse provenienti da finanziamenti UE) a partire da quelli identificati nella sezione precedente.

Conclusion

La movimentazione di turisti nel porto ed in particolare dei crocieristi ha favorito la possibilità che Ancona si riconoscesse destinazione turistica e scoprisse la propria vocazione turistico-culturale potenziale. Si tratta di un percorso tutt'ora in corso che - anche grazie all'analisi domanda/offerta della prima parte del documento evidenzia però diversi limiti affrontati in questo documento: dall'accessibilità esterna (Aeroporto, collegamenti diretti via treno) all'accessibilità fisico informativa (siti e portali assenti o comunque prevalentemente solo in Italiano), l'assenza di prodotti integrati (es. card e più in generale uno scarso collegamento tra le attrazioni dell'offerta culturale della città). Ancona costituisce oggi uno dei maggiori centri economici della costa adriatica, nonché principale centro urbano delle Marche per dimensioni e popolazione ma non ha (ancora) raggiunto lo status di destinazione turistica. La componente turistica attuale, se si esclude proprio quella crocieristica, ha una storica vocazione domestica (connazionali in vacanza balneare), basti pensare a come complessivamente la città conti su poco più di 4.500 posti letto complessivi di cui solo un terzo in hotel 3-4 stelle, con una quota più alta di esercizi extra alberghieri. Negli ultimi anni sono state promosse con un certo livello di continuità iniziative turistiche mirate al soddisfacimento in particolare delle necessità dei crocieristi e dei passeggeri delle navi traghetto in arrivo o in attesa dell'imbarco. Tra queste scelte si sono analizzate nel lavoro la presenza del punto informativo presso il terminal crociere, una segnaletica ad hoc per i crocieristi, l'apertura del centro IAT presso i magazzini del sale del porto e, soprattutto, l'apertura dei siti di interesse fuori orario per permettere le visite alle escursioni guidate dei crocieristi.

Il porto, anche grazie alle attività del progetto REMEMBER, conferma il suo ruolo di fornitore di supporto e attivatore degli altri soggetti territoriali per quanto concerne le attività che insistono sulle aree di sua competenza su scala locale ed internazionale. Alcune di esse sono già inserite in strumenti di programmazione di altri soggetti (in primis il Comune) e altre potrebbero vedere il loro lancio nelle prossime stagioni (ci si riferisce in questo caso agli investimenti diretti proprio al supporto del comparto crocieristico, quello a maggior valore aggiunto per il territorio grazie alla sua presenza prevalente di stranieri a bordo).

L'analisi dei target di mercato che la nuova offerta turistico-culturale potrebbe intercettare permette di dividere tra mercato esistente, mercato potenzialmente acquisibile e il mercato di difficile acquisizione ad Ancona. Una opportuna consapevolezza tra le diverse potenzialità sarà fondamentale per impostare i prossimi passaggi in modo efficiente ed efficace. Nella scelta delle future azioni da intraprendere per valorizzare l'offerta culturale si sottolinea l'importanza di considerare con attenzione - e possibilmente tornare ad approfondire - le soglie esistenti e potenziali: pur a fronte di biglietti gratuiti l'ordine di grandezza attuale del maggiore attrattore culturale ad Ancona si attesti su circa 60.000 visitatori (Mole)

pari a circa l'intero numero dei visitatori di tutti i musei (circa 70.000, trainati a metà dal Museo Omero, all'interno della prima citata Mole).

Cultural Touristic Management strategy

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Project acronym	REMEMBER
Project Title	REstoring the MEmory of Adriatic ports sites.Maritime culture to foster Balanced tERritorial growth
Start of the project	January 2019
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Introduction

This document is part of the Work package (WP) 5 Adriatic ports cultural network that aims at setting up the Adriatic ports cultural network for the cross-border valorization of Adriatic Italian and Croatian ports as a single integrated destination for cultural tourism, linked but at the same time alternative to the coastal tourism.

Activity 5.1 answers to a real need of involved partners to create added value for the territories from the cultural heritage that must be safeguarded. Therefore, all involved partners are committed to continue the cooperation on cultural and tourism valorization also after the end of the project, in line with the existing local developing strategies and building upon existing cooperation frameworks among the PPs.

The CTM strategy has two main parts:

1. Current state of the offer in the port/city
2. CTM Strategy

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Part one: Current state of the offer in Venice and Chioggia

Available cultural offer

Venice

Due to the immense historical and artistic heritage it possesses, Venice, one of the main Italian cities of art, is an exclusive destination for cultural tourism, a sector capable of directly affecting the local economy. The image of Venice is deeply linked to the concept of culture also understood as a gastronomic, artisanal, folkloristic heritage, etc., the so-called intangible heritage. Venice is particularly rich in museums and historic buildings of great artistic and cultural value, offering guests the opportunity to embark on a journey through art and culture to discover the art treasures kept in minor museums and less known cultural spaces, without forgetting the Venice lagoon with its small and large islands and its traditions.

The "Venice and its Lagoon" site was inscribed on the World Heritage List in 1987 for the uniqueness and singularity of its cultural values, consisting of an exceptional, integrated historical, archaeological, urban, architectural, artistic and cultural heritage. in an extraordinary environmental, natural and landscape context. The Venice Lagoon is one of the oldest and most complex examples of the relationship between anthropic activities and natural dynamics, where there is the greatest concentration of cultural heritage and artistic expressions, stratified over the centuries. The Site can be considered as a "cultural landscape" that illustrates the combined work of man and nature over time under the influence of physical constraints and environmental, social, economic and cultural opportunities. From this point of view, Venice and its lagoon have few direct competitors.

There are many institutions and foundations based in Venice. Each one, large and small, local, national or international, contributes to making Venice the city of culture par excellence, with its vast network of public and private museums, galleries, events and shows that allow the city to compete on an equal footing with the major European capitals. It should be emphasized that the city is home to the Biennale and the International Film Festival, as well as the seat of prestigious public and private foundations, such as: Venetian Civic Museums, La Fenice Theater, P. Guggenheim, Querini Stampalia, Bevilacqua La Masa, Cini, Pinault, Vedova.

Chioggia

Chioggia is a small town, standing on the southern part of the Venice lagoon, on small islands connected by bridges. It is part of the Venice area and its lagoon, as well included in the Unesco World Heritage sites in 1987. Chioggia has been built in Roman times, as evidenced by the structure of the "cardo" and "decumano" that run through it; it is also mentioned in the Natural History of Plinio il Vecchio. Until Roman times, Chioggia was known for the production of a particularly valuable salt, so precious as to represent a currency in commercial exchanges and to be defined as a state asset by the Serenissima.

Survived the barbarian invasions, it was part of the first Venetian state, although Chioggia has always maintained a sort of independence from the Serenissima. Chioggia is now an artificial island: initially it was a peninsula, but in the mid-16th century, to defend the second city of its territory, the Serenissima dug the Cava canal (which today is crossed by a road bridge). Chioggia is separated from the sea by the long beach of “Lido di Sottomarina”.

Concerning the cultural heritage, Chioggia is built on “calli” and ancient buildings along the main way (partially pedestrian) of the city - Corso del Popolo, that stands parallel to the canal Veda with its 9 crossing bridges. In the South, the “Porta Garibaldi” is a fortress built around 1300 that was once called the “Door of Santa Maria”, probably due to the internal capital of the Madonna di Marina and was originally part of the external fortification. The Santa Maria Assunta Cathedral is an example of Baroque style, designed by Baldassare Longhena, the architect of the “Salute church” in Venice, and hosts some paints by Jacopo Palma il Giovane. The octagonal dome of the temple of San Martino, in Venetian Gothic style, and the Church of San Francesco, built in 1400 and restored in 1700, the San Giacomo Basilica, which hosts the icon of the Madonna della Navicella, surrounded by “tolele” (votive tablets), are all monuments established along the Corso del Popolo. Next to Sant’Andrea Church, the Clock Tower is the oldest functioning tower clock in the world. At the very end of Corso del Popolo, the Vigo bridge was built in 1685 and decorated with marble in 1762; it is still opened by lion sculptures in Istrian stone. Also a lion statue - amicably called “el gatòn ”(the big cat) – at the top of Vigo column in the square of the same name.

Chioggia has two important sites to be specifically mentioned at cultural level: the Palazzo Grassi with the Adriatic Zoology museum “Giuseppe Olivi” and the “Civic museum of the Southern Lagoon”.

Located on the Riva Vena, near the Vigo Bridge, Palazzo Grassi was born as the home of the Grassi family, from which it takes its name. The Grassi were a family of grain merchants and in 1718 they acquired the noble title from the Senate of the Serenissima and built a palace of the same name along the Canal Grande in Venice. The first Palazzo Grassi in Chioggia was begun in the seventeenth century, however at the beginning of the eighteenth century it was modernized by Andrea Tirali. In 1830 it became the provisional seat of the Town Hall and from the second half of the 19th century it was used as a hospital. Restored in 2000, it now houses the Faculty of Marine Biology of the University of Padua. Inside Palazzo Grassi there is also the seat of the “Giuseppe Olivi” Museum of Adriatic Zoology. Here the most important historical collection of marine animals of the Adriatic is kept.

The Civic Museum of the Southern Lagoon is an archaeological and ethnographic museum housed in the former Convent of “San Francesco fuori le mura”. The first layout of the building dates back to 1315, while the second, after its destruction in the war between the Venetians and the Genoese (1378-1381), to 1434. In 1806 the convent was deconsecrated and from that moment on it assumed various functions: in 1808 it became a military warehouse; then it was used as a fruit and vegetable warehouse at the end of the First World War. In the last post-war period, the complex became a shelter for displaced people and finally, until a few decades ago, it was adapted as a garage for local buses. The Civic Museum has been operational since 1997 thanks to the contribution of the European Union. The museum is divided into three floors and collects the archaeological evidence found in Chioggia dating back to various historical

periods. On the top floor there is an exhibition on local navy and shipbuilding dating from 1700 to the present day.

Chioggia has an ancient tradition in fisheries activities and counts two important ichthyic markets, one dedicated to wholesale and one to retail. The wholesale one is the most important one at national level.

Development constraints

Development constraints are summed up in both the Destination Management Plans of Venice and Chioggia. Even if the pandemic affected the main tourism index, the SWOT analysis contained in those documents are still valid. Therefore the following tables sum up the internal (weaknesses) and external (threats) development constraint for the two destinations.

Venice

Weaknesses	Threats
<ul style="list-style-type: none"> • Trend towards poor quality and excessive standardization of commercial activities • Insufficient data and analysis regarding the type of tourist based on age, habits, spending capacity, expressed and intrinsic expectations and on the use of the proposed tourist offer • High concentration of second homes and apartments for tourist use not registered • Difficulty in creating a network of thematic offers (product clubs, business networks) • Insufficient awareness of the use of environmental resources as a factor of local development • Excessive decline in the resident population in the historic-artistic center. The access hub to the historic center is not sufficiently diversified • Excessive tourist load in some areas of the island city in prolonged periods of high seasonality • Low average stay • Excessive separation (cultural, environmental, logistical) between the so-called "cities of land "and" city of the sea " • Flattening of goods and services towards tourist monoculture 	<ul style="list-style-type: none"> • Loss of identity and perception of the city as a theme park (Veniceland) • Spread of low cost tourism, with limited purchasing capacity • Decline of medium to long term holidays • Inability to promote and sell large area proposals on the markets due to widespread parochialism • Risk of impoverishment of the patrimony of local knowledge and of the values linked to traditions • Inability to use different languages for markets, targets and tools • Degradation of buildings, and therefore of the city's heritage, due to water and its elevation • Drop in the income of Italian and foreign families and increase in unemployment, with a consequent decrease in consumption • Risk of the so-called "tourism monoculture", which would entail extensive dependence on the volatility of demand in the event of major events with a negative impact on tourism (for example: terrorism, natural disasters, etc.)

Chioggia

Weaknesses	Threats
<ul style="list-style-type: none"> • Scarce promotion of the Unesco Brand • Few tourist information points • Updating innovative detailed plans • Limited tourism planning • Limited promotion of destination • Developing spas, swimming pools and car parks • Encouraging business networking • Public access to the sea not always open • Inadequate infrastructure • Unsuitable location • Lack of a multi-purpose sports centre • Poor care of few green areas, non-existent or uneven pavements, uncontrolled parking of bicycles, motorbikes and cars in pedestrian areas • Unnecessary and image-damaging for the tourist system • Limited pedestrian zones for recreation, shopping, cycle paths, parks, green areas, etc. • Scarce presence of bike paths and infrastructures 	<ul style="list-style-type: none"> • Obsolete and dangerous road system • Lack of railways • Strengthen implementation capacities • Few infrastructure, services and road connections with Chioggia and Sottomarina Lido • Underdeveloped shoreline management

Development opportunities

Development opportunities are as well summed up in both the Destination Management Plan of Venice and Chioggia. Even if the pandemic affected the main tourism index, the SWOT analysis contained in those documents are still valid. Therefore the following tables sum up the internal (strengths) and external (opportunities) development opportunities for the two destinations.

Venice

Strenght	Opportunities
<ul style="list-style-type: none"> • Territory with large numbers of presences and arrivals • Identification brand (Venice) already positioned on international markets and with a strong identity. Venice is and remains one of the destinations to see at least once in a lifetime • Varied accommodation offer • Consolidated tradition in the organization of cultural and sporting events • Rich natural heritage given by the lagoon, the beaches and oases of Lido and Pellestrina and the woods on the mainland • Presence of an airport (Marco Polo) of international standing and another in the vicinity (Canova, TV), which offer different types of scheduled and low-cost flights • Strategic position with respect to the Northeast road axis, both from the point of view of road and motorway connections (A4 and A27) and of the railway network (Mestre and Santa Lucia stations) • Presence of an important port hub • Presence of active and proactive business associations • Presence of voluntary associations and very active committees • Excellent positioning in national and international tourist circuits • Development of the public transport network with positive intermodal formulas • Wide range of accommodation facilities, diversified in hospitality formulas and in the type of price, both in the hotel and in the complementary sector 	<ul style="list-style-type: none"> • The tourism market presents new niches that are aimed at sustainable and experiential tourism, slow tourism and sports and food and wine tourism • In addition to the usual markets of Europe, USA, Japan, there are new potentially interesting markets, with a high propensity to spend • Possible availability of funds from the tourist tax for infrastructure investments and promotion • Greater awareness, on the part of political bodies, of the dignity of tourism as an autonomous productive sector • The belonging of the Municipality of Venice to the "Venice Metropolitan City" area. • Financing opportunities represented by the POR FESR Funds (Regional Operational Program European Regional Development Fund) for the construction / improvement of tourism products and for business networks • Establishment of external investors who push for accommodation qualification • Development of project finance and new forms of investment attraction financial • Embryonic offers on thematic areas in strong expansion on the markets • Growth in demand for green tourism fruition models, in tune with a greater territorial awareness on sustainable development issues • Development, in the territory and in the surrounding areas, of large medium-high range malls • Continued growth of air connections on the Veneto hubs 45 • Development of the tourist offer in the mainland

Strenght	Opportunities
<ul style="list-style-type: none"> • Wide and widespread catering offer throughout the territory. Overall high environmental and landscape quality • Presence of various higher education institutions, including: two universities (Ca 'Foscari and IUAV), Academy of Fine Arts, Venice International University, Benedetto Marcello Conservatory of Music, Marcianum, IUSVE, EIUC • Excellence in offering international events (e.g. Carnival, Film Festival, Biennale of art and architecture) • Availability of equipped beaches • Excellent active presence of cultural bodies and foundations, in various ways and capacities involved in the territory • International uniqueness of the “lagoon” resource • System of forts and entrenched fields • Porto Marghera industrial area and its waterfront 	<ul style="list-style-type: none"> • Expansion of the so-called "student tourism"

Chioggia

Strenght	Opportunities
<ul style="list-style-type: none"> • Recognition in 1987 Unesco Heritage Site 'Venice and its Lagoon • Historic Centres with cultural and artistic heritage • Lagoon • Accommodation: family management, good cuisine with typical local products, location • Good quality of services offered • Professional training • Modern bathing establishments with access for the disabled • Dog-friendly beaches • Themed bathing establishments • Family-friendly beaches (Blue Flag and Green Flag) • High-quality restoration with typical local cuisine • Retail fish market • Promenades and pedestrian paths • Typical products: horticultural and gastronomic (fish, horticultural, bakery and lagoon products, etc.) • Le Tegnùe and other high value protected area 	<ul style="list-style-type: none"> • Opportunities to develop specialised centres for psammotherapy and halotherapy • Third Age Tourism • Townspeople of Chioggia and their customs and traditions • Eco-friendly product clubs • Quality recognition Legambiente Turismo • Novelties in the presentation of the town to tour operators • Citizens' Awareness of Urban Sustainability Development • Fishing tourism • Proximity to Venice

Part two: CTM strategy

Tourist demand and consumption effects

Venice

In the five-year period 2016-2020, arrivals, which in 2016 were equal to approximately 4 million and 645 thousand units, in 2020 counted approximately 1 million and 337 thousand units (-75.8% on 2016), while the presences (total number of overnight stays), which in 2016 had recorded approximately 10 million and 511 thousand units, in 2020 they amounted to approximately 3 million and 557 thousand units (-66.2% on 2016).

The indicators are also drastically decreasing in the two-year period 2019-2020: in 2020 arrivals recorded a decrease of -75.8% on 2019, equal to an absolute decrease of approximately 4 million and 186 thousand units, while presences decreased by -72,5% on 2019, with an absolute decrease of approximately 9 million and 391 thousand units.

The average stay is equal to 2.66 days, the highest in the five-year period.

Anno	Arrivi	Var. %	Presenze	Var. %	Perm. Media
2008	3.433.775	-5,3%	8.487.539	-4,0%	2,47
2009	3.405.115	-0,8%	8.445.911	-0,5%	2,48
2010	3.708.407	8,9%	8.521.247	0,9%	2,30
2011	4.167.171	12,4%	9.417.872	10,5%	2,26
2012	4.106.161	-1,5%	9.310.132	-1,1%	2,27
2013	4.251.798	3,5%	9.778.225	5,0%	2,30
2014	4.280.632	0,7%	9.983.416	2,1%	2,33
2015	4.495.857	5,0%	10.182.829	2,0%	2,26
2016	4.645.567	3,3%	10.511.788	3,2%	2,26
2017	5.034.882	8,4%	11.685.819	11,2%	2,32
2018	5.255.499	4,4%	12.118.298	3,7%	2,31
2019	5.523.283	5,1%	12.948.519	6,9%	2,34
2020	1.337.626	-75,8%	3.557.036	-72,5%	2,66

Tabella 1.1: Fonte: elaborazioni del Comune di Venezia, Osservatorio del Turismo e Monitoraggio dei Dati su dati dell'Ufficio di Statistica della Regione del Veneto.

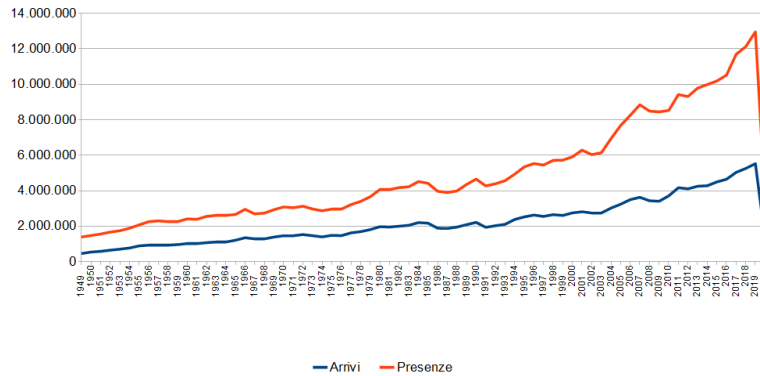


Figura 1.1: Andamento arrivi e presenze della serie storica anni 1949-2020.

In 2020, the hotel sector recorded, in the entire municipality, about 886 thousand arrivals (with an absolute decrease of about 2 million and 881 thousand units, equal to a relative decrease of -76.5% on 2019), which correspond to approximately 1 million and 975 thousand presences (with an absolute decrease of approximately 5 million 858 thousand units, equal to a relative decline of -74.8% on 2019). The result is an average hotel stay of 2.23 days (compared to 2.10 in 2019), the longest in the five-year period. Also in 2020, albeit with data in drastic decline compared to previous years, the hotel sector is confirmed as the main one in the hospitality segment, as it welcomes the majority of guests, 66.3% of arrivals (68.2% in 2019) and 55.5% of overnight stays (60.5% in 2019).

The complementary sector, on the other hand, counted around 451 thousand arrivals in the entire municipality (with an absolute decrease of about 1 million and 304 thousand units, equal to a relative decrease of -74.3% on 2019), reversing the growth trend recorded for eight consecutive years. These arrivals correspond to 1 million and 583 thousand presences (with an absolute decrease of approximately 3 million and 533 thousand units, equal to a relative decrease of 69.1% on 2019). The average stay rises to 3.51 days (2.91 in 2019), confirming itself, however, as the stay formula that stands out for its longer duration. In 2020, the complementary welcomes 33.7% of arrivals (31.8% in 2019) and 44.5% of overnight stays (39.5% in 2019).

Comune di Venezia	2020			Var. % 20/19		
	Arrivi	Presenze	P. Media	Arr.	Pres.	P. Media
Alberghiero	886.226	1.974.505	2,23	-76,5%	-74,8%	7,2%
Complementare	451.400	1.582.531	3,51	-74,3%	-69,1%	20,3%
TOTALE	1.337.626	3.557.036	2,66	-75,8%	-72,5%	13,4%
Stranieri	921.540	2.413.567	2,62	-80,7%	-78,1%	13,4%
Italiani	416.086	1.143.469	2,75	-44,3%	-40,4%	7,0%

Tabella 1.3: Fonte: elaborazioni del Comune di Venezia, Osservatorio del Turismo e Monitoraggio dei Dati su dati dell'Ufficio di Statistica della Regione del Veneto.

Foreigners represent 68.9% of arrivals (86.5% in 2019) and 67.9% of presences (85.2% in 2019) of the entire tourist market: in 2020 the decrease in arrivals of foreigners, who amounted to approximately 922 thousand units, corresponding to an absolute decrease of approximately 3 million and 855 thousand, equal to a relative decrease of -80.7% on 2019. The presences are approximately 2 million and 414 thousand, with an absolute decrease of 8 million 616 thousand units, equal to a relative decrease of -78.1% on 2019. The average stay of foreign tourists stands at 2.62 days (the highest figure in the five-year period), an increase compared to 2019 where it was equal to 2,31 days.

The foreign market remains the segment that contributes most to the overall number of both arrivals (68.9%) and overnight stays (67.9%) recorded in 2020. The foreign market is also the same one which at the same time recorded 92.1% in the overall decline in arrivals, and 91.7% in the overall decline in overnights.

Consequently, the relative weight of the internal market is equal to 31.1% as regards arrivals and 32.1% as regards presences. The Italian market accounted for 8.6% on the overall decline in arrivals and 8.3% on the overall decline in presences.

Paese di provenienza	Alberghiero		Complementare		Totale strutture	
	Arrivi	Presenze	Arrivi	Presenze	Arrivi	Presenze
Germania	104.828	257.333	79.487	233.333	184.315	490.666
Francia	61.896	169.017	37.769	139.037	99.665	308.054
Regno Unito	53.874	153.413	23.748	81.137	77.622	234.550
Austria	37.969	86.760	18.916	52.381	56.885	139.141
Svizzera-Liechtenstein	33.027	82.109	17.191	54.165	50.218	136.274
Spagna	22.863	54.706	11.924	34.929	34.787	89.635
Paesi Bassi	14.498	30.700	11.292	29.140	25.790	59.840
Belgio	11.053	28.198	6.384	19.109	17.437	47.307
Russia	10.525	22.956	6.262	21.050	16.787	44.006
Polonia	9.038	19.385	6.518	16.959	15.556	36.344
Romania	6.471	18.556	3.785	17.014	10.256	35.570
Repubblica Ceca	4.128	8.771	3.426	8.888	7.554	17.659
Ucraina	4.659	9.346	2.035	9.305	6.694	18.651
Portogallo	4.464	11.491	2.001	8.086	6.465	19.577
Turchia	3.081	6.302	2.351	7.200	5.432	13.502
Irlanda	3.355	9.494	1.904	7.405	5.259	16.899
Ungheria	3.256	7.125	1.931	6.307	5.187	13.432
Slovenia	3.139	4.750	1.613	5.011	4.752	9.761
Danimarca	2.858	7.370	1.433	4.237	4.291	11.607
Grecia	2.955	7.288	1.185	4.288	4.140	11.576
Svezia	2.983	6.754	1.069	3.392	4.052	10.146
Croazia	2.490	5.143	926	3.604	3.416	8.747
Bulgaria	1.518	4.551	922	3.447	2.440	7.998
Lituania	1.332	3.254	867	2.899	2.199	6.153
Slovacchia	1.044	2.363	447	2.207	1.491	4.570
Finlandia	1.023	5.214	439	2.336	1.462	7.550
Lussemburgo	1.019	2.710	412	1.515	1.431	4.225
Norvegia	953	2.855	378	1.544	1.331	4.399
Estonia	675	1.582	375	1.258	1.050	2.840
Lettonia	577	1.331	367	1.801	944	3.132
Malta	400	1.102	192	639	592	1.741
Cipro	254	596	76	357	330	953
Islanda	93	460	49	219	142	679
Altri Paesi Europa ¹	6.814	15.024	4.177	15.685	10.991	30.709
TOTALE EUROPA	419.112	1.048.009	251.851	799.884	670.963	1.847.893

Tabella 1.22: Fonte: elaborazioni del Comune di Venezia, Osservatorio del Turismo e Monitoraggio dei Dati su dati dell'Ufficio di Statistica della Regione del Veneto.

Paese di provenienza	Alberghiero		Complementare		Totale strutture	
	Arrivi	Presenze	Arrivi	Presenze	Arrivi	Presenze
U.S.A.	28.789	66.334	14.501	47.811	43.290	114.145
Brasile	14.311	29.805	5.021	13.405	19.332	43.210
Argentina	5.590	11.484	2.740	7.208	8.330	18.692
Messico	4.692	8.221	2.156	5.435	6.848	13.656
Canada	2.801	6.928	1.783	7.646	4.584	14.574
Venezuela	477	1.086	224	739	701	1.825
Altri Paesi Americhe*	11.522	20.426	5.366	16.274	16.888	36.700
TOTALE AMERICHE	68.182	144.284	31.791	98.518	99.973	242.802
Giappone	28.677	44.910	2.603	6.321	31.280	51.231
Corea del Sud	20.964	31.277	7.206	15.639	28.170	46.916
Cina	19.732	32.189	5.432	16.447	25.164	48.636
India	3.251	7.343	1.629	4.340	4.880	11.683
Altri Paesi Asia*	16.391	32.929	2.897	10.676	19.288	43.605
TOTALE ASIA	89.015	148.648	19.767	53.423	108.782	202.071
Israele	2.836	7.499	1.137	3.539	3.973	11.038
Altri Asia Occidentale*	4.546	9.976	2.053	8.737	6.599	18.713
TOTALE ASIA OCCIDENTALE	7.382	17.475	3.190	12.276	10.572	29.751
Africa mediterranea*	2.559	7.023	1.508	6.298	4.067	13.321
Sud Africa	793	2.273	357	3.609	1.150	5.882
Egitto	666	1.547	364	2.180	1.030	3.727
Altri Paesi Africa*	2.434	5.673	899	7.437	3.333	13.110
TOTALE AFRICA	6.452	16.516	3.128	19.524	9.580	36.040
Australia	6.379	16.173	4.435	15.243	10.814	31.416
Nuova Zelanda	946	2.348	700	2.919	1.646	5.267
TOTALE OCEANIA	7.325	18.521	5.135	18.162	12.460	36.683
Altri Paesi* e Paesi non specificati	7.878	12.589	1.332	5.738	9.210	18.327
TOTALE STRANIERI (Europei ed extraeu.)	605.346	1.406.042	316.194	1.007.525	921.540	2.413.567
TOTALE ITALIA	280.880	568.463	135.206	575.006	416.086	1.143.469
TOTALE GENERALE	886.226	1.974.505	451.400	1.582.531	1.337.626	3.557.036

Tabella 1.23: l'elenco dettagliato è consultabile al paragrafo 1.16 a fronte.

Fonte: elaborazioni del Comune di Venezia, Osservatorio del Turismo e Monitoraggio dei Dati su dati dell'Ufficio di Statistica della Regione del Veneto.

The presences of Italians in 2020 decreased by -40.4% compared to 2019, while arrivals decreased by -44.3%. In 2020 the arrivals of Italian visitors amounted to approximately 416 thousand units (with an absolute decrease of approximately 331 thousand units on 2019) which correspond to approximately 1 million and 143 thousand presences (with an absolute decrease of approximately 775 thousand units on 2019).

The average stay of Italian tourists marks an increase for the sixth consecutive year, reaching 2.75 days (2.57 in 2019). The historic city welcomes 69% of arrivals (63.6% in 2019) and 71.2% of presences (68.1% in 2019). 3.31% of tourists arrived at the Venice Lido in 2020 (compared to 2.6% in 2019) and 4.24% stayed there (compared to 3.3% in 2019). Finally, the mainland accounts

for 27.7% of arrivals and 24.5% of total overnight stays, down after five consecutive years of growth.

Chioggia

Regarding Chioggia, the trend of touristic flow seems to not be affected by the pandemic. In fact, the arrivals and permanence maintained constant in 2020. It clearly emerges that Chioggia host a seaside tourism, proved by the long lasting permanence. During last decade, nevertheless, the average permanence declined, probably as general consequence of the economic crisis beyond the COVID.

YEAR	ARRIVI		PRESENZE		TOTALE		PERM. MEDIA
	Italiani	Stranieri	Italiani	Stranieri	Arrivi	Presenze	
2008	188.873	71.621	1.661.995	483.982	260.494	2.145.977	8,24
2009	193.496	71.303	1.645.786	469.453	264.799	2.115.239	7,99
2010	185.478	72.157	1.644.399	468.585	257.635	2.112.984	8,20
2011	187.061	74.467	1.595.540	488.742	261.528	2.084.282	7,97
2012	132.314	72.563	865.690	460.604	204.877	1.326.294	6,47
2013	128.301	72.989	847.918	466.586	201.290	1.314.504	6,53
2014	120.840	77.200	742.146	497.028	198.040	1.239.174	6,26
2015	144.829	81.122	786.024	524.161	225.951	1.310.185	5,80
2016	148.393	87.379	793.164	538.894	235.772	1.332.058	5,65
2017	160.383	95.741	854.570	586.106	256.124	1.440.676	5,62
2018	177.966	92.385	876.102	520.687	270.351	1.396.789	5,17
2019	178.663	95.797	886.161	505.638	274.460	1.391.799	5,07
2020	174.561	39.126	835.733	206.819	213.687	1.042.552	4,88
2021	187.118	75.621	980.710	449.908	262.739	1.430.618	5,45

Most tourists prefer alternative shape of accommodation from hotel, both considering Italian and foreign presences.

Movimento turistico per tipo di esercizio. Anno 2021

	ARRIVI		PRESENZE		TOTALE	
	Italiani	Stranieri	Italiani	Stranieri	Arrivi	Presenze
Alberghi 5 e 4 stelle	17.155	10.377	47.016	35.608	27.532	82.624
Alberghi 3 stelle e res.	51.542	11.553	177.487	46.007	63.095	223.494
Alberghi 2 e 1 stella	11.279	2.338	37.679	8.930	13.617	46.609
TOTALE ALBERGHIERI	79.976	24.268	262.182	90.545	104.244	352.727
Campeggi e villaggi turistici	81.366	40.423	539.934	295.591	121.789	835.525
Agriturismi	806	360	2.438	2.196	1.166	4.634
Alloggi privati	20.484	8.931	164.229	57.387	29.415	221.616
Altri esercizi	4.486	1.639	11.927	4.189	6.125	16.116
TOTALE COMPLEMENTARI	107.142	51.353	718.528	359.363	158.495	1.077.891
TOTALE	187.118	75.621	980.710	449.908	262.739	1.430.618

Elaborazioni dell'Ufficio di Statistica della Regione del Veneto su dati Istat - Regione Veneto

Regarding the provenience, most of the tourism are from Germany, Austria, Switzerland, being Chioggia one of the most popular and closer destination for summer vacation of these countries.

<i>Turisti stranieri per paese di provenienza. Anno 2021</i>		
	TOTALE	
	Arrivi	Presenze
Austria	11.316	55.148
Belgio	1.188	6.633
Croazia	159	399
Danimarca	1.477	12.050
Finlandia	92	347
Francia	1.901	8.577
Germania	36.276	237.903
Grecia	65	188
Irlanda	82	663
Islanda	4	7
Lussemburgo	104	585
Norvegia	86	313
Paesi bassi	3.422	23.332
Polonia	3.327	19.363
Portogallo	101	402
Regno Unito	412	1.921
Rep. Ceca	1.760	7.715
Russia	246	1.129
Slovacchia	328	1.989
Slovenia	461	1.144
Spagna	248	788
Svezia	268	936
Svizzera-Liecht.	6.131	38.003
Turchia	36	193
Ungheria	1.075	4.861
Bulgaria	96	528
Romania	1.482	9.709
Estonia	106	240
Cipro	0	0
Lituania	171	915
Lettonia	129	321
Malta	27	70
Ucraina	290	1.522
Altri paesi europei	699	3.358
Canada	68	222
U.S.A.	465	1.454
Messico	43	174
Venezuela	29	81
Brasile	125	753
Argentina	52	158
Altri America	243	955
Cina	61	241
Giappone	11	55
Corea del Sud	5	19
India	30	74
Altri paesi asiatici	232	1.188
Israele	36	154
Altri Paesi Asia Occidentale	46	217
Egitto	25	77
Altri Paesi Africa Mediterranea	110	744
Sud Africa	7	12
Altri Africa	161	649
Australia	98	322
Nuova Zelanda	16	31
Altri extra-europei	193	1.076
Totale stati esteri	75.621	449.908
Totale Italia	187.118	980.710
Italia + stati esteri	262.739	1.430.618

Elaborazioni dell'Ufficio di Statistica della Regione del Veneto su dati Istat - Regione Veneto

Key questions and limitations

Speaking about seasonality and regarding Venice touristic flow, distinguishing tourists on the basis of nationality, in 2020 there are no significant differences between the seasonality of foreign and Italian tourism, with almost identical trends, except for a clear difference during the months of January and February in the presence of foreign visitors. From June to August, presences started to grow again and then, starting from September, they gradually decreased again until December. November and December (excluding the months of the lock-down) are the months that recorded the lowest total attendance value, that is, respectively: 95,202 total attendance in November and 67,451 total in December.

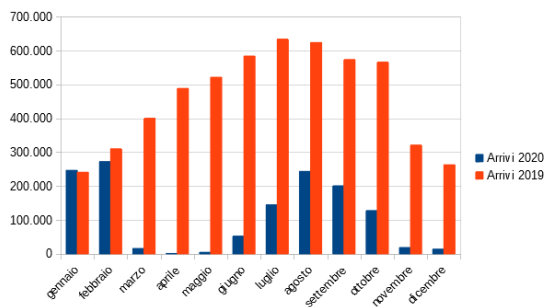


Figura 1.27: Arrivi totali 2019-2020.

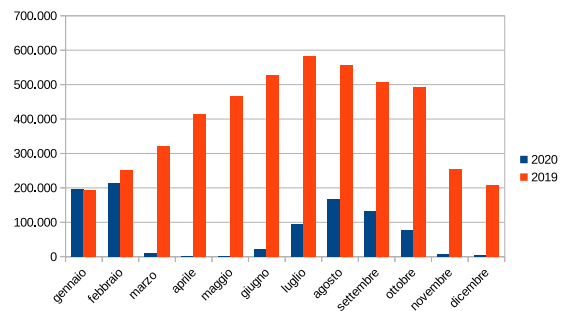


Figura 1.28: Mercato straniero 2019-2020: arrivi per mese.

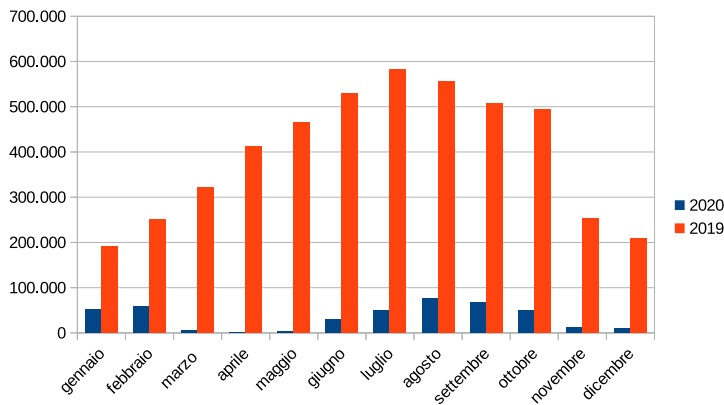


Figura 1.29: Mercato italiano 2019-2020: arrivi per mese.

Regarding Chioggia, instead, as we have said, the territory of Chioggia-Sottomarina-Isolaverde has the potential to create a product that goes beyond the traditional concept of bathing to

enrich it with a series of environmental, cultural and food and wine attractions that can hinge on the historic center of Chioggia and on the neighboring area. With this “enriched” product, the locality could place itself in a more distinctive way on the market and could also be affected by higher demand growth rates than those of pure bathing, and similar to those identified for other emerging forms of tourism. This can happen at least in the “shoulder” months, i.e. those like May - June or September (considering that July and August represent a pure bathing situation that cannot be changed in the short term).

Regarding the Venice area and the state of accommodation, the state of accommodation reflects the status of the city has one of the major touristic city in the world. Indeed, the number of accommodation service has been increasing progressively, being more than doubled in terms of number of beds, in the five years before pandemic

Anno	Numero esercizi	Posti letto	Camere	Media camere per albergo	Media posti letto per esercizio
2016	403	29.818	15.713	39	74
2017	406	30.715	16.164	40	76
2018	414	31.556	16.581	40	76
2019	419	32.523	17.023	41	78
2020	419	32.562	16.964	40	78

Tabella 2.1: Dal 2016 i dati indicati sono stati rielaborati, anche per le annualità precedenti, quando venivano forniti dall'APT, sulla base dei dati ISTAT e Regione del Veneto - Ufficio di Statistica della Regione del Veneto. Conseguentemente a detta revisione, vi è uno scostamento tra i dati su indicati e quelli riportati dalla medesima tabella nelle edizioni precedenti al 2016.
Fonte: elaborazioni del Comune di Venezia, Osservatorio del Turismo e Monitoraggio dei Dati su dati dell'Ufficio di Statistica della Regione del Veneto.

Anno	Numero esercizi	Posti letto
2016	3.706	22.532
2017	6.005	32.502
2018	7.916	41.299
2019	9.085	48.441
2020	9.380	49.287

Tabella 2.4: Fonte: elaborazioni del Comune di Venezia, Osservatorio del Turismo e Monitoraggio dei Dati su dati dell'Ufficio di Statistica della Regione del Veneto.

The Chioggia/Sottomarina area, on the other hand, has long been characterized by the presence of private accommodation and also open-air facilities. The evolution of the hotel offer in the last 5 years has been rather discreet, with a substantial redevelopment of the services offered.

It essentially showed itself in the quality of the hotels: 4-star hotels increased by one unit, there was an impressive growth in the share of 3 stars, which now concentrate 60% of the beds. On the other hand, the offer in one-star hotels went from 33% to 18% of the total number of beds.

The trend goes towards the type of tourist-hotel residence as well as the birth especially in the historic centers of Chioggia and Sottomarina, of B&Bs and tourist accommodation thanks to the new regional law incentivizing this last kind of accommodation.

To this end, however, it is noted that the production capacity is still not efficiently exploited and that there have been no particular developments in the last period.

In Venice, the port and the airport represents traditionally the two main way to access the city. The Port of Venice is the most developed hub at regional level in terms of maritime passengers traffic with a constant increasing trend before the COVID pandemic, when the reduction of cruises determined the drastic reduction of arrivals. Similar trends applied to the Venice airport passengers traffic.

Anno	Crociere		Fluviali		Traghetti		Aliscafi		Totale	
	TC	Pax	TC	Pax	TC	Pax	TC	Pax	TC	Pax
2016	529	1.605.660	96	18.670	137	58.263	339	93.501	1.101	1.776.094
2017	466	1.427.812	93	18.823	344	105.450	359	99.702	1.262	1.651.787
2018	502	1.560.579	100	20.227	375	110.051	391	99.793	1.368	1.790.650
2019	500	1.611.341	78	15.796	204	101.708	365	93.858	1.147	1.822.703
2020	6	5.237	5	512	0	0	0	0	11	5.749
Var. % 20/19	-98,8%	-99,7%	-93,6%	-96,8%	-100,0%	-100,0%	-100,0%	-100,0%	-99,0%	-99,7%

Tabella 3.1: Fonte: Autorità di Sistema Portuale del Mare Adriatico Settentrionale, VTP.

TC: approdi di navi.

Pax: numero di passeggeri.

	Pax voli naz. in arrivo e in partenza	Var. %	Pax voli int.li in arrivo e in partenza	Var. %	Pax UE (inclusi UK e Svizzera)	Pax in transito	Aviazione Generale	Totale pax	Var. %
2016	1.311.487		8.292.770		6.661.133	6.913	13.578	9.624.748	
2017 ¹	1.358.618	3,6%	8.988.759	8,4%	7.256.496	7.828	16.175	10.371.380	7,8%
2018	1.561.213	14,9%	9.602.550	6,8%	7.723.974	7.877	12.968	11.184.608	7,8%
2019	1.535.699	-1,6%	10.006.040	4,2%	8.066.820	8.424	11.431	11.561.594	3,4%
2020	866.496	-43,6%	1.922.869	-80,8%	1.653.506	1.776	8.547	2.799.688	-75,8%

Tabella 4.1: Fonte: Assaeroporti.

Pax: numero di passeggeri.

Chioggia, instead, even is located between Venice to the north and Ravenna, see the main way of access through road traffic, being Padua the main direction to reach the city, for tourist purposes. The Romea state road (SS 309) is in fact the main artery, as well as the only one together with the S.P. 9, which leads to Chioggia. During the high tourist season, in the stretch between Valli and Brondolo, traffic can reach very high levels along the primary roads and all this, combined with particular physical obstacles and sometimes fatal road accidents, cause serious congestion in some areas; effectively blocking the entrance and exit from the city. It should be

noted that these slowdowns affect the connections with the hamlets and also affect the purely urban road system.

