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## **TOURISM DEVELOPMENT PLAN**

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**Puglia Region, Molise Region, Albania and Montenegro**  
**DT.1.4.1**



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## 1 INTRODUCTION

The present study aims to provide a framework upon which decision making related to strategies and plans for the tourism industry can be made. This document will act as a point of reference for authorities support informed decision and planning. It provides summary and analyzes the internal and external factors that may affect Nautical Tourism development in the Intervention Areas. Such analysis may provide a comprehensive review of the development potentials in the reference territory. Moreover, it delivers recommendations on future goals and potential objectives in regards to the development of the tourism sector of the area with a focus on Nautical Tourism.

In the following chapters, are presented the methodological framework upon which this study was conducted, the database of the area of interest, the analysis on the trends and tendencies of the tourism sector in the area, the development objectives and the suggested actions to lead to those objectives and finally a crucial section about the potential impacts of such changes in the area.

It is worth mentioning that the present document acquires added value when used a tool in tantum with the other studies produced in the context of the REGLPORTS projects, i.e., the Current Situation Analysis, the Thematic Routes study and the SWOT analysis. Together, those provide an incredibly detailed insight on the area of interest, giving the reader easy access to assess the current conditions of the sector, the potential for development, the advantages and disadvantages that the area provides and much more.

### 1.1 Introduzione

Il presente studio intende fornire un quadro di riferimento su cui prendere decisioni relative a strategie e piani per l'industria del turismo. Questo documento fungerà da punto di riferimento per le autorità di supporto alla decisione e alla pianificazione. Fornisce una sintesi e analizza i fattori interni ed esterni che possono influenzare lo sviluppo del turismo nautico nelle aree di intervento. Tale analisi può fornire una rassegna completa delle potenzialità di sviluppo nei territori dello studio. Inoltre, fornisce raccomandazioni sugli obiettivi futuri e potenziali per quanto riguarda lo sviluppo del settore turistico dell'area con un focus sul Turismo Nautico.

Nei capitoli seguenti, vengono presentati il quadro metodologico su cui è stato condotto questo studio, il database dell'area di interesse, l'analisi sulle tendenze del settore turistico nella zona, gli obiettivi di sviluppo e le azioni suggerite per portare a tali obiettivi e infine una sezione cruciale sui potenziali impatti di tali cambiamenti nella zona.

Vale la pena menzionare che il presente documento acquisisce un valore aggiunto se usato come strumento in tantum con gli altri studi prodotti nel contesto del progetto REGLPORTS, cioè l'analisi della situazione attuale, lo studio degli itinerari tematici e l'analisi SWOT. Questi studi forniscono una visione estremamente dettagliata dell'area di interesse, dando al lettore un facile accesso per valutare le condizioni attuali del settore, il potenziale di sviluppo, i vantaggi e gli svantaggi che l'area offre e molto altro.

## 2 IMPLEMENTATION ENVIRONMENT

### 2.1 The Interreg IPA CBC Italy-Albania-Montenegro Programme

The Interreg IPA CBC Italy-Albania-Montenegro Programme, co-funded by the European Union through the Instrument for Pre-Accession (IPA II), has a total budget of 92.707.558,00 euro (including 15% national co-financing). The Programme is managed by Puglia Region, which participates together with another Italian Region, Molise; Albania and Montenegro participate with the entire territory. The objective is to promote economic growth and to intensify cooperation in the low Adriatic area, by implementing joint actions between national and regional institutional and non-profit actors and by fostering smart, inclusive and sustainable development.

The overall Programme budget is EUR 92.707.555, with a Union Support of EUR 78.801.422. The financial allocation to the chosen thematic objectives reflects the estimated financial size of actions foreseen in each priority axis, the coherence with the funding priorities as in the EC Country Position Paper and in the EC Indicative Strategy Papers, the strategic choices of the Programme stakeholders, as well as the inputs provided by relevant partners within consultations. Additionally, not less than 50% of total amount of the financial resources shall be reserved for thematic calls and strategic projects.

The Program Priority Axis are:

- **PRIORITY AXIS 1. Strengthening the cross-border cooperation and competitiveness of SMEs.**
- **PRIORITY AXIS 2. Smart management of natural and cultural heritage for the exploitation of cross border sustainable tourism and territorial attractiveness.**
- **PRIORITY AXIS 3. Environment protection, risk management and low carbon strategy**
- **PRIORITY AXIS 4. Increasing cross border accessibility, promoting sustainable transport service and facilities and improving public infrastructures.**
- **PRIORITY AXIS 5. Technical Assistance.**

### 2.2 The REGLPORTS Project

Nautical Tourism (NT) is a dynamically expanded form of tourism, consisting an industry of high added value with strong clientele growth tendencies in the Adriatic Sea. In general, NT is seasonal, however, if combined properly with other mild tourism activities it may be prolonged with profound positive impact to local economies. Despite its high potential, NT is not sufficiently developed in the intervention area and its connection with the assets of the hinterland is insufficient.

Hence, the overall objective of the REGLPORTS Project is to develop a common model for the smart and sustainable NT management through integrated development plans. More specifically, the Project aims to



provide a holistic approach by (a) connecting the coastal areas with the rich inland's assets, (b) emerging and promoting the interconnected areas (Area Brand, Thematic Routes), and (c) upgrading tourism supporting services and products.

REGLPORTS foresees to facilitate the sustainable NT management, considering as a top priority the environmental sustainability. The anticipated impact will substantially benefit stakeholders in the intervention area, including local communities, national and/or regional organizations and tourism related businesses. Brief reference to the Project content, objectives, partnership and results.

The Partners participating in the Project are:

- **National Coastline Agency (LP) - AL**
- **Municipality of Molfetta – IT**
- **Union of the Provinces of Puglia - IT**
- **Ministry of Tourism and Environment of Albania – AL**
- **Agency for the management of the town harbor Herceg Novi Ltd. – ME.**

The Associated Partners of the Project are:

- **Municipality of Vlora – AL**
- **Region of Molise – IT**
- **Municipality of Herceg Novi –ME**
- **Tourism Agency of Manfredonia – IT.**

### 2.3 The REGLPORTS Environmental Impact Assessment

The environmental sustainability of the foreseen data and development propositions, is a prerequisite for the overall viability and success. Therefore, the given data and analysis, as well as any suggested actions, measures and strategies, are provided in the context of securing that environmental conditions will not be jeopardized by the changes imposed in the Intervention Area.

Particularly, the capacities of ports and tourism destinations were carefully considered throughout the research, as well as the natural resources (marine water, coastal, soil, inland water) and habitats. In this frame, the process of the collected information and the conclusions deriving from the analysis, will be elaborated for parts of the Intervention Area, encompassing all the potential aspects that might affect natural, cultural and anthropogenic environment.

### 3 METHODOLOGICAL FRAMEWORK

In order to produce a concise and effective tourism development plan it is crucial to answer the following questions:

- What is the mission/target?
- Who is it addressed to?
- What are the ways to approach the implementation?

Tourism planning is generally a long-term procedure, in that it needs to establish long- and many-time arduous procedures, often taking into account strategies that are demanding to implement. In that regard, the types of planning can vary between short range (1-4 years), to long-range (5-10 years), to continuous meaning that is an ongoing procedure.

Therefore, in order to achieve the expected results, the planning process needs to begin with the identification of the background information and inventory of the area of interest. In doing so, the understanding of the current situation provides the foundation upon which the planning is constructed. Following the identification stage, the goals and objectives need to be established that will define any further direction.

With the objectives identified and the current situation analyzed it is possible to create the strategies, recommendations and overall action planning that will make the Tourism Development Plan.

More specifically, in this development plan the background information is identified in tantum with the Current Situation Analysis, another product of the REGLPORTS project and the detailed SWOT analysis that highlights the Strengths, Weaknesses, Opportunities and Threats of the area. Furthermore, the goals recorded are specific for the area, attainable and tangible, thus avoiding generalization and/or impossible solutions.

The plan continues with the analysis of the strategies and monitoring indicators which identify the possible avenues to lead to the desired goals, i.e., the enhancement of the tourism sector, the improvement of services, and the enhancement of the overall brand of the area as a tourism destination.

To obtain a holistic and complete approach the impacts of the suggested recommendations need to be addressed. It is essential to identify potential impacts as a tool upon which decision-making authorities can evaluate the options, identify the risk of the respective objectives and thus make a more informed decision on the course of action on any case.

Finally, it is very important to establish an evaluation procedure which will provide the basis upon which the results of the actions implemented will be measured. More specifically, there needs to be a predefined set of measurable aspects that will be analyzed through the implementation period of an action in order to assess if said action yields the necessary and expected results or if conversely acts deterioratingly on the area, service,

sector upon which it is established. Such evaluation indexes can vary depending on the circumstance and/or sector implemented to be better reflect the results. Examples, of such indexes can be the revenue fluctuations after a predefined period of implementing an action (e.g., 5% turnover raise after 6 months of lowering ticket prices), the number of visitors, the length of stay of tourists and so on.

## 4 THEORETICAL FRAMEWORK

### 4.1 Presentation & Database of the Intervention Areas

#### 4.1.1 Region of Puglia

The region of Puglia, also called Apulia, is located in the southeastern Italy and extends from the Fortore River in the northwest to Cape Santa Maria di Leuca at the tip of the Salentine Peninsula (the “heel” of Italy). It comprises the provinces of Bari, Barletta-Andria-Trani, Brindisi, Foggia, Lecce, and Taranto. The northern third of the region is centered on the Puglia Tableland, which is flanked on the north by the limestone massif of Gargano Promontory (the “spur” of the peninsula) and on the west by the Neapolitan Apennines. The central third is occupied by the low Murge plateau, which slopes gradually to the narrow coastal plains of the Adriatic Sea in the east. The Salentine Peninsula consists of the lowlands of Lecce, Taranto, and Brindisi and low plateaus east of Taranto and south of Lecce.



Figure 1: Region of Puglia (marked in red)

Puglia is one of the less crowded regions in Italy, with 4 million residents in its surface area of 7,469 square miles. The region is composed of five provinces (Bari, Brindisi, Foggia, Lecce, and Taranto), where a good number of interesting landmarks are readily available such as cathedrals, archeological museums, historic ruins of the Greek and Roman eras, fishing villages, medieval towns, Europe's largest forests, and fresh beaches along the Mediterranean coast.

Specifically, the region is rich in cultural assets, such as the two UNESCO heritage sites “Trulli of Alberobello” and “Castel del Monde”, rock churches and Romanesque cathedrals, as well as many festivals and cultural events. Apulia is also rich in traditions and handicrafts such as the famous terracotta whistles of Rutigliano, the laces of Gargano, the ceramic products of Grottaglie and the products made in Salento with the soft stone of Lecce, with wrought iron and papier-mâché. Moreover, the region offers a high quality enogastronomy and a diversified cuisine offering different dishes in relation to the different seasons.

The potentials of the area as a unique cultural destination, are also reflected on the nautical development in the recent years. In particular, Apulia has played an important role in the Mediterranean in various historical periods, representing a bridge between East and West and the gateway to the Balkans. Since ancient times, ships loaded with oil and wine, marble and precious goods coming from the East left and landed from the ports of Apulia. And from Puglia also the armies of the Crusaders left in the direction of the Holy Land for the reconquest of the Holy Sepulchre which had fallen into the hands of the Muslims. After the medieval period, when the coasts and the cities on the sea were easy prey to pirate and Saracen raids, the function of important port of call for the port cities of Puglia was constantly increasing.

Nonetheless, nowadays, the use of its splendid natural and historical heritage for pleasure boating is very modest. The current offer of port services is lacking both from a quantitative and qualitative point of view. According to the data provided by the Italian Ministry of Transport 2017, the number of nautical tourism facilities in Apulia is low compared to the national average. In fact, the total number of berths is 14,068, representing 8.87% of the national total, while the ratio of berths per km of coast is 16.3 berths per km compared to a national average of 21.3 berths per km of coast. Despite the relatively low numbers, it can still be said that nautical tourism is one of the fastest growing sectors both at international and national level and is an opportunity to be seized for the socio-economic growth of Apulia.

As for the nautical infrastructure, The Apulian coast, 865 km long, has a port system with 3 main ports (Bari, Brindisi, Taranto) 6 smaller ports (Manfredonia (FG), Barletta (Ba), Molfetta (Ba), Monopoli (Ba), Otranto (Le), Gallipoli (Le) and several smaller marinas and pleasure ports.

Hereafter you are provided information referring to the marinas in the Region with indications of the services provided both for boats (mooring, electricity and water, fuel, repairs, etc.) and for yachtsmen (catering, commercial services, other activities, etc.).

In recent years Puglia has experienced significant growth as a tourist destination. A study carried out for the PUGLIAPROMOZIONE Regional Tourism Agency on "Tourism in Puglia 2019/2020" shows that arrivals in Puglia in 2019 increased by 4% compared to 2018, of which 11.5% came from outside of Italy. Although growing in terms of internationalisation, the percentage of foreign presences has a wide margin for improvement. In fact,

in its strategic plan Puglia one of the objectives is to reduce the gap with the other tourist destinations through actions that support the Hospitality, Infrastructure and Services sector.

Taking into consideration the aforementioned brief overview of the Region of Puglia, it can be said that both opportunities and weaknesses can be identified in the context of nautical touristic development. Those elements will be analyzed further in the SWOT analysis of the area.

## 4.2 The Value of Tourism & Nautical Tourism (NT)

Tourism has the same needs, requirements and objectives for economic development, employment and wealth creation as any other sector. In countries where tourism has an important influence on the local economy, it is essential to evaluate the impact it can have on the quality of life of the local population.

### **Economic data related to the tourism sector**

Tourism is one of the driving forces of the Apulian economy. In 2019, the sector recorded 6.4 billion on final consumption (12.3% of the total), 8.9 billion in terms of added value (13.6% of the total). While the international tourist spending in Puglia according to Bankitalia's report has increased of +3% from January to September 2019.

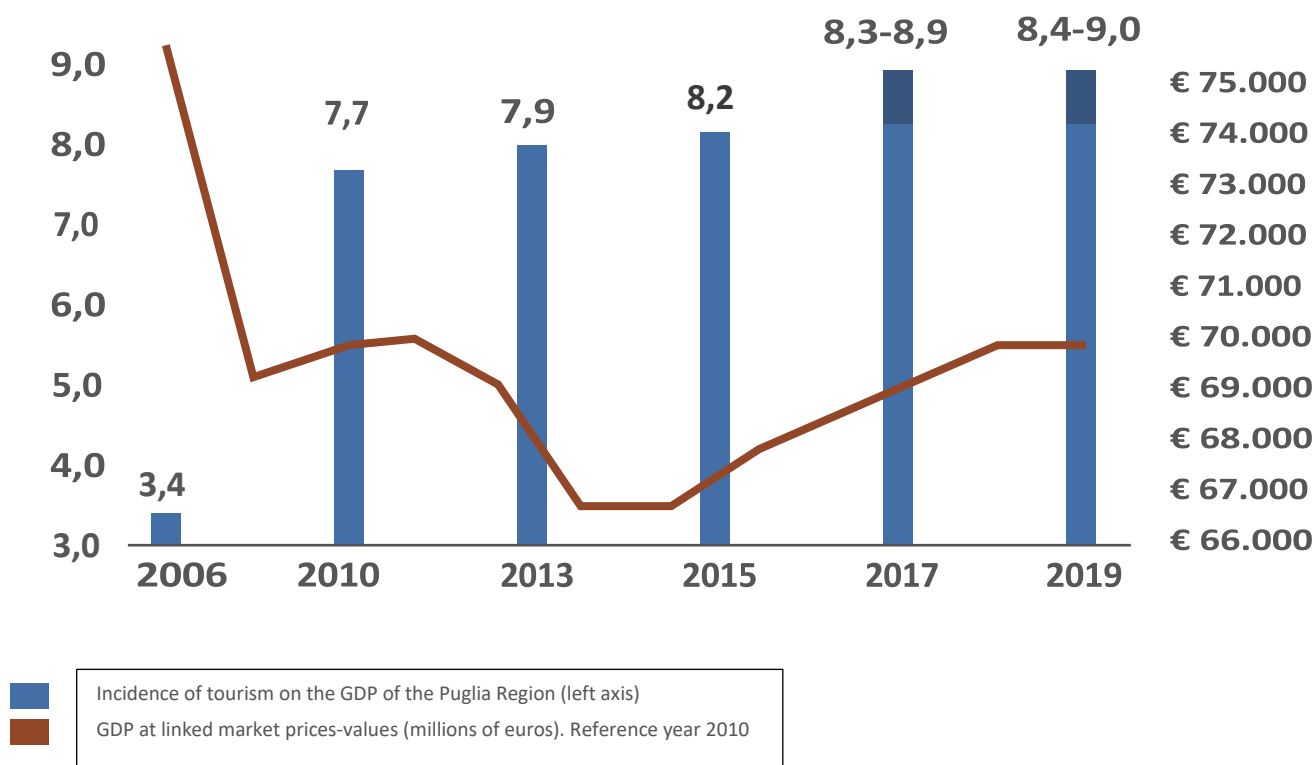
The regional tourist industry consisting of 52,000 companies (about 38% on sectors with direct involvement with tourism) equal to about 14% of companies active in 2019 while 135,000 (15.4% of the total) employees are directly and indirectly involved.

According to Bank of Italy, international tourist spending in Puglia increased by + 3% from January to September 2019.<sup>1</sup>

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<sup>1</sup> Source: Ca 'Foscari, *The economic impact of tourism in Puglia*  
IPRES elaborations and estimates on ISTAT data, Pugliapromozione Regional Tourist Agency

Figure 2 Economical Impact of tourism



The companies in the sector that have recorded the best performances (2018)<sup>2</sup> are tourist guides, companies dealing with cultural heritage and naturalistic areas, tour operators and travel agencies which are also more careful to introduce initiatives of improvement and innovation

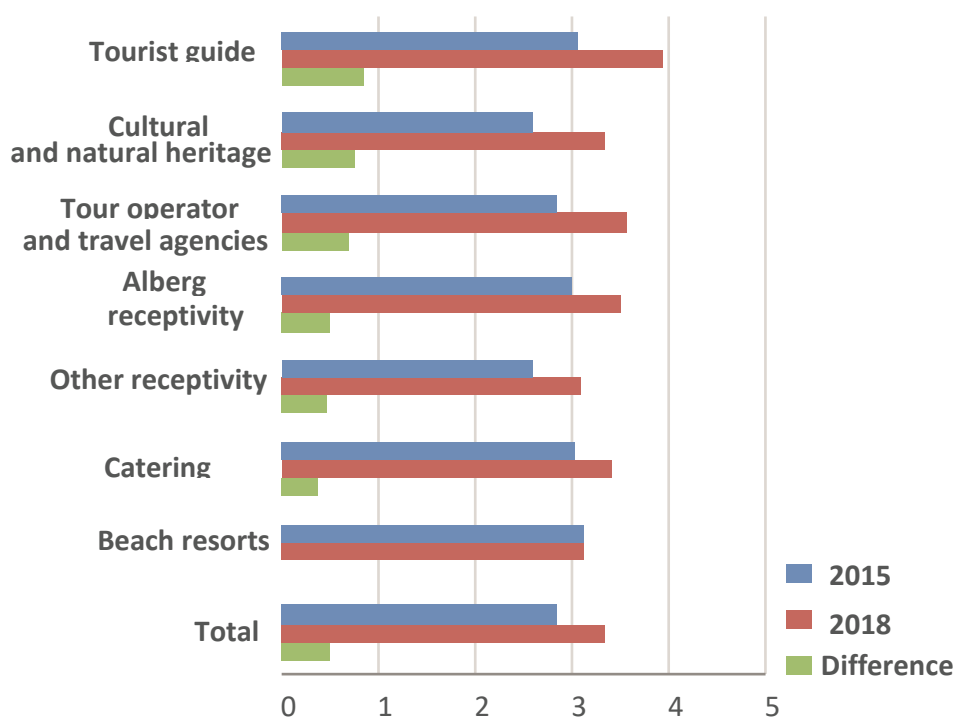


Figure 3 Tourism Companies performances

<sup>2</sup> Ca' Foscari, L'impatto economico del turismo in Puglia

## The tourist taxes

The municipalities that apply the tax in 2019 are 33, 12.7% of the total (258):

- Lecce (13): Lecce, Gallipoli, Ugento, Salve, Otranto, Melendugno, Porto Cesareo, Nardò, Castrignano del Capo, Santa Cesarea Terme, Patù, Giurdignano and Minervino di Lecce.
- Foggia (8): Lesina, Manfredonia, San Giovanni Rotondo, Vieste, Peschici, Mattinata, Rodi Garganico and Vico del Gargano.
- Bari (4): Alberobello, Castellana Grotte, Monopoli and Polignano.
- Taranto (3): Castellaneta, Ginosa and Martina Franca.
- Brindisi (4): Brindisi, Carovigno, Fasano and Ostuni.
- BAT (1): Margherita of Savoy

The overall revenues have been estimated at around 14 million euros. The municipality that enjoys the highest average income is Vieste with 1.5 million euros, followed by three municipalities in Salento, namely Otranto with 1.2 million euros, Lecce with 1.1 million euros and Ugento with 1.1 million. EUR.

## 4.3 Thematic Routes – Brief Introduction

The implementation of this development plan is mainly centered on the thematic routes identified and described in detail in the appositely produced study as foreseen by the REGLPORTS project.

Four (4) thematic routes have been identified that have as a common denominator the connection of the marina of the Municipality of Molfetta with those of the neighbouring cities but also with the hinterland rich in interesting points of nature, history and local products. And other five (5) routes that have as departure point five ports of South Puglia and i.e. Marina of Brindisi; Port of Otranto, Port of Gallipoli, San Foca di Meledugno and Marina of Leuca.

This proposal was born with a vision of a tourist offer for the area that needs to be adapted to the evolving needs of demand in the creation of integrated tourist itineraries and routes, in order to offer a diversified and at the same time attractive and quality product that enhances the local entrepreneurial and cultural resources with a view to an endogenous and sustainable tourist development in which the role of the public bodies responsible for planning the area acquires a central role.

The area of intervention covered by the study offers a series of attractive factors capable of proposing an articulated tourist offer in line with the consumer's current approach to holidays: no longer an isolated and



occasional consumption event as if it were a luxury good, but a more frequent moment in everyone's life, expressing an increasingly felt need, in which different moments of "holiday living" can coexist and integrate.

The presence of natural and cultural assets does not in itself represent a tourism product with economic value, the connection between tourism resources and profitability is given exclusively by the way in which the available resources are transformed.

The process of functional differentiation, which makes it possible to achieve "competitive advantage", corresponds in tourism to the almost unlimited segmentation of the market, the satisfaction of new needs, the personalization of the product through the creation of accessory services, the breadth of the corresponding range of services and the ability to launch new products.