The only direct access to the Sottomarina beach is the axis that leads to Viale Mediterraneo and then ends in the Lungomare Adriatico and, during the summer months, being a "funnel", it is constantly congested. Another very busy point, not of a seasonal but ordinary nature, is the historic center of Chioggia, due to the very nature of the morphology of the city. The main problem of difficult traffic is caused by the insufficient separation between local and trade traffic and, secondly, by the fragility and small size of the city's infrastructural system. A single entrance to the beach involves overused lines. In addition, many road sections do not have adequate pavements and cycle paths, while parking spaces are lacking in much of the city. In the coastal area, on the other hand, there is a high number of paid parking lots for day tourists and this entails a further vehicular increase within the seaside resort, to reach them.

Development opportunities and possible actions to implement

In recent years we have witnessed a transformation of tourism, which in various destinations from a development resource is also proving to be a source of difficulties. Venice is also undergoing this dynamic, a sort of standardization and flattening down of tourism, up to the loss of the very essence of travel: getting to know new realities, new people and new cultures and traditions.

Given the influx of tourists that affects the Venice area, the priority is certainly not so much that of promoting the city tout court, but of implementing actions aimed at the correct management of flows, their seasonal adjustment and diffusion in the different areas of the territory. All this also through targeted communication and awareness campaigns, strictly linked to the safeguarding and promotion of Venetian specificities - also in an economic sense - and to the support of sustainable tourism initiatives.

The main objective of the various actions to be undertaken is both the opportunity (or necessity) of transforming the excursionist tourist into an overnight tourist, and, given some non-modifiable external variables (for example the contraction of the duration of the holiday), the increase in the rate of return of visitors.

It is therefore intended to diversify the tourist offer, in particular by privileging the various forms and activities of sustainable tourism that allow to positively meet the needs of residents and guests / travelers, having special regard for the safeguarding and support of Venetian specificities for life and work.

The idea of sustainable and experiential tourism is strictly connected to the cultural, historical and geographical peculiarity of Venice. Its fragile beauty, cultural complexity, the fascination of a still visible and alive link between ancient and modern, as well as between East and West, depend on a very delicate balance. It could be said that the effect of a unique beauty and irresistible charm is undermining its very origin.

Even those who have never set foot there know the places that make the city of Venice famous all over the world: Piazza San Marco, the Rialto bridge, the Grand Canal. But Venice is also something else. The Venice of the mainland - Mestre and Forte Marghera, but not only - can reserve beautiful discoveries, such as the woods and green parks that can be visited with urban trekking itineraries, cycle paths and bridleways. Even a visit to one of the ancient forts defending the city is an experience not to be missed to discover an unprecedented Venice, along a widespread route between the mainland and the islands of the lagoon, of extraordinary archaeological, architectural and naturalistic interest. Venice is part of a real archipelago of islands, all to be explored, even the less known ones, such as Torcello, Sant'Erasmus, Mazzorbo, Lazzaretto Nuovo, Certosa, Vignole, Pellestrina, and many others, located in that unique territory that is the Venetian lagoon.

With reference to arrivals, in 2020, the top 12 countries of origin are: Germany, France, United Kingdom, Austria, Switzerland – Liechtenstein, USA, Spain, Japan, South Korea, the Netherlands, China, Brazil. Seven out of 12 countries are European. This data highlights that in 2020 Venice hosted "proximity" tourists, a factor related to the health emergency and the restrictive measures to contain the pandemic implemented by the various countries.

In this scenario, the **Venice Destination Management Plan** outlines a series of actions to be implemented to increase the tourist attractiveness of Venice as city and as part of a wide territory. Most relevant are listed here below:

- **Priority in the Governance and regulation of tourism:**
 - Organisation and collection of quantitative and qualitative tourism data, also through the experimentation of new forms of monitoring.
 - Carrying out qualitative studies to assess the economic impact of tourism;
 - Use of applications or mobile technologies for the mapping of the tourist flow;
 - Promotion of city branding “Veneziaunica” as a system capable of managing all public transport services (collective and individual) and cultural offers, with a dedicated tariff system accessible by booking. establish close relations with the Metropolitan City of Venice, the Veneto Region and the regional OGDs, also in order to quickly create joint tourism projects that transcend narrow administrative boundaries;
 - continue the pressure at ministerial level to complete the process to proceed with a shared solution, an alternative to the passage of "large ships" in the San Marco basin, enhancing the terminal of the Stazione Marittima

- **Priority in Promotion, communication and marketing**
 - Express the potential of cultural productions
 - realise great events to promote the products and excellences resulting from our industrial and handicraft manufacturing and local culture at a world level;
 - relaunch the Venice brand as a place of national and international cultural industry;
 - network an annual programme of all events, in synergy between the public and private sectors;

- actively support the realisation of initiatives such as festivals, competitions, exhibitions and fairs in every district of the territory, with the participation of the world of associations
- Creation of events even during the 'low season' to enhance the city's charm all year round
 - Ensure quality programming in theatres, cinemas and cultural centres also during low season, with proposals aimed at promoting foreign languages;
 - support the activities with a multilingual communication campaign aimed at travellers/guests to the city that is also disseminated in the city's official tourist information channels;
 - support the implementation of initiatives related to the world of Venetian rowing, also outside the traditional rowing season, in cooperation with local associations;
 - continue and strengthen the positive action introduced with the 'Le città in Festa' format
- To guarantee the highest quality of the natural environment and landscape
 - Pursue the support of tourist activities aimed at enhancing the lagoon and ichthyic tourism through dedicated actions in the available information channels and start the search for financing at European, national and regional level for the implementation of innovative tourism projects in the lagoon area;
 - support a multilingual awareness-raising and communication campaign addressed to travellers/guests aimed at making them rediscover and enhance the agricultural traditions of the mainland and islands;
 - conveying information on agricultural traditions and typical productions also through the Lagoon Atlas geoportal;
 - promoting and valorising local agricultural products by encouraging the consumption of zero km products, also by promoting Farmers' Markets;
 - creating multilingual awareness campaigns for travellers/guests to the city on the issues of sustainability and the correct use of the city's resources, also in collaboration with local associations;
 - seize the opportunity of 2017 as the 'International Year of Sustainable Tourism', devising a calendar of activities throughout the territory;
- To promote the spread of tourism in the mainland
 - initiate an international promotional campaign for tourism on the mainland;
 - initiate studies of activities and communication campaigns aimed at specific tourist targets of different nationalities and categories;
 - enhance the historical-monumental elements in the mainland area by connecting them to a cultural itinerary that can be enjoyed on foot and by bicycle;
- To promote local handicrafts
 - Promote the knowledge of traditional craftsmanship, active in the sector of Venetian rowing boats, through initiatives on the occasion of the major events of the rowing season;
 - support for industrial and handicraft activities in Murano artistic glass;
 - developing a 'made in Venice' project, devising a campaign to support local craftsmanship, thinking of an evolution of the 'Venice Brand' concept;
 - stimulate typical local economic activities, also through the creation of dedicated itineraries or maps;

- to build opportunities to support traditional local handicrafts, especially Murano glass (with its Vetro Artistico® Murano brand), Burano and Pellestrina lace, and minor shipbuilding throughout the lagoon area, not only for their cultural and identity value, but also for the creation of new jobs.
- Promoting the MICE sector
 - Improve initiatives to support the conference industry, also with a view to deseasonalisation and delocalisation, developing the sector also in the mainland;
 - Support the activities of the Venezia Convention Bureau.
- Strengthening sales channels
 - extension of the services conveyed through the Veneziaunica platform;
 - extension and strengthening of the IAT network, also with a view to the metropolitan city.
- **Priority in terms of receptivity**
 - Combating squatting
 - stimulate the constant search for legality and regularity of any structure, combating the so-called "squatters", a real scourge for any tourist destination, also through a strong deterrent campaign;
 - activate targeted controls with the cooperation of the competent authorities
 - Containment of activities
 - To contain the phenomenon of the gradual occupation of the city's residential heritage by hotel and complementary accommodation activities, favouring the quality of the structures and the ability to trigger redevelopment projects in the surrounding public spaces;
 - Sharing apartment
 - Opening of a round table with the main realities of the sharing economy to regulate the phenomenon and bring to light situations of irregularity.
 - Encourage sustainable investments related to infrastructure and transport
 - Enhancement and development of the Marco Polo airport, which already in its name qualifies as a natural gateway to the East and the Orient, promoting new international routes, guaranteeing the principles of sustainability, environmental protection and quality of life for citizens;
 - stimulating the development of the various docks and nautical poles in the area.
 - To promote cycling and pedestrian mobility
 - design and realisation of new cycle paths, linking the cycle paths in a Metropolitan City perspective, connecting for example with the Dese river ridge and with the Bosco di Mestre;
 - conveying information on the cycle-pedestrian mobility system of tourist, environmental and landscape interest, also through the Atlas of the Lagoon geoportal and the city's official tourist portal
 - enhance the cycle-pedestrian connection between the centres of Campalto, Tessera, the lagoon edge, the San Giuliano Park and the forts.
 - Sports facilities
 - modernisation of sports facilities, creating guidelines for the application of Law no. 9 22/01/16 art. 15, in order to facilitate the use of private resources for the realisation of interventions, to encourage sports tourism.

– **Priority in safety and decorum**

- Security actions:
 - fight against illegal sellers, counterfeit goods and harassers; control of irregular people and goods;
 - targeted contrast interventions for those who consider Venice a place to camp out.
 - removal of beggars, homeless people and pickpockets.
- Decor shares:
 - transforming tourists into "friends of Venice" through an advanced use of Veneziaunica, making them feel welcome guests;
 - creation of a multilingual information campaign that raises awareness of correct behavior in the city, in order to counteract the vision of Venice as Veniceland;
 - correct the impact of incorrect management of household waste by guests and owners of apartments used for tourist rentals, through the creation of a clear multilingual handbook on waste management.

– **Priority in training and jobs:**

- Attracting the establishment of new businesses shares:
 - Offer of spaces to creative professions that move between art, innovation, culture and tourism, to start-ups in the sector and to the different forms of entrepreneurship that characterize them;
 - create a Hub Lab of culture and art to encourage local and international productions that are firmly rooted in the city fabric, with the consequent employment repercussions;
 - support and relaunch of the incubators in the city.
- Training for companies actions:
 - support the permanent training activity of entrepreneurs and employees of the sector, also in order to increase the culture of the territory in those who are in daily contact with tourists.

As far as Chioggia is concerned, comparing the characteristics of tourism products with the expected growth rate, it emerges that there are strong potentialities, also highlighted by the **Chioggia Destination Management Plan**, by:

- increasing in naturalistic, rural and food and wine tourism;
- diversifying from traditional models, promoting authenticity, product customization, etc.
- pushing towards the 3Es (education, entertainment, excitement) and towards the possibility of a complete and complex experience, exploiting the attitude of "discovery" during the holiday;
- pushing towards "multivacation", and also the holiday-mix, in which more activities are carried out and in this meaning the promotion of cultural aspects while traveling, even during beach holidays or pure relaxation;
- boosting alternative forms of accommodation such as open air, agritourisms, bed & breakfasts, tourist accommodation, which allow a more immediate and less anonymous contact with the environment, the locality and the host community, on the other hand, greater independence and flexibility, in other words, accommodation where it is possible to come into contact with cultural elements and local traditions, and with historical-artistic aspects

These are elements that can well be grasped by the operators of the Chioggia-Sottomarina-Isolaverde offer, due to the great availability of local resources - beyond the beach: food and wine, typical production, proximity to green and lagoon areas, possibility of nautical marine and fluvial tourism, the presence of a prominent historical center and great well-known typicality and the proximity to the great Venetian art cities (Venice and Padua).

Target markets

Generally speaking, the targets set up by both Destination Management Plans of Venice and Chioggia, could be identified in the **“emotional” tourist**. To this purpose, several typology of tourism are promoted:

- Cultural tourism
- Food and wine tourism
- Naturalistic tourism
- Religious tourism
- Sports tourism
- Seaside tourism
- MICE tourism
- Entertainment tourism
- Tourism of major events
- Wellness tourism

Fields of cooperation and timeframe

In Veneto region, the competences for tourism management are hold by the Regional Administration, that issues the “Regional Plan for Tourism”, valid for three years. The regional administration, moreover, identify single “destination management organization” that are competent for the management of tourism sector in certain areas/cities of particular interest. On the whole, sixteen DMOs are established in Veneto, among which the one of Venice and the one of Chioggia. DMOs are responsible for the drafting of the Destination Management Plan. The Destination Management Plan defines the strategic lines for the management of a tourist destination, in a given period of time, through the identification of a vision and objectives shared by all the territorial actors, the identification of precise actions and the necessary organizational resources and financial. The Veneto Region acknowledges the adoption of these Strategic Plans by the Destination Management Organizations and their eventual updates, and also adequately disseminates them for the purposes of planning economic and entrepreneurial activities in the tourism sector in the regional territory.

Both the Veneto Region and the DMOs applies participatory approaches in defining strategies and measures, organizing thematic tables with relevant stakeholders. Last tables conducted tackled product innovation; digital innovation and Big Data; hospitality and human capital; promotion and communication and involved about 200 stakeholders at different levels and in different fields. These tables are permanent and will follow the further touristic development in the whole Veneto region.

The coordination at regional level is particularly important since it promotes and allows the development of integrated services and tools at regional level such as the “land of Venice” card for the mobility.

Conclusion

After the pandemic, at an international level, in most Italian destinations and also in Venice and Chioggia, there has been a shift from a constant growth in tourism with also situations of “over tourism” (like in Venice) that were not always sustainable, to a sudden and prolonged stop of almost all tourist activities, with consequences very relevant on the economic and employment level. It is still difficult to predict when the tourist phenomenon will really resume at an international level, given a situation that has not yet stabilized from the socio-health point of view.

But it is clear right now that there is a need to rethink the tourism development model known up to 2019 also for Venice and Chioggia that - albeit with very important results - had also highlighted some critical and sustainability elements on the environmental and social, but also economic level.

The phenomenon of over tourism had characterized not only large destinations, but also many historic centers, inducing some local administrations to intervene with management measures for tourist and excursion flows. Venice had led the way with the #EnjoyRespectVenezia awareness campaign, later borrowed from other cities of art.

The need for a paradigm shift also in tourism is even more necessary in the aftermath of the pandemic. The post-COVID scenario could accentuate a trend already underway in the reference markets for our country (German-speaking and Nordic), which are particularly attentive to the consequences of climate change and therefore to a different model of enjoyment of holidays and free time: tourism that is more sustainable in its proposal and more responsible in its use could therefore strongly characterize the evolution of the market, together with the elements relating to the safety and quality of the destination health system.

If these assumptions are well founded - and in this sense the analysis and research activity of the Regional Tourist Observatory of Veneto Region is fundamental - an orientation of demand towards destinations attentive to environmental sustainability, real "eco destinations" - which propose outdoor activities and increasingly "tailor-made" and pollution and ease of use and visit. All this could further accentuate the orientation towards slow tourism (cycling, walking, equestrian tourism, river navigation, etc.) which was already characterizing the demand before COVID, for urban realities, to destinations that will privilege a reduction in traffic.

The impacts of the pandemic on tourism and the need for adequate safety protocols have strengthened the attention towards destinations attentive to health protection, well organized from a health and prevention point of view and in general towards safer destinations, also accentuating in these cases a trend already underway in the tourism market.

These new scenarios require increasing attention to the local tourism system, through the involvement of the host communities (local population) on the one hand and effective governance on the other.

Therefore, today more than ever, even for Venice and Chioggia tourist destinations, the achievement or maintenance of competitive positions on the market depend on the effective ability to adapt to the

changes that continue to condition the tourism phenomenon on a global level and to the new tourist demand that will arise.

Cultural Touristic Management strategy

Project number:	10042741
Project acronym	REMEMBER
Project Title	REstoring the MEmory of Adriatic ports sites.Maritime culture to foster Balanced tERritorial growth
Start of the project	January 2019
Duration	30 months

Related activity:	5.1 – Adriatic ports cultural network
Deliverable name:	Cultural Touristic Management strategy
Type of deliverable	Strategy
Language	English
Work Package Title	Adriatic ports cultural network
Work Package number	5
Work Package Leader	KIP – Intermodal Transport Cluster

Status	Draft
Author (s)	Bruno Federico Fedi
Version	1
Due date of deliverable	12/2020
Delivery date	

Introduction

This document is part of the Work package (WP) 5 Adriatic ports cultural network that aims at setting up the Adriatic ports cultural network for the cross-border valorization of Adriatic Italian and Croatian ports as a single integrated destination for cultural tourism, linked but at the same time alternative to the coastal tourism.

Activity 5.1 answers to a real need of involved partners to create added value for the territories from the cultural heritage that must be safeguarded. Therefore, all involved partners are committed to continue the cooperation on cultural and tourism valorization also after the end of the project, in line with the existing local developing strategies and building upon existing cooperation frameworks among the PPs.

The CTM strategy has two main parts:

1. Current state of the offer in the port/city
2. CTM Strategy

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Part one: Current state of the offer in Ravenna

Available cultural offer

The port authority of Ravenna joined the programme Remember “Restoring the Memory of Adriatic ports sites Maritime culture to foster Balanced tERritorial growth” to give a chance to raise interest at the remains of the Ravenna’s past centuries history located along the two sides of the city port, the Candiano Canal.

This virtual museum, sponsored by EU, is also a smart way to attract people of all ages and from all over the world with the museum reality in a captivating way, but also to give the possibility to those who cannot face a trip to admire site and monuments.

Recent years of pandemic emergency unfortunately taught us to reach new places from another point of view: on the net.

It is also a precious way to disseminate historical richness by distance.

This project aims to disclosure the port development during its own history passing by the commercial sailing ships to the modern container ships.

Through a wide gallery of images, maps, pictures this virtual museum wants to witness

Ravenna preserves a huge patrimony of ancient and modern history: it is an Italian city in the Emilia-Romagna region. Ravenna in ancient times used to be of the Western Roman Empire (from 402 until the empire collapsed in 476). It then served as the capital of the Ostrogothic Kingdom until it was re-conquered in 540 by the Byzantine Empire. Afterwards, the city was the center of the Byzantine Exarchate of Ravenna. Surrounded by water and lagoons in the past, today Ravenna it is an inland city, but it is connected to the Adriatic Sea by the Candiano Canal. The group of early-christian monuments dated form 5th to 6th century have been inserted in the UNESCO World Heritage List since 1996:

- Orthodox Baptistry (or Neonian Baptistry)
- Mausoleum of Galla Placidia

- Arian Baptistry
- Archiepiscopal Chapel
- Basilica of Sant'Apollinare Nuovo
- Mausoleum of Theodoric
- Basilica of San Vitale
- Basilica of Sant'Apollinare in Classe

Besides this overwhelming group of monuments of outstanding universal value, Ravenna offers many other important cultural sites of archeological interest (the National Museum, the Domus of Stone Carpets, Classis Museum and others). Ravenna is also known as the city that gave hospitality to Dante Alighieri, the father of Italian language, exiled from Florence. In Ravenna Dante wrote the last part of his Divine Comedy: many are the places in the city devoted to his cult.

Ravenna is also known for its city port (Canale Candiano) which history dates back to the 1st century B.C., when emperor Augustus chose it for the stationing of the eastern imperial fleet because of its favorable geographical position. Even after the decline of the Empire in the 3rd century AD, the activity of the port remained intense; during the Byzantine rule it lived another golden age. The port was subsequently silted up, damaged by floods and moved from one bend of the lagoon surrounding the town to the other. Only in 1738 the activity of the port was moved in the canal connecting the city to the sea: the Canal Corsini, named after the Pope - Clement XII – who financed the works.

The development of the Port of Ravenna as an important international harbor dates back to the last postwar years, when the discovery of extensive offshore gas fields led to the establishment of a number of refineries and petrochemical plants. The oil crisis of the 70s particularly enhanced the commercial purpose of the port.

Today, the Port of Ravenna is a large and dynamic structure offering a wide range of services for all kinds of goods. The port can benefit from important public and private investments aimed at improving its infrastructures, as well as extending and specializing its facilities in order to achieve the highest quality standards.

Ravenna is not only a cultural and harbor city: its natural sandy beaches are famous in the national panorama, perfect echo-system for many species of rare birds such as the Frattino, and the pink flamingos that today live in Ravenna swamps.

UNESCO MONUMENTS

Mausoleum of Galla Placidia

Hidden behind the leafy branches of a large platan tree, at the end of one of the most suggestive alleys of the city, the mausoleum is a true chest of wonders (5th century a.D.). The simplicity of the outside hides a heart of mosaics, such as the sky covered with golden stars of the dome, which has dictated its success worldwide.

Neonian Baptistery

A few steps away from the Ravenna cathedral, there is one of the most ancient monuments in the city (5th century a.D.). The original structure has barely changed over the centuries and is still well-preserved, especially inside: marbles, stuccoes and, most of all, mosaics. Especially, the mosaics embellishing the dome reveal themselves to the curious eyes of the visitors, as if they were a hymn to beauty and life.

Arian Baptistery

Built during king Theodoric's rule (5th century a.D.), using as a model the early Christian mausoleums, the building has almost perfectly preserved the mosaic of the dome. Inside, you will see an extraordinary contrast between the wall vestment and the mosaic decoration depicting Christ's baptism in the water of the Jordan River, surrounded by his twelve apostles.

Basilica of Sant'Apollinare Nuovo

It is the most important Arian building dating back to Theodoric's age, later converted to the Orthodox faith. It was built by the Gothic king next to his palace (6th century a.D.) and it is a masterpiece of immense value, where you can admire the evolution of mosaic art—from Theodoric's age to the Byzantine age.

St. Andrew's Chapel

The little private oratory was built between 494 and 519 a.D. by the bishops during Theodoric's kingdom, when the main religion was Arianism. With a cross plan, it is decorated with a refined cycle of mosaics that pay homage to the figure of Christ. You can access the chapel through the Archiepiscopal Museum.

Mausoleum of Theodoric

Built at the behest of Theodoric as its burial place around 520 a.D., it has been one of the undisputed symbols of Ravenna for over 1500 years, and it is the only early Christian royal tomb in the city. Maybe it's for the peculiar architecture or maybe it's the cupola made of one single giant piece of white Aurisinia stone that the mausoleum exudes a magnetic charm you cannot so easily resist.

Basilica of San Vitale

Built in the first half of the 4th century, it is a chest of architecture and mosaic, the perfect marriage of Eastern and Western influences. Just a step across the threshold, and you will immediately realize to be in one of the greatest masterpieces of early Christian and Byzantine art, which inspired over the centuries poets and travellers alike.

Basilica of. St. Apollinaris in Classe

Standing just a few kilometres from the Ravenna city centre, it is the most perfect example of Christian architecture with a basilica plan dating back to the 6th century a.D. The basilica was built to celebrate the Patron Saint of the city and to preserve his spoils. The beauty of the original structure and the splendid polychrome mosaics of the apse rightfully inscribe it among the World Heritage.

DANTE'S PLACES

Dante's Tomb

Dante Alighieri spent his last days in Ravenna, ending his major work, the *Divine Comedy*, and leaving an accurate reflection about his life in the *Eclogues*. His tomb, commissioned by Cardinal Luigi Valenti Gonzaga and built on the project by architect Camillo Morigia, dates back to the end of the 1700.

Quadrarco di Braccioforte

Recently restored, it is next to Dante Alighieri's Tomb and preserves a number sarcophagi of the 5th and 6th century; the rests of the wall where the remains of Dante were found in 1865; a green hillock, which reminds of the place where the poet's spoils were buried during WWII.

Old Franciscan Cloisters

Enchanting access to Dante's Museum, these two cloisters host several events in summer. A tombstone reminds of the place where the friars drilled a hole to reach the sarcophagus and smuggle the body, in the attempt of avoiding that the body fell in Florentine hands.

Dante's museum

Set on the first floor of the Old Franciscan Cloisters, the museum offers an immersive experience rich of contents, images and historical witnesses of the life, work and large fortune of the greatest Western poet, Dante Alighieri.

Casa Dante

Recently opened, the 14th century house Fabbri-Farini has finally become Casa Dante. Inside, there is an exhibition room with works from the Uffizi Gallery of Florence and a display of the collections dating back to the 20th century owned by the Classense Library. Moreover, a themed bookshop will be added soon.

Basilica of San Francesco

The church was built in the 5th century, and, since then, it was enlarged and renovated. Dante Alighieri visited the church very often, and it hosted the poet's funeral in 1321. The basilica preserves some mosaic fragments of the original building and a particular crypt, which is underwater because below the sea level.

Kobra's Dante

Painted in 2016 on the occasion of the Subsidenze Festival, this work is a colourful homage to the Supreme Poet by the Brazilian artist Kobra, a famous graffiti artist who has already embellished many other cities across the world.

Classense Library

Housed in a big sixteenth-century Camaldolese abbey, it is a real jewel of art and architecture. It hosts, in its vast and valuable book heritage, the Dante Collection of Olschki, one of the most important collections of and about Dante Alighieri's works, with many first and rare editions. The library is a polyfunctional space and hosts many events, concerts and temporary exhibitions.

MUSEUMS

National Museum of Ravenna

Housed in the old Benedictine monastery of San Vitale, it is the most comprehensive and varied museum in Romagna. It displays Roman finds, late-antique and Byzantine artefacts, as well as art collections that range from fabrics to ivory objects, ceramics, but also detached frescoes—such as the splendid fourteenth-century cycle by Pietro da Rimini—and paintings, including works of contemporary art.

Mar

Art lovers cannot miss visiting this museum: They will find temporary exhibitions and mosaics with an eye to contemporaneity, not to mention the collection of antique and modern art, with works by Vasari, Guercino and Klimt, just to mention some. Housed in a fifteenth-century abbatial complex, with its elegant loggia overlooking a park, the Mar is one of the finest beating hearts in the city.

Archiepiscopal Museum

Housed inside the old Archbishopric Palace of Ravenna (Palazzo dell'Arcivescovado di Ravenna), it hosts several works of art coming from the old cathedral and other buildings that are no longer standing. Among the excellent works, the collection includes the famous ivory pulpit of bishop Massimiano and St. Andrew's Chapel, an early Christian oratory, whose splendid mosaics made it earn a place among the World Heritage.

REMEMBER Virtual Museum on Adrjo Platform

To give a wider access to the touristic sites the Port of Ravenna Authority has set up a virtual museum dedicated to sites of which lay along, or in proximity, of the Candiano Canal, the past commercial city port. This new concept of tourism was occasion was born following a Eu Consortium named ADRJO.

Museum Classis Ravenna

If you're craving for a journey into the history of Ravenna, this is the right place. Classis is one of the most important archaeological museums in Italy, housed in a former sugar factory that has been recently renovated. Once entered, you will walk across the over 600 finds on display, getting to know better the city and its history, from the origins up to the Middle Ages.

Museum TAMO MOSAICO

TAMO MOSAICO is housed in the thirteenth-century Church of San Nicolò. Thanks to the exceptional artefacts on display, the visit itinerary tells about the history of mosaic art in Ravenna and its surroundings, from Antiquity to these days. The section *Mosaics between Hell and Heaven* displays twenty-one works in mosaic of the 20th century, inspired by the *Divine Comedy*.

ARCHAEOLOGY

Ancient Port of Classe

The Ancient Port of Classe, which was one of the largest port and commercial areas in Ravenna between the 5th and the 6th century a.D., stretches in all its beauty just a few kilometres south of the city centre. It is an open-air archaeological site, with remains of the port warehouses as well as of the stoned street that still bears the traces of the carts that transported the goods.

Domus of the Stone Carpets

The Domus is one of the most important archaeological areas in the city, discovered by chance during some renovation works. Through the little Church of Santa Eufemia, you enter a little Byzantine building dating back between the 5th and the 6th century a.D., composed of fourteen floor rooms with astounding polychrome mosaics depicting geometrical, floral and figurative elements unique in their kind.

Rasponi Crypt and Roof Gardens of the Province's Palace

Just a few steps away from Dante's Tomb is one of the most suggestive spots in Ravenna. Inside, you will find artistic and natural treasures: the roof gardens with a panoramic viewpoint over piazza San Francesco, the neo-Gothic tower, and the crypt decorated with polychrome mosaics and patterns with animal figures connected with the city's history

The (so-called) Theodoric's Palace

The intriguing architecture known as "Palace" may be ascribed to a Carolingian church. The name gives nonetheless a useful topographical clue: It reminds that the building was in that portion of the city occupied by the imperial houses. On the first floor, there are sections of mosaic floors

coming from the diggings carried out at the beginning of the 19th century in the area that once was destined to the imperial palaces and the Gothic king.

Beaches

Nine seaside towns on 35 km of sandy coast: Equipped beaches, bathing establishments and bars, restaurants, hotels and camping areas, but also stretches of free quiet beach, with wild dunes and small ports. The beaches can be reached by bike or by public transport. Moreover, in Ravenna, you will find wide stretches of beach where to go with your four-legged friends.

Fine natural environments. Parks, valleys, pine forests

Ravenna is an extremely green city. It hosts over 100 parks spread across the municipal territory, with itineraries to discover the surrounding nature and the centuries-old pine forests. The valleys and the lagoons of brackish and fresh water are unique landscapes that can be visited in any season, whether on foot, by boat or by bike.

Development opportunities

A wide and diversified tourist offer, good network of relations with nearby territories and regional entities, organization, growth margins for nature and gastronomy products, and for tourist experiences

Development constraints

Maturity of the seaside product, lack of agri-food tourism supply chain.

Part two: CTM strategy

Key questions and limitations

SEASONALITY

The seasonality of Ravenna's tourist offer is based on the multiplicity of its offer. The city of art has a season that goes from the beginning of spring to the very first days of November. The seasonality of the bathing offer is concentrated in the 3 summer months, and connected to the equipped beaches. However, the winter months are characterized by numerous indoor cultural offers (theatres and museums) that make a visit to Ravenna fascinating in every season.

Tourist demand and consumption effects

Ravenna offers about 4.000 rooms and 8800 beds, distributed between the city centre and the seaside areas

TOURIST DEMAND

In this section, we prefer to provide data on the tourism demand and data in 2019 that is to say in the pre-pandemic period: it is clear to everyone that 2020 was a year heavily marked by the global crisis of the health emergency. The tourist demand in Ravenna is structured on the polarity of the city of art and the sea. In 2019 arrivals in the Ravenna area were a total of **624.770**, for a total amount of **2.845.118** nights spent. **57,08%** of total arrivals were registered at the seaside hotels; **78,41%** of the arrivals at the seaside hotels came from the domestic market. The prevailing foreign markets in seaside tourism are: German speaking countries (49,06%), France (8,37%), Czech Republic (6,84%), Poland 5,07%. The average stay of tourists at the seaside hotels was **6,54 days**. As far as tourism in the city of art is concerned, arrivals in 2019 correspond to **42,92%** of the total, with an average stay of **1,91 days**. In this market segment the percentage of arrivals from abroad is equal to **25,12%**, with a strong predominance of the German-speaking countries (23,65%), followed by France (10,90%), United States (8,33%), United Kingdom (7,11%), Spain (4,5%).

Finally, it should be noted that the data currently available to us on tourism demand in 2021 are rather encouraging, to the point that some months of the summer season by the sea and in the city of art are positive

TRANSPORTS

AIRPORTS:

Bologna airport is the main international connecting Ravenna to 95 destinations: 14 domestic, 80 international and 1 intercontinental.

www.bologna-airport.it

Rimini airport is an international airport connecting Ravenna to 16 destinations: 2 domestic and 14 international www.riminiairport.com

Forlì airport is an international airport connecting Ravenna to 24 destinations; 7 domestic and 17 international www.forliairport.com

Ravenna is connected to the Bologna railway station on an hourly basis (Bologna is one of the main Italian railway hubs)

PROMOTION AND BRANDING

PROMOTION

The promotion of Ravenna is:

- shared with the actors of a wider area and with the operators of the territory
- based on available data, which define the relevant markets and interpret behavioural trends
- multichannel and able to modulate messages in the context of seasonality and the variation of the offer
- connected to the identity of the territory, which remains the protagonist

PLACE

A special connection ties together Ravenna and the sea. Founded more than 2000 years ago, emperor Augustus chose it as the site of his imperial fleet. Today, it is one of the most important ports on the Adriatic, gateway to the East. The grandeur of Ravenna is in its centre, preserving the heritage of the Western Roman Empire, of Theodoric's reign and of the Byzantine Empire. The city counts eight UNESCO World Heritage monuments, and it safeguards the remains and the cult of Dante Alighieri. The vicinity to the Adriatic makes it a suggestive destination and the ideal place to discover the nature. Every visitor falls in love with Ravenna: a city centre rich with art, a coastline with nine seaside resorts and pinewoods, a tasty cuisine. Ravenna is a city with thousands of faces, and it certainly does not lack contemporaneity, besides having a rich schedule of events. Water, seaside and nature still represent the essential ingredients of our economic system based on the port and connected activities, agriculture, but also - and above all – tourism. Ravenna is a town of waters: we have the sea, fresh waters, marshlands and groundwater. Each water represents one or more chapters of our history and of our contemporary life. Our water-related heritage includes environmental as well as built assets, ranging from archaeological finds to contemporary industrial areas and buildings

PEOPLE

Tourism is an economic resource for Ravenna, and is managed by people who are in love the area: hoteliers, restaurateurs, tourist and environmental guides, cultural operators, managers of bathing establishments, event organizers and even sportsmen

PRODUCT

Cultural offer (mosaics and UNESCO, Dante and the city of inspiration, archaeology). Sea and nature (9 seaside resorts, 35 km of coastline, the pine forests sung by Dante and Lord Byron). A widespread and varied network of accommodation, the famous brand mark of Romagna hospitality

Target markets

A various range al tourism: Cultural tourists, classical music lovers, Naturalistic excursionists, gourmet travelers, all the people who enjoy beaches and sea.

Fields of cooperation

EU stance on culture and tourism development, as well as investments in the fields of culture in EU countries.



Financial resources

Own sources, public sources, EU funded projects.

Conclusion

The Programme “REMEMBER” puts together different actors such as city port authorities, museums, universities, public bodies and citizens in order to tell from another point of view the connection between a city, a port and the sea, strictly linked together by the thread of history and traditions giving the possibility to witness its development.

Cultural Touristic Management strategy

PP3 – Port Network Authority of the Eastern Adriatic Sea

Deliverable D.5.1.3

Project number:	10042741
Project acronym	REMEMBER
Project Title	REstoring the MEmory of Adriatic ports sites Maritime culture to foster Balanced tERritorial growth
Start of the project	January 2019
Duration	42 months

Related activity:	5.1 – Adriatic ports cultural network
Deliverable name:	Cultural Touristic Management strategy
Type of deliverable	Strategy
Language	English
Work Package Title	Adriatic ports cultural network
Work Package number	5
Work Package Leader	KIP – Intermodal Transport Cluster

Status	Draft
Author (s)	PP3
Version	1
Due date of deliverable	12/2020
Delivery date	03/2022

Introduction

This document is part of the Work package (WP) 5 Adriatic ports cultural network that aims at setting up the Adriatic ports cultural network for the cross-border valorisation of Adriatic Italian and Croatian ports as a single integrated destination for cultural tourism, linked but at the same time alternative to the coastal tourism.

Activity 5.1 answers to a real need of involved partners to create added value for the territories from the cultural heritage that must be safeguarded. Therefore, all involved partners are committed to continue the cooperation on cultural and tourism valorisation also after the end of the project, in line with the existing local developing strategies and building upon existing cooperation frameworks among the PPs.

The CTM strategy has two main parts:

1. Current state of the offer in the port/city
2. CTM Strategy

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Part one: Current state of the offer in city of Trieste

The Port Network Authority of the Eastern Adriatic Sea, PP3 of the Remember Project, is based in Trieste, the capital of the Friuli Venezia Giulia region with a favourable geographical position not only for port and commercial purposes but also for tourism. The Port Network Authority of the Eastern Adriatic Sea (PNAEAS) has no competence in the promotional and tourism fields, but having always been linked to the city, it constantly collaborates with local and regional authorities responsible for promoting the area. The actions that PNAEAS can carry out in this regard are of contribution and support to the competent bodies for the communication actions planned for the city.

Trieste, both for its position and for its history, has always been linked to the port.

Available cultural offer

The city of Trieste and its Gulf owe a significant part of their fame to the port and tourist attractions overlooking the water.

Very famous are Le Rive, the characteristic avenues that flank the city, encircling it with splendid buildings. Equally enchanting is the Molo Audace, the long promenade in the middle of the Gulf, whose name recalls the first Italian soldiers who landed in the city in 1918. Among the numerous museums operating in the Gulf of Trieste we mention for example the Natural History or the Revoltella Museum, which takes its name from the patron, who donated many masterpieces to the city.

Along the coast of Trieste there are also small beaches and bathing establishments, among which those of Duino, Santa Croce, Sistiana, Ausonia and the Lanterna (so-called Pedocin), the last beach in Italy that provides for the separation between men and women.

One of the symbolic monuments of Trieste is the Miramare Castle which is about seven kilometres from the city centre and allows you to spend a day of culture and nature. Inside you can admire antique furnishings and works of art, while outside you can walk in its big park overlooking the sea. The castle area is part of an important Marine Nature Reserve in which diving is also possible.

When it comes to Trieste it is necessary to talk about coffee, which has become an important commodity thanks to the traffic developed in the port, but which also gives the city a cultural connotation. For a coffee break it is advisable to go to one of the numerous historic Trieste Cafes to relive the magical atmosphere of the late nineteenth and early twentieth centuries.

However, Trieste is not just a seaside city. It is a border area that hosts different ethnic groups and cultures. Interesting are the many places of worship that can be visited in the centre, such as the Greek Orthodox church, the Serbian Orthodox church and the Jewish synagogue. On the top of the hill overlooking the city is the Cathedral of San Giusto, the most important Catholic religious building in Trieste.

Behind its cosmopolitan city air there is also an ancient heart. Fans of Roman history can visit the Roman Theatre, the Antiquarium and the Arch of Richard, located within easy reach of each other.

Lovers of nature and hiking and cycling tourists will be attracted by the Karst plateau that surrounds the city. Famous for its landscapes, the cliffs overlooking the sea and the soft hills of the hinterland from which you can enjoy magnificent views. The Karst is a particularly precious territory from a naturalistic point of view, a paradise for geologists for its geomorphological peculiarities such as caves, the sinkholes and the valleys that the water and the underground courses of the rivers have carved into the rock.

Furthermore, Trieste and the Karst also offer a wide range of local food and wine products.

Development constraints

The main constraints to the development of tourism in Trieste are linked to logistical connections. Few international flights, far from the high-speed train stations, the city but in general all Friuli Venezia Giulia know the transport difficulties linked to their territory.

The recent investment in the modernization of the only airport in the region, Ronchi Trieste Airport, would allow it to accommodate interesting numbers of passengers, but also due to the COVID-19 pandemic these results have not been achieved yet.

Trieste Airport and Trieste hope to take off also thanks to targeted investments in the promotion of the territory and in a more precise and detailed tourist signage.

The numbers show that the target of local tourists or neighbouring countries is satisfactorily reached by regional marketing actions, but aiming at a wider target (national and international) would also contribute to the achievement of higher tourist flows.

Trieste is however interested by a niche tourism, cultural, food and wine, hiking and in general linked to the sea culture, which deserves to be intercepted by communication marketing strategies.

Development opportunities

Trieste hosts numerous museums and multiple cultures. Over the last few years it has witnessed a progressive cultural and consequently tourist revival that has led it today to have a wide range of offers including exhibitions, theatrical performances, film festivals, concerts, conferences and artistic promotion initiatives. Focusing on cultural tourism is one of the opportunities on which the city is oriented.

To make the most of its historical and cultural potential, the requalification of the infrastructures (partly already underway), the planning of activities and, last but not least, marketing are certainly necessary. With reference to the last point, the collaboration of several bodies and organizations is also necessary to maximize the promotion of the product offered.

This not only for the summer months, but also to exploit the potential of the winter months, perhaps supporting them with equally important initiatives and using the covered spaces also recently inaugurated, such as the new Congress Centre, the Salone degli Incanti, big exhibition centre on the Rive or the Miramare Castle.

A recently renovated area which represents an important opportunity for Trieste is the one inserted in the Old Port which will potentially become an important cultural and tourist congress centre. In fact, the installation of the Museo del Mare (currently in the Campo Marzio area) is planned, as well as a series of congress and cultural activities that will allow the Old Port to be vital even in winter.

The Old Port area could also be exploited for logistical purposes. In fact, direct connections with the city centre could be envisaged with shuttle buses. A tourist InfoPoint was also created near the large parking spaces for cars and buses. In addition, the possibility of organizing maritime transport is being studied, which is essential for both mobility purposes and to exploit the nearby access to the sea. The Old Port area is able to accommodate motorboats and motor ships that can transport tourists to Grignano, Muggia, the Molo Audace and also to other regional locations.

Last but not least, the creation of a cultural space dedicated to young people could also be considered in the Old Port, that has at the same time a function of aggregation and a social, cultural and artistic container.

Over the years Trieste has been defined as a city of literature, science, coffee, a port city, a multi-ethnic city, a border city and it is precisely on this varied wealth of contents and values that the competent bodies have decided to focus on the promotion of tourism in the city and in the region.

Part two: CTM strategy

The first part provides an analysis of the current state of the cultural offer available in Trieste, a city for which PNAEAS intends to contribute to the development of sustainable cultural tourism. Speaking of sustainability, therefore of non-mass tourism, we provide below some numbers on the accommodation facilities in Trieste and in the Region found and analysed by PromoTurismoFVG, the competent authority.

The questionnaire was sent to about 1500 accommodation facilities of all types in Udine, Gorizia, Collio and Monfalcone, Pordenone, Trieste and Carso.

In the summer period May-September 2021 84% of the facilities remained open. The reporting period was characterized by a high rate of last-minute bookings due mainly to the uncertainties caused by the restrictions due to the COVID-19 pandemic. There was a greater presence of Italian and foreign tourists than in the summer of 2020 and in particular of couples and families oriented towards cultural, food and wine tourism, but also sports.

Based on the observation in September 2021, the two main reasons that led tourists to book a holiday in the region are "Nature and the environment" (20%) and "Affordable prices" (19%). As regards the impact of the organization, 62% of the structures declared to be in an area where in the period September-October 2021 events were organized capable of attracting tourists from different areas and 73% of the structures located in areas affected by events recorded positive impacts in terms of bookings, with 22% of these having increased bookings in their own structure by more than 50%.

The analysis of the presences showed that Italian tourists (excluding FVG) are 42%, Austrian 37% and German 37%. Operators indicated above average attendance in the case of tourists traveling as a couple (25%) and as a family (17%).

In summary, the geographical areas and tourist facilities of Trieste and the analysed territory are chosen by tourists for their affordable prices and the possibility of staying in areas that are not densely urbanized. The numerical data confirm Trieste's potential to become even more an important destination for niche, cultural and above all sustainable tourism.

Development opportunities and actions to implement

Trieste's development opportunities are manifold. As described in the previous chapters, the city has a very wide and varied tourist offer in which cultural and historical assets play a fundamental role.