## 5 SWOT ANALYSIS

From the previously carried out evaluation of the current situation of tourism and nautical tourism, it emerged the elements on which to base the SWOT analysis that constitutes the basis for defining a proposal for the tourist development plan of the Municipality.

The extraordinary variety and breadth of the natural, cultural, architectural etc. heritage of the study area certainly constitute the qualifying elements of its tourist offer. In this regard, the authorities in charge must guarantee policies and practices of valorization and fruition adequate to the richness and importance of the heritage, also in order to avoid the phenomenon of the so-called "hit and run" tourism that generally characterizes the area.

The analysis of the tourist demand, in fact, shows an increasing volume of presences, even if the territory under examination has a wide margin of improvement from the point of view of the accommodation capacity of the area, even if in some cities under study, it is limited if compared to the high incidence of the excursion component of the demand.

There is a need to implement a promotional action in terms of tourism and in particular linked to nautical tourism in the area, which has never been proposed in a unitary way and according to a shared project, determining an excessive fragmentation of the initiatives and the inability to define a line of development of the territory.

In this context, the construction of the new commercial harbour in the Municipality of Molfetta plays a strategic role. Once completed, it will be a driver for the development of nautical tourism, offering the potential for interconnection with the entire neighbouring and regional territory.

Another key issue that emerged from the analysis of the territory concerns the relationships between the local players involved in defining the tourist offer. In general, there is a weakness in the relational framework, even if the enterprises, today more than in the recent past, are oriented towards establishing a dialogue with the institutions.

Below is a table summarizing the Strengths, Weaknesses, Opportunities and Threats, extrapolated from a dedicated study previously implemented.

## 5.1 Puglia Region

Strengths	<ul style="list-style-type: none"> <li>Types of tourism that can be accommodated</li> <li>Two international airports</li> <li>Specific sectors of the economy record positive employment trends in spite of the crisis</li> <li>An excellent tourism website</li> <li>Favorable climate characteristics</li> <li>Important natural environment and quality local resources</li> <li>Historic town centers and attractions with great cultural, religious, architectural quality</li> <li>Commitment to further improve regional planning and coordination</li> <li>Access to EU funding sources</li> <li>Excellent road network</li> <li>Traditional hospitality of local population</li> <li>Quality seaside tourism</li> <li>Significant awareness and recognition of the "Puglia" brand in Italy</li> <li>A strong focus on tourism development</li> <li>Plethora of ports marinas</li> <li>No of berths</li> <li>Length of coastal area</li> <li>Water quality</li> </ul>	Weaknesses
Threats	<ul style="list-style-type: none"> <li>Environmental threats</li> <li>Uncontrolled development of nautical tourism: concessions, occupation of the sea and the coastline.</li> <li>High real-estate price</li> <li>Poor coordination between stakeholders and administrative authorities</li> <li>Risk of identity loss</li> <li>High competition with other EU countries with strong tourism tradition (Spain, Greece, Croatia, Mediterranean North Africa countries)</li> <li>Degradation of sea front due to increased development</li> <li>Difficulty for SME's to access private finance</li> <li>Lack of conservation efforts by tourists or travellers damage the heritage</li> </ul>	Opportunities

Figure 4: SWOT Table

## 6 STRATEGIC TOURISM PLANNING

Planning deals with organizing the present to accomplish the required future. Tourism planning is concerned with the goal of providing a coordinated transition or linkage between a destination's current situation for a better future for both residents and tourists. As with all economic activities, tourism generates direct and indirect benefits that can be maximized only through proper planning and integration. On the other hand, however, there are also socio-cultural benefits that derive from tourism, so proper planning not only optimizes the benefits, but also mitigates the negative impacts that tourism might cause.

Sound tourism planning also necessitates the development or upgrading of infrastructure such as roads, water, communication etc. which are shared by both tourists and local people. As a result of tourism planning and development, local people are further motivated to make improvements to their properties for use by tourists, thereby benefiting from the increased value.

### 6.1 Strategic Planning of Tourism -Puglia Region

The Apulia Region, in collaboration with operators in the sector, local authorities, associations, trade unions, stakeholders, MIBACT, local opinion leaders, universities and LAGs, has implemented the Puglia365 2016-2025 Tourism Strategic Plan. It identified the strategic interventions that the Apulia Region intends to activate in the forthcoming years to promote tourism and to qualify the offer by diversifying it, to increase the number of visitors by pursuing the perspective of de-seasoning.

The initiative was financed with 36,090,000 euros, under the POR - Regional Operational Programme ERDF - European Regional Development Fund and ESF - European Social Fund 2014-2020 for the three-year period 2017-2019, entrusted to the Regional Tourism Agency PugliaPromozione. During 2018, the intervention was strengthened with an allocation of an additional €4,250,000 for 2018 and 2019 for more than €40 million in total.

Among its objectives it aims at:

- the growth of the competitiveness of the Apulia destination in Italy and abroad;
- increasing the flow of national and international tourists;
- the depersonalization of tourism, with the aim of helping the Apulian territories to organise themselves for year-round tourism.

The Strategic Areas cover the themes of:

- Valorisation and Welcoming
- Promotion
- Communication
- Innovation
- Products

### Some Results obtained

The increases recorded in Puglia from 2015 to 2019, according to Istat data, were:

4.2 million arrivals (+24% compared to 2015), 15.5million presences (+14%)  
1.2 million arrivals from abroad (+60%)  
3.8 million international overnight stays (+43%),  
3 million domestic arrivals (+14%)  
11 million overnight stays by Italians (+7%)

#### The impact on the regional economy

Tourism in Apulia has an impact of 6.5 billion on final consumption (12.3% of total consumption);

9 billion in terms of added value (13.6% of the total);

The direct incidence of the sector on regional GDP is 9% (13% indirect incidence).

The official accommodation offer (Istat data) counts 8 thousand accommodation facilities (+42% compared to 2015) for 286 thousand beds (+4%).

From 2015 to 2019, the companies directly involved in the tourism sector (36 thousand) have increased by +10% and the employees by +27%, reaching more than 178 thousand work units at the beginning of 2020.

## 6.2 Touristic Profiles

The tourist offers of a given tourist destination is represented by all the elements that it is composed and that constitute the factors of attractiveness which, organized and provided, meet the needs of the final or potential user. This offer is often highly flexible and adapts to the needs of the demand also by virtue of the phenomenon of seasonal adjustment.

It consists of various elements that compose the tourist product:

- accommodation and restoration structures;
- transports;
- complementary services;
- leisure activities;
- assistance and support to tourists.

In order to better define a tourism development plan, it is necessary both to analyze the tourist flows in the area, in order to analyze their dynamics and future potential (demand analysis) and to identify the existing endowment, in order to exploit the existing resources as much as possible, foreseeing their adjustment

interventions, also with a view to containing as much as possible the costs related to the development of the strategies to be undertaken (offer analysis).

In consideration of this, it has been proceeded to the implementation of a punctual analysis that would highlight: the different characteristics of the tourist flows, both hotel and extra-hotel, which represent the market demand.

#### ➤ **Mapping of tourist flows**

Making a more detailed analysis and considering the total arrivals at hotels and non-hotel facilities, it can be noted that in 2019 were registered, 4.258.308 tourist arrivals of which 3.085.772 were from Italy and 1.172.546 foreigners. Below is a table of arrivals in Puglia distributed by month and by type of origin. Refer to the origin of the tourists, the weight of foreign tourists in Apulia is still far from what is recorded in Italy and therefore with significant margin for improvement. In 2019, international arrivals reached the 28% and attendance/overnights the 25%. Compared to 2015, the internationalization rate of incoming has increased by 7 percentage points.

The highest arrivals are concentrated in the summer months both Italians and foreigners have contributed significantly to increase the flows between May and September. Compared to 2018, 2019 saw an overall increase in the share of arrivals of about 5%.

The total presences in the facilities of the region follow the trend of arrivals while recording an increase compared to the previous year (2018) in which had registered a total number (Italian and foreigners) of 15.197.186 while in 2019 there were 15,440 297 presences.

	ITALIANS	FOREIGNERS	TOTAL
Month	Arrivals		
January	86.506	15.157	101.663
February	95.416	18.601	114.017
March	138.632	31.559	170.191
April	210.327	89.963	300.290
May	202.781	150.734	353.515
June	411.169	168.982	580.151
July	499.544	166.195	665.739
August	690.703	156.463	847.166

<b>September</b>	319.931	198.861	518.792
<b>October</b>	174.726	124.098	298.824
<b>November</b>	126.996	32.114	159.110
<b>December</b>	129.041	19.809	148.850
<b>TOTAL</b>	<b>3.085.772</b>	<b>1.172.536</b>	<b>4.258.308</b>

Figure 5: No of visitors per month

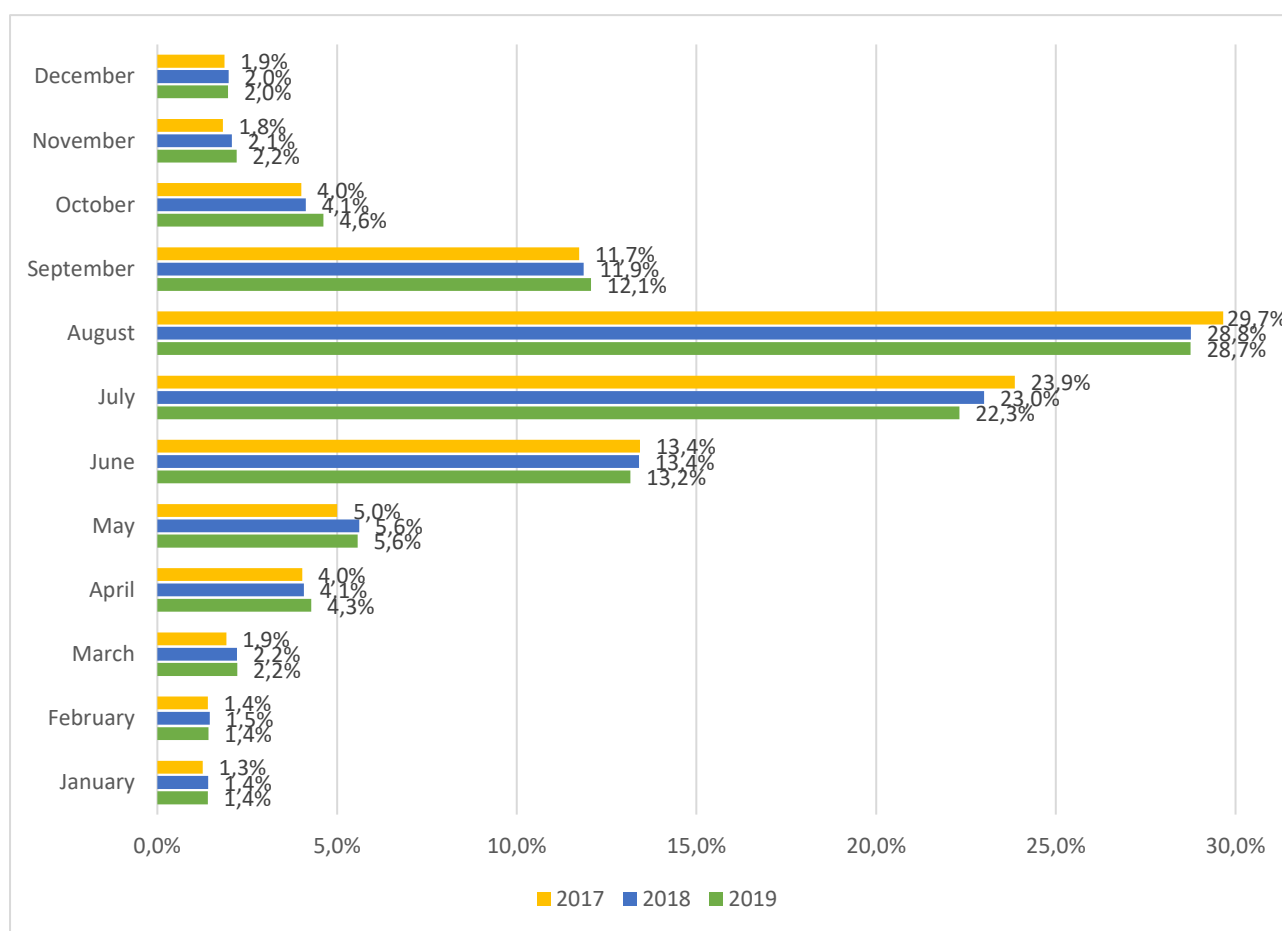


Figure 6: Visitors distribution (%)

In relation to the three years of reference (2017-2019), August is the month with the highest number of presences followed by July, June and September

Refer to the origin of the tourists, the weight of foreign tourists in Apulia is still far from what is recorded in Italy and therefore with significant margin for improvement. In 2019, international arrivals reached the 28% and attendance/overnights the 25%. Compared to 2015, the internationalization rate of incoming has increased by 7 percentage points.

Puglia is placed in 8th place in the national ranking for number of total presences, overcoming the Regions of Sicily and Sardinia. However, the dimension of tourism is still moderately contained in comparison to the potential of the region.

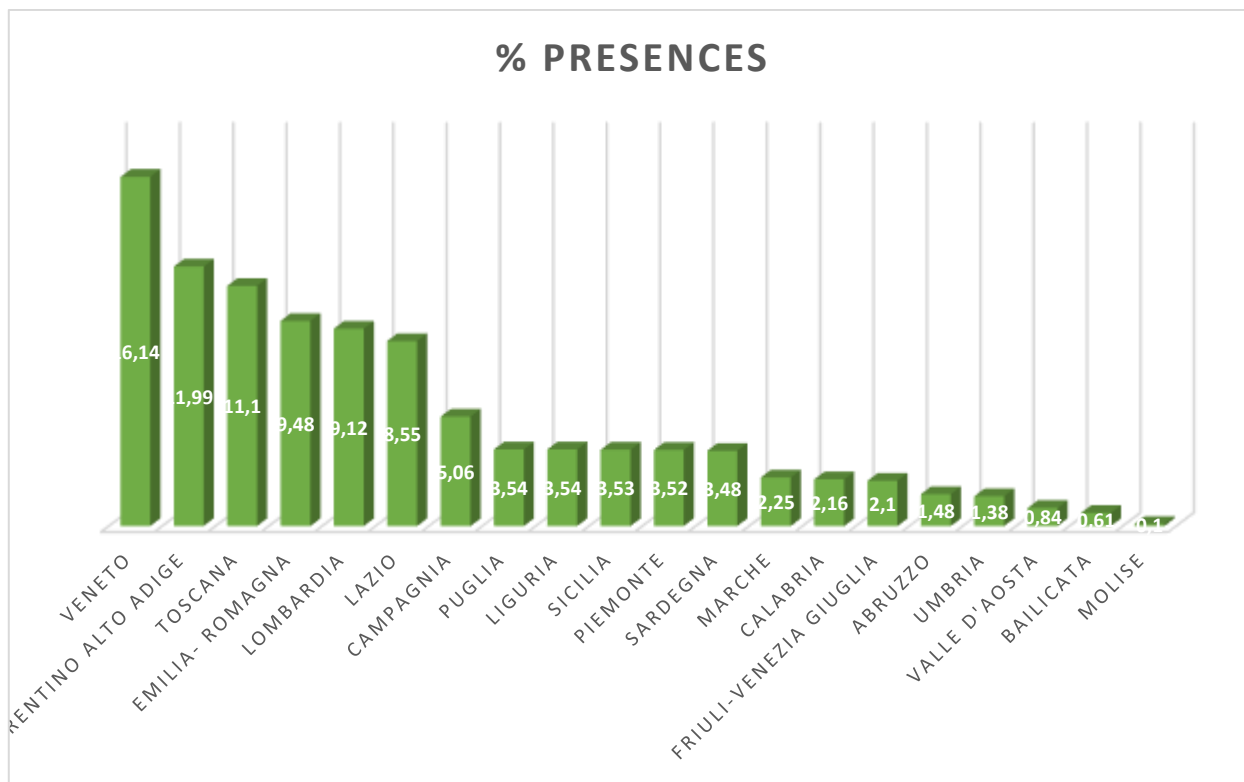


Figure 7: Distribution per area (%)

Most tourists prefer to sojourn in hotels. On the whole, tourists visiting the region prefer hotels to extra-hotel establishments. In 2019, 69% of arrivals made use of hotel hotels and the remaining 31% used non-hotel facilities. This trend can be seen in both national arrivals (70.65% stayed in hotels) and foreign arrivals (65.44%).

Analyzing the arrivals in 2019 in the Region, in fact, about 2.8 million of Italian tourists and 0.77 million foreign tourists have been accommodated in hotels, while only 0.91 million Italian tourists and 0.41 million foreign tourists have preferred the extra-hotel structures.

The accommodation offer has had a small variation in recent years even if the number of extra-hotel facilities has increased most. The Region in 2019 has a total of 7996 accommodation facilities with 284,854 beds. The quality of hotel facilities is satisfactory with 39 % 4- and 5-star hotels, 40 % 3 stars and the remaining 12 % 1 and 2 stars.



## Internationalization

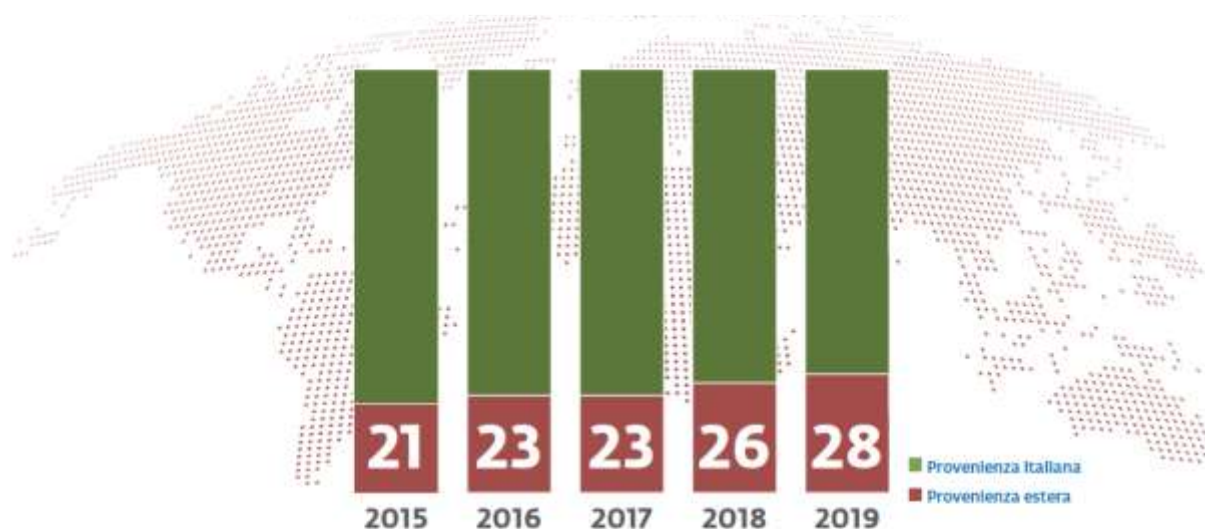


Figure 8 Internationalization rate arrivals by origin(%)

In 2019, the internationalization rate reached 28% for arrivals and 25% for presences / overnight stays. Compared to 2015, the internationalization rate of incoming has grown by 7 percentage points.

### Puglia airports data 2019

- **Bari**  
International flights: 2.4 million passengers (+ 17% compared to 2018) Domestic flights: 3 million (+ 4.5%)
- **Brindisi**  
International flights: 717 thousand passengers (+ 18%)  
Domestic flights: 1.9 million (+ 6%)
- **Topo 10 destinations from Bari:**  
London Stansted, Budapest, Paris Beauvais, London Gatwick Munich, Bucharest Otopeni, Amsterdam, Wien, Krakow, Chaleroi
- **Top 10 destinations from Brindisi:**  
Geneve, Bordeaux, London Stansted, Zurich Basel, Chaleroi, Frankfurt, Berlin Tegel, Eindhoven, Stuttgart, Beauvais