Investments in the improvement and modernization of existing infrastructures are underway and the city will soon be able to exploit them for even more impactful products and events.

The marketing and communication activities promoted by the competent regional and municipal bodies are distributed on different channels and follow precise strategic guidelines.

PP3, as Port Authority, carefully follows the evolution of the tourist offer of Trieste and has always supported communication and promotion of the territory. Thanks to the REMEMBER Project, PNAEAS has managed to develop a permanent exhibition at its headquarters, that can be visited by all interested parties and perhaps integrated with guided tours of the Port when the pandemic restrictions will allow it.

During the workshops with the various stakeholders, who collaborated in the creation of content for the Virtual Museum (VM), the strategic importance of keeping the site constantly updated and sharing the link as much as possible was agreed in order to create a communicative network not only on local level, but on a transnational one, involving also the other project partners. Creating an interactive network using modern digital technologies will allow to reach a wider target, encouraging site viewers to physically visit cities, ports and regions.

In the specific case of Trieste, PNAEAS has tried to bring together in VM as much information as possible on the history of the port, of the city and of the citizens. The numerous multimedia files uploaded allow not only to learn new contents but also to assimilate them through a digital experience that can possibly be relived live.

The main strategic objective can be summarized in the increase in the notoriety and attractiveness of Trieste as a safe, open, welcoming city.

Thanks to the numerous locations that are able to accommodate events of any type / sector and size (from high-class hotels to historic homes, in addition to the various conference venues, among which the new center in the Old Port area stands out, the Trieste Convention Center, the largest in the North East), Trieste is also the ideal destination for conferences, events, weddings.

Regional communication strategies are also aimed at the leisure and business target. The two major international events recently hosted, the 2020 edition of the EuroScience Open Forum-Esof and the meeting of the research ministers of the G20 countries, show that Trieste has all the numbers to establish itself among MICE destinations (Meetings, Incentives, Conferences and Exhibitions).

Regarding this, PP3 can make its contribution by organizing events, meetings and conferences, currently suspended due to the pandemic.

In particular, the activities envisaged by the PNAEAS in the respective TIMEFRAMES are:

TIMEFRAME	ACTIVITIES
3 years	improvement of the contents of the VM and of the permanent exhibition at the Port headquarters, with the organization of open-door events, always and in any case in contact with local public bodies. Sharing of the website link according to the strategy agreed in the various workshops with the stakeholders met and with the project partners.
5 years	monitor the success of the website and keep the contents of the VM updated, if possible provide for a graphic review of the website, with the help of funds from the various European programs, increasingly consolidating relationships with other ports and project partners to create a solid network of cross-border cultural cooperation, in constant contact with local public bodies.
10 years	continue the activities of previous years, possibly exploiting new technologies, new resources and new contents available on the market and adapting as much as possible its activities to any new needs of the tourism market of the city.

Target markets

By collaborating with the public bodies responsible for the tourism promotion of the territory, PP3 intends to reach the largest number of tourists, who fall into the categories of people interested in living the cultural and naturalistic experience in a sustainable oriented city not yet interested by mass tourism.

Thanks to the VM, PNAEAS also wants to reach the target of potential interested people, who for various reasons, such as physical and other impediments, are unable to visit Trieste physically. The tools offered by modern technologies also allow them to enjoy Trieste comfortably seated at home, giving them a unique and certainly sustainable experience with a click.

Fields of cooperation

PP3 wants to pursue a geographically as wide as possible communication strategy through collaboration with project partners, this means at transnational level, starting from a solid local / national collaboration with the stakeholders who have contributed to the creation of the VM. These are the fundamental pillars of the CTM strategy. The PP3 activities will always be carried out in close contact with the local authorities in charge of tourism promotion activities. Moreover, the constant monitoring by PP3 of the European calls will make it possible to identify the possibility of obtaining funds from the various programs and to improve and further implement the strategy.

Financial resources

For the updating of the contents of the VM, the Port of Trieste will make use of internal resources as much as possible. For the development of digital and multimedia contents and for the integration of new communication strategies and promotion of the culture of ports and of the culture linked to port cities, will constantly monitor the possibility of application to new European funds and stay constantly in contact with other project partners.

Conclusion

The main goal of PP3's CTM strategy is to provide a contribution to local and regional authorities in charge of promoting Trieste and the surrounding area. The VM created thanks to REMEMBER project offers an additional tool that the Port can use to promote its city to different targets through different contents offered by a cosmopolitan city like Trieste.

The VM created thanks to REMEMBER project summarizes almost all of different above-mentioned contents that a city like Trieste can offer. This virtual instrument allows the Port to promote its city to different targets.

The key for a communication strategy as wide as possible is the collaboration of all involved partners and stakeholders in the project. This will elevate the CTM strategy to a transnational level able to reach new potential tourist targets.

Also, by exploiting its role as an important commercial port, PP3 will also be able to contribute to congress tourism in the city centre.

The characteristics of a city overlooking a Gulf, described in the first chapters, capture the attention of tourists oriented to experiencing the cultural, naturalistic and food and wine offerings of a place already oriented towards sustainability. There are many treasures to discover: there are the sea and the beaches, but Trieste is much more.

Del 5.1.3 Cultural Touristic Management strategy

Pp5 – Dubrovnik Port Authority

Project number:	10042741
Project acronym	REMEMBER
Project Title	REstoring the MEmory of Adriatic ports sites. Maritime culture to foster Balanced tERritorial growth
Start of the project	January 2019
Duration	30 months

Related activity:	5.1 – Adriatic ports cultural network
Deliverable name:	Cultural Touristic Management strategy
Type of deliverable	Strategy
Language	English
Work Package Title	Adriatic ports cultural network
Work Package number	5
Work Package Leader	KIP – Intermodal Transport Cluster

Status	Draft
Author (s)	Dubrovnik port Authority
Version	1
Due date of deliverable	12/2020
Delivery date	14/03/2022

Introduction

This document is part of the Work package (WP) 5 Adriatic ports cultural network that aims at setting up the Adriatic ports cultural network for the cross-border valorisation of Adriatic Italian and Croatian ports as a single integrated destination for cultural tourism, linked but at the same time alternative to the coastal tourism.

Activity 5.1 answers to a real need of involved partners to create added value for the territories from the cultural heritage that must be safeguarded. Therefore, all involved partners are committed to continue the cooperation on cultural and tourism valorisation also after the end of the project, in line with the existing local developing strategies and building upon existing cooperation frameworks among the PPs.

The CTM strategy has two main parts:

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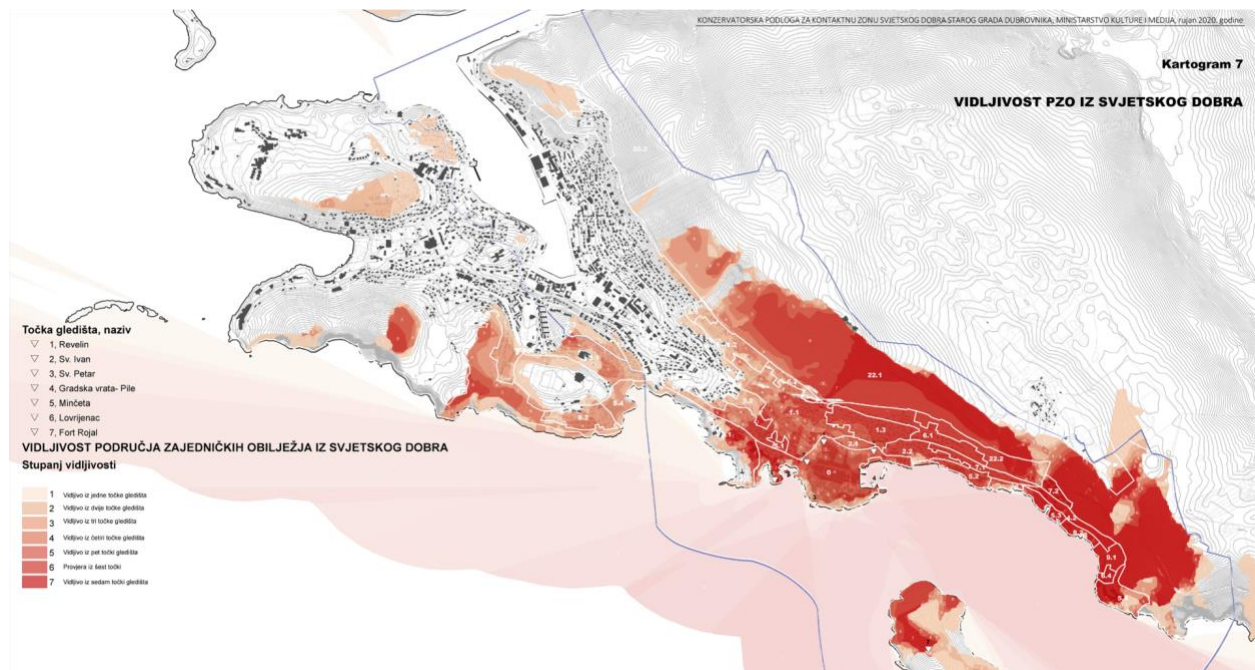
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Part one: Current state of the offer in Dubrovnik

Port of Dubrovnik, managed by PP5 Dubrovnik Port Authority (PP5 DPA) is an integrated part of the City of Dubrovnik, the centre of touristic destination. The port is located in Gruž, an urban part of the city (about 35 minutes walking distance from the historical part of the City). Therefore, for the purpose of the Cultural Touristic Management Strategy, PP5 DPA set the objectives to address the area of the City.

The City of Dubrovnik is the centre of Dubrovnik-Neretva County, the southernmost region of Croatia located in between Bosnia and Hercegovina, Montenegro and Adriatic Sea, and with around 40.000 inhabitants. Dubrovnik is one of the most prominent tourism destinations in the Mediterranean, also known as “the pearl of the Adriatic”. It is UNESCO protected heritage area since 1979. and together with the natural and other resources, it forms complete and unique tourist destination (Figure 1: Dubrovnik and the visibility of the area protected by UNESCO).

Figure 1: Dubrovnik and the visibility of the area protected by UNESCO

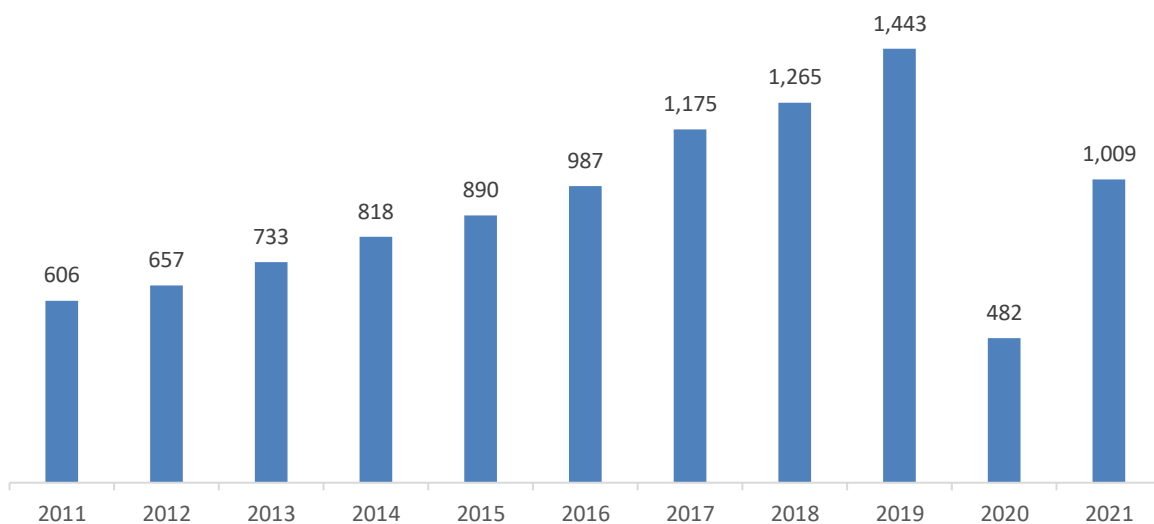


Modern tourism in Dubrovnik is evident from mid-19th century in line with the development of steamships and line routes. The established and good connections made Dubrovnik interesting destination for early travellers and explorers. As well known, Dubrovnik administration started the mandatory record of the visitors in 1896. (1.976 arrivals). A year later, an hotel ‘Imperial’ was built and the new era of tourism in Dubrovnik started. Following years Dubrovnik continuously invest in its infrastructure by building the public lightening system, public transport by tram, roads, beaches, cruise ships connections and other hospitality facilities.

Over decades Dubrovnik developed itself nurturing tourism industry based on its cultural heritage and natural resources. The peak in 20th century was 1987. with 515.134 arrivals and 2.691.726 overnights. The rest of the century’s records are affected by the war and post war rebuilding. The record tracked in 1987. was met in 2nd decade of 21st century but with important difference in indicator of average tourist stay (days) – in 1987. an average tourist stay was 5,2 days while in 2014. it was 3,4 days.

Recent records that include period just before COVID-19 pandemic, shows that in 2019. Dubrovnik had 1.443.971 arrivals and 4.375.987 overnights (Figure 2: Number of overnight arrivals in Dubrovnik from 2011 to 2019 (in thousands)). Such figures clearly indicated the destination facing mass and over tourism that threaten the sustainability of touristic destination. Dubrovnik is well aware of the mass tourism challenge and focus on rebuilding the destination into desirable place for both, inhabitants and tourists preserving the cultural and natural heritage and resources.

Figure 2: Number of overnight arrivals in Dubrovnik from 2011 to 2019 (in thousands)

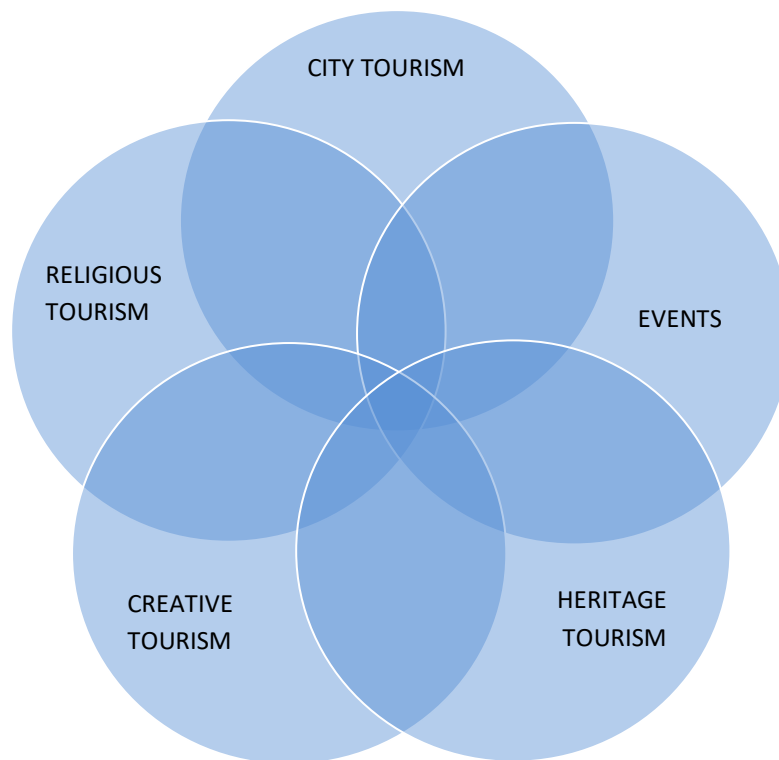


Available cultural offer

Dubrovnik is medieval town/republic of east Adriatic coast that was a trade centre for the west countries towards east (and vice versa). As such, Dubrovnik and surrounding area are rich with historical buildings and sites. The primary religion is catholic, but throughout the history, there is a culture of recognition and nurture of other cultures and religions.

As it is defined in the Methodology for the cultural touristic management strategy (WP5.1.), cultural offer can be divided into following elements: (1) city tourism, (2) heritage tourism. (3) events. (4) creative tourism and (5) religious tourism, and all of the elements are integrated into destination offer. Synergy between the elements (Figure 3: Cultural tourism elements synergy) that creates cultural offer of destination cannot function separately without another element.

Figure 3: Cultural tourism elements synergy



Cultural offer of Dubrovnik can also be seen as combination of tangible and intangible assets. Tangible assets are buildings, walls, churches, monasteries, gardens, museums, and other facilities. The centre of the destination and tangible assets is the City itself, urban medieval settlement surrounded by the City Walls (Picture 1: the City (the old town)).

Picture 1: the City (the old town)



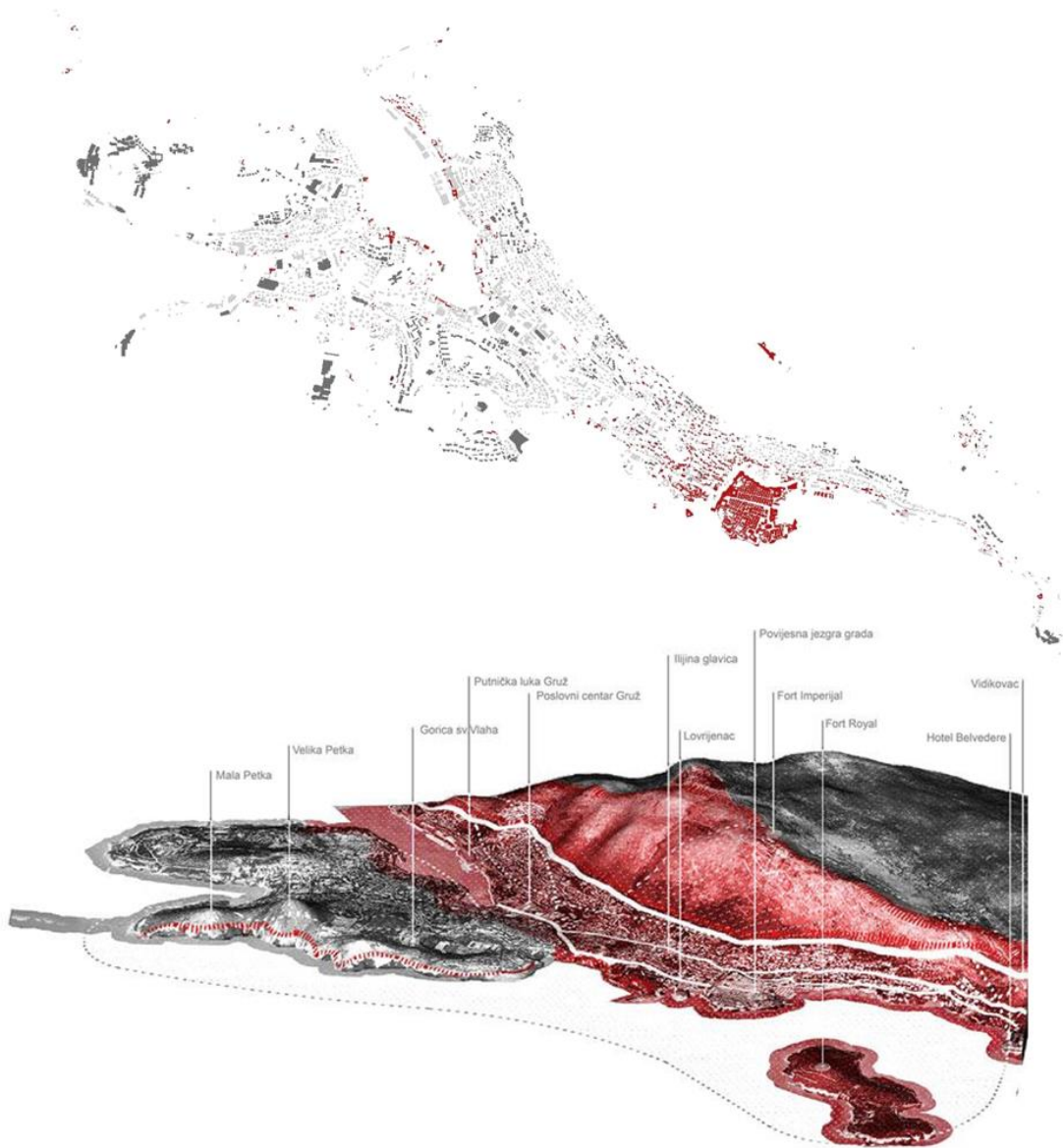
Old Town Dubrovnik is the most visited area in Dubrovnik. This is where many of the current main attractions can be found. The first of them are the two arched gates that provide the entrances to the Medieval wall that surrounds the Old Town – one to the east (the Ploče) and one to the west (Pile). The iconic Dubrovnik walls are something special and are what define the City. They are so special in fact that UNESCO declared Old Town Dubrovnik a World Heritage site in 1979. The walls were constructed between the 13th and 16th Century, and have been restored and maintained, through many wars and events over the centuries. The 1,940 meters long Dubrovnik city walls are one of the most grandiose fortification monuments in Europe and an example of early fort architecture. The first fortifications were built in the Eighth Century, but the most intense construction took place from mid-15th to the end of 16th Century.

The main thoroughfare of car-free Old Town is Stradun, also known as Placa. On each side is a grid of narrow alleys where travellers can find numerous cafes and restaurants. Other attractions include The Franciscan Monastery with one of the world's oldest pharmacies (operating since 1317), Dubrovnik Cathedral, the harmonious blend of Gothic and Renaissance style Sponza Palace, The Rector's Palace, and Dominican Monastery sheltered by the City Walls.

Within the Walls and in the nearby surrounding area, there are more than 30 churches, chapels, monasteries with preserved collection of books, paintings, relics. Museums in Dubrovnik are operating through a single institution, Dubrovnik Museums and consists out of Maritime Museum, Ethnographic Museum, Archaeological Museum, Cultural History Museum. Thus, there are art museum, monastery museums, palaces, summer houses and gardens all around the destination.

Intangible cultural assets are events and works of that symbolises Dubrovnik destination. The local cultural sector has a track record and long-standing experience producing and organising international performing arts events (e.g., Dubrovnik Summer Festival), exhibitions (e.g., Museum of Modern Art, Dubrovnik Museums, Museum of Natural History) and concerts (e.g., Dubrovnik Symphony Orchestra). The City also holds carnivals and festivals throughout the year, most notably Dubrovnik Summer Festival. Since 1950, this festival has taken place annually between July 10th and August 25th. It features the opera, theatre, dance, and music, with events held in various open-air venues around Dubrovnik. Additionally, Lovrijenac, a popular attraction in Dubrovnik, hosts a variety of cultural events, from the World Series of Cliff Diving to local productions of Shakespeare's Hamlet. It also served as a backdrop in some of the most memorable scenes from Game of Thrones.

Figure 4: Tangible assets, visibility and 3D view



Panoramic views of Dubrovnik’s ancient city can be enjoyed by gliding to the top of Mount Srđ on an ultramodern cable car. Located just outside the City walls, the cable car station offers visitors a quick, easy and scenic mode of transport to the peak of the rugged little mountain. In addition to a restaurant, snack bar and souvenir shop at the summit is a small museum and memorial commemorating the Homeland War of the 1990s. Hikers may enjoy descending the mountain by way of a steep ropeway trail. (Touropia, 2020)

Dubrovnik is a global upscale destination for both leisure and business travellers which offers its guests a year-round experience based on culture and events. New tourism infrastructure is created for the most part through investment initiatives by local entrepreneurs (e.g., a wine museum, raising the quality of rural accommodation), and to a lesser extent through larger investment projects (e.g., the marina as a priority, and in later stages a resort project). New tourism infrastructure and competitiveness projects enable a qualitative repositioning of the “sun and sea” products and establishment of a nautical product, thus creating a new market for rural and gastro offers and positioning the tourism product of the peninsula in a consistently qualitative manner.

Figure 5: Key cultural offer synergy

	CULTURAL TOURISM ELEMENTS				
	CITY TOURISM	EVENTS	HERITAGE TOURISM	CREATIVE TOURISM	RELIGIOUS TUORISM
The City Walls	•		•		•
The Rector’s Palace	•	•	•	•	•
Museums	•	•	•	•	•
Dubrovnik Summer Festival	•	•		•	
St. Blaise Festival	•	•	•		•
The Cable Car – Panorama Museum	•	•	•	•	•

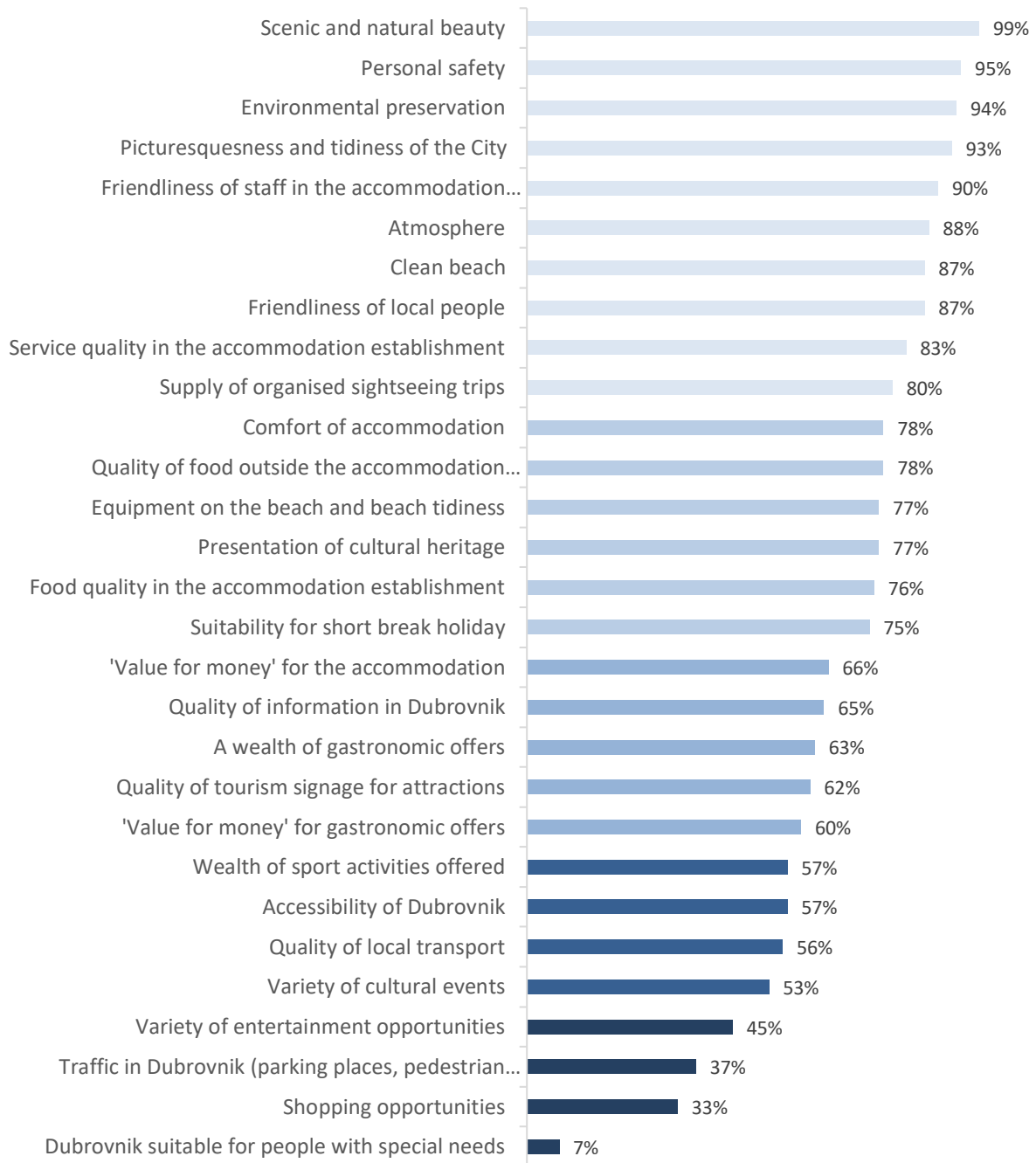
Port of Dubrovnik, as a part of touristic destination is legal entity established primarily to manage port assets and operations. As such, the Port has no cultural offer to present in its facilities; Port’s intention is to become a shareholder in cultural offer of the destination by promoting maritime values, history and tradition. Therefore, project REMEMBER is an important mean to achieve Port’s objectives.

Development constraints

Tourism in Dubrovnik has grown steady over the years. In 2019, Dubrovnik received almost 1.5 million overnight visitors. Additionally, Dubrovnik welcomes around 9.000 – 9.500 cruise passengers daily during the peak season (divided between morning and afternoon). While boosting economy in Dubrovnik, this growth has results in operational difficulties such as traffic congestions, overcrowding of sites and attractions, degradation of important assets, and other challenges. The end result is dissatisfied, both tourists, visitors and inhabitants.

According to Tomas Dubrovnik Report 2018, and the level of satisfaction of tourist offer questioned through conducted survey, tourists are very satisfied with scenic and natural beauty (99%) of destination, personal safety (95%), friendliness, atmosphere and other similar assets, while at the bottom of the list are needs for disabled people (7%), shopping opportunities (33%), traffic issues (37%), virality of entertaining events (45%) and cultural events (53%) (Figure 6: Tourist satisfaction with destination offer (Tomas Dubrovnik 2018). There are many conclusions coming from this survey and the constrains that creates opportunities for future interventions.

Figure 6: Tourist satisfaction with destination offer (Tomas Dubrovnik 2018)



To address this situation Dubrovnik redefines its strategic orientation putting in front the sustainability of tourist destination and needs of inhabitants, tourists and visitors. Together with Cruise Lines International Association (CLIA), Dubrovnik commissioned (2019) a Global Sustainable Tourism Council (GSTC) Destination Assessment of the City of Dubrovnik in line with The United Nations standard for sustainable management of tourism destinations. Although CLIA funded GSTC Destination Assessment, they were no allowed editorial input into the content of the report.

According to GSTC Destination Assessment of Dubrovnik, and based on four main pillars of destination sustainability:

1. Destination policy and planning,
2. Community involvement and benefits,
3. Management of cultural and natural assets, and
4. Environmental and natural resource management,

GSTC report identify 16 main issues (Table 1: Main Issues Identified in GSTC Destination Assessment).

Table 1: Main Issues Identified in GSTC Destination Assessment

<i>GSTC PILLARS</i>	<i>Main 16 Issues Identified in GSTC Destination Assessment</i>
Destination Management	<ol style="list-style-type: none"> 1. Destination Management Organization (A2) 2. Comprehensive Monitoring and Data-Driven Decision-making (A3) 3. Climate Change Mitigation and Adaptation (A5) 4. Tracking of Visitor Satisfaction (A10) 5. Sustainability Standards (A11) 6. Safety and Security / Transport and Traffic Control (A12) 7. Crisis & Emergency Management (A13)
Social & Economic Benefits	<ol style="list-style-type: none"> 8. Diversify Economic Base to Develop Experiences Reflecting Distinctive Dubrovnik Natural & Cultural Assets (B2) 9. Resident Satisfaction & Public Participation in Destination Decision Making (B3) 10. Support for local entrepreneurs (B9) 11. Traveller Engagement in Community and Local Benefits (B5)
Natural & Cultural Asset Management	<ol style="list-style-type: none"> 12. Visitor Management System to Protect Sites and Attractions (C2) 13. Visitor Education and Behaviour (C3) 14. Code of practice for tour guides and tour operators (C3)
Environmental Sustainability	<ol style="list-style-type: none"> 15. Environmental and Natural Resource Infrastructure & Awareness (D2) & Wastewater (D9) 16. Management of Light and Noise Pollution (D11)

Table 2: GSTC Criteria, full list

PILLAR	CRITERIA NUMBER	CRITERIA NAME	SCORE
DESTINATION MANAGEMENT	A1	Sustainable Destination Strategy	2.20
	A2	Destination Management Organization	2.60
	A3	Monitoring	0.67
	A4	Tourism Seasonality Management	2.00
	A5	Climate Change Adaptation	2.00
	A6	Inventory of Tourism Assets & Attractions	2.00
	A7	Planning Regulations	1.70
	A8	Access for All	2.00
	A9	Property Acquisitions	2.00
	A10	Visitor Satisfaction	1.00
	A11	Sustainability Standards	0.50
	A12	Safety & Security	2.20
	A13	Crisis & Emergency Management	0.80
	A14	Promotion	2.00
SOCIAL & ECONOMIC BENEFITS	B1	Economic Monitoring	1.00
	B2	Local Career Opportunities	2.50
	B3	Public Participation	1.50
	B4	Local Community Opinion	1.00
	B5	Local Access	1.00
	B6	Tourism Awareness & Education	2.00
	B7	Preventing Exploitation	1.50
	B8	Support Community	1.00
	B9	Supporting Entrepreneurs & Fair Trade	1.50
NATURAL & CULTURAL ASSET MANAGEMENT	C1	Attraction Protection	2.00
	C2	Visitor Management	2.00
	C3	Visitor Behaviour	1.50
	C4	Cultural Heritage Protection	2.50
	C5	Site Interpretation	1.80
	C6	Intellectual Property	2.00
ENVIRONMENTAL SUSTAINABILITY	D1	Environmental Risks	0.50
	D2	Protection of Sensitive Environments	2.00
	D3	Wildlife Protection	2.50
	D4	Greenhouse Gas Emissions	0.50
	D5	Energy Conservation	1.50
	D6	Water Management	1.00
	D7	Water Security	1.00
	D8	Water Quality	1.67
	D9	Wastewater	0.75
	D10	Solid Waste Reduction	1.25
	D11	Light & Noise Pollution	1.50
	D12	Low-Impact Transportation	2.00

Development opportunities

The destination sees opportunities in developing widely known area of sustainable tourism. The project run by current administration that put sustainability at the top of the priorities is called 'Respect the City'. Respect the City (RTC) represents the commitment of the local government to manage destination towards the community that preserves cultural and natural heritage, and live with it.

Respect the City as research and development programs, *has a general objective to set the guidelines for enhancement of quality of living and staying of all inhabitants and visitors of Dubrovnik by research, development and implementation integrated approach to reflect, financing and realization of development solutions in key segments of community, economy, culture, education, social, urbanist, transport and tourist sustainable development.* By this time, RTC manage to kick-off the actions towards set goals and it is good starting point.

Picture 2: Respect the City presented by the City Mayor Mr. Mato Franković

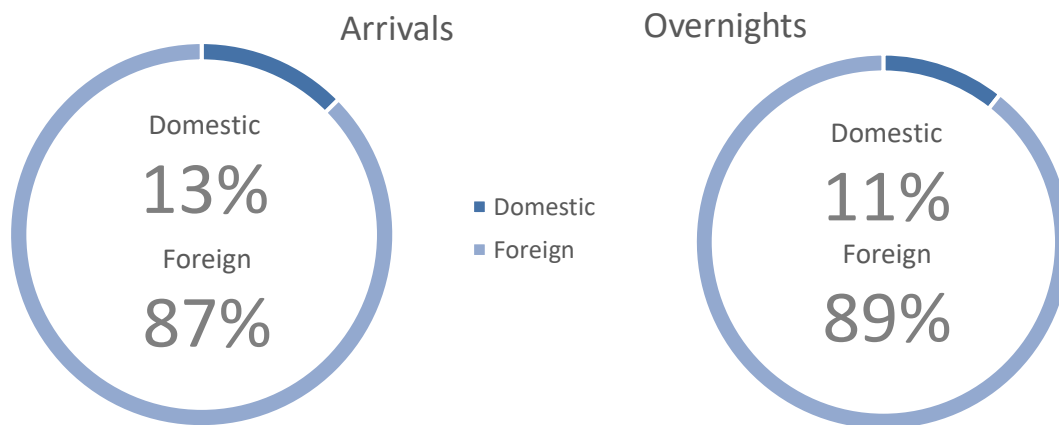


Part two: CTM strategy

Tourist demand and consumption effects

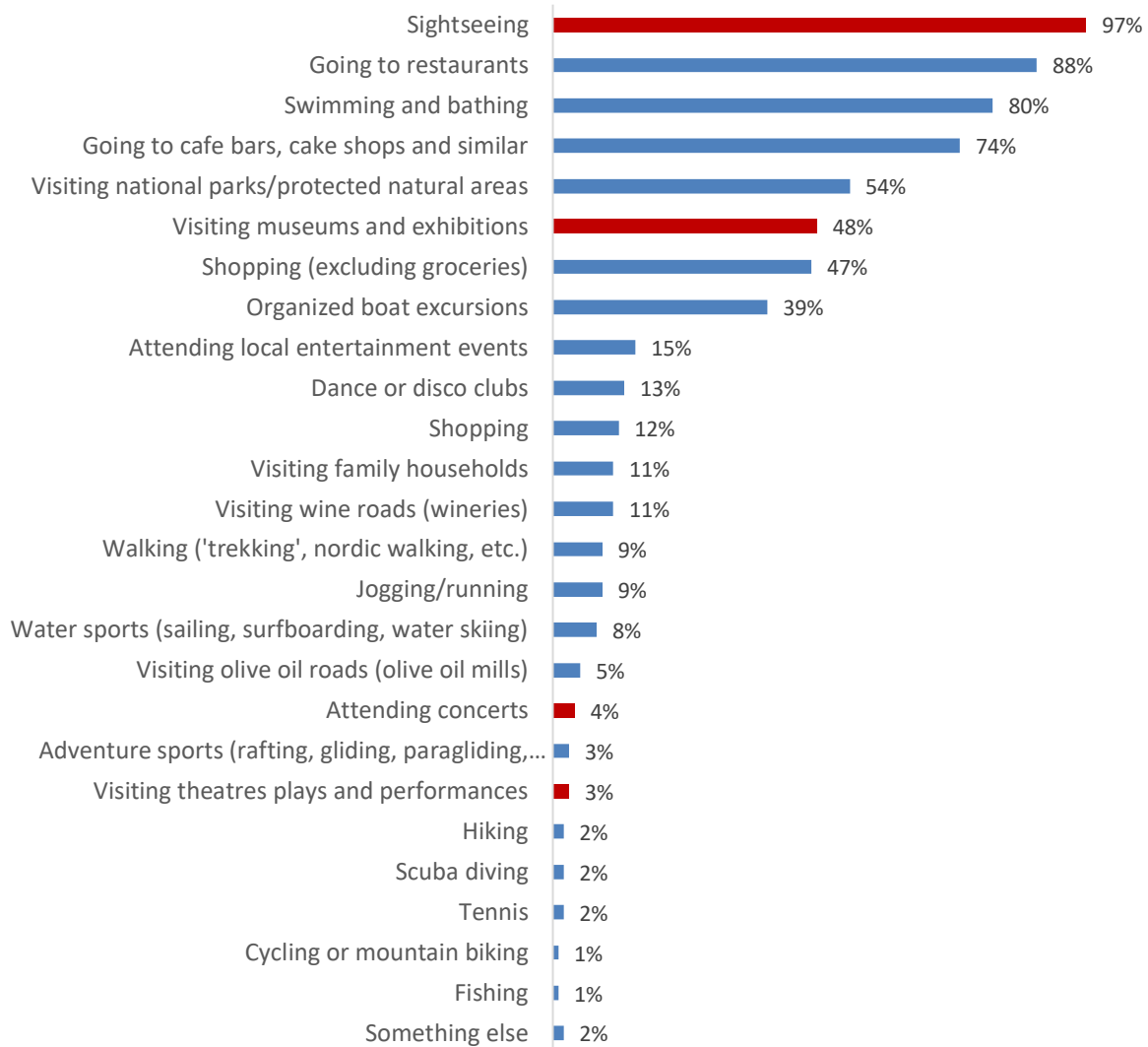
Dubrovnik host more than 1.5 million overnight arrivals in 2019. The COVID-19 global situation resulted in 1/3 of 2019. figures in 2020., and 2/3 in 2021. that brings an optimism for the years ahead. The most of the tourists are foreign visitors (almost 90%) (Figure 7: Number of domestic and foreign tourists (2021)).

Figure 7: Number of domestic and foreign tourist (2021)



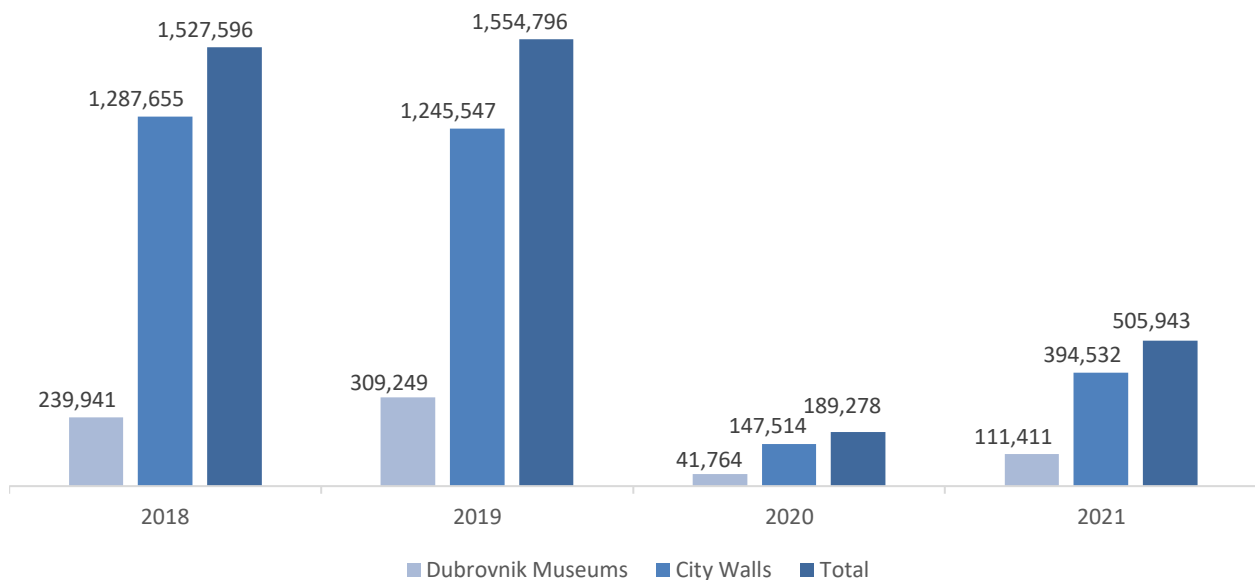
Survey conducted for the purpose of Tomas Dubrovnik 2018. (Figure 8: Activities of the tourists at the destination (Tomas Dubrovnik 2018)) found that the top activity at the destination is sightseeing – 97%. Sightseeing was expected to be the top activity at the destination since Dubrovnik as whole is landmark and tourists can spend significant time just to explore the location by walking. At the 6th place at the top list of activities are visits to museums and exhibitions; 48% of the tourists prefer those activities while staying in Dubrovnik. Other primarily cultural offer like concerts and theatre, attracted only few percentages of tourists.

Figure 8: Activities of the tourists at the destination (Tomas Dubrovnik 2018)



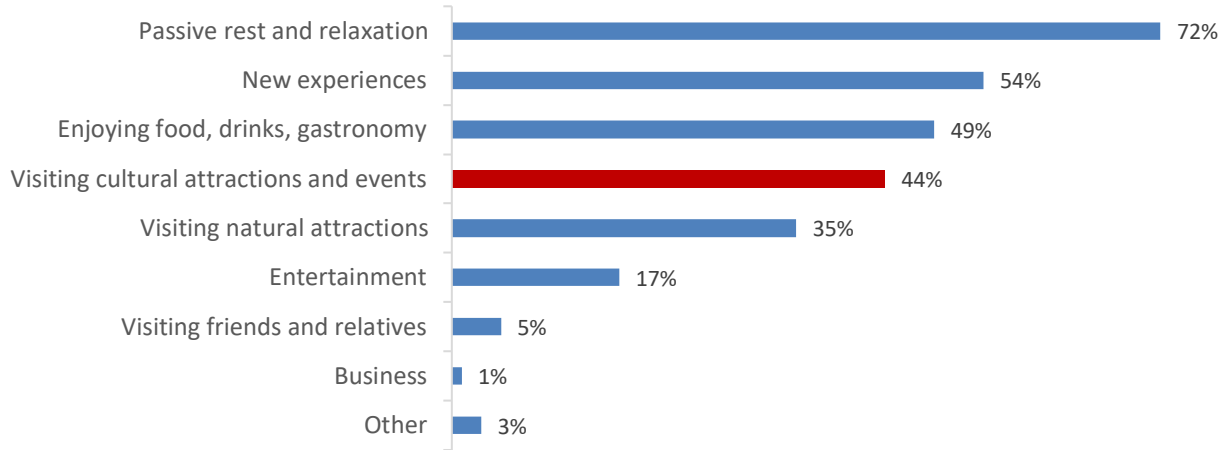
Available records for number of tourists visiting cultural offer of Dubrovnik are related to the City Walls and Dubrovnik Museums, as key cultural offer of destination. Out of total 1,5 million visitors in 2019. 80% of them took the walk over the City Walls, and only 20% visited Dubrovnik museums (Figure 9: Number of visitors of Dubrovnik Museums and the City Walls). These numbers go in line with previous results of the survey on tourist activities at the destination (97% tourists do sightseeing). Although the trend for number of visitors in Dubrovnik Museums is positive and promising, the gap between 80-20% ratio is significantly huge and a proof of space for intervention and development.

Figure 9: Number of visitors of Dubrovnik Museums and the City Walls



Moreover, the assessment includes the question of motivations for visiting Dubrovnik. Although Dubrovnik foundation for tourism activities is its rich history and cultural heritage, it is primarily perceived as destination for passive rest and relaxation (Figure 10: Motives for visiting Dubrovnik (Tomas Dubrovnik 2018)) as stated 72% of questionees. Dubrovnik landmark is exploited for sightseeing that is motivated by rest and relaxation, and not the cultural tourism offers. Next on the scale of motivation is 'new experiences' (54%) and 'gastronomy' (49%). At 4th place of motivation for visiting Dubrovnik is visiting cultural attractions and events (44%).

Figure 10: Motives for visiting Dubrovnik (Tomas Dubrovnik 2018)



Key questions and limitations

Dubrovnik like other touristic destinations of the Mediterranean, is facing seasonality of touristic activities. Most tourists chose the time of year to visit Dubrovnik based on climate conditions.

Dubrovnik's climate is borderline humid subtropical (Cfa) and Mediterranean (Csa), in the Köppen climate classification. Typically, in July and August daytime maximum temperatures reach 28°C, and at night drop to around 23°C. In Spring and Autumn, maximum temperatures are typically between 20°C and 28°C. Winters are among the mildest of any Croatian city, with daytime temperatures around 13°C in the coldest months. Snow in Dubrovnik is rare. The tourists favour clear, rainless days with perceived temperatures between 18.5°C and 27.7°C that are perfect for outdoor activities from mid-May to late July and from mid-August to early October. Dubrovnik is showing creativity capitalizing on the advantages of its attributes to better spread visitors year-round, including the Dubrovnik Tourism Board campaign "A City for All Seasons."

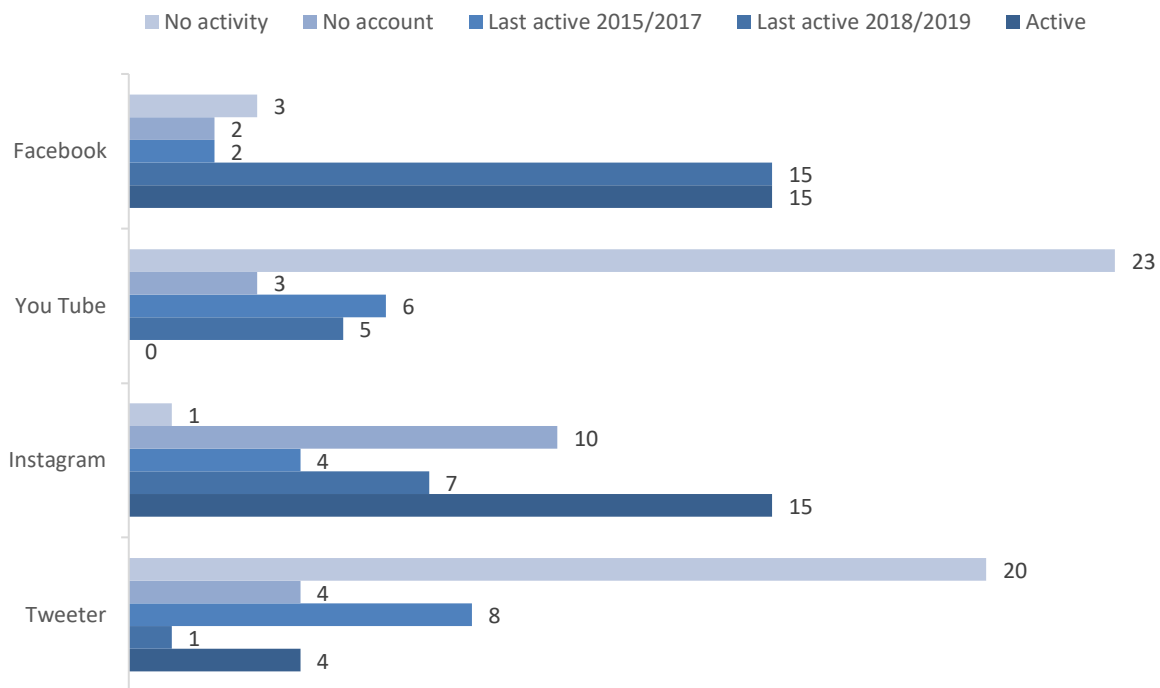
Alongside with the climate condition and the number of visitors throughout a year goes the cultural offer of the City. Concerts, exhibitions, plays and other cultural events are organized during the peaks of the season. The most popular cultural event, Dubrovnik Summer Festival (DSF) is traditionally held from July 10th to August 25th while other similar events are spared before and after DSF. It can be said that the stage for all kind of events is set throughout the whole year and the challenge is to develop and promote cultural offer.

As of end of 2019, Dubrovnik featured 15 hotels of the highest class – Five Star, the highest number of Five Star hotels in a tourist destination in the Republic of Croatia. Exceptional quality of refurbishment and high-level offer are features of 11 Four Star hotels, 16 Three Star hotels and 2 Two Star hotels. The total hotel capacity is 12,027 beds, with additional 16,019 private accommodation beds, 547 beds by hostel and 1,542 places in camping. Recent research analysed 37 Dubrovnik hotels' appeal to the growing Millennial visitor market, by examining their websites and tracking social media platforms (Instagram, Facebook, YouTube and Twitter) over a two-week period. Results showed low social media activity among Dubrovnik hotels. Even those that showed higher levels of social media activity, are not publishing content appealing to Millennials. (Ema Pocuca, 2019).

Dubrovnik is the absolute leader of social media in Croatia. By far the most traffic and interest of any Croatian destination on the web and social media is drummed up by Dubrovnik, with nearly twice as much interest as the second Croatian city. Most social media mentions come from the United States, UK, Switzerland, Germany and Italy, with most mentions (89%) favourable. Many comments address the natural beauty of Croatia, the sea, islands, and history. Instagram is by far the most used social media

channel referencing Dubrovnik. The top three destinations in Croatia with most visitors in the first six months are Rovinj, Dubrovnik, and Zagreb. When it comes to social networks and the web, only two cities are mentioned the most - Dubrovnik (12,759 mentions) and Split (7,313 mentions). Dubrovnik’s mentions are mostly associated with the popular Game of Thrones series. King’s Landing was mentioned 4,000 times in visitor posts, of which 741 relate to Dubrovnik and 321 to Croatia. (Total Croatia News, 2019).

Figure 11: Dubrovnik hotels’ social media activity

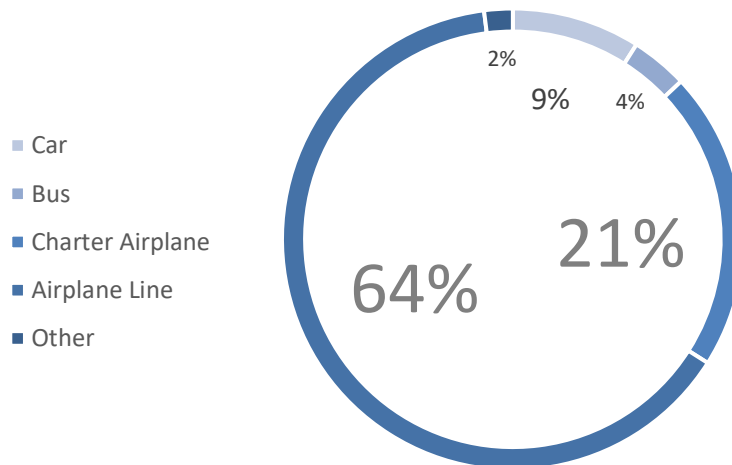


Transportation to destination can be by air, road and sea. There are 2 main intermodal hubs: Port of Dubrovnik and Dubrovnik Airport. Both are the points where sea/air traffic connects to local/regional/national road infrastructure.

The Port of Dubrovnik has amassed high-profile tourism awards. After being named as the best port in the Adriatic Sea region by MedCruise, Dubrovnik was named Top-Rated Eastern Mediterranean Cruise Destination for 2019 in the Cruise Critics Choice Destination Awards, based on passenger reviews and ratings. (The Dubrovnik Times, 2019) While Dubrovnik is a popular cruise destination, the majority of visitors travel to Dubrovnik by air. Most visitors arrive from March to November directly from almost fifty European towns, while in Winter the air traffic is via Zagreb. Dubrovnik visitors are mostly from Great

Britain, then from France, Croatia, Spain, and Germany. Arrivals are increasing from the Greek, Turkish and Scandinavian markets.

Figure 12: Means of transportation to destination



In line with the project methodology, we put our focus in following elements to be addressed by destination management: place, people, product, process. For this purpose, we focused on Dubrovnik Port Authority as an active stakeholder in cultural tourism destination management, and how DPA contribute to the overall touristic destination.

The Place – Dubrovnik Port Authority as location is a point where tourists do the shift from sea traffic to road traffic. DPA is in urban area of Dubrovnik, and in small walking distance to the main tourist attractions. It is equipped with all necessary facilities and features for its purpose of operating, but there is no additional offer related to cultural tourism of destination.

The People – tourists stay in port for limited amount of time (between 10 minutes and few hours, or overnight). They tend to stay in port as less as possible, but at the same time they have to ‘spend’ time in port due to administrative and other reasons.

The Product – DPA product is to secure port operations. One part of ‘the product’ is to provide transfer of people and goods from-to different means of transportation, but in addition, DPA need to create positive experience of that transfer. The first part of the product (transfer) is something that highly depends of policies and procedures, while other (experience) can be developed. Time that tourist spend in DPA can

be organized so that there is no crowds and lost minutes during the transfer, and time can be 'filled' with content which at the same time making the waiting period less anxious, and informative by promoting the culture offer of the destination.

The Process – management of destination have to be coordinated among the stakeholders, and each one has to have clear picture of duties, tasks, timeframe, and resources. DPA has duty to share and teach other stakeholders about the operations done at DPA in order to jointly upgrade the product.

Development opportunities and actions to implement

The GSTC standard for destinations emphasizes the importance of meaningful and inclusive community involvement in destination decision making. The GSTC Destination Assessment process therefore relies heavily on community stakeholder consultation to evaluate the destination's performance and prioritize risks for the destination to address first and foremost. Based on the GSTC Assessment findings, GSTC recommended that Dubrovnik address 16 main issues that were identified as risks, or gaps, during the evaluation.

Dubrovnik Port Authority is one of the key stakeholders in destination management and 'a silent partner' in cultural tourism of destination. DPA operates in fields of traffic, and the most negative reviews of destination are related to traffic issues. The Port have to share its knowledge and experience with their shareholders, and be open for implementation of new ideas. The overall GSTC assessment process helped DPA to prove its importance as stakeholder of tourist destination.

Out of main 16 issues, the following issues are flagged as priorities to be addressed:

- Sustainability Standards
- Environmental and natural Resource Infrastructure and Awareness
- Crisis and Emergency Management
- Transport and Traffic Control
- Resident Satisfaction and Public Participation in Destination Decision Making
- Support for Local Entrepreneurs.

Table 3: Main Issues Identified in GSTC Destination Assessment

<i>GSTC PILLARS</i>	<i>Main 16 Issues Identified in GSTC Destination Assessment</i>
Destination Management	<ol style="list-style-type: none"> 1. Destination Management Organization (A2) 2. Comprehensive Monitoring and Data-Driven Decision-making (A3) 3. Climate Change Mitigation and Adaptation (A5) 4. Tracking of Visitor Satisfaction (A10) 5. Sustainability Standards (A11) 6. Safety and Security / Transport and Traffic Control (A12) 7. Crisis & Emergency Management (A13)
Social & Economic Benefits	<ol style="list-style-type: none"> 8. Diversify Economic Base to Develop Experiences Reflecting Distinctive Dubrovnik Natural & Cultural Assets (B2) 9. Resident Satisfaction & Public Participation in Destination Decision Making (B3) 10. Support for local entrepreneurs (B9) 11. Traveller Engagement in Community and Local Benefits (B5)
Natural & Cultural Asset Management	<ol style="list-style-type: none"> 12. Visitor Management System to Protect Sites and Attractions (C2) 13. Visitor Education and Behaviour (C3) 14. Code of practice for tour guides and tour operators (C3)
Environmental Sustainability	<ol style="list-style-type: none"> 15. Environmental and Natural Resource Infrastructure & Awareness (D2) & Wastewater (D9) 16. Management of Light and Noise Pollution (D11)

Under each prioritized issue there were project ideas proposed with key elements (*Table x: List of project ideas under key issues*), and details of each project idea.

Table 4: List of project ideas under key issues

<i>Priority Issue</i>	<i>Project Idea</i>
Sustainability Standards	<ol style="list-style-type: none"> 1. Implement Sustainability Standards in Dubrovnik 2. Upscale Local Souvenir Scheme
Environmental and Natural Resources Infrastructure and Awareness	<ol style="list-style-type: none"> 1. Improve Solid Waste Management Facilities and System 2. Upgrade Wastewater Facilities 3. Educate and Incentivize Responsible Resource Use
Crisis and Emergency Management	<ol style="list-style-type: none"> 1. Developing Mechanisms for Effective Crisis
Transport and Traffic Control	<ol style="list-style-type: none"> 1. Smart City Solutions, Traffic Control and Regulation 2. Infrastructure, Green Mobility and Awareness

Resident Satisfaction and Public Participation in Destination Decision Making	1. Resident Satisfaction Upscale
Supporting Local Entrepreneurs	1. Development of Local Entrepreneurs Infrastructure 2. Utilizing Entrepreneurship against Tourism Monoculture

Dubrovnik Priority Issue 1 – Sustainability Standards

<i>Project idea 1.1</i>	Implement Sustainability Standards in Dubrovnik
<i>Objectives</i>	<ul style="list-style-type: none"> - To educate stakeholders across sectors about sustainable tourism and sustainability standards; - To set targets and systems for Dubrovnik tourism businesses to meet and be promoted as certified to sustainability standards; - Expand the scope of sustainability across the pillars of sustainability in City Operation to include elements of GSTC standards
<i>Activities</i>	<ul style="list-style-type: none"> - Conduct trainings for the local community on sustainable tourism development and application of sustainability standards; - Set up a research centre / working group – connecting scientific institutions, to develop inventory of existing standards and a plan to adopt GSTC Criteria and indicators for tourism within Dubrovnik.
<i>Results</i>	<ul style="list-style-type: none"> - Increase in businesses complying with GSTC sustainability standards for tour operators and accommodations; - Publicized list of tourism businesses certified to GSTC accredited program
<i>Indicators</i>	<ul style="list-style-type: none"> - Use of sustainability standards in the private sector; - Use of sustainability standards in the public sector
<i>Partners</i>	<ul style="list-style-type: none"> - GSTC, universities, DURA, hotels association, tour operators' association
<i>Timeframe</i>	<ul style="list-style-type: none"> - 3y

<i>Project idea 1.2</i>	Upscale Local Souvenir Scheme
<i>Objectives</i>	<ul style="list-style-type: none"> - Upgrade Authentically Croatian Souvenir to Include sustainability elements; - Expand the scheme outside Dubrovnik.
<i>Activities</i>	<ul style="list-style-type: none"> - Update the scheme criteria in order to include major and minor criteria for sustainability; - Design and execute training on stores owners on the sustainability good practices; - Execute marketing campaign on that new content of the scheme in order to invite more stores to be included into the scheme, not only from the old city but also in other parts of the Municipality
<i>Results</i>	<ul style="list-style-type: none"> - Increase in businesses complying with Local Scheme Criteria; - Increase of awareness on the Scheme outside Dubrovnik
<i>Indicators</i>	<ul style="list-style-type: none"> - Number of members in the Local Scheme

<i>Partners</i>	- the City of Dubrovnik, Dubrovnik Tourism Board, GSTC, DURA, Local Chamber of Commerce, universities, GSTC
<i>Timeframe</i>	- 3y and more

Dubrovnik Priority Issue 2 – Environmental and Natural Resources Infrastructure and Awareness

<i>Project idea 2.1</i>	Improve Solid Waste Management Facilities and System
<i>Objectives</i>	<ul style="list-style-type: none"> - To upgrade solid waste management facilities and system (landfill, etc.) - To achieve greater quality in waste management services - To increase public awareness and participation in sustainable waste management practices
<i>Activities</i>	<ul style="list-style-type: none"> - Organize the infrastructure of the Solid waste management - Set up a research centre - Conduct information sessions for local residents - Create a Bio-composting plant for sludge treatment
<i>Results</i>	<ul style="list-style-type: none"> - Increased recycling statistics in the City of Dubrovnik - Improved waste sorting in containers; Increase in the utilization of sorted waste - Reduced amount of waste
<i>Indicators</i>	<ul style="list-style-type: none"> - Data on recycling practices among various stakeholders, and waste avoided to landfill - Time for creation of the new facility of solid waste management in Dubrovnik - Sorting success rate
<i>Partners</i>	- The City Of Dubrovnik, Utility Companies, Waste Management Company, Universities, DURA
<i>Timeframe</i>	- 3y and more

<i>Project idea 2.2</i>	Upgrade Wastewater Facilities
<i>Objectives</i>	<ul style="list-style-type: none"> - To increase the quality of provided services - To minimize any risk of failure on wastewater facilities
<i>Activities</i>	<ul style="list-style-type: none"> - Improvement of the wastewater drainage system - More frequent monitoring samples on wastewater facilities outcomes
<i>Results</i>	<ul style="list-style-type: none"> - Increase of transparency on wastewater monitoring results - Awareness increases on facilities efficiency
<i>Indicators</i>	<ul style="list-style-type: none"> - Monitoring frequency - Results of monitoring (data collected)
<i>Partners</i>	- The City of Dubrovnik, water supply company
<i>Timeframe</i>	- 3y and more

<i>Project idea 2.3</i> Educate and Incentivize Responsible Resource Use	
<i>Objectives</i>	<ul style="list-style-type: none"> - Increase responsible resources use in private and public sectors - Increase energy and water efficiency - Minimize waste production
<i>Activities</i>	<ul style="list-style-type: none"> - Public and Business education in environmental and natural resource conservation issues (including separation of waste, minimizing single-use plastic etc.) - Creation of a comprehensive monitoring system (on-line, real time or quasi real time) on several resources (water, energy, air quality), introducing sub-metering devices and new technology implementation, even in the old city region - Construction of the water purification facility - Creation of a map for noise and illumination in all parts of the City of Dubrovnik - Creation of an Inventory of buildings with low energy efficiency and introduction of cases with important renovation / retrofit potential - Generation of environmental impact assessments based on scientific data and field work collected data
<i>Results</i>	<ul style="list-style-type: none"> - Increase in energy efficiency, especially in Buildings - Creation of studies for EU or Country financial support - Implementation of monitoring and evaluation systems - Generation of ecosystem services and sustainability - Creation of Educational, informative and interpretation panels
<i>Indicators</i>	<ul style="list-style-type: none"> - Number of retrofitted buildings - Number of sub meters installed - Kwh of saved energy and m3 of saved water - Improved performance as measured by data collected
<i>Partners</i>	<ul style="list-style-type: none"> - Utility Company, Waste Management Company, The City Of Dubrovnik, Inspection Services, The Port Authorities, The Department For Health Inspection, Building Maintenance Company
<i>Timeframe</i>	<ul style="list-style-type: none"> - 5y and more

Dubrovnik Priority Issue 3 – Crisis and Emergency Management

<i>Project idea 3.1</i> Developing Mechanisms for Effective Crisis	
<i>Objectives</i>	<ul style="list-style-type: none"> - To upgrade the existing crisis and emergency management plans - To create awareness along the public - To upgrade the necessary infrastructure, from planning, to navigation, to communications before, during, and after crisis
<i>Activities</i>	<ul style="list-style-type: none"> - Evaluate the existing plans and make the necessary updates, adapting existing systems to include pandemic response and recovery. Develop site carrying capacities and management plans - Run education / awareness series on private and public sector, especially for tour operators and guides - Install necessary infrastructure for early warning and cover the entire area with a sound warning system. Creation of Shelters inside the City

	<ul style="list-style-type: none"> - Written notifications to households. Installation of image displays. Setting up a schematic diagram in public institutions on “how to act in situations of crisis”
<i>Results</i>	<ul style="list-style-type: none"> - New plans in place until 2021, under RtC priorities, Strategic Projects (2021-2027) and Integrated Development Program Dubrovnik 2030 - Educated public on crisis and management plans - Electronic system established for real time monitoring of crisis issues - Regularly update plans based on lessons learned - Training and awareness of central management team, visitors, and supply chain - Funded implementation for purchase and maintenance of the apparatus - Updated Guides Training Manual
<i>Indicators</i>	<ul style="list-style-type: none"> - Number of People that are educated on management plans - Number of evacuation plans exercises & drills per year for a case of seismic activity - Number of Events testing, Citizens, surveys and simulations of real events
<i>Partners</i>	<ul style="list-style-type: none"> - The City Of Dubrovnik; The Mayor’s Office, The Directorate For Civil Protection
<i>Timeframe</i>	<ul style="list-style-type: none"> - 3y

Dubrovnik Priority Issue 4 – Transport and Traffic Control

<i>Project idea 4.1</i>	Smart City Solutions, Traffic Control and Regulation
<i>Objectives</i>	<ul style="list-style-type: none"> - To reduce traffic congestion and improve traffic flow - To regulate ‘hot’ issues on traffic control - To leverage innovation and research to inform transport outcomes
<i>Activities</i>	<ul style="list-style-type: none"> - Select a monitoring system for controlling the movement of vehicles - Upgrade the Traffic Control Centre - Introduce regulation of transport providers to achieve roadway capacity and traffic management plans - Merchandise delivery inside the city core - Introduce a dynamic system for traffic signalling (green wave, cameras, sensors) - Taxi vehicles colour regulation
<i>Results</i>	<ul style="list-style-type: none"> - Technology-driven traffic and visitor monitoring and management system - Improved traffic flow - Adapted number of taxi vehicles according to the city’s size
<i>Indicators</i>	<ul style="list-style-type: none"> - Data on vehicles around the Old City centre - Data on taxi and commercial transport at traffic peak times - Percentage of City area with controlled traffic via the monitoring system
<i>Partners</i>	<ul style="list-style-type: none"> - Administrative Office For Traffic, Dubrovnik and Neretva County Police Department - The City Of Dubrovnik
<i>Timeframe</i>	<ul style="list-style-type: none"> - 5y

<i>Project idea 4.2</i> Infrastructure, Green Mobility and Awareness	
<i>Objectives</i>	<ul style="list-style-type: none"> - To encourage sustainable movement systems / Green Mobility - To raise awareness for Green Mobility in Dubrovnik City - To introduce innovation and research to mobility planning - To support and promote sustainable and green mobility as well as set of gamified incentives and stimuli for the visitors, experience providers and locals
<i>Activities</i>	<ul style="list-style-type: none"> - Introduce locals and visitors to more Green Mobility Solutions - Educate all stakeholders - Introduce ways for harmonizing pedestrian traffic - Build a garage system and more secure road infrastructure - Create an information system on the use of green mobility in the City / Smart Visitor Flow and Experience Management System (RtC) - Introduce a sea tram in maritime traffic as alternative solutions
<i>Results</i>	<ul style="list-style-type: none"> - Increase of Pedestrian & Cycling - Increase of Local public transportation - Reduction in the air pollution impact from transporting passengers from cruise ships to the city core - Decrease of emissions during the peak traffic days
<i>Indicators</i>	<ul style="list-style-type: none"> - Number of sea tram routes - CO2eq per ship passenger km - Number of bicycle parking slots - Number of parking slots - Number of people that are using the public transportation means
<i>Partners</i>	<ul style="list-style-type: none"> - The City Of Dubrovnik; Libertas; Public Health Institute; Dubrovnik and Neretva County Police Dep., Local Public Transportation Company
<i>Timeframe</i>	<ul style="list-style-type: none"> - 3y and more

Dubrovnik Priority Issue 5 – Resident Satisfaction and Public Participation in Destination Decision Making

<i>Project idea 5.1</i> Resident Satisfaction Upscale	
<i>Objectives</i>	<ul style="list-style-type: none"> - To boost public participation in City of Dubrovnik Budgeting and Decision Making - To raise public awareness and involvement in the City Planning - To increase resident satisfaction with destination decision making
<i>Activities</i>	<ul style="list-style-type: none"> - Establish clear and transparent decision-making process for projects, including access for the public to track project progress online - Introduce a system for online public voting, referenda, and comment on projects - Hold meetings where representatives of the City of Dubrovnik engage participants regarding decisions which concern them, finding a place for meetings and explaining the reasons behind reaching a decision - Establish a Residence Satisfaction Index (KPI) - Set up a fund for expanding home purchases for residents - Introduce incentives and disincentives in favour of a live city

<i>Results</i>	<ul style="list-style-type: none"> - Clear process and transparency for destination decision making - Greater and more open public participation in destination decisions
<i>Indicators</i>	<ul style="list-style-type: none"> - Number of city management Surveys - Number of participation of locals at Decision Meetings - High levels of Residence Satisfaction Index - Increase in # of purchased and renovated apartments - Availability of affordable housing for residents
<i>Partners</i>	<ul style="list-style-type: none"> - The City Of Dubrovnik, Locals, NGOs, Universities, Foundations
<i>Timeframe</i>	<ul style="list-style-type: none"> - 3y

Dubrovnik Priority Issue 6 – Supporting Local Entrepreneurs

<i>Project idea 6.1</i>	Development of Local Entrepreneurs Infrastructure
<i>Objectives</i>	<ul style="list-style-type: none"> - Support the development of the local entrepreneurship infrastructure - Define, measure and monitor indicators for sustainable development and sustainable tourism development, with special focus on small business and entrepreneurship outcomes, including market access in tourism value chain - Minimize “Brain Drain” phenomenon for Dubrovnik area - Connect entrepreneurs with technology and research
<i>Activities</i>	<ul style="list-style-type: none"> - Create an entrepreneurial zone - Create a network-driven business incubator for entrepreneurs and business accelerator for local businesses - Create a map of SMEs and system to better link geographically dispersed businesses to tourism value chain - Introduce an initiative for employment support for young trainees, women and people with disabilities - Deliver education which covers soft and hard skills for entrepreneurs - Provide financial assistance for local business representatives to participate in international events promoting the destination
<i>Results</i>	<ul style="list-style-type: none"> - Greater revenue and market linkages - Increased employment of locals - Increase application of Incubators and Accelerators - Higher participation in co-funded projects - Higher rate of technology transfer to the market
<i>Indicators</i>	<ul style="list-style-type: none"> - Annual/monthly report on implemented activities - Number of approved subsidies - Number of students who applied - Number of new local Start-Ups - Number of new supporting schemes for entrepreneurs - Economic data on small business formation and performance
<i>Partners</i>	<ul style="list-style-type: none"> - The City Of Dubrovnik, DURA; universities

<i>Timeframe</i>	- 5y and more
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Project idea 6.2 Utilizing Entrepreneurship against Tourism Monoculture	
<i>Objectives</i>	<ul style="list-style-type: none"> - Diversify the Economy - Invest in programming to grow diverse economic supply, focusing on sectors that would connect authentic local products and services to the tourism value chain (e.g., agriculture, ecotourism, etc.) - Support no-mainstream economic activities of Dubrovnik Area
<i>Activities</i>	<ul style="list-style-type: none"> - Create a comprehensive study on the activities inside and outside the tourism supply / value chain in the area of Dubrovnik, including RtC Tools - Develop a supporting scheme for local family farms and agricultural holdings, focusing on boosting the rural tourism - Create a common brand for local products and services, widening the Authentic Croatian Souvenirs program - Support and revitalize the traditional crafts - Develop specific indicators that are in line with sustainable tourism in the City of Dubrovnik and complete analysis of the gathered economic information - Develop financial grants programs and training programs for these target groups
<i>Results</i>	<ul style="list-style-type: none"> - Increase of local entrepreneurs who operate their business off-season from payment of public space lease in the whole area of the city - Widen scope of Authentic Croatian Souvenirs program to feature a more diverse array of local suppliers and products - Increase of scholarships for bottleneck occupations
<i>Indicators</i>	<ul style="list-style-type: none"> - Annual/monthly report on implemented activities - Number of approved subsidies for these activities - Number of SMEs and locals who applied - Number of new local Start-Ups - Number of new supporting schemes / scholarships for entrepreneurs in that groups
<i>Partners</i>	- The City Of Dubrovnik; DURA; Dubrovnik Tourism Board, universities
<i>Timeframe</i>	- 5y and more

Target markets

In order to define target markets, it crucial to see the current state of market. At first, we define market by the countries they are from. The records from 2019 shows that most of tourists are from United Kingdom (304.000 arrivals, 1.577.000 overnights) which is 18% of all tourists (Figure 13: Tourist by countries (2019)). This trend is same for the years before and can be expected in following years. Most of the tourist comes from neighbour countries except for the tourist from USA, and there are no countries without tourist present in Dubrovnik (Figure 14: *Tourist segmentation by their nationality (in thousands) 2019*).

Figure 13: Tourists by countries (2019)

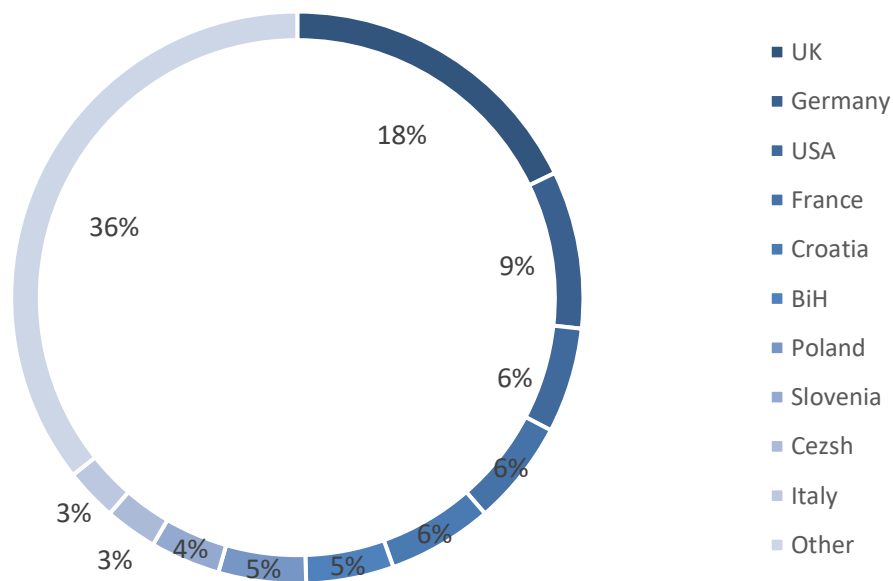
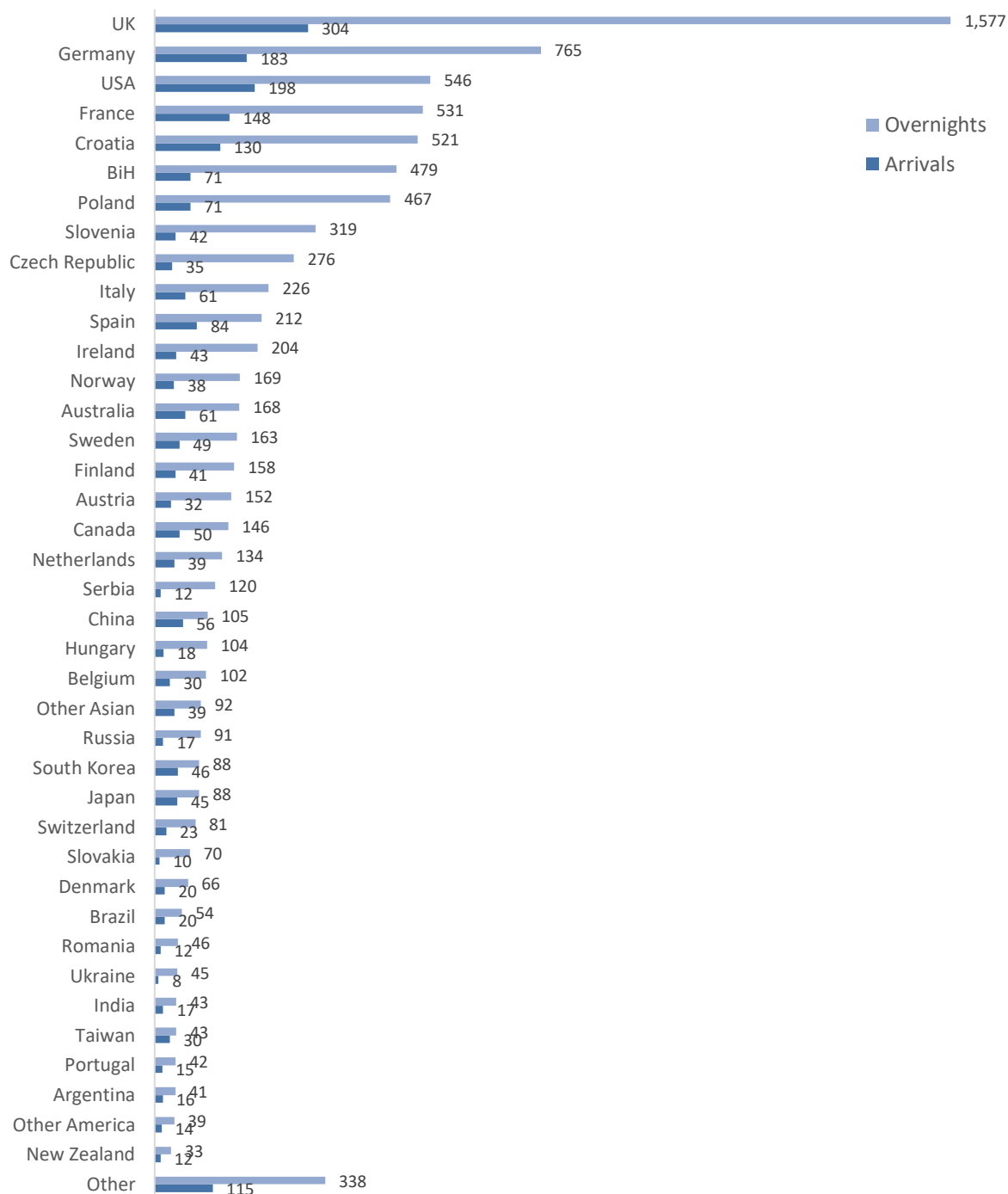


Table 14: Tourist segmentation by their nationality (in thousands)



If we look at the tourist by their age (Figure 15: Tourist share by age) we see that most of the visitors are ages between 26 and 35 (30%) closely following by age group between 36 and 45 (26%). All others fall under the rest.

Another figures to analyse in order to define target market is monthly household income of tourist (Figure 16: Monthly household tourist income (€)). It is evident that most of tourist comes from households with monthly income between 2.001 – 5.000 € (65%) (with the most questionees between the range of 3.001 -4.000 € (28%)). It is also evident that the last category of tourists with monthly household income of more than 7.001 € (17%) is significant and the tourists to be targeted.

Figure 15: Tourist share by age

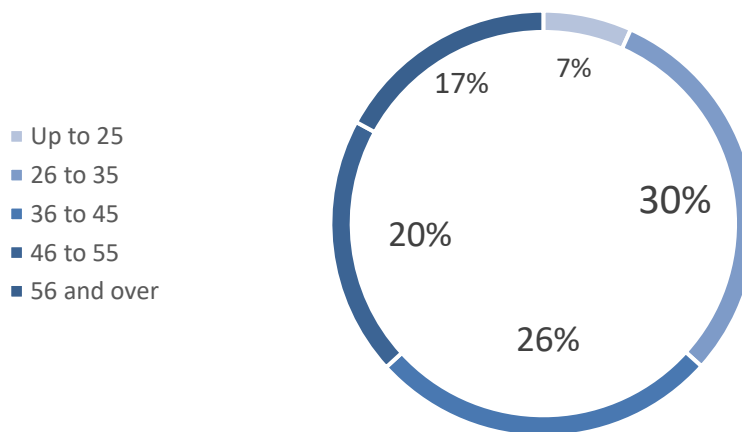
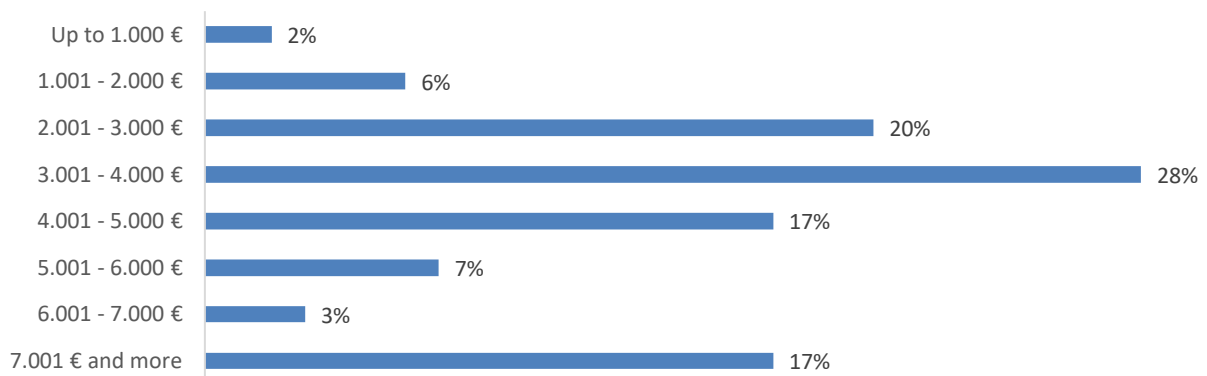


Figure 16: Monthly household tourist income



If we look at the average daily spending of tourist staying in hotels and family apartments (Figure 17: Average daily spending (2018)), we can see that guests from hotels spend almost double (2016 € per day) comparing the guest from family apartments (115 € per day). Going deeper in records comparing the types of hotels we see that guest in 5* hotels spend 295 € daily, while guest from 4* and 3* hotels together spend 320 € daily. These figures show us an opportunity for investment into recategorization of 4* hotels and especially 3* hotels in order to achieve better business records. Having said that, it is clear why Dubrovnik has so many 5* hotels.

Figure 17: Average daily spending (2018)

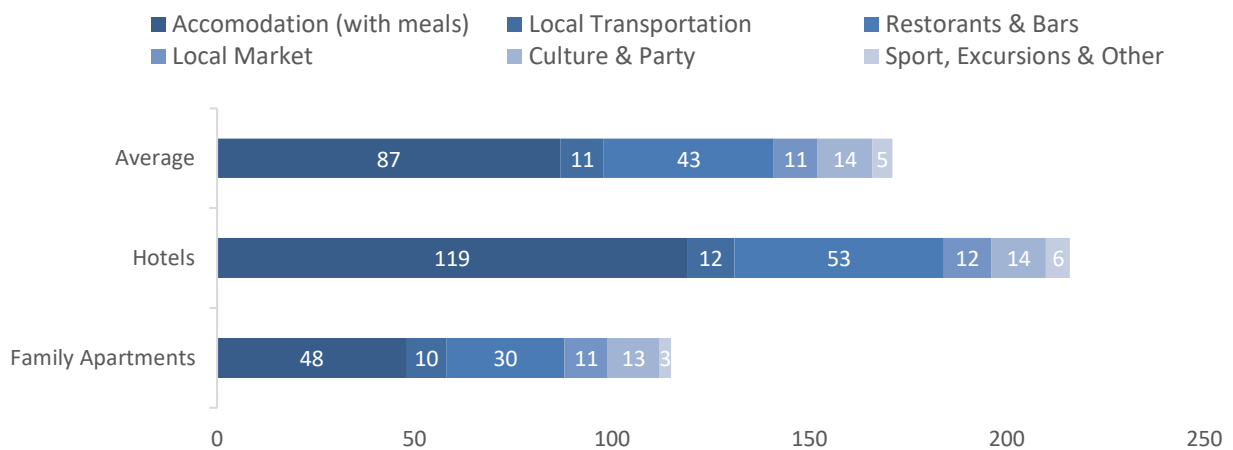
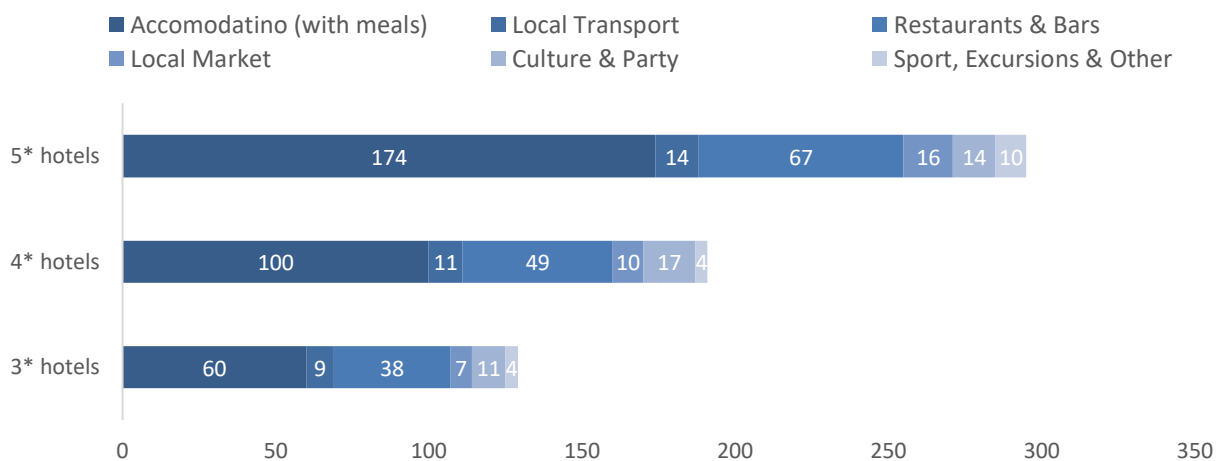


Figure 18: Average daily spending of hotel guests



In addition to described target groups of tourists, there is a significant number of visitors from cruise ships whose behaviour is important to assess, and we can divide them into two groups: cruise ship passengers, and cruise ship crew.