### Top 15 foreign markets in Puglia<sup>3</sup>

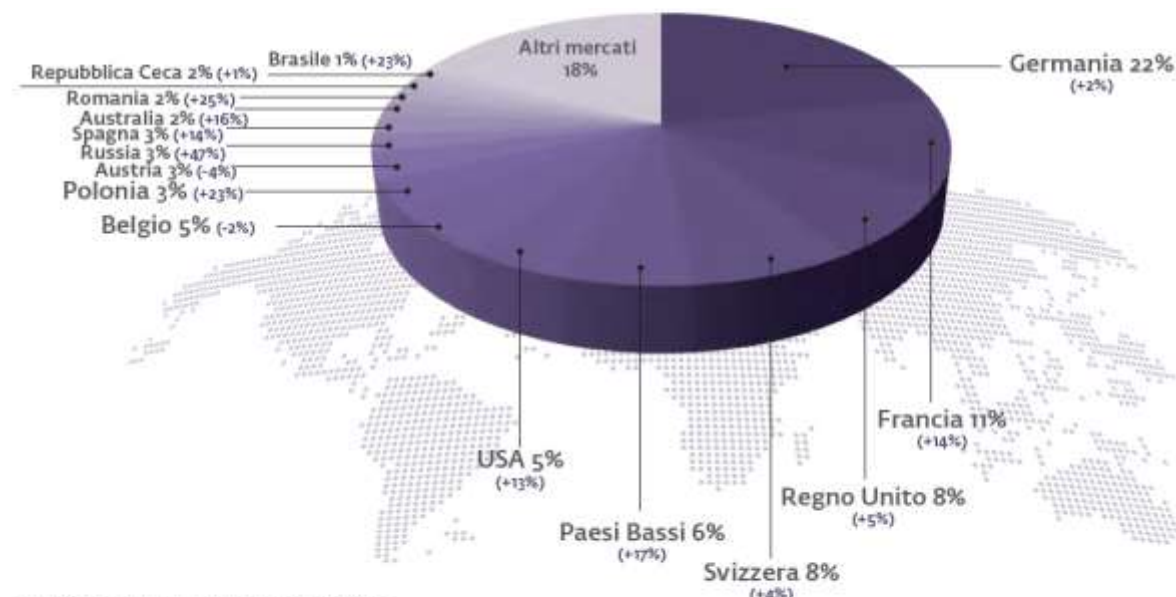


Figure 9: % Share of overnight stays- 2019

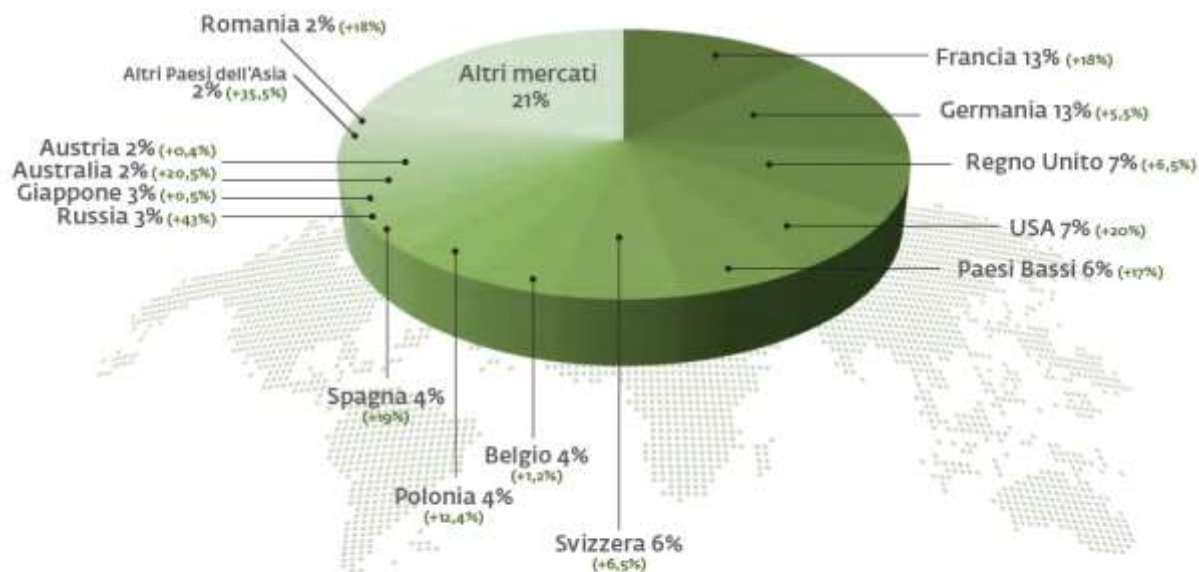


Figure 10: % arrivals per market -2019

<sup>3</sup> Regional Tourist Observatory. Processing on ISTAT / SPOT data.

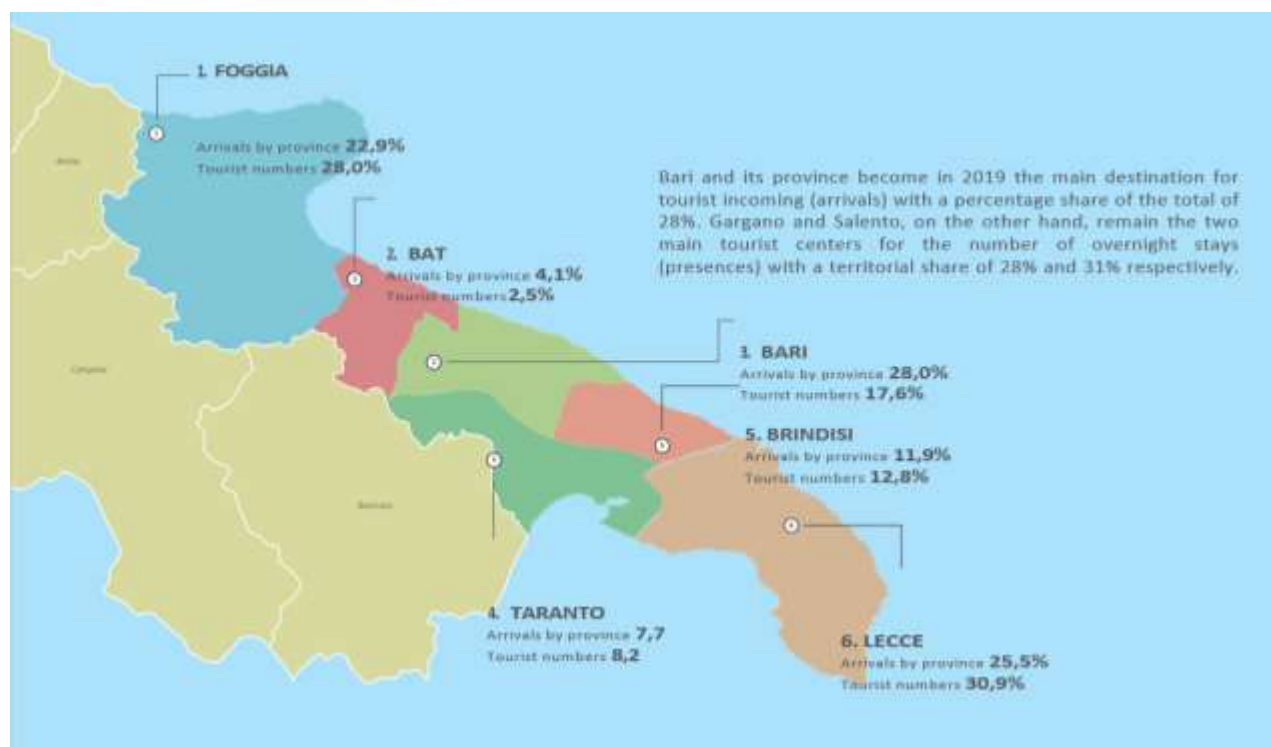


Figure 11: % share of arrivals/presences 2019

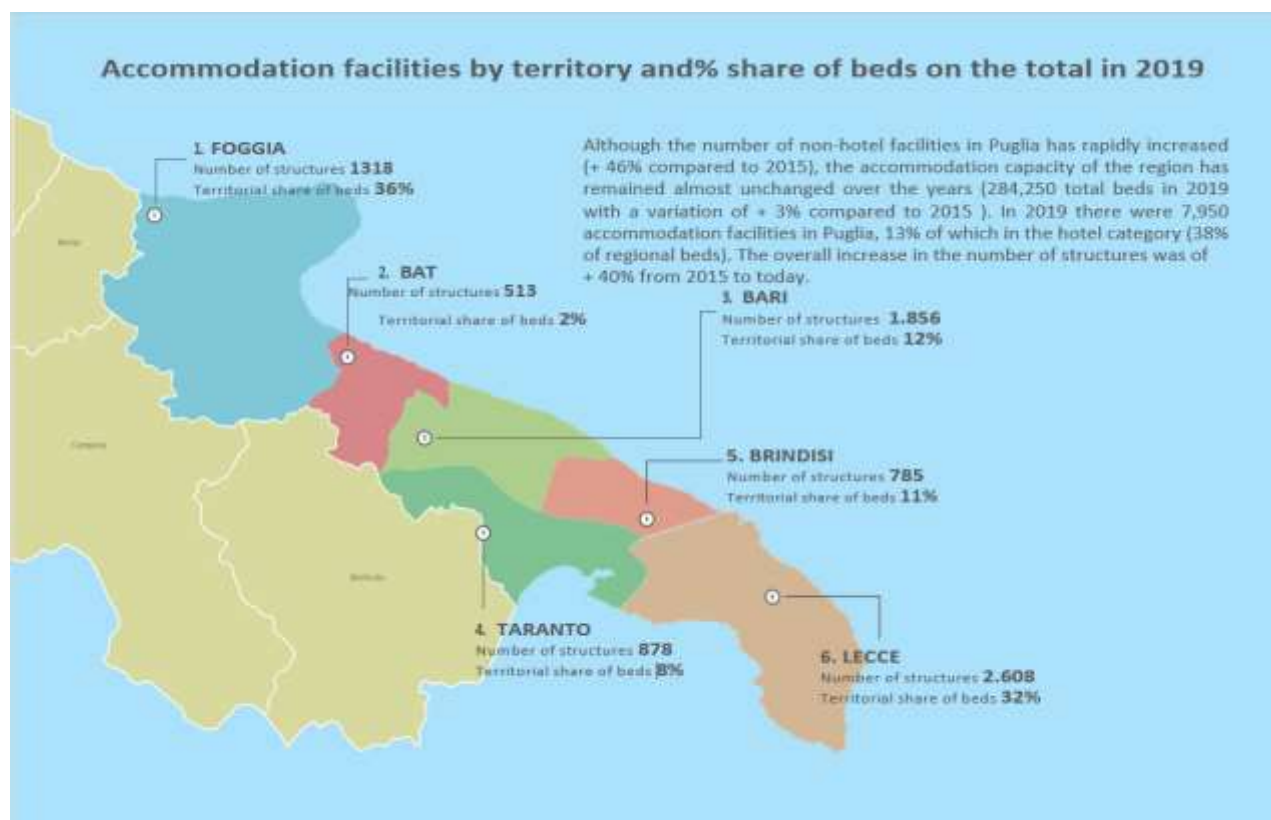


Figure 12: Accommodation facilities/ beds - 2019

## Focus Areas

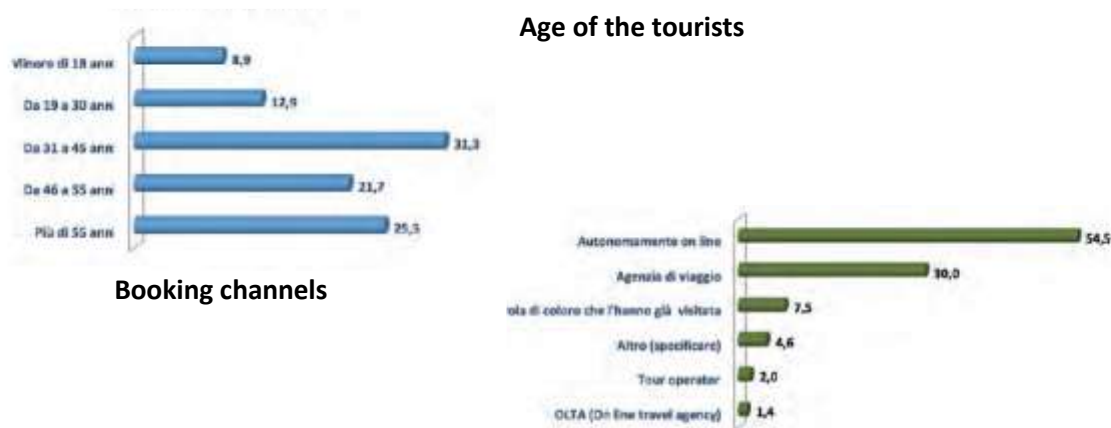
Focusing the analysis on the 11 municipalities on which based the study of thematic routes of North Bari, the state of the tourist movement is a slightly different. In fact, the area suffers from the lack of accommodation facilities having in fact only 53 hotels, the majority of which are located in the city of Trani. From those, about 75% have a quality classification of 3 and 4 stars. Generally, it is very frequent the B&B solution that anyway follows the tendency of the whole region, in fact about 63% of the extra-hotel structures are B&B accommodation. The demand is purely domestic since the arrivals and presences of Italian tourists in this area represent about the 74% of arrivals and the 70% of presences of the tourist demand. It is advisable therefore to identify actions to increase the foreign presence in the territory which represents an important driver of development.