Figure 19: Cruise ships passengers per nationality (%)

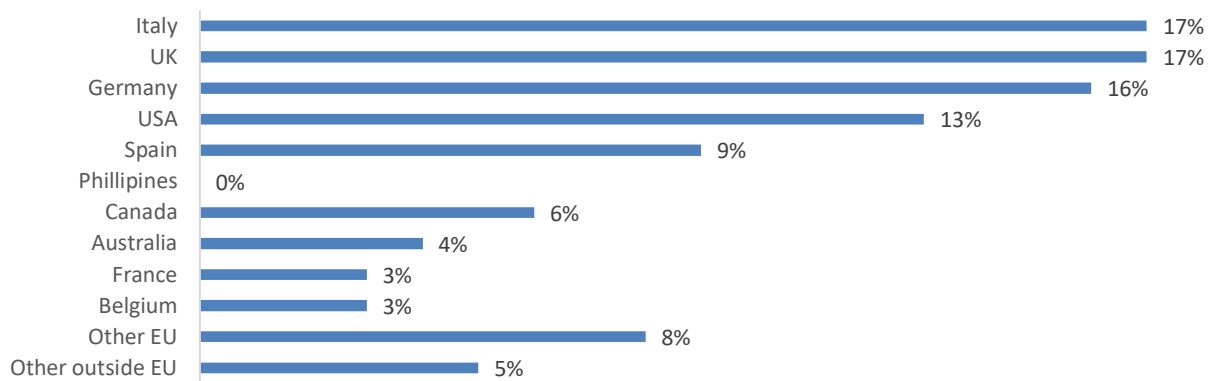
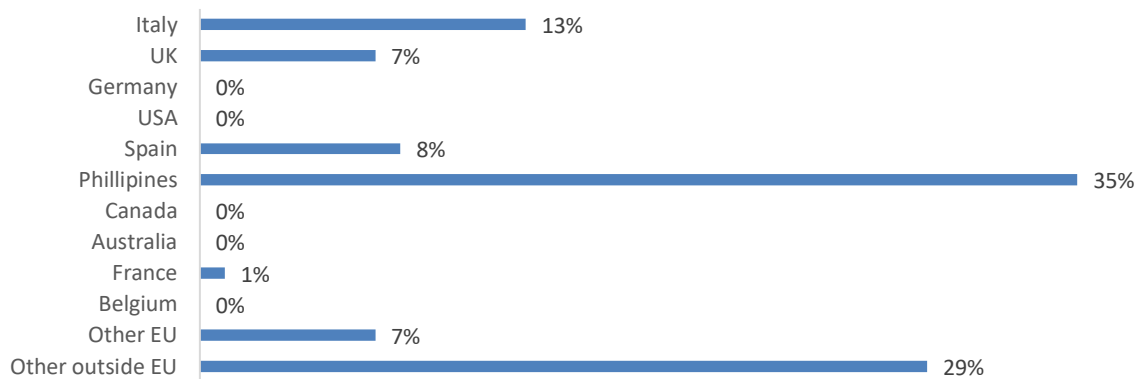
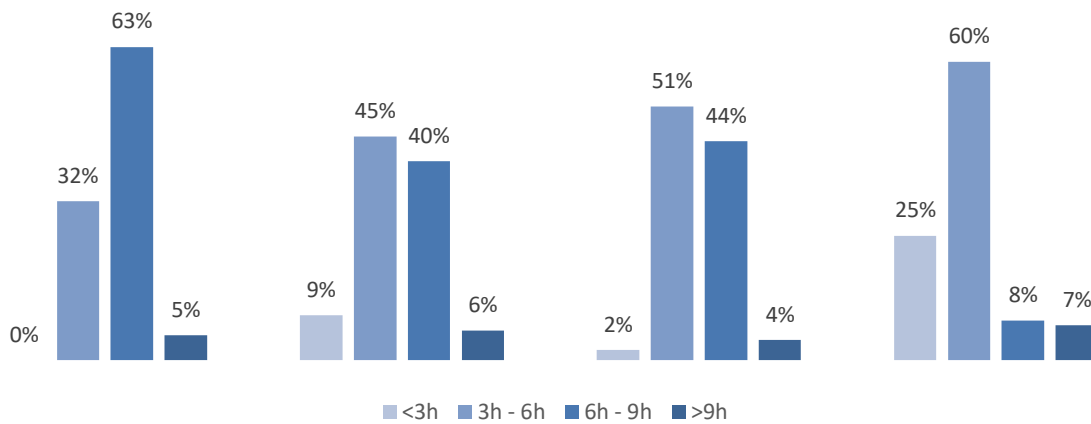


Figure 20: Cruise ships crew per nationality (%)



Most of the cruise ships' passengers are first time visiting Dubrovnik (92%) and depending on the size of the ship their average stay in Dubrovnik is between 5 and 8 hours. Other information and data related to the cruise ships visitors are in line/closely similar to figures of other visitors of the destination previously described.

Figure 21: Time spent in Dubrovnik



All described data and information give us a clear picture of the current attracted tourist at our destination, and the space for the improvements in order to achieve maximum sustainable industry impact on local economy. With the set goals to be sustainable tourist destination with the benefits for visitors and inhabitants and all other shareholders, the shift in experiencing the destination happened among the tourists also. The tourists are aware of the importance of set goals, and are willing to cooperate in order to achieve objectives.

Fields of cooperation

Cooperation among the stakeholders of sustainable tourist destination is crucial to meet future objectives. List of stakeholders includes: local/regional/national public authorities, cultural and natural heritage management bodies, local/regional development agencies and other supporting institutions, associations, NGOs, education and training institutions and inhabitants. So far, the practice is to include all stakeholders into planning and decision-making process. Strategies, assessments, action plans and other key elements to achieve objectives includes close cooperation with stakeholders, and (although the process takes time) the results are emerging.

Financial resources

Financial resources necessary to implement planned activities and meet targeted objectives are mainly public budgets and funds. Tourist demand in destination is resulted in highest GDP per capita in Croatia

in recent years. Having in mind the awareness of the local government towards set goals for sustainable tourism development, it is expected that the significant portion of financial resources will be spent by local government at the beginning of the projects' implementation. This starting phase of implementation is also important since it is time to set and organize the management of the overall process towards sustainable tourist destination.

On the other hand, infrastructure projects financing is planned with European structural funds through national and EU plans and strategies. These projects need significant contribution from (at least) the national level, and planned actions are in line with all strategies of higher hierarchy level.

Third group of actions and projects are the ones that emphasize cooperation with partners of the same or similar interests, and the ones that aim at testing and piloting initiatives and solutions. One of the most suitable tools and financial resources and the ones provided through cross-border and trans regional cooperation programmes (like different Interreg Programmes, and more).

All of the above-mentioned financial resources available are the ones that destination's stakeholders are already successfully using over the years (even before Croatia became EU member state, before 2013).

Conclusion

The City of Dubrovnik evolve into mature tourist destination committed to moving tourism industry towards a sustainable future. The records and figures show us that Dubrovnik currently lacks many enforced and unified systems to promote sustainable tourism in the destination, and considerable work needs to be done to ensure the sustainability of the destination.

REMEMBER activities and results together with other assessments, strategies and other, brings values to destination by pointing the relevance of setting up the priorities, policies and local actions. Developed project ideas outlines consensus priorities for the following years, and Dubrovnik Port Authority has important role in it.

Cultural Touristic Management strategy

Project number:	10042741
Project acronym	REMEMBER
Project Title	REstoring the MEmory of Adriatic ports sites.Maritime culture to foster Balanced tERritorial growth
Start of the project	January 2019
Duration	30 months

Related activity:	5.1 – Adriatic ports cultural network
Deliverable name:	Cultural Touristic Management strategy
Type of deliverable	Strategy
Language	English
Work Package Title	Adriatic ports cultural network
Work Package number	5
Work Package Leader	KIP – Intermodal Transport Cluster

Status	Final Version
Author (s)	Port Authority of Zadar / Assoc. Prof. Dino Županović, PhD
Version	1
Due date of deliverable	12/2020
Delivery date	21/12/2020

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Introduction

History of Zadar

Zadar is a city whose past goes back 3,000 years, when it was first mentioned as a settlement in written documents and historical artefacts. It became a fully urbanized center during ancient Roman times and remained as such continuously for another two millennia. Ever since those first records, Zadar has been one of the most important cities on the Eastern Adriatic coast, and an inevitable destination for adventurers, poets, and writers. With every step you take, its streets, squares, the seafront, churches, and monumental heritage unveil its antiquity and continuity, whereas modern installations show the vision of modernity and inspire new travelers. Three thousand years ago the bases were set, and the adventure started.

Prehistorical Findings

Material remains of human existence and its culture in the region of Zadar date back to the late Stone Age. The oldest Dalmatian man named Šime, and a Palaeolithic Venus named Lili were found in the 15,000-year-old layer on Dugi Otok. Settlements of Puntamika and Arbanasi on Zadar land date from the late Neolithic. Their present-day residents still pride themselves on being unique.

Liburnians

2,700 years ago, Zadar, as a Liburnian settlement, had already become a significant center, anchorage, and port for numerous trading voyages. The Liburnians were the contemporaries of the Etruscans in Italy and the Levantine Phoenicians, and they were just as skillful in trading and navigation as the most influential civilizers of the Iron Age. The notorious seamen, the Liburnians, later became the main builders of the future Roman Empire Armada (Naves Liburnae) that controlled the Mediterranean. In Zadar's hinterland, within the territory of Ravni kotari, an impressive megalithic Asseria still exists.

Roman Empire

The union with Rome did not only prevent the Liburnians from losing land within the Northern Dalmatia territory, that was threatened by the advance of the Greeks and neighboring Dalmatae, but it also gave their ancient settlement Zadar the final touch as a city. In the period of the Empire, Zadar was built and urbanized, in other words it thrived and little by little it what will mark it through the entire historical period of the Late Antiquity and Middle Ages, or rather until the very beginning of the First World War – the center of the Eastern Adriatic. The Roman Forum in Zadar is the witness of that period.

Middle Ages

A big earthquake and consecutive volcanic eruptions on Iceland in the 6th century terminated all the relationships between Zadar and its ancient past, so the city changed and recovered gradually during the Early Middle Ages. Very soon, Zadar became the most significant Dalmatian free commune and center of Dalmatia in the Byzantine Empire, just as strong and advanced as Venice. The Croatian war elite of the time controlled the wider Zadar area, as well as towns, and to the widest extent Adriatic islands, so the characteristics of space remained the same: high level of urban territory development, shipbuilding equivalent to the Liburnian (Condura Croatica and Serilia Liburnica in the neighboring historical town of Nin) and the metropolitan significance of Zadar. At the end of the 14th century, the first University on Croatian territory was founded here by the Dominicans.

Zadar Under the Republic of Venice

From the 11th until the 14th century Zadar's dukes were at ceaseless wars with the Republic of Venice, which did not view the significant and powerful trading competition in its neighborhood favorably. The Croatian king Petar Krešimir IV annexed the city of Zadar and the Dalmatian municipalities in 1069 consensually, but as soon as the beginning of the 12th century, Zadar and the Kingdom of Croatia entered a personal union with Kingdom of Hungary. Nominally, it still belonged to the Kingdom of Naples and the Holy Roman Empire right until 1409, when Zadar and Dalmatia were sold to the Republic of Venice for the price of 100 thousand ducats. The

later period of Zadar was characterized by controlled development, and during the 16th and 17th centuries by the growing danger of the Ottoman Empire, which was slowly taking control over Zadar hinterland. With the construction of the new fortress and wall system that changed the city's appearance significantly, Zadar soon became the biggest city-fortress in the Republic of Venice, and its defense system is inscribed on UNESCO's World Heritage List.



Figure 1: Representation of Zadar under the Republic of Venice [1]



Figure 2: The crusaders conquering the City of Zadar in 1202, painted by Andrea Vicentino [2]

Napoleonic Wars

With the fall of Venice at the end of the 18th century, Zadar was annexed to Austria, but as soon as 1806, Zadar came under the authority of Napoleonic France. During only seven years of rule over Zadar and Dalmatia within French Illyrian Provinces, the French were trying to significantly alter the reality thus far and to modernize the region, so Zadar University was re-established with the Faculty of Medicine, Chirurgical Studies, Pharmaceutical Studies, Law, Construction and Geodesy. At the same time, Zadar became the administrative center, where the first newspaper in Croatian, *Kraglski Dalmatin*, was written and printed. After the fall of Napoleon and the siege of Zadar in 1813, the Austrian army entered the city yet again.

Austrian Empire

The second Austrian rule over Zadar lasted until 1918 and the end of the First World War, when Zadar kept its role of the capital Dalmatian city, but this time of the Kingdom of Dalmatia. Zadar was also the seat of the Dalmatian Parliament and the Church Metropolis for entire Dalmatia, so the city was gradually settled by numerous officials from Italy, which also belonged to Austria. In 1816 the first high school and later the first public park (Queen Jelena Madijevka Park) opened in Zadar. Also, the National Museum was founded and in 1838 the first modern city water supply system was used. Very soon, Zadar became a modern European city with numerous squares and public spaces, luxurious coffee houses and hotels, libraries and reading rooms, and it even had six printing houses and more than 40 different newspapers and magazines. 33 types of liqueurs were produced in Zadar, the world's most famous one being Maraschino. On the last day of 1894, the first electric city light was lit in Zadar, and the first electricity distribution network in Croatia was systematically installed.



Figure 3: Representation of Zadar under Austrian Empire [3]



Figure 4: Maraschino [4]

Yugoslav Period

The Austro-Hungarian Monarchy broke down in 1918, so therefore in 1920 Zadar was annexed to Italy as an enclave on the Eastern coast of the Adriatic. Only at the end of the Second World War, Zadar became a part of Croatia once again, or rather Yugoslavia. In the Yugoslav period Zadar was entirely rebuilt because it suffered severe bombings during the Second World War in 1943 and 1944, when nearly the entire historic center was devastated. This period was characterized by the industrialization of the city and its surroundings, the Faculty of Philosophy was founded, and Zadar became a powerful cultural and economic center of the region. Based on an almost three-thousand-year-old tradition of skillful shipbuilders, a big shipping company was founded in Zadar called Tankerska plovidba, and at that time Zadar became a tourist center as well. Zadar was mostly known for its pioneer contribution to the development of Croatian and Yugoslav basketball, whose representation was proclaimed the European, World and Olympic champion repeatedly, together with Zadar's own Krešimir Ćosić.



Figure 5: Allied bombardment of Zadar in 1944 [5]

Contemporary Zadar

Since 1991 Zadar has been a part of the Republic of Croatia, established in the Homeland War, and after declaring independence from the Socialist Federal Republic of Yugoslavia. Once again, Zadar has become the centre of the region called Zadar County, and during the 30-year-long period the city prioritized the building of a new community infrastructure, a big modern port and passenger terminal Gaženica, where cruise ships now berth, then establishing the Zadar University, and turning to tourist industry. Zadar is connected to Zagreb by a motorway and because it has an airport, it is practically connected to entire Europe and the world by sea, land, and air. Zadar today is a city of students, a dynamic urban centre with around 70,000 inhabitants,

while around 100,000 people from other cities, municipalities, towns, and islands of Zadar County look up to Zadar as an inspiring center.



Figure 6: Panoramic view of contemporary Zadar [6]



Figure 7: Zadar Passenger Port Gaženica [7]

Review of Zadar and Zadar County Tourist Offer

Since the most distant past when the first living cultures were created, today only mute shards of human existence, up to contemporary and abstract ideas of the nature of everything, human beings left a trace in time and space. Zadar's museums are a vivid proof of those endeavors; its unrevealed secrets, secret fragments of time, stories untold and those that are about to be told.

Next chapters bring review of Zadar and Zadar County most prominent cultural heritage representing long and often very active history over several thousand years. Presented tangible and intangible cultural heritage in no way represents all, rather only a portion of available heritage, as for its presentation several hundreds of pages would not be sufficient.

Museums

National Museum Zadar

The National Museum Zadar has been a stakeholder in the development of public museum activities since 1832, and its holdings today count about 100,000 items and represent the heritage capital of the identity of the city of Zadar and the entire Zadar region.

A proud custodian of the tradition and cultural heritage of the people in this region, today the Zadar National Museum has four departments - the Department of Natural History, the Department of Ethnology, the Museum of the City of Zadar, the Art Gallery; two regional collections - the Ethnographic Collection Veli Iž and the Cultural-Historical Collection Mali Iž; three exhibition pavilions, as well as cultural monuments - the City Lodge, the Rector's Palace and the visitor center Mali Arsenal; two professional services - Documentation and Pedagogical Service, and Secretariat and Accounting as general services.



Figure 8: City Lodge [8]



Figure 9: Mali (Little) Arsenal [9]

Natural History Department of the National Museum Zadar

The Natural History Department of the National Museum Zadar has its roots in Napoleonic rule in Zadar in 19th century, when Vincenzo Dandolo, the governor of the Zadar Lyceum, insisted on establishing the Natural History Cabinet. The Natural History Department preserves the historical remains of natural history collections gathered over the past centuries, but also collects new natural resources distributed in about thirty collections (vertebrate collections, insect collections, mollusk collections, herbarium, and other natural history collections).



Figure 10: Natural History Department of the National Museum Zadar [10]

Ethnological department of the National Museum Zadar

The ethnological department of the National Museum Zadar collects traditional items of the rural culture of northern Dalmatia, which is divided into Dinaric and Adriatic. Located in the

City Guard, where there is a permanent exhibition "Ethnological features of northern Dalmatia", this department is a place of dialogue of the population of this area with its own cultural heritage and its search for their own cultural identity in contemporary cultural and civilizational circumstances. The realization that ethnic heritage is best known through active adoption has led the Ethnology Department to organize various workshops and cultural events "Ethno Days".



Figure 11: City Guard [11]

Zadar City Museum

Zadar City Museum as a department of the National Museum Zadar, operates in a building that until Napoleon was the wing of the monastery of St. Chrysogonus, later turned into a lyceum, and then into a primary school and an economic technical school. In the Allied bombing during the Second World War, the building was destroyed and rebuilt in 1962 for the needs of Zadar City Museum.

This department collects cultural goods created in the period from the end of the XIII. century to the present day, and the material is divided into a cultural-historical collection and a collection of recent history. Over half a century, the cultural-historical collection has collected the following museum holdings: old majolica, glass, furniture, portraits, old photographs, old postcards, small useful objects, weapons, models, etc. The collection of recent history has collected flags, photographs from the National Liberation War, documents, printed matter, weapons, posters, badges, etc.

Zadar City Museum is closed for visits. The permanent exhibition of the department "SIX SALON STORIES" is set in the Rector's Palace. Occasional exhibitions of the department are held in the Rector's Palace and the City Lodge.

Gallery of Fine Arts

Gallery of Fine Arts in Zadar was founded after World War II in a completely ruined city on October 10, 1948. From the beginning until 1963, it was an independent institution. It is the first institution of its kind in Zadar that collects, preserves, and presents artistic material mostly from 20th century. Today, one of the departments of the National Museum Zadar Art Gallery contains numerous collections: a collection of icons, a collection of old paintings, a collection of XIX. century and the first half of the XX century, a collection of contemporary art, a collection of photographs, a collection of negatives by Ante Brkan, a legacy of Ivan Palčić, a collection of Novaković. Occasional exhibitions of the department are held in the Rector's Palace and the City Lodge.

Rector's Palace

The Rector's Palace is a cultural monument whose historical sources date back to the 13th century. Renovated with EU funds in 2017, the Rector's Palace is a modern cultural and historical complex and a tourist attraction. The palace covers an area of 2,000 square meters and combines a museum space, atrium, concert hall, halls for temporary exhibitions, video gallery, multimedia

hall and spaces for education and creative expression in one place. The architecture of the palace, the ambience of the space and the picturesqueness of the surroundings are an additional attraction for culture lovers. As a polyvalent cultural center, it is meant to capture the interests of various visitors.

Archaeological Museum

On the glass facing the Archeological Museum in Zadar you can see the reflection of the remains of the Roman Forum and the early medieval church of St Donatus, with which the Museum is unbreakably connected. Since 1880 the works of protection and restauration had been done in St Donatus with the idea to place the Archeological Museum in it. The museum was founded in 1832 making it the second oldest museum in Croatia, and one of the oldest in this part of Europe. Today it keeps more than 100.000 archeological objects from all the cultural and historical periods from the Paleolithic to the end of 11th century. As a state museum, it is responsible for the area of Zadar County, along with the islands of Rab and Pag. For almost 60 years it has been producing hand-made souvenirs such as amphoras, recipients, fibulas (broches), jewelry and other valuable museum material in a preparatory workshop.



Figure 12: Archaeological Museum (left) i Benedictine nuns' Convent of Saint Mary (right) [12]

The Gold and Silver of Zadar

The first exhibition Gold and Silver of Zadar was initiated by the great Croatian writer Miroslav Krleža, who was glorifying Zadar's gold, and since 1976 it turned into a permanent display of the exhibition of religious art of the convent of Benedictine nuns of Saint Mary. As part of the Convent of Saint Mary in Zadar almost 50 years ago a representative display has been set up – The Permanent Exhibition of Religious Art. It is one of the most valuable exhibitions in Croatia that is popularly called Gold and Silver of Zadar. In eight contemporary rooms on a surface of about 1.200 square meters shines Zadar's gold and silver with shining beauty, and this inestimable treasure is kept safe by the Benedictine nuns.



Figure 13: Benedictine nuns' convent of Saint Mary (The Gold and Silver of Zadar) [13]



Figure 14: The Gold and Silver of Zadar [14]

Treasury of Franciscan Monastery

The monastery of St. Francis with the Gothic church, the chapel of St. Anthony, the cloister, the sacristy and the monastery treasury is a real jewel of Zadar culture. Among the greatest treasures is the Ugljan polyptych from the 15th century, which is attributed to the famous local painter Dujam Vušković. Behind the main altar of the church there is a wooden choir, a magnificent work of floral Gothic signed by the carver John, son of James Borgosansepelcro of Venice, completed in 1384. Mention should be made of the wood painting of the Venetian painter Lazarus Bastiani (died in 1512) located on the front wall of the sacristy depicting the heavenly and earthly Church with historical figures such as Matthias Corvinus, Pope Sixtus IV. and Katarina Kosača.



Figure 15: Franciscan Monastery [15]

In the monastery treasury are kept several artistically valuable crucifixes, a painting of the Dead Christ from the 16th century, a work by James da Ponte Bassano, statues of the

Annunciation of Mary from 1408, part of a polyptych in wood by Peter de Riboldis from 1433 ... the first hall exhibits samples of precious illuminated coral codices (14th and 15th centuries), important historical documents about the monastery, several incunabula, and important historical seals. Specimens of Mass vestments from past centuries have also been preserved, and a gilded Gothic procession cross, stolen in the famous 1974 robbery, was kept in the monastery.

Museum of Ancient Glass

The Museum of ancient glass in Zadar has a souvenir shop with a very rich offer in which one can buy publications and especially souvenirs like replicas of ancient glass made in glassmaking museum workshops with the method of hand blowing. The Museum of Ancient Glass is a contemporary and unique cultural institution in the world, and it has a specialized archeological collection of more than 5.000 glass objects from the period of Antiquity from the first century B.C. do the 5th century A.D. in its possession. It has a permanent display and an attractive glassmaking workshop in which by manual blowing technique replicas of ancient glass are made.



Figure 16: Museum of Ancient Glass [16]

International Centre for Underwater Archeology

Soon the International Centre for Underwater Archeology Zadar will have a Museum of underwater archeology that will be collecting, preserving, keeping, elaborating, and exposing this attractive museum material. The International Centre for Underwater Archeology in Zadar has the status of an UNESCO center of second category, with the prospect of preservation and promotion of the underwater cultural heritage of Croatia, the Mediterranean and Europe. The center has several departments – like the departments for education, conservation, restoration, presentation, underwater heritage and other- that are located at the spot of the former convent of Saint Nicholas where the remains of the medieval church of the same name can be found.

The Treasury of the Serbian Orthodox Church of Saint Elias the Prophet

The church of Saint Elias the Prophet in Zadar was built in the 16th century on the spot of a homonymous medieval catholic church. It has been adapted in the 18th century in Late-Baroque style and it guards a rich collection of icons from the period of the 16th to 18th century. The Serbian Orthodox Church of Saint Elias with its rich and unique Treasury is one of the most valuable monuments of Zadar. The priceless art treasure has been walled in in the inside of the church for a long time and then later the objects have been restored and displayed. The treasure contains numerous icons, liturgical objects, crosses, church books, manuscripts, and other religious exhibits.



Figure 17: The Treasury of the Serbian Orthodox Church of Saint Elias the Prophet [17]

Church of St. Donatus

The Church of St. Donatus in Zadar has long been desacralized, meaning no liturgies are held here, and from the end of the 19th century until 1954 it housed the Zadar Archaeological Museum. As St Donatus has exceptional acoustic characteristics, it has been the venue for

Renaissance music festivals for decades. The monumental medieval monument was built in the 9th century on the model of early Roman (Byzantine) architecture. It was first named the Church of the Holy Trinity, and then later it bore the name of Bishop Donatus who had it built. Today it is used as the venue for musical programs. It represents the most famous monument of Zadar, to which many songs have been dedicated.



Figure 18: Church of St Donatus and Forum [18]

The forum in Zadar has been built by the first Roman emperor Gaius Julius Caesar Octavian of what the inscriptions in stone dating back to the 3rd century give evidence, when the construction came to an end. It was once closed by a portico with galleries on the first floor, and under the portico there were shops.

Since the first century B.C. the forum has been the main gathering place for roman soldiers, religious people, bureaucrats of the Republic and later of the Empire, as also for traders and all Zadar citizens in ancient times. In the time of its full glory, the forum was surrounded from three sides by a magnificent portico. It is indispensable for a walk and one of the symbols of the city.

The Museum of Salt

For some, their natural wealth is gold-for Nin they have salt, a source of existence, but also a tradition which recently was converted into a unique institution and tourist attraction-the Museum of salt. If you want to see a traditional way of salt production, if you are interested in souvenirs from salt, or would like to taste “the flower of salt “, by many called the „caviar of salt“- you are in the right place which will take you to a really special world of the salt pans of Nin, so different from what you have seen, experienced or tasted so far.



Figure 19: The Museum of Salt [37]

The Museum story of salt-whose institutional beginnings came with the opening of the Nin Salt works in 1955-starts with revealing its effects on health and ways of exploitation as well as the tools and equipment which were used in the process. It is possible also here to buy original Croatian salt and to taste the famous “salt flower” – French “Fleur de Sel”, which is evidence of ecological and traditional production and a perfect addition to every meal.

Forts, monasteries & remains

Mašković Han

Jusuf Mašković, originally from Vrana, a high dignitary on the Sultan's court and a supreme admiral of the Turkish fleet, wanted to build his luxurious and modern summer house Han in eastern style for his return from Constantinople to his homeland. It started in 1644 and over 500 workers worked on it every day. But Mašković never got to see it. A year later, along with 60.000 soldiers, he conquered Crete. The nobility he showed to the Venetian soldiers provoked the sultan who summoned him to the court where Mašković was executed. His death changed everything, even the Han, which was built more modestly. Today you can admire it in its full richness since it has been turned into a boutique hotel.



Figure 20: Mašković Han [19]

Novigrad Fortress

Novigrad is known for its medieval architecture and its crystal-clear sea which used to be a source of pearls. Today, it is known for its abundance of fish and clams. It is also known for centuries of turbulent history. The most famous story is the one of Queen Elizabeth of Bosnia. She was imprisoned in the Novigrad Fortress that is the most prominent structure in the town. According to the legend, during her imprisonment she embroidered a royal cloak – Misnica, using velvet and gold threads. It has been preserved at the Parish of the Assumption of the Blessed Virgin Mary in Novigrad. Sturdy walls will tell you many more extraordinary tales from this town's uniquely rich history.



Figure 21: Novigrad Fortress [20]

The St. Michael Fortress

The St. Michael fortress on Ugljan island, built in the 12th century by the Venetians, measures 265 meters in height and makes an ideal walking tour. Along the walk, enjoy superb views across the rest of the island, the Zadar archipelago, the mainland, and Dugi otok.



Figure 22: The St. Michael fortress [21]

Ćokovac Monastery

The last Benedictine monastery inspires the visitors with its history dating back to the 14th century. In addition to the interesting history, the visitors of Pašman island are also delighted by the nature and the vistas extending from it.



Figure 23: Ćokovac Monastery [22]

Roman City of Asseria

Witness some eras gone by in the former Roman City of Asseria. Nestled between the present day Bukovica and Ravni Kotari it is one of the most important Liburnian and then Roman settlements in northern Dalmatia, located around the present-day village of Podgrađe close to Benkovac. The city was known for its triumphal arch, forum, aqueduct and cippus, a type of a Liburnian gravestone. They were discovered in the greatest numbers in this area. In addition to cippus, numerous other stone monuments were found here: portrait steles, decorations on public structures, altars, and many others. All this is proof of a very developed stonemason economy that exists even today.



Figure 24: Roman City of Asseria [23]

Kaštel Benković

The most noticeable cultural-historical monument in Benkovac is Kaštel Benković, a fort named after the great Croatian Benković family who built it in the second half of the 15th century. However, there are also some other theories about its origin. Some say that it was built by Croatian lords in the Middle Ages. In the beginning, this mysterious castle played a defensive role. However, the Turks conquered it in 1527. The proof of the importance of this structure for this area is the fact that it marks the beginning of history of the City of Benkovac. The castle is just as important today even though it has a different function – it serves as the ideal stage for various manifestations and represents the center of cultural life.



Figure 25: Kaštel Benković [24]

Basilica of St. John the Baptist in Biograd na Moru

The remains of St. John the Baptist Basilica clearly show the temperament of Biograd's stormy past. This Benedictine seminary was built in the 11th century by Croatian king Petar Krešimir IV. However, the seminary "survived" only one century because the Venetians, upon succeeding in their conquest of Biograd, destroyed it, razing it practically to its foundation. The Benedictines, luckily, managed to escape, and under the leadership of their abbot, settled in Šibenik. Four years later, they permanently relocated to the island of Pašman, where on Cokovać hill, they moved into the church of Saints Kuzma and Damian.



Figure 26: Basilica of St. John the Baptist in Biograd na Moru [25]

The old croatian boat Condura Croatica

The historical story of Nin is the story of prosperity based on salt as well as its long maritime tradition, together with recognizable boats called Condura Croatica. These boats were found at the entrance to the port of Nin in 1966 and taken out of the sea in 1974 when the desalination, conservation and restoration began in Zadar. They sailed at the end of the 11th and the beginning of the 12th century and is supposed that it was these very boats mentioned by the Emperor Constantin Porfirogenet in the 10th century when he spoke about the old Croatian navy. This is the reason why the boats were called Condura Croatica.

Interestingly, these are the smallest but the deadliest war ships in the world's history, of which the Croats-as we find out from the description of the Byzantine Emperor Porfirogenet – possessed around eighty. They were 7-8 m long, narrow and built in the classical manner, with the ribs and paneling of the boat's starboard connected with wooden and iron nails. In the situation where there were favorable winds, a square sail would be used. They were also used as fast rowing boats.

These boats were made and probably sailed during the reign of the Croatian national Kings, Krešimir IV and Zvonimir. Historical records say that during the reign of King Krešimir IV. Croatia possessed up to 20,000 rowers on Conduras. Some sources also say that King Tomislav, in Nin alone had 15,000 rowers ready on Conduras.



Figure 27: Condura Croatica [26]

The Museum of Nin Antiquities

The most valuable findings which are kept in the Museum of Nin Antiquities are two original old Croatian boats from the 11th century called Condura Croatica. Next to them there is a copy of part of the boat called Serilia Liburnica from the 1st century and a replica of the Baptismal font of Duke Višeslav, as well as many remains of the material culture from Prehistoric, Roman Old Christian and Old Croatian life of Nin.

The wealth of architectural and other heritage of Nin, is the reason for the interest in archaeological excavations in this area which date from long ago, even from 1777 when the first

smaller archaeological diggings in this area are mentioned. They reached their climax from the end of the 19th century and during the 20th century the number of exhibits kept increasing and the place of their display changed, until the new permanent exhibition was opened in 1999, and in 2005 it assumed a new conception and organisation, as well as the present-day name.



Figure 28: The Museum of Nin Antiquities [27]

Religious treasures

The Church of St Nicholas

A recognizable symbol of Nin is the Church of St Nicholas, located in the field of Prahulje, it is very important for the rulers of the Croatian dynasty and for the history of Croatia and Nin. According to tradition, seven Kings were crowned in Nin, and every crowned ruler rode on horseback to the Church of Saint Nicholas, and it was in fact here that he would be presented to the people by the same symbolic ritual-on that mound he would cut with a sword the four corners of the world.

The small church is built on an earthen mound which rises above the wide field, and it is just here on this place that the visitor can experience an unforgettable sunset. In the mound can be found, yet unexcavated prehistoric graves. The church is 5.90 m long, 5.70 m wide and 6 m in height (measured from the inside), while the walls are 50 cm thick. Due to the danger from the Turks as an addition to the church, a defense crown with 8 battlements was built in the 16-17th century, which served as a watch tower. The Church of Saint Nicholas is the only preserved example of the early-Romanesque architecture of such form in Dalmatia, which dates from the end of the 11th and the beginning of the 12th century.



Figure 29: The Church of St Nicholas [28]

The Episcopal complex of Zadar

Complex includes the Roman Forum, the Cathedral of St. Anastasia, the Archbishop's Palace, the Church of St. Donatus, the Zmajević Seminary, the Orthodox Church of St. Elias, the Benedictine Nunnery, and several other buildings.



Figure 30: Cathedral of St. Anastasia [29]

The legend says that, in 1203, a merchant who was carrying the body of St. Simeon from the Holy Land to Venice sought shelter in Zadar because of a storm. He did not reveal the identity of the body he was carrying, but when he became ill and before he died, he gave the nurses a hint. That is why they dug up the grave with the local priests. Simultaneously, three city rectors had the same dream the night before the body of Saint Simeon was to be excavated. St. Simeon has been revered in Zadar ever since. The Chest of Saint Simeon, a masterpiece of medieval art, is a rectangular cedar wood sarcophagus in the shape of a chasse, overlaid with silver and silver-gilt plaques, said to hold the relics of St. Simon the God-receiver. On Oct. 8th, the Patron's Day, the chest is opened, and the mummy of the saint is displayed for a week. But you can visit the Church of Saint Simeon any day of the year!

Church of Saint Simeon

The church of Saint Simeon in Zadar was firstly an Early Christian three-ailed basilica, then later a Gothic building, and later a monument of provincial Baroque. On its main altar there is the silver chest of Saint Simeon dating back to 1380. The chest of Saint Simeon is a valuable goldsmith work that has been ordered by the Hungaro-Croatian queen Jelena for the relic of Saint Simeon. It was made by the goldsmith Francis from Milano who was living in Zadar at that time, and in the south of the church of Saint Simeon there is a Roman column that was put there in 1729, made of two columns from the city's temple that were maintained on the Capitoline on the Forum.



Figure 31: The chest of Saint Simeon [30]

The Church of the Holy Cross

The Church of the Holy Cross called „the smallest cathedral in the world“ is the most valuable preserved monument of early Croatian religious architecture and one of Nin's symbols.

By its position and beauty, it dominates the area where it stands. It was built in the 9th century, in the Early Christian period. It is the only religious object in Nin which has remained untouched since its construction to date. It is 7.80 m long, 7.60 m wide, and 8.20 meters in height (inside measures) and the walls are 57cms thick. It was built on the remains of ancient houses which are visible even today. During the reign of Croatian Kings, it served as a Court chapel for the nearby Duke's Court. Several medieval graves were discovered around the church.

This small church, thanks to the position of its windows and the angle of the fall of light is a kind of calendar, and according to the sun 's rays, the exact date of the equinox and solstice can be determined, which on the first day of summer is the start of an interesting event called „The Festival of Sun and Light“. Spellbound by its beauty, the famous English architect Thomas Jackson, called it „the smallest cathedral in the world“.



Figure 32: The Church of the Holy Cross [31]

UNESCO-va baština

Zadar City Walls

Zadar is one of those cities whose identity is related to the UNESCO World Heritage. Its city walls were impenetrable, and they have defended the city from conquerors and have offered a secure shelter for its inhabitants, and today it is a favorite promenade for travelers from all over the world. Since 2017 with the decision made by the UNESCO World Heritage Committee, the famous City Walls in Zadar can be found on the World Heritage list. The walls have been adapted and reconstructed in 2020 with support by the EU funds. They were built in the 12th and 13th century, later reinforced in the 16th century for the purpose of Venetian defense against the Turkish conquerors. The "Walls of Zadar's Uprisings" were officially named after the eleven uprisings of Zadar inhabitants against the authorities of the Venetian Republic. The Land Gate of medieval Zadar was built in 1543 and it still inspires the same mysticism and reverence. It was erected high above the sea level with the engraved figure of Saint Chrysogonus on the horse and Saint Mark's winged lion, the coat of arms of the Republic of Venice, so with time this gate has become one of the most beautiful monuments and a masterpiece of Renaissance architecture. Between the ferry port and the market there is the Sea Gate, that is also known as the Gate of Saint Chrysogonus because of a little church nearby that is dedicated to this patron of Zadar, and it was built in the year 1573. In the honor of the victory of the Christian army over the army of the Ottoman Empire in Lepanto. The Gate is shaped by built-in components of a Roman triumphal arch that Melia Aniana, a former Roman citizen from Zadar, erected in memory of her husband.

Within proximity to the bridge on the northern side the Neo-Renaissance New Gate can be found, that was built in the time of Italian occupation of Zadar. The Gate of Saint Roch leads to the city market, in proximity of which the Gate of Saint Mary was in the Middle Ages.



Figure 33: Zadar City Walls (South-East side) [32]



Figure 34: Zadar City Walls (East side) [32]



Figure 35: Zadar City Walls (North side) [33]

UNESCO protected Pag lace

Pag lace is a finely crafted product of beauty and delicacy that many grateful owners frame and regard as artwork. Thanks to the nuns of the local Benedictine monastery, who were the first to start perfecting and teaching fine-thread ornamental lacemaking in the 15th century, Pag lace has been an important source of income for many skilled and industrious local women ever since. Some of them were even invited to the court of Empress Maria Theresa to hand-weave for her exclusively! Fully learning the craft of Pag lacemaking is a lengthy and complex process. However, you can also test your skills by enrolling in the beginner course under the guidance of some of the most experienced and talented lace-makers on the entire island.



Figure 36: UNESCO protected Pag lace [34]

The story and women behind Pag lace is as interesting as the lace itself! Pag lace has fascinated for centuries – it used to be valued by emperors and now it is valued by the whole world. Probably mainly because only a few women know how to make it. Pag’s lace-makers say that not even a computer could repeat the pattern they create each time. It comes from a time long before computers – the 16th century. The Benedictines of Saint Mary were the first teachers in the town, and they formed a school for girls where they taught, among many other things, lace making. Since then, they have been praised for their hard work which was passed on from generation to generation. If you are looking for a different kind of souvenir, this is it! The lace can be purchased in one of the gift shops in the town of Pag, and we recommend you visit the Benedictine nuns at the Convent of Santa Margherita, who were the main initiators of the lace craft in Pag and its style. The nuns have always been protectors of heritage and besides lace, they also protected a rich collection of sacral art presented in a Permanent exhibition. In honor of the

700th anniversary of the establishment of the Benedictine Convent of St. Margarita in Pag, a permanent exhibition of sacral art was opened. Besides being able to see lace and interesting exhibits such as relics, paintings, and sculptures at the Benedictine convent in Pag, this is also the ideal opportunity to experience the lifestyle of the Benedictine nuns who follow the motto “ora et labora”. For example, they make the famous baškotin, which is a type of sweet toast made according to the Benedictine nuns' special recipe, which has been made for more than 300 years. Sweeten up your excursion of traditional Croatia art with an authentic Croatian delicacy!

Crafts and Customs

Musical evenings in the Saint Donatus Church

Experience spectacular days in Zadar! Apart from the usual summer activities you can pamper your senses in the magnificent ambiance of the Saint Donatus Church. Every year it is home to the international musical festival Musical Evenings in Saint Donatus, one of the oldest in Croatia, which gathers top musicians who transform musical scores into wondrous joy. The audience is given the opportunity to enjoy classical and modern music at the various sacral, cultural, and historical locations in Zadar’s Old Town. And while your evenings are reserved for musical treats, you can use your days to discover Zadar’s cultural and historical heritage, which stretches back to the 9th century BC. Visit the Archaeological Museum and discover the traces of Italian and Greek culture left in Zadar during different epochs.



Figure 37: Musical evenings in the Saint Donatus Church [35]

Boatmen of Zadar – Barkajoli

From the early morning to the late evening barkajoli transport passengers and tourists with a little rowing boat that connects the mainland and the Peninsula in Zadar, thereby cultivating the tradition that according to some daring explorers' dates back 3.000 years in the past. The walk that ends with the city walls continues the other end of the port of the city, but the easiest and quickest way to get there is to use the service of rowers of Zadar. Since the 14th century those tireless guardians of the tradition transport passengers in little boats under all possible weather conditions. The tradition is transmitted from father to son, from one generation to the other.



Figure 38: Boatmen of Zadar – Barkajoli [36]

Mirila

Mirila, stone monuments to the departed, can be found along the mountain paths, passes, elevations and clearings of Mt. Velebit. Mirila date from the times of the Velebit hamlets (17th–20th centuries), that mainly survived from animal husbandry. They preserve the memories of persons who died on the mountain slopes and had to be carried to the village church and then to the cemetery where they were buried. On such arduous journeys, it was only permitted to stop, rest, and place the deceased on the ground in one place - the place where the deceased would greet the sun for the last time.

On this place was erected a mirilo, the resting place of the deceased. Flat stone tablets were generally laid at the head and foot of the deceased, marking his height, to be connected later by a row of stone tablets. The headstones were also sometimes subsequently adorned with symbols carved in shallow relief. These mirila were venerated and visited more than graves, as it was believed that the grave only contained “the body without the soul, which remained at the mirilo.”

Mystical artistic markings on the headstones, among which the cross and solar circle were the most common, bear witness to a continuity of artistic adornment from prehistoric cultures, via early Christianity and the iconography of the stećak (medieval Bosnian standing tombstone), while inscriptions are rare and belong to more recent times. As the stone markers of a unique funeral cult, mirila convey the customs, way of life and creativity of an entire era.



Figure 39: Mirila [38]

Tovareća mužika

Tovareća mužika is a peculiar way of making music on various types of drums and antique irons filled with stones and especially attractive horns. It is a trademark of Sali on Dugi otok island, and today it is considered intangible material heritage of Croatia. But tovarēja mužika is no joke. Although it started off as one. In 1960, some youngsters pulled a prank at a spinster's wedding using what is today known as the instruments for tovarēja mužika. The rest was history. Soon they shaped their performance, set the rules, and created costumes. The infectious rhythm is the main reason it is mostly performed during Saljski užanci, the festivities on Dugi otok - a combination of live music, fine food and good entertainment. With a few performances, tovarēja

mužika moves through the entire village and everyone hears Budnica performed on Sunday morning waking up even the heaviest sleepers.



Figure 40. Tovareća mužika [39]

The feast of Iž island

The feast of Iž island is summer entertainment that presents cultural programs and sporting events along with food, drinks and plenty of joy during a three-day period. The traditional folklore entertainment of the Island of Iž reaches its peak with the final event of the festival entitled "Election of the King of Iž". It is a custom from the ancient times related to the Roman tradition of bacchanalia and saturnalia where the oldest people from the village drew straws (zbice). The person who pulls the longest straw becomes the king. The old king sails into the Veli Iž harbour accompanied by his "entourage" in national costumes with a song, fireworks and "luncijanj" of bells. The new king is then crowned on the stage with the presentation of the traditional island folklore. Every good party also features good food. "Iški lopiž" is popular around here, a meat dish with vegetables and aromatic Mediterranean herbs. What makes it special is

the clay pot it is prepared in which is not surprising since this area is known for its pottery traditions.

Fair of Benkovac

The biggest fair of its kind in Dalmatia is held every 10th of the month in Benkovac, in the hinterland of Dalmatia. The fair has always a lot to offer, but especially the summer months are packed with products and people. You can find antiques, tools for everyday use and homemade products such as honey, rakija, marmalade and vegetables and fruits. If you are a wine lover, aim for September when grape harvesting objects are in the spotlight. There are a lot of animals which give a special feeling to the already colorful setting. Even if you do not end up buying anything, it is worth the trip to experience the atmosphere and get lunch!

Zadar's Specificities

The Sea Organ

Zadar has a unique combination of architecture and music, the worldly known Sea Organ. It is located next to the installation Greeting to the Sun, and it represents an organ whose sound is produced under the influence of the energy of the sea, rather waves and tides. The Sea Organ has been gently formed out of stone and returned to the sea. It stretches out on a surface of seventy meters of Zadar's coast, under which on the level of the lowest sea tide 35 pipes of different lengths, diameters and descent are installed. When the most beautiful sunset illuminates the waterfront, the play of light of the Greeting to the Sun accompanies the rhythm of waves and the sounds of the Sea Organ.



Figure 41: The Sea Organ [41]

The Greeting to the Sun

This new symbol of Zadar is in the Zadar port on the western point of Zadar Peninsula. The Greeting to the Sun is overlooking the Zadar Channel, the islands and the widely known sunset. With this installation Zadar has got a new tourist attraction. The modern installation Greeting to the Sun is made of 300 multilayer glass solar panels in the shape of a circle of a diameter of 22 meters. Throughout the day it collects the energy of the sun and transforms it into the electricity, which is consumed in and around the installation throughout the night. The Greeting to the Sun in the immediate proximity of the Sea Organ, the second modern intervention on Zadar's waterfront, and both brought Zadar to the front covers of all the world media.



Figure 42: The Greeting to the Sun [41]

The Port Authority of Zadar played a major role in the realization of the projects of the Sea Organ and the Greeting to the Sun, as these tourist specificities-attractions along with a cruise ship pier were realized through the project of reconstruction of the Istrian coast, whose management is under the responsibility of the Port Authority of Zadar.

Cultural Touristic Management strategy (CTM)

First step towards optimization of cultural heritage utilization in touristic manner, is conducting analysis of existing tourism data with special review on cultural component. Presented data refer to Zadar and/or Zadar County and Adriatic Croatia region, respectively for 2019.

Touristic demand

Regarding to the official data provide by Zadar Tourist Board [42], Zadar and Zadar County has achieved all-time high number of tourist visitations, totaling 2,015,000 arrivals (5% more than in year 2018) and more than 15,100,000 overnight stays (4% more than in year 2018), exceeding forecasts of 3% increase in both visitations and overnight stays. Domestic tourists have achieved 7% more arrivals and 9% more overnight stays whereas foreign tourists have achieved 5% more arrivals and 3% more overnight stays. Table 1 presents number of arrivals of domestic and foreign tourists, their total number, and their respective percentage share for all tourist boards in Zadar County.

TOURIST BOARD	DOMESTIC VISTORS	FOREIGN VISITORS	Σ	%
Zadar	74,811	556,525	631,336	31.32
Biograd n/M	41,426	193,365	234,791	11.65
Vir	43,658	109,910	153,568	7.62
Pag	14,147	106,015	120,162	5.96
Starigrad	9,654	83,883	93,537	4.64
Pakoštane	12,788	80,706	93,494	4.64
Nin	7,983	73,981	81,964	4.07
Zaton	7,048	67,495	74,543	3.70
Sv. Filip	15,693	48,460	64,153	3.18
Sukošan	9,325	52,924	62,249	3.09

Bibinje	5,982	53,591	59,573	2.96
Privlaka	9,260	35,249	44,509	2.21
Kolan	4,810	30,425	35,235	1.75
Pašman	5,085	20,985	26,070	1.29
Ražanac	3,464	22,351	25,815	1.28
Sali	3,708	21,534	25,242	1.25
Povljana	5,563	18,811	24,374	1.21
Vrsi	6,291	17,450	23,741	1.18
Obrovac	4,027	14,800	18,827	0.93
Posedarje	2,460	14,705	17,165	0.85
Jasenice	3,629	13,221	16,850	0.84
Ravni Kotari	1,027	12,275	13,302	0.66
Ugljan	2,938	10,251	13,189	0.65
Preko	2,663	9,907	12,570	0.62
Tkon	1,710	9,908	11,618	0.58
Novigrad	1,498	7,714	9,212	0.46
Kukljica	1,605	6,545	8,150	0.40
Božava	1,918	4,213	6,131	0.30
Kali	942	4,470	5,412	0.27
Silba	1,794	3,199	4,993	0.25
Poličnik	94	2,543	2,637	0.13
Gračac	262	1,043	1,305	0.06
Σ	307,263	1,708,454	2,015,717	100.00

Table 1: Distribution of tourist arrivals in year 2019 by Zadar County Tourist Boards [42]

It is evident that the most arrivals were made in the City of Zadar, more than 31%, followed by the city of Biograd na Moru, the Municipality of Vir, the city of Pag, the Municipality of Starigrad, the Municipality of Pakostane, the city of Nin and the town of Zaton. When the data of the city of Nin and the town of Zaton, which represent one administrative unit, are added together, it is ranked 3rd with participation of 7.77%.

Touristic Offer Seasonality

Table 2 and Graph 1 show the dynamics of tourist arrivals by months. High seasonality is visible, with the highest turnover still occurring in July and August. Thus, as many as 56% of arrivals and 67% of overnight stays are realized in these two months. The months of March, April, May, and June are subject to the schedule of the Easter holidays, Corpus Christi, and Pentecost. From I to IV, and from X to XII months, tourist traffic is negligible, however, as most hotels are closed, camps are closed, and fewer business trips and congresses are recorded. These data confirm that it is necessary to continue with the development of existing and the introduction of new tourism products, which will become a motive for coming in the months outside the main season. Regarding the development of new tourist offers, the additional possibility of developing the offer of cultural contents is especially emphasized, which due to their characteristics and weather conditions in the Zadar area have a much greater possibility of exploitation outside the main tourist season in summer.

Mjesec	Domaći	Strani	Σ	%
I	3,418	10,463	13,881	0.69
II	4,068	7,792	11,860	0.59
III	6,813	16,940	23,753	1.18
IV	12,763	73,005	85,768	4.25
V	21,151	109,712	130,863	6.49
VI	54,705	259,566	314,271	15.59
VII	86,249	475,507	561,756	27.87
VIII	81,774	491,385	573,159	28.43
IX	14,269	173,411	187,680	9.31
X	10,934	68,734	79,668	3.95
XI	6,738	11,944	18,682	0.93
XII	4,381	9,995	14,376	0.71
Σ	307.263	1.708.454	2.015.717	100.00

Table 2: Monthly distributed tourist arrivals in 2019 in Zadar County [42]

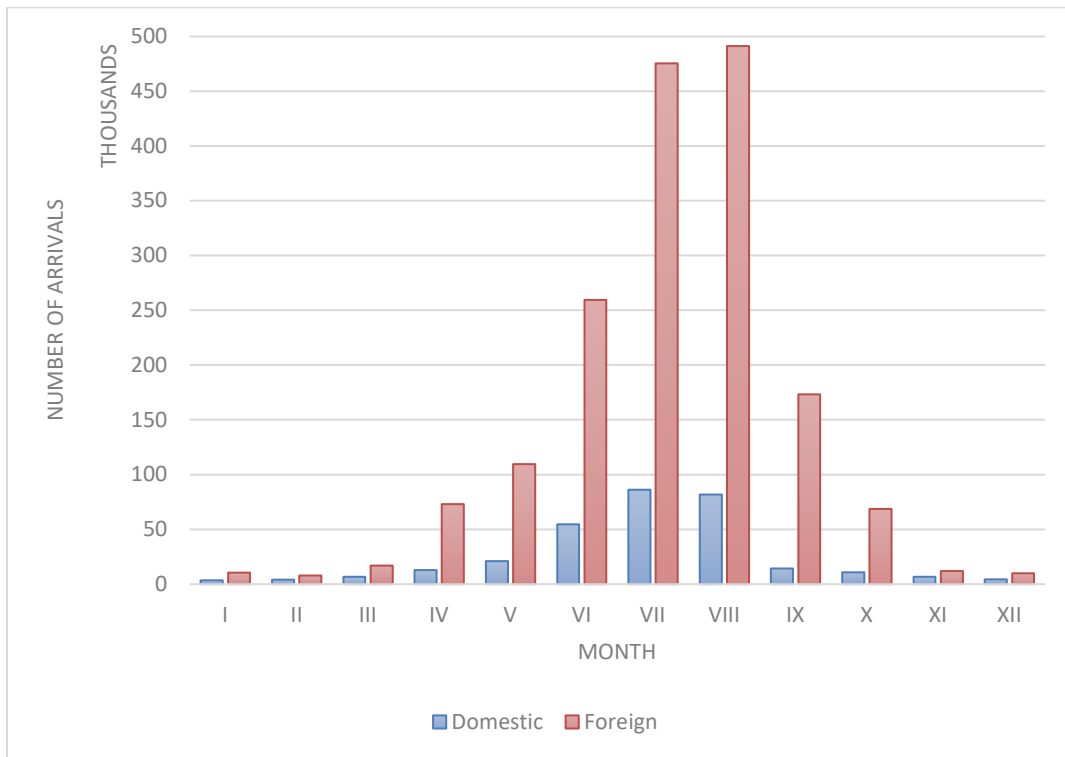


Chart 1: Monthly distributed tourist arrivals in 2019 in Zadar County (according to Table 2.)

Table 3 and Chart 2 show the tourist emitting countries to Zadar County. The largest number of arrivals is generated by domestic tourists, which is a consequence of the large number of holiday properties that domestic tourists own in the Zadar County. The table shows established emitting countries such as Germany, Slovenia, Poland, the Czech Republic, and Slovakia, i.e., the countries of Western and Eastern European countries, which traditionally gravitate to Croatia. However, with the increase in the frequency of low-cost flights, there is an increase in the number of tourist arrivals from the United Kingdom and northern European countries, as well as Spain, and generally better air connections with Croatia (primarily Zagreb and Split), a noticeable increase in tourists from Asian countries, especially South Korea and China.

RANK	COUNTRY	ARRIVALS	Δ STAY (DAYS)
1	Croatia	307,263	13.8
2	Germany	297,327	8.0
3	Slovenia	217,182	8.9
4	Austria	128,034	6.4
5	Poland	123,051	7.1
6	Czech Republic	120,785	7.5
7	Slovakia	96,066	7.4
8	Hungary	89,643	6.2
9	Italy	77,996	5.3
10	France	54,695	3.8
11	Other Asian Countries	52,031	1.6
12	South Korea	45,804	1.1
13	Bosnia and Herzegovina	45,527	6.4
14	Netherlands	45,260	6.3
15	United Kingdom	42,179	5.4
16	Other European Countries	34,144	4.1
17	Spain	29,511	1.7
18	USA	25,352	2.8
19	China	25,114	1.2
20	Belgium	23,108	5.0
21	Switzerland	22,951	5.3
22	Sweden	15,910	6.1
23	Mid. & South Am. Countries	14,142	2.0
24	Australia	11,599	3.3
25	Serbia	11,573	11.0
26	Canada	11,247	2.6
27	Ukraine	10,793	7.0
28	Denmark	9,015	7.6
29	Russia	8,017	6.1
30	Ireland	7,322	5.6
31	Norway	5,170	6.8
32	Other African Countries	3,300	3.8
33	Other Countries	2,847	2.6
34	Northern Macedonia	1,759	10.3
	Σ	2,015,717	7.5

Table 3: Number of arrivals and average length of stay of guests by tourist emitting countries from January till December in 2019 in Zadar County [42]

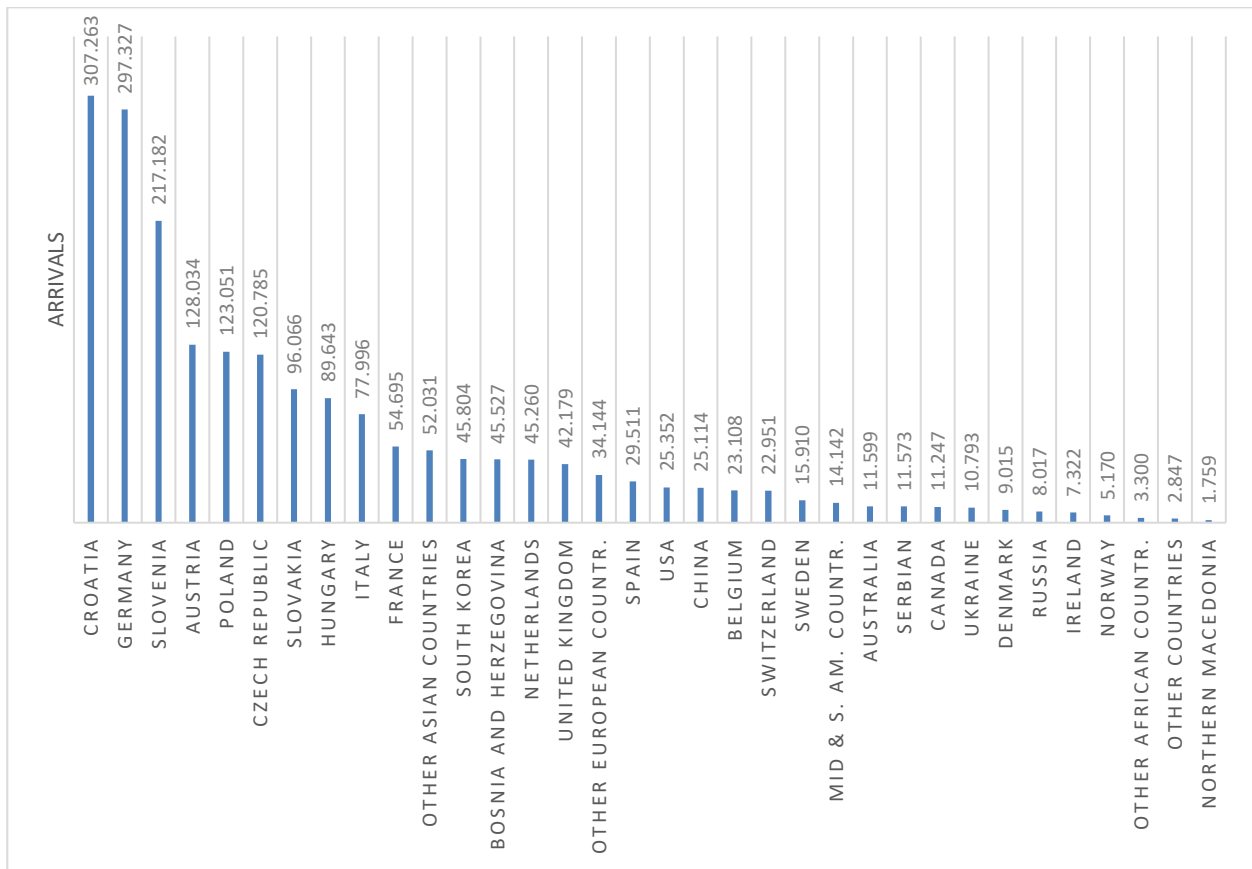


Chart 2: Tourist emitting countries by number of arrivals Zadar County in 2019 (according to Table 3.)

Table 4 shows that the Zadar County represents a significant camping destination in Croatia. In addition to large camps, there are also several small family camps, and in principle there is a lack of hotel capacity.

ACCOMODATION TYPE	ARRIVALS	Δ STAY (DAYS)
Hotels / Tourist Resorts	439,846	3.2
Camping	307,441	7.0
Apartments	970,441	6.5
Hostels / Adventure / Hiking	40,742	2.2

Vessels	111,944	6.6
Other	747	6.9
Non-commercial accommodation	144,556	30.8
Σ	2,015,717	7.5

Table 4: Average stay of guests in days by type of accommodation from January till December 2019 in Zadar County [42]

Table 5 shows that Zadar County ranks fourth in the number of tourist arrivals in 2019, but with a significant percentage difference behind (more than 5%) for the third ranked county, which also means that there is a possibility of further development of the tourist offer.

RANK	COUNTY	ARRIVALS	
		#	%
1	Istrian	4,609,448	22.28
2	Split-Dalmatia	3,956,157	19.12
3	Primorje-Gorski Kotar	3,130,326	15.13
4	Zadar	2,015,717	9.74
5	Dubrovnik-Neretva	2,328,990	11.26
6	Šibenik-Knin	1,146,622	5.54
7	Lika-Senj	842,626	4.07
8	Grad Zagreb	1,458,198	7.05
9	Continental Croatia	1,203,786	5.82
	Σ CROATIA	20,691,870	100.00

Table 5: Tourist arrivals by counties of the Republic of Croatia in 2019 [42]

Tourists' age groups

The average age of tourists who stayed in one of the destinations in Croatia from May 2019 to March 2020 was 43 years (Chart 3). There is no difference in the average age of tourists between Adriatic and Continental Croatia. Most tourists (55%) are middle-aged (30 to 49 years), 30% are older than 50, and 15% are younger than 30 years. Middle-aged guests are more represented in Adriatic Croatia compared to Continental Croatia, where those younger than 30 and older than 50 are somewhat more represented. Given the country of origin, the youngest guests on average come from Spain (36 years), while guests from Germany (46.5 years) and Austria (46.4 years) are slightly older than average.

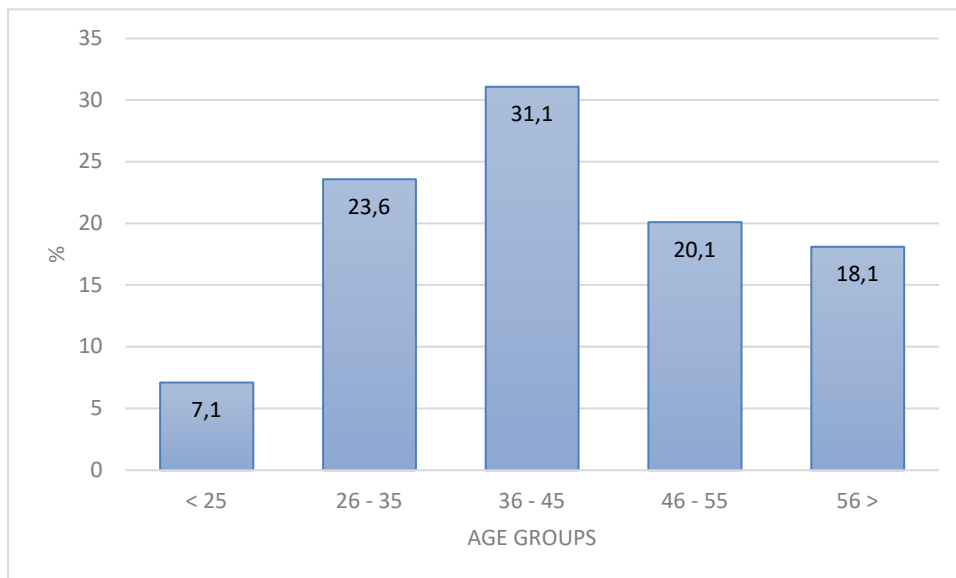


Chart 3: Graphic representation of the age group distribution of tourists in Adriatic Croatia [43]

Hostels have the largest share of younger guests (up to 29 years), and the average age of hostel guests is 33.5 years. In other types of accommodation, the largest share have middle-aged guests. Given the main motive of the trip, the youngest guests (on average 31 to 32 years old) are those motivated by entertainment and festivals and manifestations and events. On average,

the oldest guests (52 years old) are those motivated by health reasons, including the largest share of guests older than 50 years (57%).

Tourists' Level of Education

43% of tourists visiting Croatia have a university degree. More educated guests are more represented among guests of higher category hotels and among guests from Japan, China, and North Korea. Given the main motive for the trip, the above-average share of university-educated guests is among those motivated by visits to rural areas and cultural and art heritage.

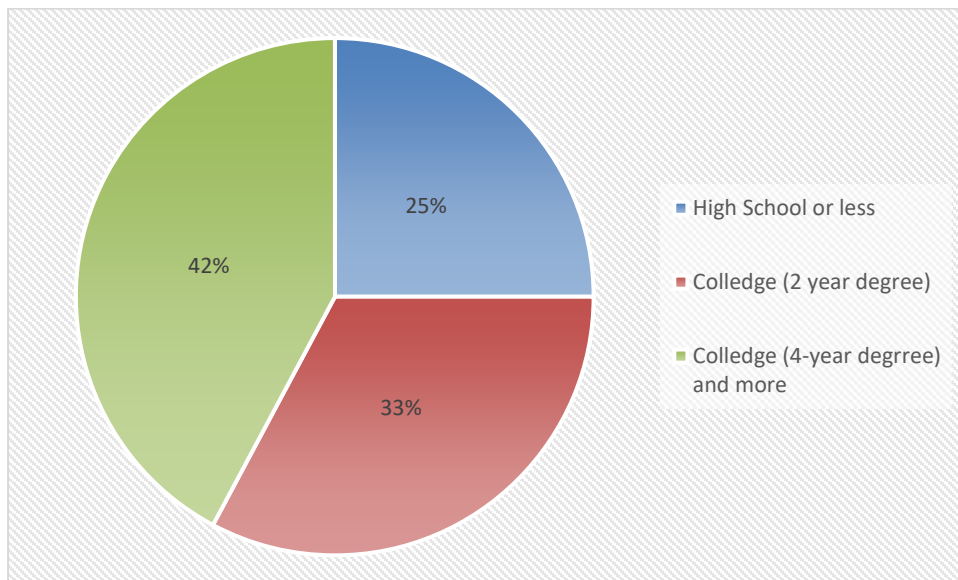


Chart 4: Graphical presentation of the level of education of tourists who visited Adriatic Croatia in 2019. [43]

Average Tourist Income

In 2019, almost every second guest had a monthly household income of more than 3,000 euros (49%). The largest share of guests with higher household incomes was recorded in three

coastal counties: Dubrovnik-Neretva, Istria, and Zadar (from 59% to 61%). Guests with the highest average household income come from the Republic of Korea, followed by Switzerland, the Scandinavian countries, the Netherlands, and the USA (from 71 to 82%). Given the main motive for the trip, the highest share of guests with household incomes above 3,000 euros is among those motivated by visiting rural areas and those motivated by sightseeing.

This information represents a particularly important basis for the possibility of further development of the cultural and tourist offer of Zadar and Zadar County.

Tourists' arrival motivation

According to Table 6, the "sea" motivates more than 80% of guests to come to the destinations of Adriatic Croatia, followed by "nature" which motivates 56% of them. It makes them the main motives for coming to the Croatian coast and islands. This is followed by arrivals (from 13% to 24%) motivated by "city break", "touring", sports and recreation, and culture and art. The third group of motifs consists of gastronomy, entertainment and festivals, visits to rural areas and manifestations and events. This confirms the possibility of further development of cultural and artistic offer, especially for the purpose of supplementing the off-season tourist offer.

Also, it is interesting to note that the arrival accompanied by a family is the dominant way of coming to Adriatic Croatia (43%). Followed by arrival with a partner (40%), then with friends (11%) and unaccompanied (7%). This information also supports the possibility of further development of (off-season) cultural and tourist offer.

RANK	ADRIATIC CROATIA	%
1	Sea	81.5
2	Nature	56.2
3	Cities („City Break“)	23.8
4	Touring	21.0
5	Sport and Recreation	14.9

6	Culture and Arts	12.7
7	Gastronomy	6.6
8	Entertainment and Festivals	5.5
9	Villages	4.5
10	Manifestations and Events	4.2

Table 6: Motives for the tourists' arrivals to Adriatic Croatia in 2019 [43]

Visiting cultural heritage

For additional analysis of visits to cultural assets in Zadar and Zadar County, Table 7, and Chart 5 show data on the number of visitors (total and foreign) in museums in the Republic of Croatia. Data on foreign visitors are not shown until 2016, because their tracking starts as of 2017. This information is also extremely important for the further development of cultural and tourist facilities, as it shows a steady increase in the number of museum visitors.

YEAR	2014	2015	2016	2017	2018	2019
Σ VISITORS	4,771,230	4,823,286	4,939,211	4,662,111	5,446,881	5,235,765
FOREIGN VISITORS	-	-	-	1,018,540	1,038,541	1,228,216

Table 7: Overview of the number of visitors to Croatian museums from 2014 to 2019 [44]

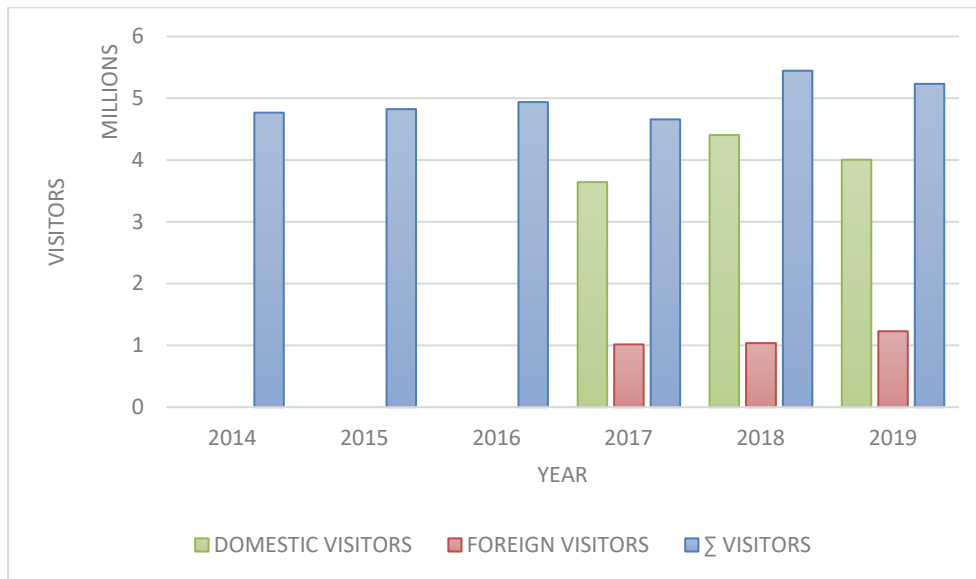


Chart 5: Graphic representation of the number of visitors to Croatian museums from 2014 to 2019 (according to Table 7)

Chart 6 shows the number of visits to museums in the city of Zadar and Zadar County. Unfortunately, the available data do not include all available museums and cultural assets, but they provide a quality basis for the further development of the cultural and tourist offer. The significant dominance of the Archaeological Museum in Zadar is visible, which is not surprising given the long and rich historical heritage of the city of Zadar and its surroundings.

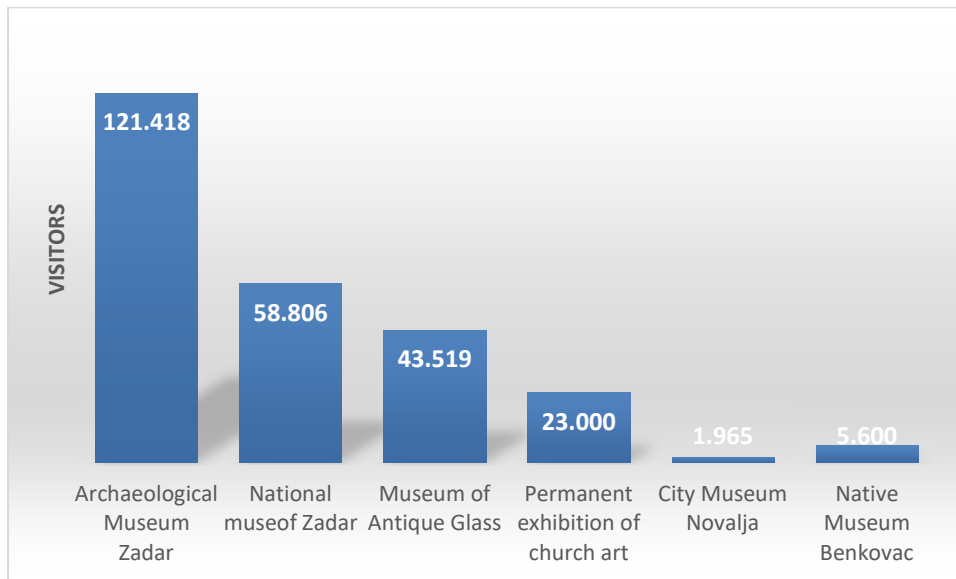


Chart 6: Number of museum visitors in Zadar County in 2019 [45]

To obtain the highest quality data on visitors to museum facilities in the city of Zadar and Zadar County, and considering the lack of official statistics on their number, Tables 8 and 9 show the calculation of the estimated number of foreign and domestic museum visitors in Zadar County.

A	B	C	D
Σ Domestic Tourists in Zadar County [Table 2]	% Domestic Tourists in Zadar County $[A/(A+C)]$	Σ Foreign Tourists in Zadar County [Table 2]	% Foreign Tourists in Zadar County $[C/(A+C)]$
307,263	15.24	1,708,454	84.76
E	F	G	H
Σ Foreign Museum Visitors in Croatia [46]	% Tourists in Zadar County [Table 5]	% Foreign Museum Visitors in Zadar County $[F \times (D/100)]$	$\approx \Sigma$ Foreign Museum Visitors in Zadar County $(E \times F)$
1,228,216	9.74	8.26	101,397

Table 8: Estimate of the number of foreign museum visitors in 2019 in Zadar County

I	J	K
Σ Museum Visitors in Zadar County	$\approx \Sigma$ Foreign Museum Visitors in Zadar County	$\approx \Sigma$ Domestic Museum Visitors in Zadar County (I-J)
254,308	101,397	152,911

Table 9: Estimate of the number of domestic museum visitors in 2019 in Zadar County

Sources of information during destination selection

Sources of information are changing significantly under the influence of technological changes, and their monitoring is important for all those involved in information and promotion in tourism. The main source of information according to Graph 7 for tourists visiting Croatia is the Internet, which is relied on by 56% of guests in the Adriatic Croatia. Following are the recommendations of relatives and friends relied on by 25% of tourists, previous stays cited by 22%, and recommendations of a travel agency or club cited by 10% of tourists.

The Internet is equally used by guests of all forms of accommodation, while among the countries of origin, the Spanish visitors stand out as the biggest users, and guests from Bosnia and Herzegovina use it the least. A large proportion of guests who come for work or to visit relatives and friends said that they did not need any information before arriving at the destination.

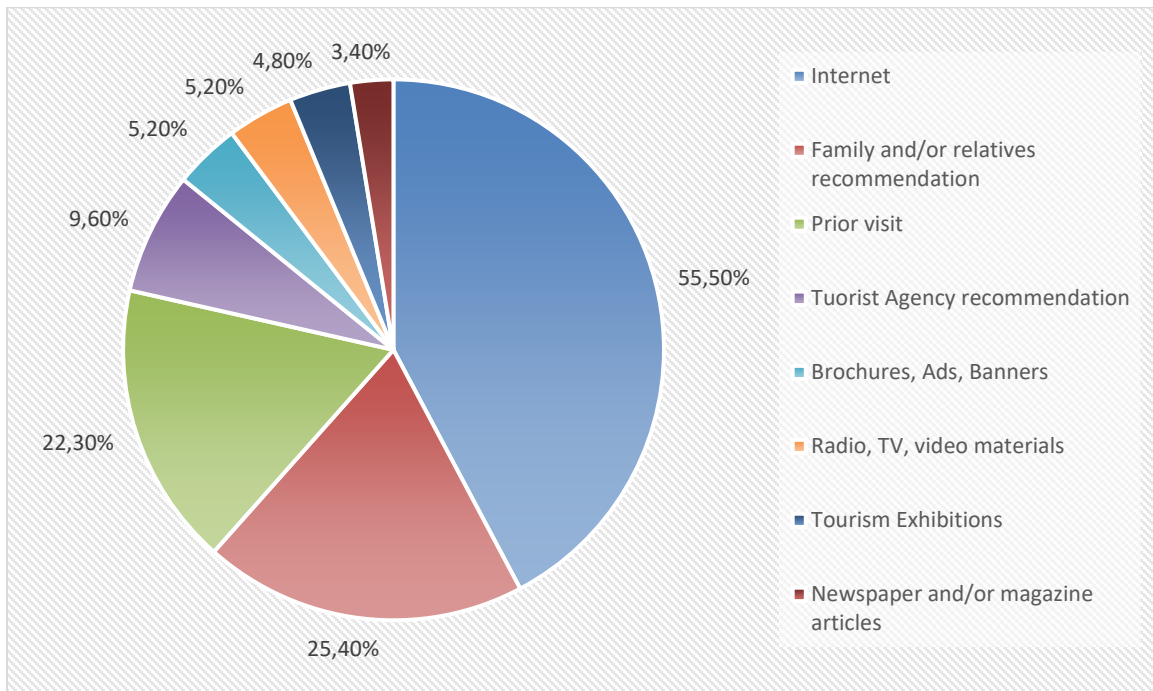


Chart 7: Graphic presentation of sources of information for tourists who visited Croatia in 2019 [43]

According to the data shown in Table 10, tourists who collect information via the Internet, in addition to the websites of online travel agencies (61%) in large numbers also visit social media, websites of accommodation facilities and tourist boards or offices.

INTERNET AS INFORMATON SOURCE	Σ	ADRIATIC CROATIA (%)
Online Tourist Agencies: Booking.com, Expedia, Holidaycheck.de, ...	61.1	61.8
Social Media (Facebook, TripAdvisor, Instagram, Twitter, ...)	48.1	48.4
Accommodation Provider Web Pages	41.7	41.9
Tourist Board Web Pages (National, County, City, Local)	30.6	29.5

Table 10: Online sources of information for tourists who visited Croatia in 2019 [43]

Visitors' arrivals frequency

In the context of the development of the cultural and tourist offer, it is necessary to consider the data on the frequency of tourist arrivals in Croatia, but also the frequency of arrival in the same place. These data refer exclusively to foreign tourists and are shown in Graph 8.

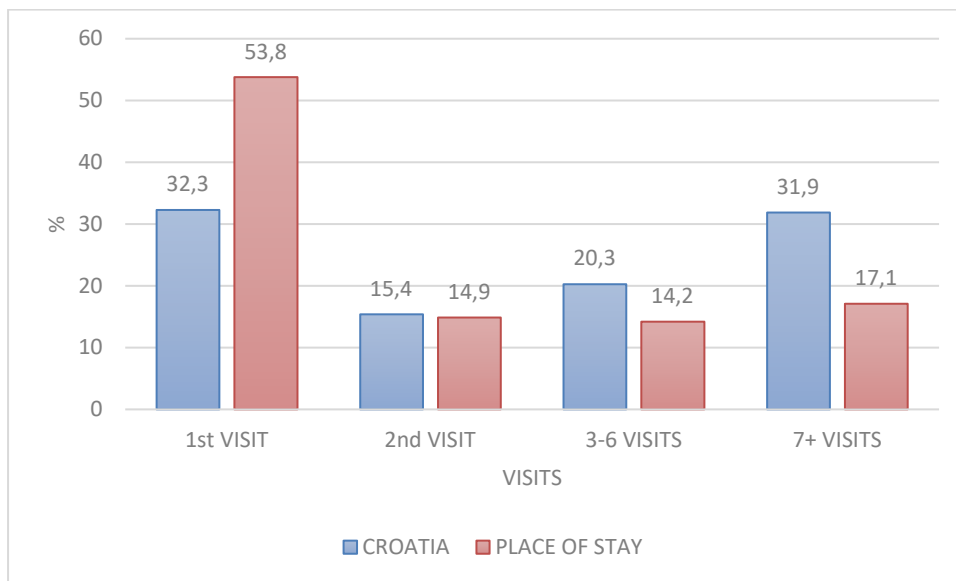


Chart 8: Graphic representation of the frequency of tourist arrivals in Croatia and place of stay [43]

Foreign guests who stayed in Croatia in the observed period are loyal to it, considering that every other guest has already visited Croatia three or more times, and loyalty is particularly pronounced in Adriatic Croatia. The share of repeated visits to destinations during the last five years (a size that represents one of the ETIS indicators of tourism sustainability in the destination) is 38% for Adriatic Croatia.

Camp guests are more loyal than average - 74% of them have been to Croatia three or more times. Camp guests are also extremely loyal to the destination - 52% of them have stayed three or more times in the destination where they were surveyed. Given the country of origin, it

is logical that among the most loyal guests are those from the nearest markets - Bosnia and Herzegovina, Slovenia, Italy, and Austria. In these markets, the share of guests who have been to Croatia seven or more times ranges from 42% to 65%.

Visitors' overnight stays

Guests of Adriatic Croatia spend an average of 9.4 nights on the entire trip and 7.6 nights in the place of the survey. Almost every fifth tourist (19%) in Zadar County spends 11 to 14 nights. On average, the longest stay is for guests from the Netherlands (12.8 nights), followed by Germans (10.8 nights) and Belgians (10.5 nights). The shortest stay is realized by guests from Japan (6.4 nights), domestic guests (6.4 nights) and guests from Bosnia and Herzegovina (6.6 nights). Given the main reason for traveling, the longest stays on average are realized by guests whose arrival is motivated by the sea, and the least by those who come for wellness / spa or business reasons. On average, guests spend the longest time traveling in Croatia in camps (12.6 nights), and the least in hotels of higher categories (7.7 nights).

Visitors' activity in the place of stay

According to the data listed in Table 11, it is evident that most tourists in the place of residence in some way encounter the cultural offer of the place and its surroundings, which is an excellent basis for further improvement of cultural and tourist offer, with special reference to offers in the form of organizing traditional events, thematic units, and promoting cultural heritage in museums, galleries, and exhibitions, but also visiting historical buildings.

RANK	ACTIVITIES (multiple choices were possible)	ADRIATIC CROATIA (%)
2	City Sightseeing	53.5
4	Historic Buildings	22.8
5	National Parks and Protected Natural Areas	18.1

9	Museums, Galleries and Exhibitions	13.0
15	Thematic Parks	7.9
16	Fun Events	7.4
19	Thematic Roads (Vine, Oil, ...)	6.3
20	Traditional Events and Manifestations	5.4
32	Workshops	1.6

Table 11: Activities of tourists during their stay in a tourist destination related to cultural heritage [43]

Confirmation of the possibility of further development of cultural and tourist offer is evident through the data presented in Table 12, which shows the level of tourist satisfaction with the offered facilities, where there is a possibility for additional promotion of cultural and artistic content, including the organization of various cultural related events and manifestations.

RANK	OFFERING ELEMENTS	ADRIATIC CROATIA (%)
2	Beauty of the Place	86.1
4	Feeling	82.2
7	Landscape	78.3
10	Destination Information	76.3
17	Sights Markings	71.3
18	Culture and Arts	70.6
21	Organized Nearby Trips	69.7
22	Information, Education about protected natural areas	69.4
26	Events and Manifestations	63.3

Table 12: The level of visitor satisfaction with the facilities offered [43]

Visitors' expenditures

The average daily consumption of tourists in Adriatic Croatia was 97 euros per person. The largest expenses are made by hotel guests (142 euros per day), followed by guests in family accommodation (88 euros), hostels (78 euros) and camps (68 euros). The share of expenditures for catering services, ie accommodation and food and beverage services, in the structure of daily expenditures of tourists staying in hotels is 76%, 71% in camps, 67% in family accommodation and 61% in hostels.

The average daily expenditure according to the country of origin of the guests ranges from 67 euros, which is the average daily allowance of guests from Bosnia and Herzegovina to 206 euros for guests from Japan. In addition to guests from Japan, guests from the USA (174 euros), the Republic of Korea (157 euros), China (150 euros) and other Asian countries (155 euros), Great Britain (143 euros) and Switzerland (118 euros), Scandinavian countries (115 euros), Spain (107 euros), France (107 euros), Austria (102 euros), Belgium (102 euros) and Serbia (100 euros). Differences in average expenditures reflect the types of accommodation used, but also of expenditures on different destination services.