Region of PUGLIA: Municipalities included to the study area						
ANNUAL TOURIST MOVEMENT REPORT BY MUNICIPALITY						
Year 2019						
	ITALIANS		FOREIGNERS		TOTAL	
Municipality	Arrivals	Presence	Arrivals	Presence	Arrivals	Presence
Andria	16.524	28.698	4.843	9.960	21.367	38.658
Barletta	32.939	64.557	10.675	27.153	43.614	91.710
Bisceglie	27.167	55.265	7.625	25.480	34.792	80.745
Canosa di Puglia	4.319	12.715	868	2.888	5.187	15.603
Corato	12.389	24.218	3.308	9.349	15.697	33.567
Giovinazzo	19.892	64.498	11.662	37.105	31.554	101.603
Margherita di Savoia	8.853	37.665	1.816	5.815	10.669	43.480
Molfetta	10.033	18.844	2.762	8.353	12.795	27.197
Ruvo di Puglia	7.693	13.683	1.270	3.737	8.963	17.420
Trani	37.749	72.050	17.314	38.879	55.063	110.929
<b>TOTAL</b>	<b>177.558</b>	<b>392.193</b>	<b>62.143</b>	<b>168.719</b>	<b>239.701</b>	<b>560.912</b>

Figure 13: Annual Tourist Movement Report by Municipality

## 6.2.1 Offer and motivational factors: appeal, opinion, customer satisfaction

### Data collection in regional info points<sup>4</sup>



### The knowledge of tourists

#### The territory's ability to meet the needs of tourists. Perceptions in comparison<sup>5</sup>



Figure 14 Tourist Needs /perceptions analysis

The companies demonstrate a fair knowledge of the tourists who visit Puglia. Many of the characteristics investigated have similar evaluations by businesses and tourists, but there is a tendency on the part of operators to underestimate the regional tourism system.

The factors with the highest evaluation by tourists (landscape and colors, welcome and hospitality, offer of typical food products) are also generally recognized by businesses.

The information points, internal mobility and signage are considered to be much worse than the average opinion of tourists, albeit low.

<sup>4</sup> The data derives from the approximately 20 thousand questionnaires administered to tourists / visitors in 2019\_2020 who went to the Infopoints of the regional network

<sup>5</sup> Ca' Foscari



# SODDISFAZIONE DEGLI OSPITI E TARIFFE 2019 STRUTTURE RICETTIVE (no appartamenti)

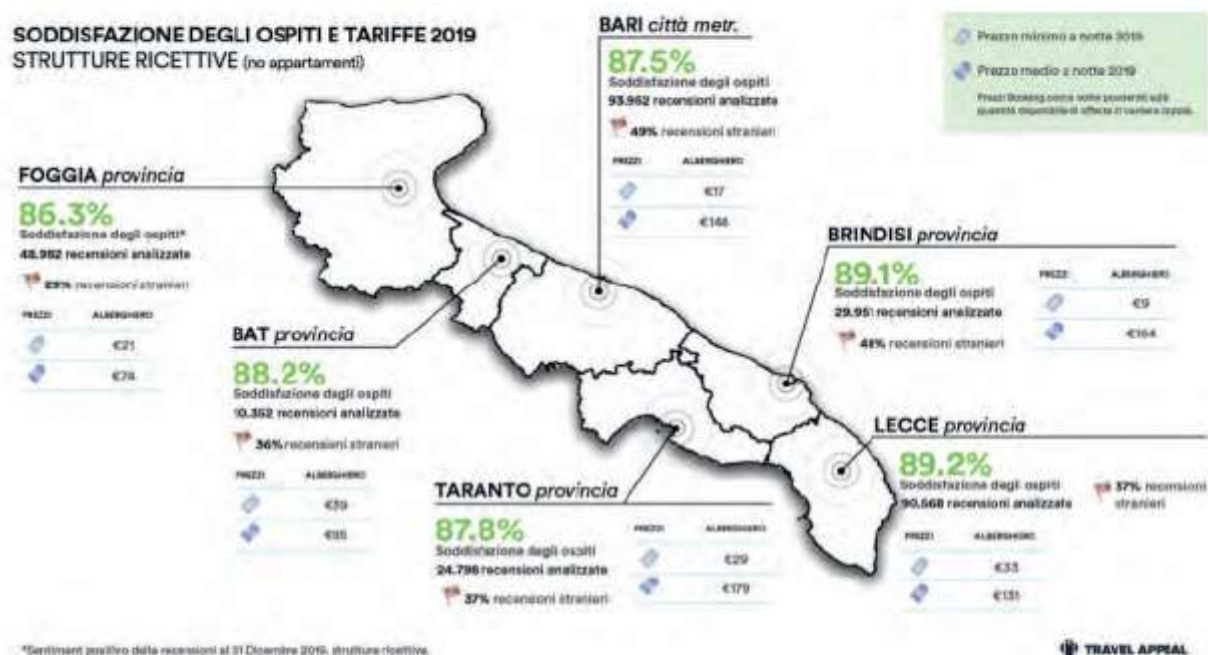


Figure 15 Travel Appeal: the sentiment

## 7 FORMS OF TOURISM IN THE REGION – THE NEW TOURISM

### ➤ Food and wine in Puglia

Food and wine experiences offered by tour operators, food and wine experiences offered by traditional intermediaries. Italian regions proposed and number of operators. Absolute and percentage values \*. December 2017.

REGIONE	NUMERO	%
Toscana	86	66%
Veneto	71	54%
<b>PUGLIA</b>	<b>68</b>	<b>52%</b>
Campania	65	50%
Lazio	63	48%
Sicilia	61	47%
Emilia Romagna	60	46%
Piemonte	57	44%
Liguria	50	38%
Lombardia	48	37%
Umbria	46	35%
Trentino Alto Adige	33	25%
Marche	29	22%
Sardegna	26	20%
Friuli Venezia Giulia	25	19%
Valle d'Aosta	22	17%
Calabria	22	17%
Abruzzo	21	16%
Basilicata	20	15%
Molise	11	8%

Table 1 Food/wine offers - 2017

Note:

\* percentage values calculated on the total of operators who have in their catalog at least one food and wine theme proposal (n. = 131)

The operators considered are both Italian and foreign

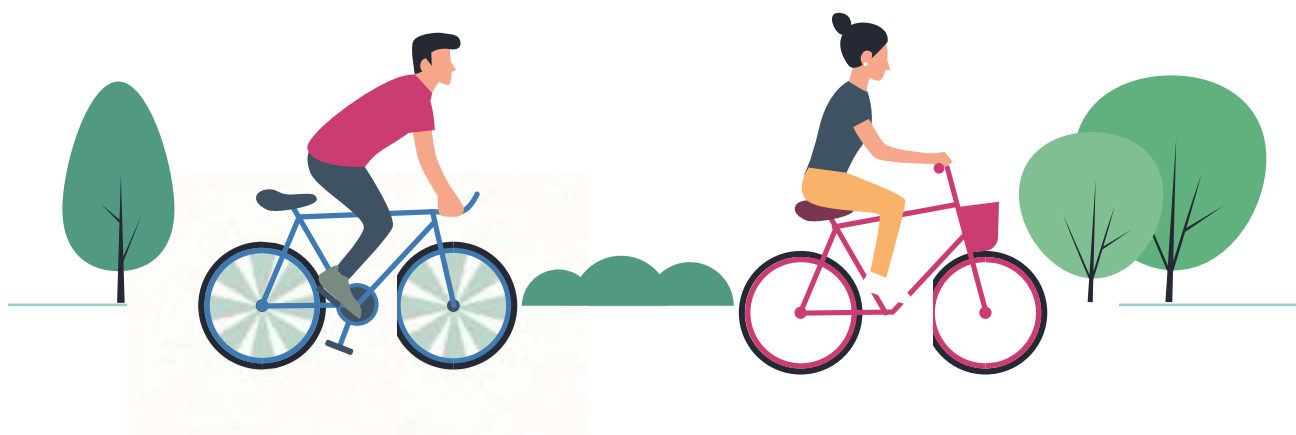
Source: our elaboration on a survey carried out on a panel of 236 operators (Tour Operators and Travel Agencies) who participated in the main trade fairs and workshops in 2017 (TTG, Good Workshop, BIT - Borsa Italiana del Turismo, BITEG - Borsa Italiana del Turismo Enogastronomico)

### ➤ The Bike Economy and cycle tourism in Puglia

- Economic phenomenon of great importance: 500 billion in the EU alone (see European Cyclist Federation)
- Italy is the 17th European country for bicycle use
- 60% of Italians declare that they do not use the bicycle
- High economic impact on the local economy: for every euro spent, 32% impacts in the local area
- European citizens make 2.3 billion daily tourist excursions and 20.4 million overnight trips every year
- A bicycle tourist spends an average of 80 euros per day
- The potential induced for Italy has been estimated at approximately 3.2 billion euros (See Istat)
- High growth rates of the sector in Puglia

- Significant consistency, both in terms of the number of overnight stays developed and the added value generated in the area
- Increasing number of local tour operators that are born and national / international tour operators that sell Puglia bikes
- Increasing number of "Puglia" packages sold
- Increasing variety of the proposed itineraries
- Exponentially growing turnover of local companies that sell "Puglia"
- Increasing number of Apulian hotels that close allotment contracts with tour operators specializing in cycle tourism.

The Puglia Region in its PRT has dedicated great attention and resources to tourist cycling, in particular with the CY.RO.N.MED project. (Cycle Route Network of the Mediterranean - Mediterranean cycle network), financed with Interreg IIIB ArchiMed 2000-2006 funds, with which the regional sections of the national cycle routes of the Bicitalia network and those of the trans-European EuroVelo, which cross the regional territory. Specifically: a) Adriatic Cycle Route (Trieste - Santa Maria di Leuca) - Itinerary no. 6 Bicitalia; b) Ciclovía dei Borboni (Bari-Naples) - Itinerary no. 10 Bicitalia; c) Cycle path of the Apennines (Colle di Cadibona - Reggio Calabria) - Itinerary 11 of Bicitalia with variants: Gargano and Apulian aqueduct cycle path); d) Ciclovía dei tre Mari (Otranto-Sapri) - Itinerary 14 Bicitalia; e) Pilgrims Cycle Route (London-Rome-Brindisi) - Itinerary no. 5 EuroVelo (3 Bicitalia). A further important initiative was that carried out by AQP with the construction of the Aqueduct Cycle Route, one of the most evocative in Italy.



#### ➤ Cultural Tourism



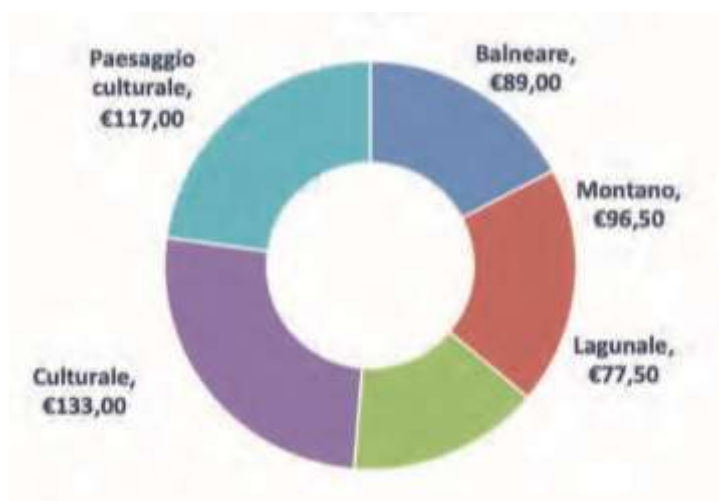


Figure 16 Average spend by type of trip/person

Cultural and art tourism represents a significant share of the Italian tourist demand which was the main travel motivation, exceeding half of the arrivals. Therefore, cultural tourism destinations (51.7% of the total) have exceeded, in terms of arrivals, the seaside data (21%), both because they lend themselves more to a short break holiday, and because visitors are more uniformly distributed throughout the year. The expenses for the cultural holiday are growing in 2017, each cultural tourist has spent an average of € 133.00 per day, while an average seaside tourist has spent € 89.00.