According to the data shown in Graph 9, although there is no exact specification of expenditures exclusively for cultural content, they fall into the category of "Other services" (culture, entertainment, sports and recreation, excursions, local transport, and other services), from which it can be assumed as it is a relatively low daily consumption in this category. Apart from the possibility of additional popularization of cultural and artistic contents, as mentioned several times, the reason is probably the fact that in the area of Adriatic Croatia a large part of cultural heritage is located in the open and is not commercialized, ie access to such contents does not charge. Of course, this does not mean that these facilities need to start charging, but it is also mostly about individual and unorganized visits, which can be converted into (for visitors) better, organized and thematically related visits, which would certainly result in increased spending visitors for cultural and artistic content.

When organizing such activities, it is necessary to consider the target groups, who are in principle older, prefer hotel accommodation and organized sightseeing in smaller groups, and are more inclined to spend on cultural and artistic activities. Also, this group of visitors is extremely interesting and can be an excellent target group for the extension of the main tourist

season, especially in the pre- and post-season, i.e., from April to July and from September to December, when the weather conditions in this area allow sightseeing of cultural events located in the open, but also indoors.

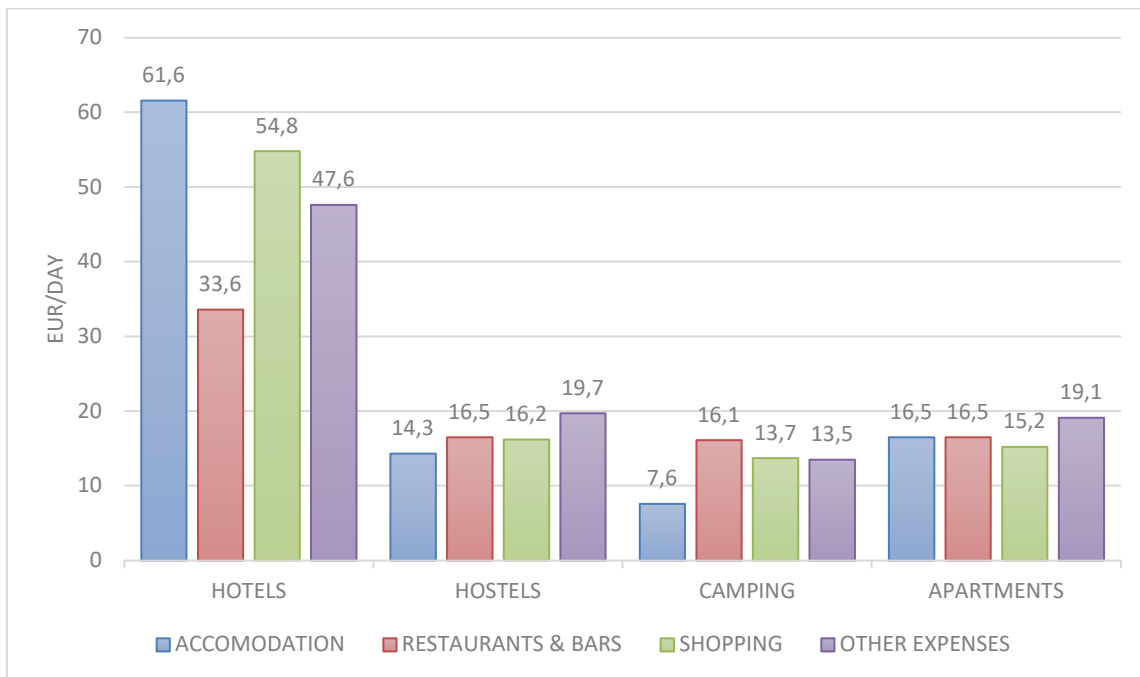


Chart 9: Graphic presentation of the average daily consumption in the area of Adriatic Croatia in 2019 by types of accommodation [43]

Cruise ship visitors

Visitors who come to Zadar by cruise ship (except in the case of museums) do not enter the listed tourist statistics, because their visit lasts less than one day, and they do not need to register in the central tourist tracking system eVisitor. However, given the fact that on average 85% of passengers from cruise ships on arrival in Zadar leave the ship (in case of favorable weather conditions, this percentage ranges between 90% and 100%), and with 2/3 passengers who left, decide to visit the city of Zadar, while the other 1/3 choose organized visits to some of

the tourist attractions in Zadar or neighboring counties (Lika-Senj; Plitvice Lakes National Park, Šibenik-Knin County; Krka National Park, or visits to islands) [47].

According to the Port Authority of Zadar [49], the average stay of cruise ships in the Zadar port of Gaženica is ≈ 8 hours, which leaves visitors from cruise ships enough time to go on organized or independent trips to Zadar or the surrounding area. By surveying visitors from cruise ships [47], data were obtained on the average length of their stay in the Zadar area, shown in Graph 10. It can be seen from the above that most visitors spend 7 to 12 hours outside the ship, or almost the entire time of detention. in the port of Zadar. A very small percentage spend less than 3 hours off the boat. This information, in addition to information on the age structure of visitors from cruise ships, or the elderly population, represents additional opportunities for the promotion of organized visits to cultural and artistic facilities and heritage of Zadar and its surroundings.

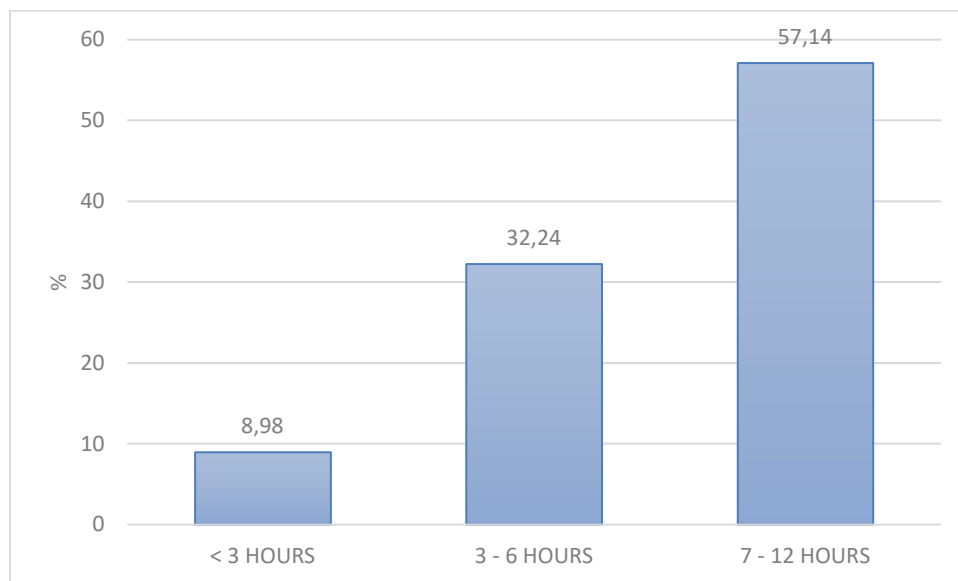


Chart 10: Time of keeping visitors from cruise ships in Zadar and its surroundings, spent outside the ship [47]

The importance of tourists arriving by cruise ships is supported by the data shown in Chart 11, which shows a steady increase in the number of cruise ships in the port of Zadar Gaženica, and is in the projections for next year (ignoring the emergency caused by the COVID virus -19 during 2020) was expected to increase the number of their arrivals or increase the number of visitors because of the growth and development of "cruising" tourism.

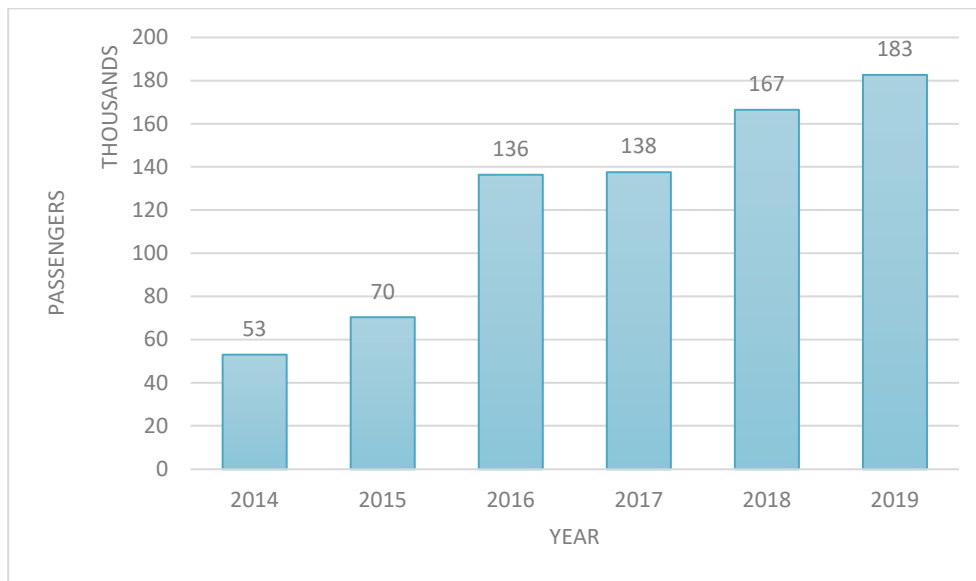


Chart 11: Graphic representation of the number of passengers on cruises for the period from 2014 to 2019 in the passenger port of Gaženica (Zadar) [48]

In accordance with the general seasonality of tourist arrivals in the Republic of Croatia, Zadar County and the city of Zadar, there are also data on the seasonality of landing ships for cruises shown in Graph 12. An interesting phenomenon is the shift of the peak period of "cruising" tourism in September and October of the main tourist season in July and August which also represents an additional opportunity to reduce tourist seasonality.

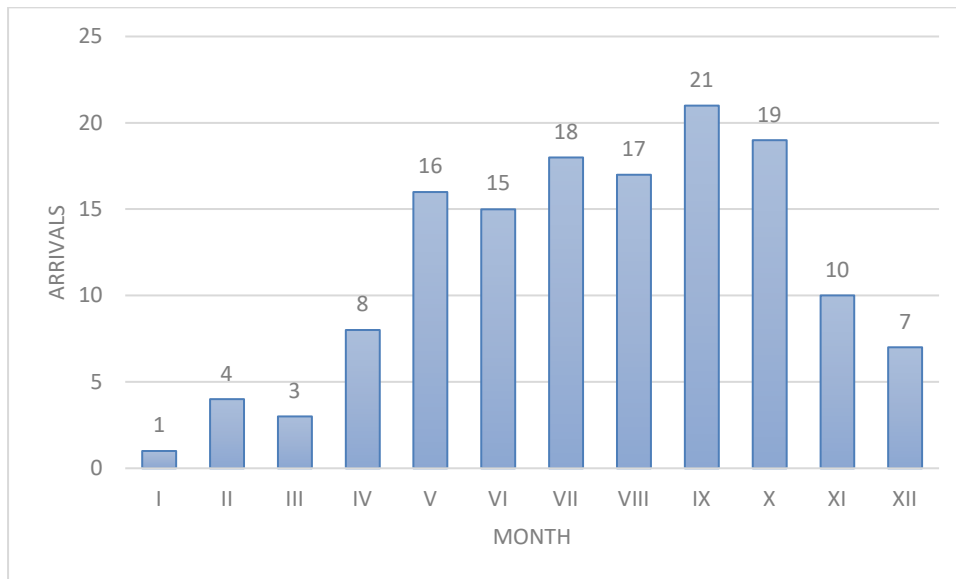


Chart 12: Number of cruise ships arrivals per month in 2019 in the Zadar port of Gaženica [49]

The data shown in Graph 13 show the habits of visitors from cruise ships, ie they show that most of these visitors have already been on a cruise two to four times, ie that more than 50% of visitors have been on cruises before, which clearly shows that such visitors show a propensity to go on cruises again.

However, an interesting fact is also shown in Chart 14, and shows how many times visitors from cruise ships have already visited Croatia. In contrast to the data shown in Chart 8, which refers to the frequency of visits by tourists staying in Croatia for several days, the percentage of visitors visiting Croatia for the first time is almost twice as high.

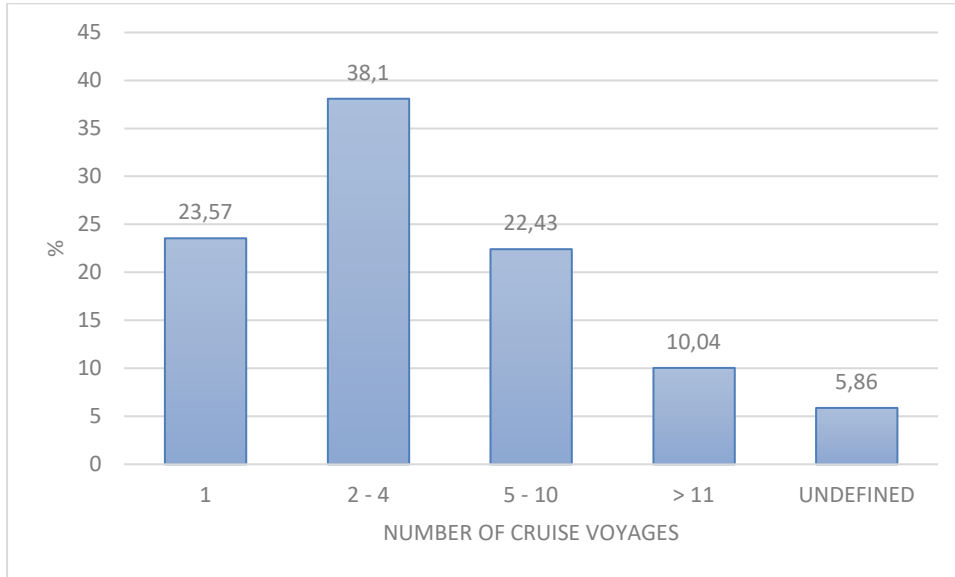


Chart 13: Frequency of visitors going on cruises [49]

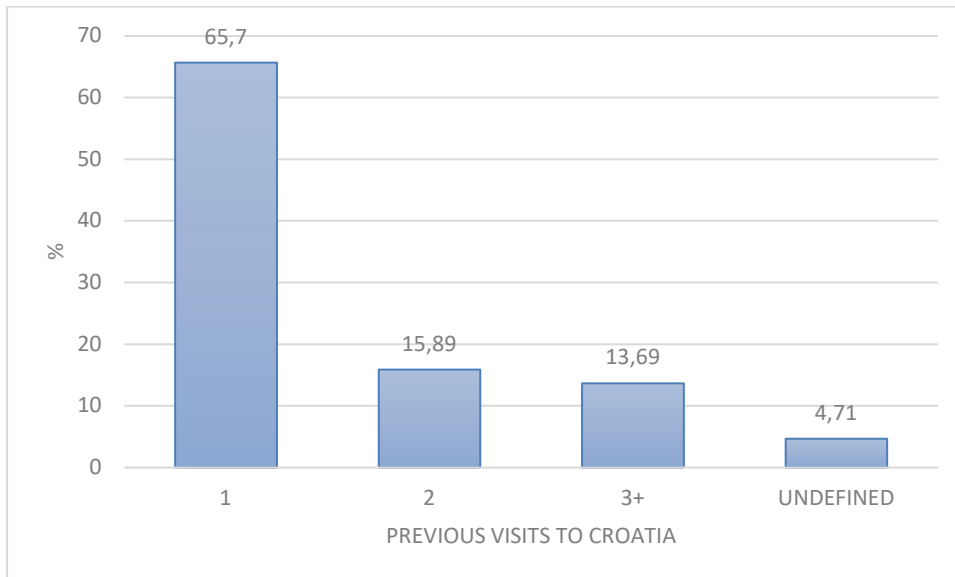


Chart 14: Frequency of visits to Croatia by visitors from cruise ships [49]

Also interesting are the motives of visitors from cruise ships when visiting Zadar, shown in Graph 15, and the data shown in Graph 16, which relate to the preference of visitors from cruise ships to re-visit Zadar. Most would recommend a visit to Zadar to their relatives and friends, but, that they would not visit Zadar again next year, which is also understandable for this form of tourism. This data shows a completely opposite tendency to return from visitors who are in Croatia for several days, and in accordance with the above fact and the data shown in Graph 10 show that for this category of visitors it is necessary to organize a targeted tour of cultural and artistic heritage lasting up to 12 hours. that is, to adjust the time of detention of ships for cruises in Zadar. This claim is supported by the first five motives of visitors from cruise ships when visiting Zadar, shown in Graph 15.

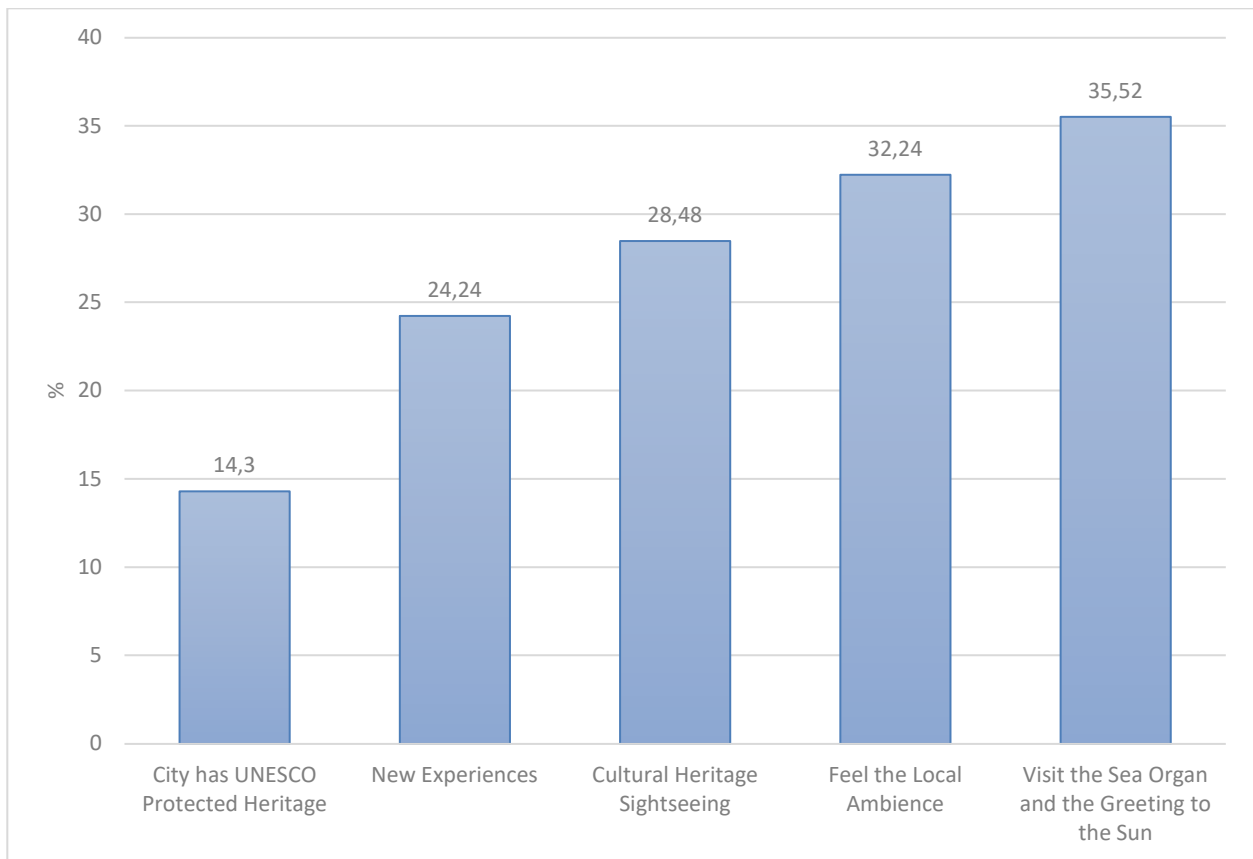


Chart 15: Motives for arrival of visitors from cruise ships when visiting Zadar [49]

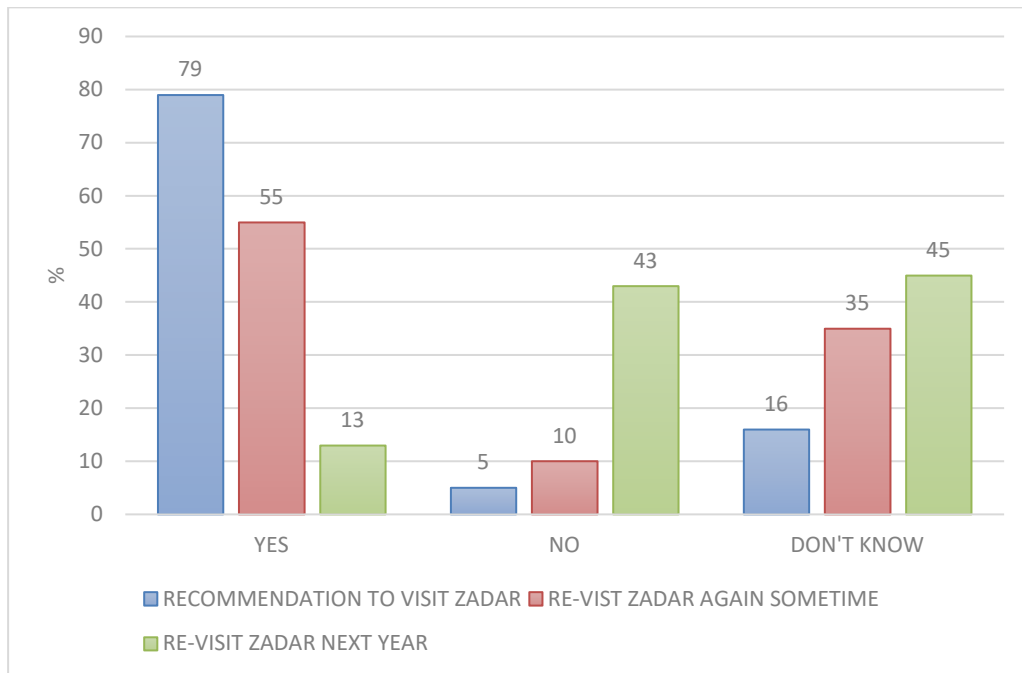


Chart 16: The tendency of visitors from cruise ships to revisit Zadar [49]

From the above data, it follows that visitors from cruise ships represent a very suitable target group for the presentation and promotion of Zadar's cultural and artistic heritage, but in a well-prepared and organized form.

Constraints overview

Considering the long history and rich accompanying cultural heritage, it can be concluded that in Zadar and Zadar County there is really no lack of opportunities for further development of tourist activities based on available cultural heritage. However, it should be noted that regarding historical reasons, it is necessary to pay attention to its preservation, especially in conditions of their increased tourist demand.

When considering development constraints, it is necessary to divide the cultural heritage of Zadar and its surroundings into internal and external heritage, where the internal is located within the museum capacity, while the external refers to buildings or their historical remains. The reason for this division stems from the museum's capacity, which due to its size is not able to receive larger groups of visitors at the same time, and the situation with the external beating is also very similar, due to its spatial location. Of course, these limitations can be mitigated and circumvented by an appropriate organizational approach, i.e., coordinated guidance and visits of tourists to the Zadar cultural heritage in smaller groups, each starting from different locations.

The second limitation, which is also necessarily related to the just mentioned spatial capacities of cultural heritage, is the tourist seasonality, i.e., the disproportion between the number of tourists in the summer (July and August) and other months of the year. The optimal solution would be the distribution of tourist visits throughout the year, i.e., the harmonization of the offer according to the Zadar cultural heritage.

Of course, when thinking about the (re) distribution of tourist visits, it is necessary to consider the categories of tourists who could visit Zadar and Zadar County outside the tourist season. Previous tourist analyzes show that the elderly population has a higher share of visits in the months outside the main (summer) tourist season. Of course, the same population needs to be offered "all-inclusive", i.e., hotel accommodation, which could be said to be lacking in the current situation in the tourist offer of Zadar and Zadar County, where the offer is mostly based on camping and apartment accommodation.

Development possibilities

According to the previously presented data, it is evident that thanks to the available modern technologies and information channels, visitors are already well informed about the cultural and tourist offer of Zadar and the Zadar area. However, although efforts to promote cultural and artistic heritage have been significantly intensified in the past ten years throughout Croatia, including Zadar and Zadar County, there is still room for improvement in several areas.

First of all, it is necessary to make additional efforts to extend the tourist season, ie to use the existing cultural and artistic heritage for the purpose of its extension, organizing targeting and integrated programs of presenting cultural and artistic content to groups of visitors who are interested in such content. According to the presented results, it is evident that these are elderly visitors, who also need to be provided with appropriate accommodation. This group prefers hotel, over camping and apartment form of accommodation. Given that camping and apartment accommodation capacities have a dominant representation in the accommodation capacities of Zadar and Zadar County, it is necessary to increase these capacities, primarily by putting them into operation outside the main tourist season.

To increase the attractiveness of cultural and artistic heritage, it is possible to integrate them with contents from the field of health tourism, i.e., to use cultural and artistic offer as an added value service in the development of health tourism, also very interesting for the mentioned target age group.

Finally, it is necessary to continue with the further promotion of the existing cultural and artistic heritage through Internet media, encouraging the organization of tourist offers with integrated presentation of cultural heritage, but also encouraging the development of new multi-day cultural and artistic events such as festivals or workshops, research on cultural and historical events in the history of Zadar in which visitors can actively participate. In this way, it is possible to expand the cultural and artistic offer to other target groups, especially those of middle and younger age who have a desire to spend an active vacation. The stated need for the development and expansion of the cultural and artistic offer becomes even more pronounced for visitors who continuously return, spend several days on vacation in Zadar and Zadar County.

Excellent transport connections, especially by road and air modalities, and the growing number of arrivals of cruise ships, provide Zadar and Zadar County with a quality foundation for tourism development. Excellent transport connections enable not only a simple direct connection of Zadar with emitting tourist markets, but also with all important tourist locations and attractions in the city and in the county.

Target markets

The target markets for the development of the cultural and tourist offer of Zadar and Zadar County represent the basic two groups of visitors – those who make overnight stays (on several-day visits) and those who do not realize overnight stays, i.e., visitors arriving by cruise ships (one-day visits). The first group consists of visitors from Croatia traditionally emitting western European countries (Germany, Austria, The Netherlands, Switzerland, France, Belgium, ...), Central (Slovenia, Czech Republic, Slovakia, Poland, Hungary), Southern (Italy), and Eastern Europe (Bosnia and Herzegovina, Serbia), but also due to the growing supply of low-cost flights, increasingly from more remote western European countries (United Kingdom) and more remote southern European countries (Spain). As a result of the introduction of new air routes between Croatia and Europe's main aviation hubs from Asian countries (South Korea, China, Japan), but also the United States. It is possible to provide this group of visitors with a more diverse and time-consuming less limited cultural and tourist offer that can be consumed in a multi-day period. Another group of visitors, i.e., one-day visitors arriving by cruise ships, should be offered a well-organized but time-limited cultural and tourist offer due to the time limit.

Looking at age groups, Zadar and Zadar County provide a diverse range of tourist facilities for all age groups, from those who want to spend passive holidays, to those looking for active holidays, cultural and artistic facilities, or nautical tourism.

Cooperation with other stakeholders

The tourism development strategy, i.e., the basic elements of the development of Croatia's tourist offer, are defined at the level of strategic documents of the Government of the Republic of Croatia, primarily the "Tourism Development Strategy of the Republic of Croatia until 2020" (NN55/2013), and their operational implementation is foreseen through the Croatian Tourist Board, as well as tourist boards of counties, cities, municipalities, and towns. In this context, it is also necessary to observe the role of the Port Authority of Zadar, which is not directly in charge and does not participate in the adoption and execution of plans and programs in the

field of tourism, but of course directly participates in the reception of visitors from cruise ships, i.e. one-day visitors, for whose pleasant reception and sense of experience cooperation with the Zadar Tourist Board and the Zadar County Tourist Board is necessary, and of course local travel agencies and activities participating in organizing thematic visits.

The role of the Port Authority of Zadar primarily, as before, implies taking care of meeting the technical requirements for the reception of cruise ships, and supporting the mentioned tourist stakeholders, in the form of collecting statistics on incoming passengers, and taking care of achieving the highest quality conditions for the reception of these passengers.

Further development of the cultural and tourist offer of Zadar and Zadar County, and care for material and intangible cultural heritage, the Port Authority of Zadar will, as before, strive to achieve through participation in projects co-financed by the European Union, as it does through the REMEMBER project.

Conclusion

The rich cultural heritage of Zadar and Zadar County represents a great potential for further development and improvement of the tourist offer of Zadar and its surroundings. In this context, this document in its first part provides a brief overview of the most important cultural heritage of Zadar and Zadar County as the basis for the development of cultural and tourist offer. The second part presents data and statistics related to patterns of behavior of visitors as a basis for recognizing their needs and creating new and adapted cultural and tourist facilities.

The data presented shows significant progress in cultural heritage promotion, in the form of new content, as well as an increase in the number of visitors to museum institutions, in the last ten years. However, it is undoubtedly necessary to make additional efforts to promote this content, as well as to create new experiences, based on cultural heritage to meet the needs of all categories of visitors, especially those who want to spend their visit in the form of an active holiday, for which Zadar and Zadar County provide more than enough opportunities.

The analyzed data is showing an increase in the number of highly informed visitors, who want to include in their vacation research of local cultural heritage, especially taking into consideration older target groups who come on cruise ships on day trips, already informed in advance about the state of cultural offer. Such target groups are extremely suitable for well-organized cultural and tourist visits.

In conclusion, Zadar and Zadar County have a great cultural and tourist potential that needs to be elevated and promoted through constant innovation and investment, and by meeting the target groups of visitors, adapting it to their liking.

Through one of the basic activities – the reception of cruise ships, whose number of arrivals is growing every year, together with the number of visitors arriving, the Port of Zadar Authority will continue to strive and actively contribute to increasing the attractiveness of Zadar and Zadar County as a destination, and by cooperating with the tourist boards of the city of Zadar and Zadar County, as well as museum institutions, contribute to increasing the quality of cultural and tourist facilities.

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Cultural Touristic Management strategy

Public Institution RERA SD for Coordination and
Development of Split Dalmatia County

Project number:	10042741
Project acronym	REMEMBER
Project Title	REstoring the MEmory of Adriatic ports sites.Maritime culture to foster Balanced tERritorial growth
Start of the project	January 2019
Duration	30 months

Related activity:	5.1 – Adriatic ports cultural network
Deliverable name:	Cultural Touristic Management strategy
Type of deliverable	Strategy
Language	English
Work Package Title	Adriatic ports cultural network
Work Package number	5
Work Package Leader	KIP – Intermodal Transport Cluster

Status	Final
Author (s)	PI RERA SD; Horwath and Horwath Ltd
Version	2
Due date of deliverable	12/2020
Delivery date	06/2022

Introduction

This document is part of the Work package (WP) 5 Adriatic ports cultural network that aims at setting up the Adriatic ports cultural network for the cross-border valorization of Adriatic Italian and Croatian ports as a single integrated destination for cultural tourism, linked but at the same time alternative to the coastal tourism.

Activity 5.1 answers to a real need of involved partners to create added value for the territories from the cultural heritage that must be safeguarded. Therefore, all involved partners are committed to continue the cooperation on cultural and tourism valorization also after the end of the project, in line with the existing local developing strategies and building upon existing cooperation frameworks among the PPs.

The CTM strategy has two main parts:

1. Current state of the offer in the port/city
2. CTM Strategy

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Part one: Current state of the offer in Split-Dalmatia County

The subject of the project is consulting in the process of drafting "Guidelines for the positioning of the Split-Dalmatia County as a cultural tourism destination" in the implementation of the "REMEMBER" project as part of the Cross-Border Cooperation Program Italy Croatia 2014-2020. The general goal of the REMEMBER project is to promote sustainable tourism and blue growth in the program area through the valorization of the extremely rich maritime heritage of eight Italian and Croatian port areas - Ancona, Venice, Trieste, Ravenna, Zadar, Rijeka, Dubrovnik, Split, four of which are protected by UNESCO area, which can be seen as a driver for more competitive and balanced development.

The geographical area covered by the project is the Split-Dalmatia County, with special reference to the city of Split and the city port of Split, bearing in mind that the REMEMBER project focuses on ports as a place of connection, exchange of culture and traditions, and the creation of jobs related to their maritime heritage and relations . In addition to the destination product of sun and sea, the Split-Dalmatia County has numerous resources and offers in the field of cultural tourism. Thus, there are a total of four sites on the UNESCO World Heritage List in the County:

- Historical complex of Split and Diocletian's Palace (1979)
- Historic city of Trogir (1997)
- Starogradsko polje (2008)
- Stećci - medieval tombstones (2016)

In addition, UNESCO's list of intangible heritage recognizes eight more properties in the county:

- Agave lace as part of lace making in Croatia
- Hvar procession 'For the Cross'
- Sinj alka
- Vrličko silent wheel

- Klap singing
- Mediterranean diet on the Croatian Adriatic, its coast, islands and part of the hinterland (the emblematic communities of Hvar and Brač)
- Musical expression ojkanje (Dalmatinska zagora)
- The art of drywall construction.

In addition to the mentioned cultural assets from the UNESCO list of tangible and intangible heritage, the Split-Dalmatia County has a large number of cultural and historical landmarks, which provides an excellent base for further commercialization of the county's cultural product. In this regard, the cultural tourism product in the County is still in the development phase with the aim of positioning the County as a cultural tourism destination as clearly as possible. Therefore, the fundamental mission of this project is to define concrete steps in which to position the Split-Dalmatia County as a destination for cultural tourism on the primarily European broadcast market. In this context, the Horwath HTL team, based on expertise and planning methods in tourism, will define the priority elements of the cultural offer, the elements of the cultural offer that should be a flywheel, both in the repositioning of the destination and in the clearer profiling of its cultural offer.

In addition to the above, the goal of the REMEMBER project is to increase the attractiveness of local economies by using ICT to digitize cultural content, differentiate the tourist offer with the aim of reducing seasonality, and create new and qualified jobs that connect digital and cultural competencies. An important item of the analytical part of the project is the analysis of the presentation of the offer of cultural tourism through official digital media, as part of which the activities on own and shared digital territories will be evaluated.

MAIN RESULTS OF THE PROJECT

Based on the need for (i) respect for trends on the international tourist market and (ii) better market valorization of the currently underutilized cultural resources of the Split-Dalmatia County, the main results of the REMEMBER project are:

- Identification of the current state of the offer of cultural tourism

- Classification of the resource basis for the development of cultural tourism
- Analysis of key challenges and limitations of further development of cultural tourism
- Identification of key areas of improvement of cultural tourism products
- Definition of cultural tourism target markets
- Positioning SDŽ as a cultural tourism destination.

As part of the project, two phases are foreseen, (i) Analysis of the state of cultural tourism supply and demand and (ii) Guidelines for the management of cultural tourism, and a final phase has been added, which includes holding a final presentation intended for destination stakeholders, during which the key findings of the project will be presented . Completion of the first phase is scheduled 45 days from the start of the project, and the second phase 90 days from the start of the project.

PROJECT DEVELOPMENT METHODOLOGY

The usual methodological procedure for planning in tourism is used for the preparation, which includes several research, analytical and interpretation procedures, i.e. the following:

<p><i>Desk</i> istraživanje</p>	<ul style="list-style-type: none"> - Analiza županijske resursne osnove i postojećih kulturnih atrakcija te njihovo rangiranje prema lokalnoj, regionalnoj, nacionalnoj i međunarodnoj važnosti/atraktivnosti - Analiza fizičkih pokazatelja, dolazaka i noćenja, na razini SDŽ - Analiza potražnje kulturnog turizma - Analiza prezentacije ponude kulturnog turizma putem službenih turističkih digitalnih medija u SDŽ.
<p>Aktivnosti na terenu</p>	<ul style="list-style-type: none"> - Upoznavanje s ključnim dionicima turističkog razvoja

	<ul style="list-style-type: none"> - Identifikaciju resursne osnove - Održavanja jedne radionice s predstavnicima JU RERA i TZ SDŽ - Intervjuiranje nositelja razvoja turizma destinacije (7 predstavnika) pomoću strukturiranog upitnika.
Javna prezentacija projekta	Nakon završetka projekta, smjernice će biti prezentirane stručnoj javnosti i partnerima na projektu REMEMBER nakon čega slijedi isporuka izvještaja i skraćenog dokumenta u obliku prezentacije.

Considering the above, the main assumptions for creating the project are:

- Cooperation with the Client - JU RERA, the SDŽ Tourist Board and the local community with the involvement of all interest groups and
- Methodological approach that implies consideration of all individual development possibilities of cultural tourism.

Available cultural offer

Analysis of the state of cultural tourism supply and demand:

With the aim of determining as precisely as possible the current state of the cultural offer in the area of Split-Dalmatia County, a comprehensive analysis of the cultural resources and attractions of the destination was carried out, which included a total of 324 elements of the cultural offer. The identified resources and attractions are classified into five different categories:

- Material cultural heritage
- Intangible cultural heritage
- Manifestations

- Cultural institutions
- Famous personalities from art and culture.

The primary focus of the analysis was a total of 65 cultural resources and attractions that were selected based on the initial findings of the analysis and expert assessment. Their classification will be presented in chapter 2.1. Identification and classification of key components of cultural tourism offer. The analysis of the demand for cultural tourism provides a qualitative insight into the general profile of cultural tourists on the tourist market, as well as the basic results of statistical analyzes conducted by the Split-Dalmatia County Tourist Board and Tomas research.

An important part of the overall analysis is the evaluation of the presentation of the cultural tourism offer through the official tourist digital media, which showed how successful the key stakeholders of the destination are in promoting cultural tourism through online channels. The last chapter of this phase, 2.4. The assessment of the state of cultural tourism will serve as a kind of summary of the analysis carried out and will result in the prioritization of up to 10 cultural resources and/or attractions on which further positioning of the destination should be focused.

The analysis of the destination's cultural offer included the following methodological processes:

- Materials provided by the Client
- Submitted materials from external partners (e.g. Museum Documentation Center)
- Detailed overview of available information on available digital channels
- Tour of the destination and selected key localities
- Management and content audit on identified official websites and social media channels
- Conducting structured interviews with selected destination stakeholders
- Conducting a strategic workshop and testing key assumptions and ideas with the Client and selected stakeholders of the destination.

Identification and classification of key components of cultural tourism offer

As stated in the introductory chapter, the total number of resources and attractions of the cultural tourism offer that was included in the analysis was 323, of which 65 were analyzed in more detail according to three defined categories:

- Market recognition
- Tourist potential
- Tourism valorization.

Each category is further elaborated through different levels of evaluation, the description of which is presented in the following table.

Tržišna prepoznatljivost	
M-međunarodna	Kulturni resurs ili atrakcija koji je prepoznat na međunarodnom turističkom tržištu i generira potražnju van granica Republike Hrvatske.
R-regionalna	Kulturni resurs ili atrakcija koji je prepoznat u regionalnim okvirima te generira potražnje među turistima iz susjednih zemalja.
N-nacionalna	Kulturni resurs ili atrakcija koji je prepoznat na razini Republike Hrvatske te dominantno generira domaću potražnju.
L-lokalna	Kulturni resurs ili atrakcija koji je prepoznat na razini Splitsko-dalmatinske županije te generira potražnju unutar same županije i okolnih županija.
Turistički potencijal	
V-visok	Kulturni resurs ili atrakcija može doseći visoku razinu razvijenosti i postati snažan privlačni faktor destinacije.
S-srednji	Kulturni resurs ili atrakcija može doseći srednju razinu razvijenosti i postati kvalitetan potporni element kulturne ponude destinacije.
N-nizak	Kulturni resurs ili atrakcija ima limitiran razvojni potencijal te se može koristiti samo kao dopunski element kulturne ponude destinacije.
Turistička valorizacija	

V-visoka	Kulturni resurs ili atrakcija je u potpunosti turistički valorizirana te postoji vrlo malo ili gotovo nema prostora za daljnju valorizaciju.
S-srednja	Kulturni resurs ili atrakcija je dosegla srednju razinu valorizacije te uz određena ulaganja može u kraćem roku doseći intenzivniju valorizaciju.
N-niska	Kulturni resurs ili atrakcija je vrlo slabo valorizirana te postoji dosta prostora za intenzivniju valorizaciju, najčešće u dužem vremenskom periodu.

The following shows 65 identified resources and attractions in the area of Split-Dalmatia County, which were processed based on the described methodology. In addition, ratings were assigned based on the analysis of available websites (official websites of tourist boards, websites of individual resources/attractions, Tripadvisor, etc.), the Consultant's professional assessment and consultation with the Client and destination stakeholders.