Figure 17 Top of mind of cultural tourism

## 7.1 Tourism trends

### 7.1.1 Global trends

The number of people traveling has grown enormously in the last few decades, as we can see from the analysis

of the UNWTO and Wttc data. Tourism has progressively transformed itself from an elitist phenomenon into a form of widespread and mass action (70s / 80s), involving ever wider and more differentiated sections of the world population. The quantitative increase in the tourist movement was accompanied by the expansion of the variety and variability of consumption behavior. The multiplication of low-cost routes, the self-care and the search for physical and psychological well-being, the wide penetration of smartphones (mobile first) which has amplified the possibility of accessing content (always connected), and the growing importance of web and social networks in guiding choices, are some of the great changes that are revolutionizing the way travel is experienced. Among the other megatrends of world tourism on which it will be appropriate to start a reflection in terms of promotion and development strategy, it is worth mentioning:

1. The increase in short breaks on the short-medium range: tourist flows are growing, but the periods of use are decreasing. A trend that is now generalized: people travel more than in the past, but they do it for shorter periods.
2. The multiplication of motivations to purchase and the diversification of consumption behaviors: an increasingly heterogeneous parterre of actors, both for countries of 3 Unicredit4tourism in collaboration with the Italian Touring Club: Report on tourism 2016. 15 origins and for social categories (elderly people, single women, millennials, medical tourism, etc.) is addressing the tourist offer in an increasingly less homogeneous and increasingly fragmented way.
3. The polarization of spending with trading-down and trading-up effects: in the future the demand for low-cost flights and travels will increase, but at the same time will increase also the demand for high-level accommodation. The number of rich people is increasing in the world, for example it is estimated that the number of Chinese millionaires will rise from 1.2 million to more than 2 million by 2019. For the new rich people in the world, travelling has become the new status symbol.
4. The growing desire for authenticity and uniqueness of the tourist experience: the holiday is no longer conceived and lived as a simple period of rest and relaxation, but as an experience of life and personal enrichment: tourism is increasingly experiential. 5) Greater attention to the environmental component and eco-sustainability of the travel: from this new sensitivity also arises the enhancement of non-traditional tourist destinations (rural tourism, green tourism in parks and nature reserves).
5. The key word for tourism development in the coming years will be "sustainability", for the World Tourism Organization this is a development that minimizes the environmental impact. According to the study "Walk on the wild side: estimating the global number magnitude of visits to protected areas", published by the team of researchers at Plos Biology, annual visits to protected areas of the planet have been quantified at 8 billion; the 80% of these visits relate to North America and Europe. It is estimated that these visits generate approximately \$ 600 billion in direct spending and \$ 250 billion in consumer surplus each year. The turnover of nature tourism in 2012 in Italy was calculated

at € 11.3 billion.

6. Agritourism, an ever-expanding trend: almost 11 million visitors in Italy, of which 57% foreigners, and a growth rate of over 20% in the last five years. To explain the success of the agritourism - over 18,000 accommodations, with an increase in beds of 26% over the medium term - a series of factors must be considered: the desire to get in touch with the rural world, as opposed to the now dominant urban one; the presence of “strong” attractors (from the landscape to the artisan traditions and to the typical agri-food production); a “local” management, which makes the stay less standardized.
7. Bike tourism and adventure tourism are on the rise: according to the findings of the ENIT in 2015, cycle tourism generates an economic impact of 44 billion in Europe, with 2 million trips and 20 million overnight stays. In Italy it has a potential value of 3.2 billion and is growing at a steady pace. An estimate from the Fiab (Italian Federation of Bicycle Friends) calculates that a person who rides a bike for a day and stays overnight is worth 80 euros.
8. The search for new destinations: within the classic destinations (for example, the sea and the mountains), unspoiled and unregulated places are sought. Increased interest in thematic trips and special stays.
9. The new tourist demand from the emerging middle class of the RDEs (Rapidly Developing Economies), that is the rapidly growing economies: China, India, Eastern and Central Europe.
10. Climate change: the overheating of the planet, following the increasing concentration of greenhouse gases in the atmosphere, is also a decisive factor for the travel and vacation sector because it influences the context conditions that can favor or slow down tourism: the drought, increasingly hot summers, mild and dry winters and the recurrence of exceptional phenomena.
11. International terrorism, no longer an isolated and sporadic phenomenon, limited to a “dangerous” area of the world but something extended to all the areas of the globe. If global tourism has not been affected immediately, something will likely change in the medium term: tourism could, for example, further accentuate its short-medium range character. In fact, already today, over 80% of international arrivals are intra-regional, then they concern movements in the same geographical area;
12. The crisis of the BRICs, which are experiencing a general setback with evident consequences also for tourism. In fact, in just a few years, some destinations have established themselves among the main generating countries of outgoing tourism, such as China, which has assumed the world leadership with 165 billion dollars of tourism spending abroad, Russia which is in fifth place with 50 billion, while Brazil is in tenth position (26 billion). India, on the other hand, is still a non-significant reality (25th place with almost 15 billion). The current scenario may change in the light of economic growth forecasts: The World Economic Outlook of the International Monetary Fund of January 2016 highlights the slowdown in China (the projections for 2016 are around + 6%, positive but far from those of previous

years), while the forecasts are negative for Russia and Brazil (-1% and -3.5% respectively). The tourist consequences are not lacking: the still provisional UNWTO figures on spending abroad in 2015 already see a 30% drop for Russia and Brazil;

13. The Sharing Economy, which has asserted itself strongly in recent years, has found an excellent field of application in tourism: from Airbnb to Blablacar and others. The sharing economy is born in a difficult economic and employment context and it has been able to give new solutions to travelers, taking advantage of technological evolution.
14. The European population is aging and requires an increasingly targeted, evolved and innovative offer: European senior tourism will strongly increase. Eurostat estimates that in 2060 about 30% of EU residents will be over 65 (to date this segment covers only 18% of the total). Over 65s people love organized trips, culture and good food, they prefer safety, they are ready to leave even in low season and their stay lasts longer on average. Senior tourists are now more dynamic people and enjoy superior financial resources compared to previous generations.

### 7.1.2 Regional trends

#### The trends of 2020 according to Booking.com

##### **The revenge of the lesser known destinations**

- Travel to lesser known destinations will increase in 2020, helping to reduce mass tourism and protect the environment.
- 54% of travelers worldwide want to do their part to reduce overtourism (56% for the 18-25 age group).
- 51% would choose a lesser known destination but similar to the more well-known ones, if this had a lower environmental impact.
- 60% of travelers worldwide want to use a service (app / website) that recommends destinations where increased tourism could have a positive impact on the local community.

##### **Technology take me away**

- In 2020, travelers have entrusted the key aspects of their travel decision-making to technology even more resolutely. Technology will give “smart” advice and will allow you to find a myriad of new experiences.
- 59% of respondents want to use the surprise effect of technology to find completely new ones.
- 46% will use an app to find and book an activity in real time while on the go. 44% will use an app to plan in advance the activities to do once at their destination.

##### **Slow tourism to the rescue**

- In 2020 FOMO (Fear of Missing Out, i.e. the fear of missing something important or being cut off) and being always in a hurry will give way to slow travel. The very way of traveling will change:
- 48% of travelers intend to spend more time traveling, in order to reduce their environmental impact

- 61% will take a longer trip to enjoy the journey even more, starting from the landscape.
- 62% want to go on a trip where the means of transport used makes the experience truly unique.  
56% of people don't mind taking longer to get to their destination, just to use a less common means of transport.

### **Pet Friendly Tourism**

2020 will mark a turning point in the field of holidays designed especially for pets, since when it comes to choosing the destination of a trip, where to stay and what to do, the needs of pets will come before those of the owners.

### **The rush to book**

In the new year, food will play a fundamental role in the choices of travelers in deciding which destination to visit, and there will be a real rush to book for the best restaurants. In fact, many will choose the destination for their trip based on the possibility of being able or not to book a table to savor a much desired gastronomic experience.

### *7.1.3 The 2015-2025 regional strategy*

Tourism, with its approximately 10% incidence on regional GDP, is a key sector of the Apulian economy. The 2014/2020 programming allocated approximately sixty million euros to Apulian tourism, adopting an integrated governance capable of enhancing the opportunities and advantages of sectoral intersections and creating products / services aimed at enriching, diversifying and qualifying the tourist and cultural offer of the territorial areas. It has flanked and integrated within the Europe 2020 program the "Smart Puglia 2020" strategy, "Puglia Digital Agenda 2020" which traces the path of innovation and development that has to be followed to strengthen the regional digital system, to outline the prospective vision of current phase of regional planning, that proposes an ever closer integration of "transversal" policies for innovation, competitiveness, internationalization, with the "vertical" policies of the environment, transport, welfare and health, cultural heritage.

1. In the first place, through the research, a clear and incontrovertible fact emerged: "deseasonalization equals internationalization" (that is lengthening the classic Apulian tourist season). Therefore, the Apulian strategy must have this aim because the data show that Italian tourists are still concentrated in the months of July-August, while foreign tourists are those who naturally destagionalise our market.
2. This first observation is also followed by another one linked to the target of foreign tourists and their origin, and it emerged that the European market remains by far the most productive for our operators. The target of the so-called "gray panthers" stands out in this: people over 55/60 who live in countries that have a good welfare system, who have already visited Italy and who are preparing for group holidays in Puglia attracted by wellness and food-nature combination.
3. Key element of the strategy is linked to brand identity and more generally to the prospect of marketing

and promotion of Puglia in the near future. Starting from the assumption that 65% of visitors choose their destination independently of traditional intermediaries (tour operators, travel agencies), it is clear that a "generalist" promotion must be pursued while trying to be consistent with the targets to be reached, the places reached from direct flights: a promotion therefore consistent with these areas.

4. A further important strategic element has been that one related to the relationship between product and promotion. The shared orientation appears to be to go towards "product clubs" to be structured through homogeneous clusters (for example art and culture, active tourism, etc.) within which an adequate number of product clubs of regional rank has to be defined. These specific products (for example bike tourism) will require ad hoc promotion with specialized fairs and defined promo-marketing.
5. Between product, promotion and strategy, also emerged the need to define Puglia through its territories without forgetting its specificities, connected to the brand. Salento, for example, in Italy is equal to the Puglia brand, sometimes overlapping it.
6. The theme of promo-marketing is a fundamental and strategic element. The strategy of Puglia aims at producing an advancement of the functions of the portal to favor promo-marketing without necessarily reaching "direct" sales. The orientation is to tie mature product clubs to an online promo-marketing system.
7. Still on the subject of the online, digital is decisive for a tourism enhancement strategy, which emerges as decisive in the light of the new category of prosumers (tourist consumers who become producers of information and "involuntary" promotion). In this sense, engagement appears to be a strategy to be pursued even in the long term.
8. A strategy that looks to the future cannot ignore the theme of innovation and technological innovation in the strict sense. This area will have to work a lot on the topic of big data and on consumer profiling. Furthermore, the need for tourist apps and cards that provide the traveler with information and suggestions both in the cultural and public transport fields emerges as transversal.
9. In a shared vision, the strategy that looks to 2025 cannot ignore the air connections that have been decisive in recent years to increase tourism in Puglia starting from the "putting on the map" that low cost flights (confirmed until 2019) have represented, and that will reasonably continue following the pandemic crisis. In this context has emerged the need to coordinate promotion and destinations reached by direct flights, while trying to overturn the logic: not only to promote where the Puglia Airports have direct connections, but to ask AdP to directly connect the target markets that emerged from the research and from the demand of the operators.
10. Still in the infrastructural field, the dimension linked to the bike tourism, the slow mobility and the new emergence of "paths" as a tourist product has emerged as strategic. European, national and



regional investments are planned on this: Puglia is also the leading region in two projects of "paths" and aims to encourage urban policies towards a progressive pedestrianization of historic centers. Furthermore, it appears necessary to enhance the internal railways as experiential information points.