Materijalna kulturna baština					
#	Naziv resursa/atracije	Lokacija	Prepoznatljivost	Potencijal	Valorizacija
1.	Pustinja Blaca	Nerežišća, Brač	N	S	N
2.	Velika i Mala Crljivica – Stećci - srednjovjekovni nadgrobni spomenici	Cista Velika	N	S	N
3.	Hvarsko kazalište	Hvar	N	S	N
4.	Tvrđava Fortica (Španjola)	Hvar	R	S	S
5.	Tvrđava Topana	Imotski	N	S	N
6.	Selo Humac	Jelsa	N	S	N
7.	Tvrđava Starigrad – Fortica	Omiš	N	S	N
8.	Gradska utvrda (Peovica, Mirabela)	Omiš	N	S	N

9.	Tvrđava Stari grad	Sinj	N	S	N
10.	Arheološki lokalitet Salona	Solin	R	S	S
11.	Krunidbena bazilika kralja Zvonimira (crkva sv. Petra i Mojsija)	Solin	N	S	N
12.	Gospin otok	Solin	N	S	N
13.	Povijesni kompleks Splita i Dioklecijanova palača	Split	M	V	S
14.	Katedrala Uznesenja Blažene Djevice Marije (Sv. Duje)	Split	N	S	N
15.	Dioklecijanov akvadukt	Split	R	S	N
16.	Starogradsko polje	Stari Grad	R	S	N
17.	Tvrđalj Petra Hektorovića	Stari Grad	N	S	N
18.	Groblje s katakombama	Sutivan	N	S	N
19.	Arheološki lokalitet Tilurium	Trilj	N	S	N
20.	Katedrala sv. Lovre	Trogir	N	S	N
21.	Tvrđava Kamerlengo	Trogir	N	S	N
22.	Povijesna jezgra Trogira	Trogir	R	S	S
23.	Tvrđava Klis	Klis	R	V	S
24.	Engleski fortifikacijski sustav iz vremena Napoleonskih ratova na istočnom Jadranu, 1806. - 1813. (tvrđave King George III, Bentinck, Wellington i Robertson)	Vis	N	S	N
25.	Arheološki lokalitet Issa	Vis	R	S	S

26.	Podzemni vojni objekti	Vis	R	S	N
27.	Tvrđava Prozor (Gradina)	Vrlika	N	S	N
Nematerijalna kulturna baština					
#	Naziv resursa/atrakcije	Lokacija	Prepoznatljivost	Potencijal	Valorizacija
28.	Umijeće ručnog klesanja kamena u sklopu Klesarske škole	Pučišća, Brač	R	S	N
29.	Mediterranska prehrana na hrvatskom Jadranu, njegovoj obali, otocima i dijelom zaleđa	Dalmacija	R	S	N
30.	Umijeće suhozidne gradnje	Dalmacija	N	S	N
31.	Glazbeni izričaj otkanje	Dalmatinska zagora	N	S	N
32.	Nijemo kolo s područja Dalmatinske zagore	Dalmatinska zagora	N	S	S
33.	Vještina izrade čipki od niti agave	Hvar	N	S	S
34.	Iskustvo gajete falkuše – pučke vrednote vezane uz komišku gajetu falkušu	Komiža	N	S	S
35.	Klapsko pjevanje	SDŽ	R	S	S
Manifestacije					
#	Naziv resursa/atrakcije	Lokacija	Prepoznatljivost	Potencijal	Valorizacija
36.	Hvarska procesija 'Za Križen'	Hvar	N	S	S
37.	Uskočki boj za Klis	Klis	N	S	S
38.	Rota Palagruzona	Komiža	N	S	N

39.	Gusarska bitka	Omiš	N	S	S
40.	Sinjska Alka - viteški turnir u Sinju	Sinj	R	S	V
41.	Predstava Opsada Sinja 1715.	Sinj	N	S	S
42.	Splitsko ljeto	Split	N	S	S
43.	Međunarodni festival arheološkog filma	Split	N	S	S
Kulturne institucije					
#	Naziv resursa/atrakcije	Lokacija	Prepoznatljivost	Potencijal	Valorizacija
44.	Muzej hvarske baštine	Hvar	N	S	N
45.	Muzej općine Jelsa	Jelsa	N	S	N
46.	Muzej Sinjske Alke	Sinj	R	S	S
47.	Muzej Cetinske krajine	Sinj	N	S	N
48.	Galerija Stipe Sikirice	Sinj	N	S	S
49.	Hrvatski pomorski muzej	Split	N	S	S
50.	Arheološki muzej u Splitu	Split	N	S	S
51.	Etnografski muzej Split	Split	N	S	S
52.	Galerija Meštrović	Split	R	S	S
53.	Muzej grada Splita	Split	N	S	S
54.	Muzej hrvatskih arheoloških spomenika	Split	N	S	S
55.	Hrvatsko Narodno Kazalište u Splitu	Split	N	S	N

56.	Galerija umjetnina Split	Split	N	S	S
57.	Jakšić galerija	Split i Brač	N	S	N
58.	Muzej Starog Grada	Stari Grad	N	S	N
59.	Muzej Uja	Škrip	N	S	N
60.	Muzej triljskog kraja	Trilj	N	S	S
61.	Arheološka zbirka Issa (područna zbirka Arheološkog muzeja u Splitu)	Vis	N	S	N
Poznate ličnosti iz umjetnosti i kulture					
#	Naziv resursa/atrakcije	Lokacija	Prepoznatljivost	Potencijal	Valorizacija
62.	Matko Trebotić	Milna, Brač	N	N	N
63.	Zvonimir Mihanović	Split	M	S	N
64.	Kažimir Hraste	Supetar	N	S	N
65.	Tin Ujević	Vrgorac	N	S	N

Of the 65 analyzed resources and attractions, the Historical Complex of Split and Diocletian's Palace as part of material cultural heritage and the academic painter Zvonimir Mihanović as part of famous figures from art and culture show international recognition. Of the other resources, 14 are recognizable at the regional level, while the rest are recognizable at the national level.

As for the tourist potential, the Historical Complex of Split and Diocletian's Palace and the Klis Fortress have high potential and with additional development can become a strong attractive factor for visits. The remaining resources and attractions record medium potential, which means that they can represent significant elements of the cultural offer of the destination.

Only one attraction, the Sinjska Alka event, is marked with high valorization, and it is considered that its organization and maintenance is very close to maximum utilization. On the other hand, 26 resources or

attractions record a medium level of current valorization, while the remaining 37 resources or attractions are not adequately developed and therefore record a low level of valorization.

Part two: CTM strategy

Tourist demand and consumption effects

Analysis of cultural tourism demand:

The analysis of cultural tourism demand is an important element of this phase, since its conclusions contribute significantly to the understanding of the motivation and movement of tourists in the destination. The findings of the demand analysis largely determine how the guidelines for the positioning of the Split-Dalmatia County as an attractive destination for cultural tourism will be defined in the coming period. The analysis will include the following elements:

- Profiling tourists motivated by culture
- Destination demand analysis
- The main reasons for coming to the destination
- Degree of satisfaction with the elements of the tourist offer
- Activities during the stay in the destination
- Attendance at selected museums.

Profiling tourists motivated by culture:

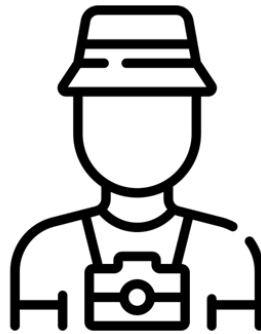
The baby boom generation contributed the most to the strong growth of cultural tourism, which was primarily motivated by visiting the main cultural attractions and monuments and traveled in groups. The next generation of travelers, primarily the Millennials, place greater focus on authentic and unique experiences that are highly personalized. The demand for a modern and creative cultural offer is on the rise among a new type of cultural tourist.

Osobne karakteristike

- Visoko obrazovanje i tehnološka pismenost
- Visoka platežna moć, aktivan i čest putnik

Demografske karakteristike

- Još uvijek dominantno starije životne dobi
- Sve veći udio mladih putnika – segment *Millennials* koji su dobro stojeći i često putuju



Karakteristike putovanja

- Prakticira ostati duže od prosjeka u destinaciji
- Troši više od prosjeka
- Ne gleda vrijednost za novac, već vrijednost za vrijeme

Ključne aktivnosti

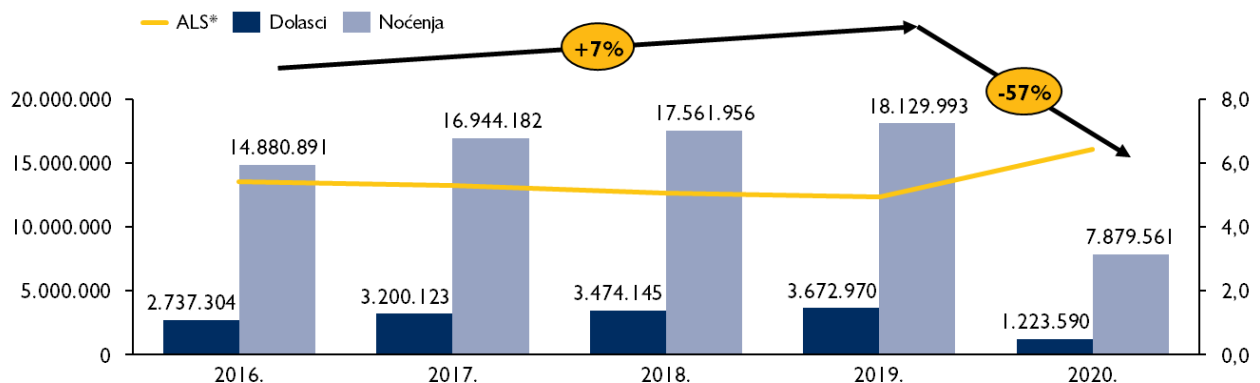
- Povezuju se i komuniciraju s lokalnom zajednicom
- Cilj im je što bolje razumjeti domicilnu tradiciju i običaje
- Rade kraće izlete po potrebi u obližnja mjesta

Izvor: cbi.eu; studija „The European market potential for cultural tourism“

Destination demand analysis:

Analysis of tourist arrivals and overnight stays of the destination:

The analysis of tourist arrivals and overnight stays of the destination focuses on the last 5 years, from 2016 to 2020. The analysis of the last year will not be relevant to a large extent due to the outbreak of the pandemic and the difficulty of carrying out tourist activities.

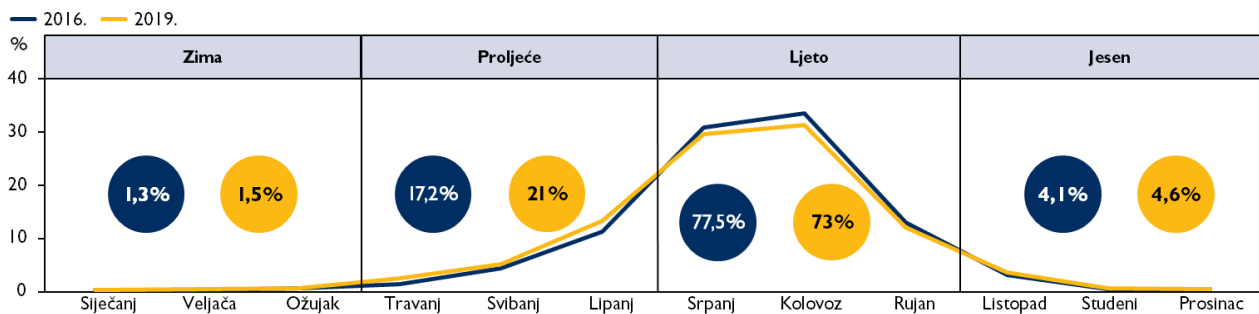


Izvor: Službene stranice Turističke zajednice Splitsko-dalmatinske županije

The graph shows that in the period from 2016 to 2019, there is a noticeable positive trend in the growth of arrivals and overnight stays with an average annual growth rate of 7%. However, in the same period, it is noticeable that the average length of stay in the destination decreases slightly and varies around 5 nights. In the last year of the analysis, a significant drop in overnight stays of 57% was noticeable, with a noticeable increase in the average length of stay to 6.4 nights.

Seasonality of overnight stays:

The analysis of the seasonality of overnight stays compares two years, 2016 and 2019, since 2020 is not relevant due to the outbreak of the pandemic.



Izvor: Službene stranice Turističke zajednice Splitsko-dalmatinske županije

The graph of the seasonality of overnight stays in both analyzed years shows a high proportion of overnight stays in the summer months (from June to September 88.8% in 2016 and 86.4% in 2019), which leads to the conclusion that the primary tourist product of the destination is the sun and the sea. In the off-season, in the winter months, the share of overnight stays does not even reach 2%, while in the pre-season period, a higher number of overnight stays is noticeable in 2019, which represents a positive trend in the number of overnight stays.

Emissive markets:

The focus of the analysis was the first 15 broadcast markets according to the criterion of overnight stays for 2019.

#	Emitivno tržište	Ostvarena noćenja	ALS
1.	njemačka	2.231.211	6.3
2.	Poljska	2.207.534	7.3
3.	Češka	1.619.309	7.6
4.	Ujedinjeno Kraljevstvo	1.130.406	4.7
5.	Hrvatska	1.115.420	3.8
6.	Bosna i Hercegovina	997.994	5.0
7.	Švedska	752.171	5.5
8.	Slovačka	745.934	7.4
9.	Francuska	726.239	4.3
10.	Slovenija	715.778	6.8
11.	Norveška	576.329	6.2
12.	Austrija	520.540	5.7
13.	Mađarska	511.817	6.0
14.	SAD	473.583	2.6
15.	Italija	394.268	4.2

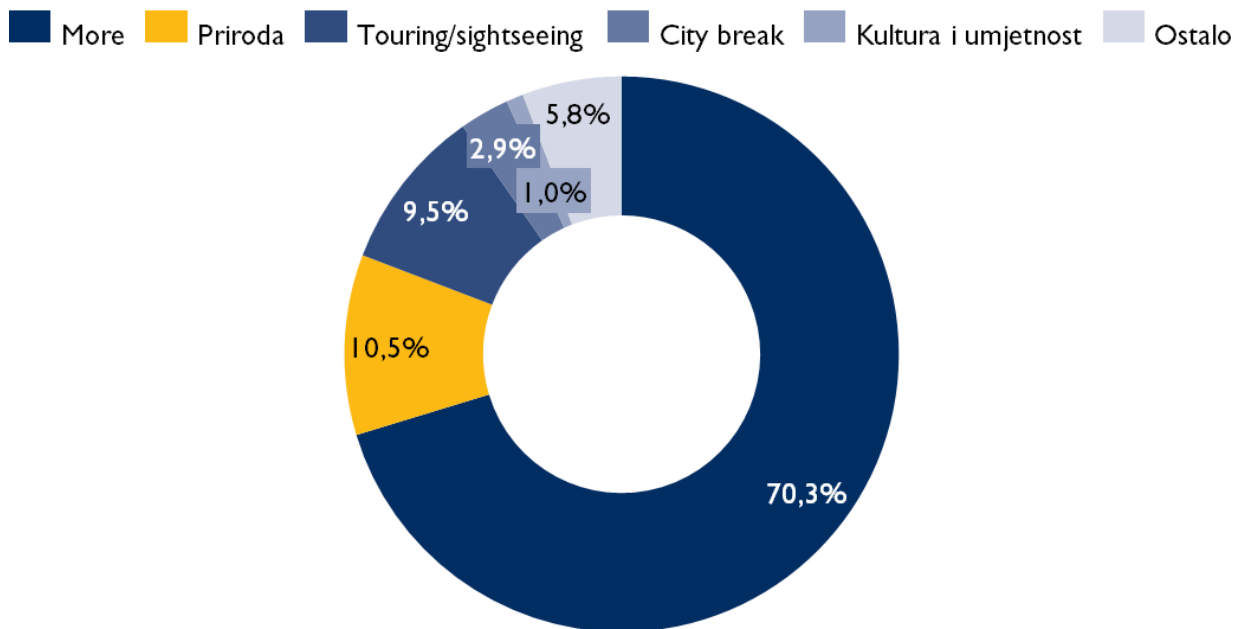
Izvor: Službene stranice Turističke zajednice Splitsko-dalmatinske županije

The largest number of overnight stays in the destination in 2019 came from the German market. They are followed by guests from Poland, who spent 23,677 fewer nights than guests from Germany, but recorded a longer average stay. The third and fourth places on the list are occupied by guests from the Czech Republic and the United Kingdom, followed by domestic tourists followed by travelers from Bosnia and Herzegovina.

The top 6 markets in Europe for cultural tourism are Germany, the United Kingdom, Italy, France, the Netherlands and Spain. Among the mentioned 6 markets, 4 of them can be found in the top 15 in terms of overnight stays in the destination.

The main reasons for coming to the destination:

The analysis of the main motives for coming to the destination was interpreted through the available TOMAS research for 2019 and refers only to tourists who stated Vacation as the main reason for the trip.

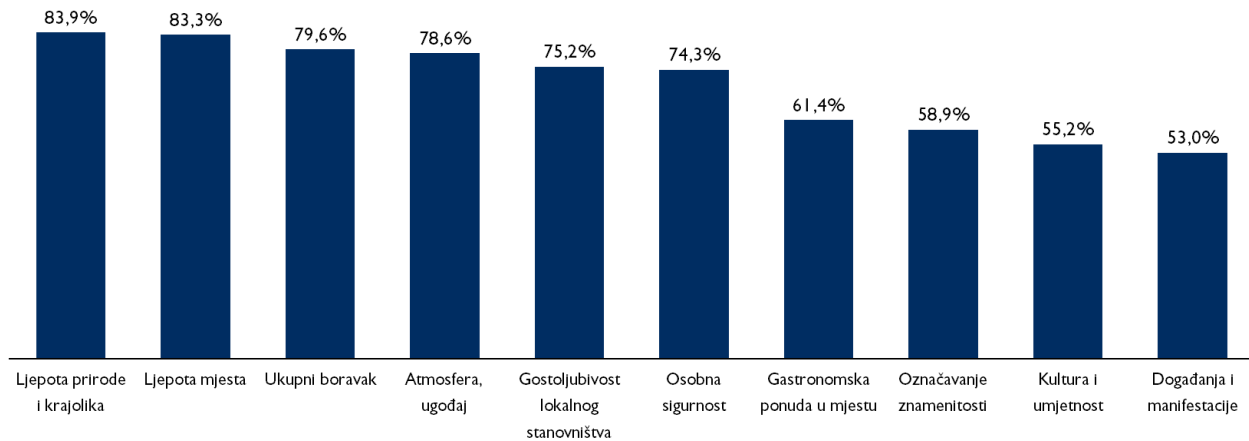


Izvor: TOMAS istraživanje 2019

The largest share in the motivation for coming to Split-Dalmatia County is taken by the Sea with 70.3%. The next motif is Nature with 10.5%. Although culture and art only account for 1% of the primary motivation for visiting the destination, cultural tourists can certainly be partially classified as individuals who cited touring/sightseeing and city break as the primary reason for their visit, which would raise the share of culture to 13.4%.

Degree of satisfaction with the elements of the tourist offer:

Like the previous item, the analysis of the degree of satisfaction with the elements of the tourist offer is based on the TOMAS survey and its associated methodology. 10 selected elements were taken into analysis, while the entire research included a total of 30 elements.

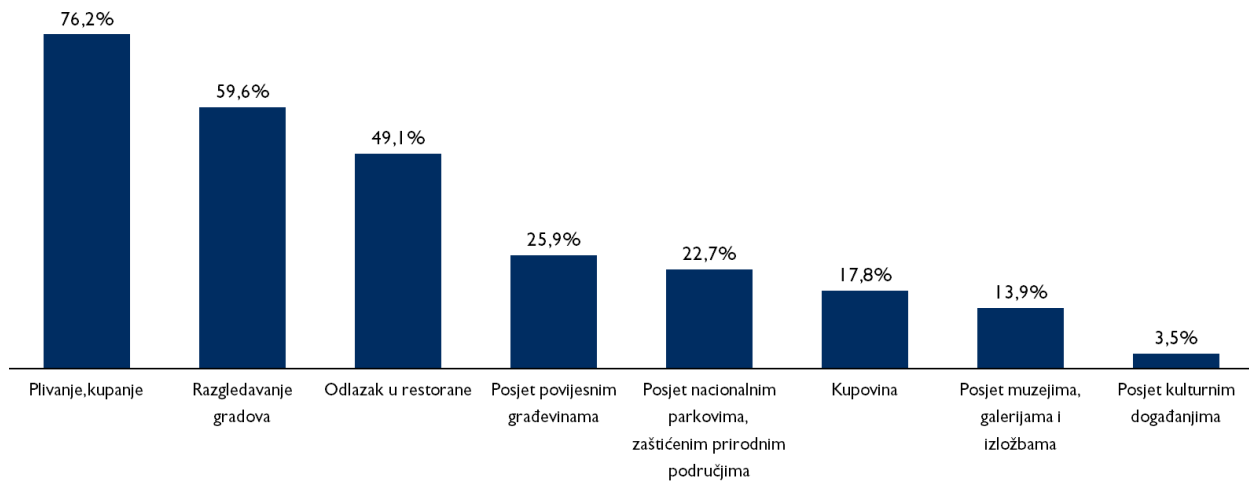


Izvor: TOMAS istraživanje 2019

The elements of the tourist offer that tourists in the Split-Dalmatia County are most satisfied with are Beauty of nature and landscape (83.9%), Beauty of the place (83.3%) and Overall stay (79.6%). According to the classification from the TOMAS survey, the mentioned elements achieve a very high and high level of satisfaction. On the other hand, elements of the offer that are in the domain of cultural tourism, such as Marking landmarks (58.9%) and Culture and art (55.2%), achieved a low level of satisfaction from respondents.

Activities during the stay in the destination:

As part of the TOMAS research, 39 activities were included, but for the purposes of creating the project, 8 of them were taken into closer analysis.



Izvor: TOMAS istraživanje 2019

The activity most consumed by the respondents in the destination is Swimming, swimming (76.2%), which consistently coincides with the analysis of the main motives for coming to the destination, according to which more than 70% of the respondents declared that the Sea was the primary motive for coming. City sightseeing is the second most represented activity with 59.6%, and it can also be partially viewed in the context of cultural tourism. Of the other activities that can be classified in the domain of cultural tourism, on average every fourth visitor to the Split-Dalmatia County visits historical buildings, while the activities Visit museums, galleries and exhibitions with 13.9% and Visit cultural events with 3.5% are relatively poorly represented .

Attendance at selected museums:

The data for the analysis of the visitation of the selected museums was obtained from the Museum Documentation Center and does not include all museums in the area of the destination, but only those that decided to submit their visitation data to the Center. A total of 20 museums were analyzed with available attendance data for the last 5 years.

#	Naziv muzeja i galerija	Mjesto	2016.	2017.	2018.	2019.	2020.
1.	Muzej grada Splita (i Dioklecijanovi podrumi)	Split	321.274	357.745	323.618	389.814	41.417

2.	Arheološki muzej Split	Split	33.335	34.552	40.602	38.052	7.953
3.	Etnografski muzej Split	Split	29.503	33.771	35.781	55.400	8.286
4.	Muzej otoka Brača	Škrip	14.494	15.570	14.967	14.144	2.668
5.	Muzej grada Trogira	Trogir	13.717	16.510	17.788	16.092	4.957
6.	Muzej grada Kaštela	Kaštel Lukšić	10.563	8.092	9.633	9.836	2.625
7.	Galerija umjetnina	Split	10.032	10.184	11.838	11.515	7.036
8.	Hrvatski pomorski muzej Split	Split	8.843	8.585	11.953	10.081	6.130
9.	Prirodoslovni muzej i zoološki vrt	Split	7.594	7.669	9.164	9.780	
10.	Muzej hrvatskih arheoloških spomenika	Split	7.518	5.040	8.151	6.232	4.307
11.	Gradska galerija Antuna Gojaka	Makarska	5.780	2.700	3.218	5.748	1.713
12.	Gradski muzej Makarska	Makarska	4.700		2.038	2.100	
13.	Muzej Cetinske krajine	Sinj	4.640	1.950	1.105		
14.	Muzej Staroga Grada	Stari Grad	3.090	3.026	2.899	2.936	1.296
15.	Galerija umjetnina "Branislav Dešković"	Bol	2.171	1.202	994	1.138	763
16.	Muzej triljskog kraja	Trilj	1.497	1.528	1.753	1.876	685
17.	Zavičajni muzej Imotski	Imotski	1.315	3.258	1.761		
18.	Gradski muzej Omiš	Omiš	1.160	1.800	720		300

19.	Muzej Sinjske Alke	Sinj				24.320	2.159
20.	Muzej općine Jelsa	Jelsa				3.652	1.614

Izvor: Muzejski Dokumentacijski Centar

The most visited museum in the Split-Dalmatia County is the Museum of the City of Split (and Diocletian's Cellars), which recorded an average annual growth of 7% in visitors before the pandemic. In 2019, the second most visited museum in the destination area was the Ethnographic Museum in Split with 55,400 visitors, while the Archaeological Museum in Split recorded the third result with 38,052 visitors. Understandably, the most visited museums are in Split, while the museum with the highest number of visits outside of Split was the Sinjska Alka museum in Sinj. At other museums, a pronounced volatility of visits is noticeable.

Development opportunities and actions to implement

Defining the target market demand for cultural tourism products

Cultural tourism is one of the fastest growing specific forms of tourism on the global tourism market with more than 40% of tourist movements motivated by culture, according to UNWTO data. Cultural tourists primarily travel to experience different cultural elements of a destination, such as historical heritage, cultural traditions, lifestyle of the resident population, art, music, literature, architecture and religion. The prioritized elements of the tourist offer are still not sufficiently recognized at the level of the tourist destination, and the definition of target demand markets is an initial step for a more effective positioning of the Split-Dalmatia County as a cultural tourism destination. The main goal of this project activity is to identify segments of cultural tourism demand and define up to five primary broadcast markets where prioritized cultural attractions should be positioned in the upcoming period.

1.2.1. Segmentation of cultural tourism demand

The segmentation of cultural tourism demand that is most widely accepted in practice is the one defined by the tourist board of Great Britain (Visit Britain). According to this classification, there are five different segments of the cultural tourist whose nomenclature will not be **translated into**

Croatian for the reason that the basic description of each segment is not lost. Identified segments include:

1. The purposeful cultural tourist / culture vulture

1.1. The cultural offer of the destination is the primary motive for the visit

1.2. The tourist has significant experience of visiting cultural attractions and comes targeted for certain sights of his interest

2. The sightseeing cultural tourist

2.1. The cultural offer of the destination is the primary motive for the visit

2.2. The experience of visiting cultural attractions is not so pronounced, more emphasis is placed on visiting a few key sights

3. The serendipitous cultural tourist

3.1. The cultural offer of the destination is not the primary motive for the visit

3.2. Although it is not the primary motive of arrival, the tourist visits certain cultural attractions and after the visit achieves a connection with the visited sights

4. The casual cultural tourist

4.1. The cultural offer of the destination is not the primary motive for the visit

4.2. The tourist participates in visiting the most prominent cultural attractions of the destination, however, his experience is relatively low

5. The incidental cultural tourist

5.1. The cultural offer of the destination is not the primary motive for the visit

5.2. The tourist participates in some activities that are related to the cultural offer of the destination, however, his experience is relatively low

Based on the presented classification, the conclusion is that the primary focus of upcoming positioning activities of Split-Dalmatia County should be on the first two market segments, The purposeful cultural tourist / culture vulture and The sightseeing cultural tourist. The main reason for this decision is that both segments view the cultural offer as the primary motive for visiting the destination and consume specific cultural attractions in a targeted and purposeful way. The aim is to achieve that the cultural tourism of the destination is the main motivating factor for a certain part of the market in visiting the destination, in contrast to tourists who at this moment come predominantly motivated by the sun and the sea.

Additionally, it is suggested that other market segments be represented in marketing activities, however to a lesser extent, for the reason that for them cultural tourism is more of a supplement and a supporting element in their stay in the destination. For example, the serendipitous cultural tourist segment of the market should not be completely ignored, since visitors belonging to this group actively visit cultural sights, even though their primary motive for visiting the destination was not culture.

Target markets

1.2.2. Defining emission demand markets

When defining the emitting demand markets, three key components were taken into account:

- Classification of emission markets whose tourists are mostly motivated by culture
- Number of overnight stays in Split-Dalmatia County in 2019
- Air connection of the destination with emission markets

The main goal is to identify emission markets that overlap in all three components in order to prioritize emission markets where in the coming period it is necessary to position Split-Dalmatia County more strongly as a cultural tourism destination.

Outbound markets with the largest share of cultural tourists in Europe include Germany, the United Kingdom, Italy, France, the Netherlands and Spain.

	Udio stanovnika po zemlji u kojima je kultura ili <i>city break</i> bio razlog putovanja u 2015. godini	Procijenjeni broj noćenja turista kojima je kultura ili <i>city break</i> bio razlog putovanja u 2018. godini (u milijunima)
Njemačka	50%	54
Ujedinjeno Kraljevstvo	48%	34
Italija	66%	22
Francuska	62%	17
Nizozemska	65%	15
Španjolska	50%	10

Izvor: Flash Eurobarometer 432

According to data from the Eurobarometer survey conducted by the European Union, the largest share of residents per country in which culture or a city break was the reason for traveling in 2015 was recorded in Italy and amounted to 66%, while the largest number of overnight stays by cultural tourists in 2018 was from foreign guests from Germany.

The number of overnight stays in the Split-Dalmatia County in 2019 is presented in detail in the analytical part of the document (Chapter 2.2. Analysis of cultural tourism demand). Following on from the elaboration of the emission markets in which the largest share of cultural tourists is represented, it is possible to identify four emission markets that achieved a greater number of overnight stays in the Split-Dalmatia County. Of the 15 presented markets, 4 identified are Germany (1st place), the United Kingdom (4th place), France (9th place) and Italy (15th place).

The importance of air connectivity analysis is especially highlighted in the context of the possibility of a city break product through which the cultural offer of the destination is communicated to the greatest extent. The analysis was made with the help of the Skyscanner website, taking into account the possibility of booking direct flights to Split in June 2022. The total number of countries with which Split is connected

is 21, including Croatia, while the total number of destinations is 51. The emission markets with the largest number of directly connected destinations are Germany and France, 7 of them, followed by the United Kingdom with 6, Norway and Poland with 5, Italy with 3 and the Netherlands, Spain and Switzerland with two destinations each.

According to the conducted analysis, the conclusion is that the activities for a stronger positioning of the Split-Dalmatia County as a cultural tourism destination should be focused on the following emission markets:

- Germany
- France
- United Kingdom
- Italy
- Croatia.

Fields of cooperation

Based on data from the previous two project activities, the goal is to define concrete guidelines for positioning SDŽ as a cultural tourism destination. In this regard, it is necessary to define an approach that will separate the two basic concepts of the destination's cultural tourism offer. The primary focus of the identified positioning guidelines will be placed on that part of the demand for which culture is the primary motive for visiting the destination. This defined approach enhances the stronger development of the city break tourist product, where tourists visit the destination for a shorter period of time (up to 4 days), most often in the period outside the main season, and are primarily motivated by the cultural offer of the destination. One of the main prerequisites for the realization of this type of tourist product is quality air connectivity.

Another understanding of the destination's cultural tourism offer includes its consumption by tourists whose primary reason for coming is not culture, but usually the sun and the sea. Tourists who perceive culture as one of the supporting elements of the tourist offer of the destination will not be in the primary focus when defining the guidelines for the positioning of the cultural

tourism destination, but they certainly form an important part of the tourist demand and some of the guidelines will reflect on them as well.

The guidelines for positioning will not be related exclusively to a particular cultural resource or attraction that was the subject of prioritization, but the goal is to define guidelines that will use these resources and attractions in the context of positioning the destination. Furthermore, the communication of the cultural offer would have to be based on several key, most recognizable elements of the tourist offer with the support of those that are still insufficiently valorized as tourists at the moment, so that they could be used more significantly in the context of positioning the destination.

In the following, 10 guidelines will be described that the Consultant believes can more strongly position the Split-Dalmatia County as a cultural tourism destination in the coming period. Some of them refer to the establishment of basic web infrastructure for the reason that this is a prerequisite for the effective implementation of marketing activities as part of positioning the destination.

1. Modernization of websites of tourist boards and certain cultural attractions

The basic prerequisite for quality positioning on online channels is the modernization of existing websites that communicate the cultural product of the destination. Websites are most often the first contact a potential tourist has with a destination, and in this sense it is crucial to create a positive impression through this medium and initiate the desire to visit.

The analysis carried out showed that only a small number of websites can be considered informative and attractive, while the need for investment in order to reach the necessary qualitative level is noticeable in most of them. The design and content of websites (first of all, the level of information presented, and then the quality of multimedia) are marked as primary elements that need to be improved, while in the second step, it is necessary to define the key performance indicators of websites that will enable active management of them. Additionally, most of the analyzed pages are currently set up as an information service for visitors, and such an approach needs to be upgraded through greater use of inviting content that will motivate visitors to visit the destination.

In addition, the proposal is to minimize the number of supporting websites at the destination level so that potential visitors to the destination can get all information on one main website, in this case, the website of the county tourist board.

2. Professionalization of social network management

Social networks are one of the most important channels of information for potential visitors about the destinations they want to visit, and their professional management can have a significant impact on making travel decisions. By raising the quality level of social network management, basic prerequisites are created for the effective promotion of the cultural tourism of the destination.

The social networks that were analyzed as part of the project indicate that their management could be improved in such a way that the created content is published in a planned and systematic manner, that high-quality images and videos are used for publication purposes, that more innovative promotional campaigns are conducted through the networks. and that the focus should be placed to a greater extent on increasing the engagement of the followers themselves.

Likewise, it is possible to create a common guide on the destination level on the publication of content related to the destination's cultural tourism, which would point out the basic rules and potential of running social networks to tourism workers in an educational way. Such an initiative would influence the uniformity of the tone of announcements about the cultural tourism of the destination by tourism stakeholders, which would further raise the visibility of the destination in that segment.

Similar to the previous guideline, a large number of different social network profiles is noticeable, which can create some confusion for potential visitors, and it is suggested that the number of profiles be revised and grouped into a few key profiles. For example, the Sinjska Alka profile created by a private user is more active and visited than the official profile.

3. Investing in SEO optimization of websites

The analysis carried out showed that the visibility of some cultural resources/attractions is not at a satisfactory level. For example, the archaeological site of Salona does not have its own website, and searching for the term Salona at the beginning of the search does not open the pages of the

tourist board of the city of Solin (in 48th place), the city of Split (in 7th place) and the tourist board of Split-Dalmatia County (in 13th place).

This guideline is closely related to the guideline for the modernization of web pages, for the reason that their high quality is a prerequisite for high-quality web positioning. In this regard, the primary emphasis for organic positioning refers to the quality of the content and the mutual connectivity of different domains with other websites within the tourist boards as well as with other external websites. Therefore, with the aim of achieving the highest possible positioning of websites in search engines, it is necessary to carry out SEO optimization of certain websites in order to further increase the visibility of cultural resources/attractions.

4. Development of the cultural tourism marketing plan at the county level

With the aim of a more systematic approach to presenting the Split-Dalmatia County as a cultural tourism destination, it is necessary to adopt a cultural tourism marketing plan that would comprehensively define the strategy for further promotion of the destination's cultural offer. Such a strategic document includes a more detailed approach to the elaboration of key marketing areas, and in this sense, the "Guidelines for Positioning SDŽ as a Cultural Tourism Destination" project can essentially serve as an ideal starting point.

The marketing plan should include a strategic and operational component in order to realize the desired positioning of the destination in an efficient manner. In addition to positioning itself, the strategic component would include defining the marketing vision, marketing goals, defining target markets and prioritizing attractions and experiences that will be the subject of further commercialization. On the other hand, the operational part of the plan is focused on proposing concrete marketing activities whose goal is to attract as many guests as possible motivated by culture to the destination.

5. Development of a communication plan for each of the prioritized resources/attractions

One of the main conclusions of the analysis of prioritized resources/attractions is that their communication towards the tourist market is not at a satisfactory level. The development of a communication plan for each of the analyzed resources/attractions would significantly raise their visibility on the market, and thus the visibility of the entire destination.

The communication plan primarily involves defining a communication strategy that sets specific instructions for publication and goals to be achieved, and then adopting a systematic plan for publishing content for the upcoming period. Additionally, in the event that there is a blog on the website, the communication plan places a special focus on the key assumptions of successful blogging.

6. Creation of joint marketing campaigns at destination level

A traditional, but often effective way of promoting a tourist destination is the lease of media space in certain media of interest. Depending on the financial possibilities and the defined target groups of the market, the primary goal would be to choose the media that are most suitable for publishing content about the cultural offer of the destination.

The proposal is to first pay special attention to the domestic market because there are some resources/attractions such as Starogradsko polje or the experience of growing falkusha that are not yet sufficiently recognized in terms of domestic demand. More recognizable attractions such as Diocletian's Palace or Sinjska Alka should primarily be communicated on the regional and international market.

7. Connecting with local and international tourism influencers and/or bloggers

With the growing importance and use of social networks, influencers and/or bloggers have become an indispensable tool of marketing communication, and their engagement has become an obligation for all developed tourist destinations. In this sense, it is necessary to select a certain number of influencers and/or bloggers who will present the cultural offer of the destination in the best possible way, both on the domestic and international tourist market.

This type of promotion can very effectively raise the level of recognition of the destination, especially among the younger population that actively uses social networks to a greater extent.

8. Leasing of media space

A traditional, but often effective way of promoting a tourist destination is the lease of media space in certain media of interest. Depending on the financial possibilities and the defined target groups of the market, the primary goal would be to choose the media that are most suitable for publishing content about the cultural offer of the destination.

The proposal is to first pay special attention to the domestic market because there are some resources/attractions such as Starogradsko polje or the experience of growing falkusha that are not yet sufficiently recognized in terms of domestic demand. More recognizable attractions such as Diocletian's Palace or Sinjska Alka should primarily be communicated on the regional and international market.

9. Organization of promotional events on primary broadcasting markets

Thematic events that aim to present a particular cultural resource or attraction, as well as the entire cultural offer of the destination, can be an effective way of marketing communication and successfully position the destination in the minds of potential visitors. For example, as part of the Zvonimir Mihanović exhibition or by organizing the presentation of Sinjska Alka, it is possible to present the destination directly to the target market.

For the realization of such events, cooperation with the Croatian Tourist Association is first of all necessary, but also the gathering of interested stakeholders from the area of the destination who would support this type of tourism promotion.

10. Development of a strategic communication approach for Game of Thrones shooting locations at the level of the entire destination

The analysis carried out showed that the series Game of Thrones and the associated places where the series was filmed were not adequately used in the context of communication of the destination to the tourist market. For example, the Klis Fortress has an insufficient amount of content on its website that can be linked to the series, and it is one of the more recognizable filming locations. Therefore, the proposal is to develop a joint communication strategy for the locations of series filming at the destination level in order to simplify the presentation of these locations to the tourist market.

Such an approach includes the creation of a unique website that would present all filming locations and their basic features in one place. In addition, it is necessary to connect other places where visitors find information, such as tourist board pages, with that unique website.

Financial resources

Key implementation steps include a more detailed elaboration of the identified positioning guidelines in such a way that the following items are defined for each of the guidelines:

- *Initiator and bearers of the proposed guideline*
- *Estimated budget for the implementation of the guideline*
- *Time period of implementation*













Below is a table showing a more detailed elaboration of the identified guidelines.




Timeframe

Below is a table showing a more detailed elaboration of the identified - proposed timeframe.

Smjernica	Inicijator	Nositelji	Procjena budžeta za realizaciju smjernice	2022			
				Q1	Q2	Q3	Q4
1. Modernizacija web stranica turističkih zajednica i određenih kulturnih atrakcija	TZ SDŽ	Turističke zajednice u sklopu županije i institucije zadužene za upravljanje određenim kulturnim atrakcijama	Ovisno o tipu stranice, cijene se kreću od 50.000 HRK do 300.000 HRK	●—————●			
Priprema							
Realizacija							
2. Profesionalizacija upravljanja društvenim mrežama	TZ SDŽ	Turističke zajednice u sklopu županije i institucije zadužene za upravljanje određenim kulturnim atrakcijama	Cijena se odnosi na jedan profil kroz razdoblje od 12 mjeseci rada te ovisi o željenoj razini kvalitete (objave i priprema materijala). 90.000 HRK - 500.000 HRK	●—————●			
Priprema							
Realizacija							
3. Ulaganje u SEO optimizaciju web stranica	TZ SDŽ	Turističke zajednice u sklopu županije i institucije zadužene za upravljanje određenim kulturnim atrakcijama	Cijena se odnosi na razdoblje rada od 12 mjeseci i formira se različito za drugačije tipove stranica. 90.000 HRK - 350.000 HRK	●—————●			

<i>Priprema</i>							
<i>Realizacija i održavanje</i>							
4. Razvoj marketinškog plana kulturnog turizma na razini županije	TZ SDŽ	TZ SDŽ	200.000 HRK				
<i>Priprema</i>							
<i>Realizacija</i>							
5. Razvoj komunikacijskog plana za svaki od prioritiziranih resursa/atrakcija	TZ SDŽ	Institucije zadužene za upravljanje određenim kulturnim atrakcijama	Uključujući cjelokupni dizajn i kreaciju sadržaja, cijene se kreću između 100.000 HRK do 400.000 HRK				
<i>Priprema</i>							
<i>Realizacija i održavanje</i>							
6. Kreiranje zajedničkih marketinških kampanja na razini destinacije	TZ SDŽ	Turističke zajednice u sklopu županije i institucije zadužene za upravljanje određenim kulturnim atrakcijama	150.000 HRK - 300.000 HRK				
<i>Priprema</i>							
<i>Realizacija</i>							

7. Povezivanje s lokalnim i međunarodnim turističkim influencerima i/ili blogerima	TZ SDŽ	TZ SDŽ	<i>Cijene značajno ovise o profilu influencera koji se angažira. Za kampanje na društvenim mrežama cijene se kreću između 60.000 HRK na domaćem tržištu do 500.000 HRK na međunarodnom. Za korištenje web citata na blog stranicama cijena je između 80.000 HRK i 200.000 HRK</i>				
<i>Priprema</i>							
<i>Realizacija</i>							
8. Zakup medijskog prostora	TZ SDŽ	TZ SDŽ	<i>Ovisno o mediju, cijene se kreću od 10.000 HRK do 100.000 HRK uz neki prosjek od 7 kuna po kliku</i>				
<i>Priprema</i>							
<i>Realizacija</i>							
9. Organizacija promotivnih događanja na primarnim emitivnim tržištima	TZ SDŽ	TZ SDŽ i HTZ	<i>Ovisno o lokaciji održavanja događanja, cijena se kreće između 80.000 (HRK) i 200.000 (HRK)</i>				
<i>Priprema</i>							
<i>Realizacija</i>							

10. Razvoj strateškog pristupa komunikacije mjesta snimanja serije Game of Thrones na razini cijele destinacije	TZ SDŽ	Turističke zajednice u sklopu županije i institucije zadužene za upravljanje određenim kulturnim atrakcijama	Cijena se odnosi na razvoj jedne web stranice koja bi bila jedinstvena referentna točka za ovu temu. 100.000 HRK - 150.000 HRK	
Priprema				
Realizacija				

Conclusion

Horwath HTL Croatia was engaged by the public institution RERA to develop a project named "Guidelines for positioning of the Split-Dalmatia County as a cultural tourism destination." The project consisted of two phases, the first of which was to analyse the state of destination's cultural supply and demand, while the focus of the second was put on defining guidelines for the management of cultural tourism. The main goal of the analytical phase was to prioritize 10 cultural resources and attractions on which the positioning of the destination in the coming period will be based. Out of a total of 324 identified elements of cultural offer, 65 were taken into the primary focus of the analysis, and analysed in detail, considering their market visibility, tourism potential and tourism valorisation. In addition to the analysis of resources, the first phase of the project also included demand analysis for cultural tourism and analysis of the presentation of cultural tourism through official tourist digital media in Split-Dalmatia County, which provided a detailed insight into the current state of cultural tourism in the destination. Based on the analysis, priority in positioning the county as a cultural destination should be placed on Diocletian's Palace and medieval Split, the archaeological site Salona, Starograsko polje, the historic centre of Trogir, the art of hand stone carving within the School of Masonry, values related to the Komiža gajeta falkuša, Sinjska Alka, Meštrović Gallery and artists of Central Dalmatia.

In the next phase of the project, improvements in the tourist experience of visiting each priority resource or attraction were defined, as well as improvements in the field of promotion and positioning of that resource or attraction. Defined improvements can be regarded as potential projects that can raise the tourist valorisation and attractiveness of priority resources or attractions. In addition, as part of the

second phase of the project, the definition of target markets for cultural tourism products was carried out, which indicated which market segments and emitting markets should be focus of marketing activities in the next period. In conclusion, based on the findings of the analytical phase and defined improvements of prioritised resources and attractions, 10 specific guidelines have been identified to improve the county's visibility in the tourism market as a destination for cultural tourism. For each of the guidelines, initiators and implementation bodies were defined, as well as the estimated budget and the period needed for implementation.