11. The strategy also involves overcoming the weaknesses that have emerged in particular in the field of the widespread hospitality. The shared perception is that Puglia is today a cool destination that has eroded market slices to competitive regions in the 80s and 90s such as Tuscany, Sardinia and Sicily; it has established itself with respect to North Africa (also for reasons of international contingency); it has a very dynamic private system and excellent promotion, but lags behind in the area of territorial policies dedicated to hospitality. For this reason, it will be necessary to network the new local INFO POINTS, to promote a digital market place, as well as to provide the sector with trained workers who speaks foreign languages.
12. Besides the ability to communicate in foreign languages, training emerges as a strategic theme in all sectors. To be divided into four macro-areas: the world of university training, professional training, e-learning and training with regional leadership, and the business world. A particular focus is training in the cultural field, in the food and wine heritage and typical Apulian specialties.

#### *7.1.4 Focus about new tourism*

Enhancing the beauty of our landscape means promoting all over the world itineraries of naturalistic-international significance, marine reserves (Tremi and Torre Guaceto, to name a few), regional protected areas, nature reserves and related activities connected (cycling, trekking, birdwatching, diving, etc.).

For a tourism development based on the union of culture and territory, a subdivision into by-products will be necessary: archaeological heritage; historical-artistic heritage: creative industry and arts; "small heritage" or rural heritage, villages, small municipalities; immaterial, such as craftsmanship, rites and traditions, local knowledge; heritage of UNESCO sites with a synergistic design with Matera; cultural itineraries of Puglia Basilicata along the Lecce - Taranto - Matera axis, passing through Altamura and Gravina; religious; fortified sites; circuit of geosites and natural parks; Puglia Bridge over the Mediterranean; streets and paths of Puglia; knowledge and flavors (with food and wine tourism); events and club culture.

It will be necessary to create networks and alliances, thanks to a public-private planning and management model. Once the clusters have been defined, also the products will have to be defined, on which to create any product clubs, declined in relation to the various user targets: families, children, the disabled, seniors, young people, students, lgbt, petfriendly, foreign markets, various needs.

This system will allow the recognition of the offer, through product standards. It will be essential to create thematic tourist itineraries and destinations based on themes that will allow connections between territories.

In particular, the "sea product" should not be understood as mere seaside tourism, but according to a theming and an evolution that responds to what international demand requires (heliotherapy, sports, recreational and cultural activities, etc.), but also "sea tourism", that is product of enhancement of knowledge and flavors linked to the sea. The sea must become a cultural element, representing a "gate" for the enhancement and knowledge of the territory, including inland. Nautical tourism can be linked to ancient routes of Magna Graecia reused by travelers on the "Grand Tour", encouraging the "slow" fruition system of the territory.

#### 7.1.5 Focus about tourism at the time of Covid

At the beginning of 2020, the tourist perspective was excellent. The UNWTO World Tourism Barometer reports that in 2019 international tourist arrivals globally were 1.5 billion or 54 million more than in 2018 (+ 4%). It also estimated that in 2030, international tourist arrivals would amount to 1.9 billion, continuing the steady growth that the tourism industry was experiencing. For 2020, the UNWTO estimated further growth between 3 and 4%. The explosion of Covid-19, starting from January 2020, and its international spread in the following months, has radically altered and changed both the flows and the concept of international tourism. Considering the fact that travel restrictions around the world have changed existing tourism perspective from 2020 and likely until 2023, UNWTO estimates that international tourist arrivals globally shrank by 72% in the period from January-October 2020 compared to the same period of the previous year. And given the second wave, the losses will likely increase again in the following period.



Figure 18 COVID Impact on tourism- Arrivals



The consequences of this can be seen in an increase in domestic tourism in 2020, mainly by road, and a tendency to book last minute travels, with a very reduced booking window. International tourism has experienced a drastic downsizing this year, due to limitations, fear of travel, and severely reduced air connectivity. All this has caused a radical change in the behavior of the demand in deciding where and how to spend holidays, but also the way of doing tourism in the destination. However, the new phase of vaccination immunization and the structural resilience of an ever rapidly changing sector outline a scenario in the short-medium term that through the phases of stagnation-oscillation-assimilation-recovery will provide a substantial recovery of the volumes prior to the phenomenon, but with a substantial change in the relationship between in-home tourism and travel to foreign destinations.

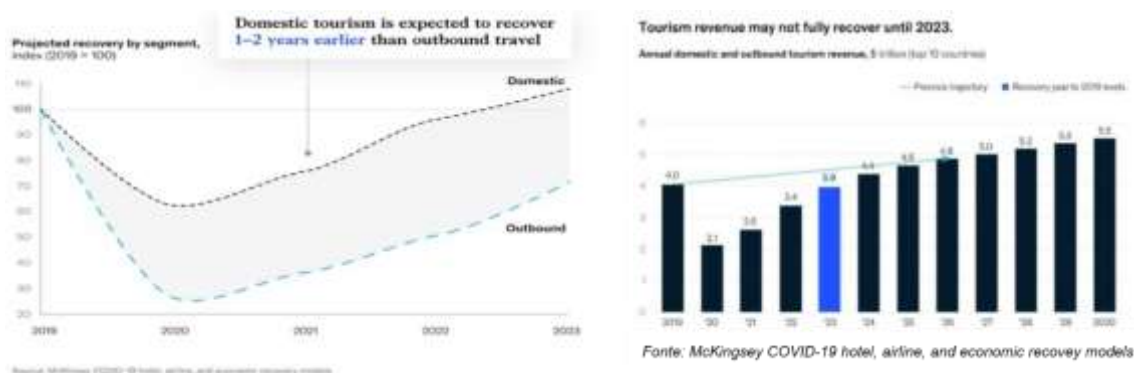


Figure 19 COVID Economical Impacts

## 7.2 Resource Mapping

### 7.2.1 Introduction

Puglia is the most maritime of the Italian peninsular regions, and not only for the exceptional extension of its coasts, which overlook two seas. With its major centers located mainly along the coast and most of the rest within 25 kilometers of the coastal strip, Puglia is a structurally maritime region, not only in the geographic sense of the term, but also in the economic and social one.

The relationship of confidence of the Apulians with the sea is expressed in their daily life, in the language, in the cuisine, in the expressions of art, placing itself at the center of the collective imagination and assuming the value of an anthropological figure.

If we frame Puglia in a broader context, on a smaller scale, the frequent definition of "pier in the Mediterranean" is anything but a metaphor. The narrow arm of the Adriatic Sea and then the Ionian Sea, rather than separating, unites Puglia like a bridge to the facing Balkans, with which it has shared events, economic interests, flows of men and cultures since the earliest times. From the sea came fortunes and misfortunes, and Puglia historically owes to the sea what today would be defined as a role of geopolitical relevance, which is confirmed in the present times by a defensive, commercial, logistic-infrastructure point of view.

But those 860 km of coastline are today, above all, the most important asset of the Apulian tourist offer, both in terms of attractiveness and in terms of access to the territory and connection to the turistic systems of the macro-region, representing one of the major points of strength of the Apulian economy in the perspective dictated by the Blue Economy.

For these reasons, after a long and economic crisis and the new pandemic crisis, the future of the region can only start from the sea, perhaps changing the perspective and looking at this region from the sea.

### 7.2.2 Infrastructures

The railway endowment counts 1,261 km of FS line in operation, 81.4% of which are electrified. In addition, more than 60% is double-track and four regional railways for tourism that manage a total of over 800 km of network: Ferrovia del Sud Est, Ferrovie del Gargano, Ferrotramviaria, Ferrovie Appulo Lucane.

The role of airports and ports is also important. In 2019 in particular, the International airport of Bari has increased by 17% the number of international passenger-flights and 4.5% of passenger-domestic flights. Brindisi airport registered a similar increase of 18% and 6% of passengers international and domestic flights respectively.

The marine movement to Apulia from other countries and from the Aegean is very small because the potential source basins of customers (Greece, Turkey and African countries) are still characterized by a very weak outgoing demand.

The cruise movement is also much discussed because of the costs it entails: the present potential is not used, if it is true that Puglia is only the eighth region for the number of passengers handled, even though there are five possible berths. According to the Report on cruises in Italy and Europe by Risposte turismo, the Veneto region with only two moorings recorded, in 2016, 530 ship touches and 1.605 million passengers handled; Puglia with five marinas only 177 ship touches and about 409 thousand passengers. More relevant are the possibilities related to pleasure boating, with a total number of berths that in 2016 is about 14,200, equal to 9.0% national and 19.9% of those in southern Italy. Similar to that of Puglia, is the number of berths in Campania, with 14,739 units.

### *7.2.3 The Regional System of tourist Ports in Puglia*

In 2005, the Framework Program Agreement on Local Development (II supplementary act) between the Ministry of Economy and Finance, the Ministry of Productive Activities and the Puglia Region entrusted to Sviluppo Italia (now the National Agency for the attraction of investments and business development - INVITALIA), the drafting of the "Feasibility study of the regional tourism port system", as the implementing body of the "National Tourist Port Network Program - First three-year plan for the regions of Southern Italy" pursuant to the Resolution CIPE 83/2003.

Over the last decade, the increasing demands of sustainability of economic development and protection of fundamental resources have dictated the Union and national directives, and have seen Puglia at the forefront of the national scenario for the adoption of the instruments of regulation and planning of the territory, the main ones being the Territorial Landscape Plan (PPTR) and the Regional Coastal Plan (PRC). The PRC in particular aims to "guarantee the correct balance between the safeguarding of the environmental and landscape aspects of the Apulian coast, the free use and the development of recreational tourist activities".

This new regulatory framework and a more careful sensitivity of the local communities, the technical structure and the decision-makers themselves have called into question the criteria initially adopted and generally lengthened the implementation process of the projects, adapting at the same time to the dynamics of the sector and of the territorial and macro-regional tourism market, that is rapidly changing, especially in the last decade.

### *7.2.4 Characteristics of supply and internal demand*

The total number of moorings that are actually available in the region as of 9/2019 is 13,656, divided according to location, and consequent services, ashore in:

- tourist ports 3,323
- tourist landings 3,234
- mooring points 6,486

The subdivision of the moorings according to the size is as follows:

- <10 m / n.d. 10,609
- 10-24 m 2,907
- > 24 m 120

The number of vessels registered at the Peripheral Maritime Offices amounts to 12,031 units, divided as follows:

- boats (<10 m) 10,609
- boats (10-24 m) 1,336
- ships (> 24 m) 24

From the above numbers it would be deduced an excess of available moorings compared to internal demand, and therefore available for the reception of extra-regional vessels. In reality, some fundamentals must be made about the real relationship between shipping and moorings and therefore on the reception capacity of the Apulian yachting port system:

1. the mooring points, which constitute the major part of global nautical receptivity, are actually often anchorages in the harbor (eg Porto Cesareo), of uncertain regulatory regularity, without services and not usable outside the favorable season, therefore completely non-standard for the pleasure craft of transit and not computable for the purpose;
2. the category of nautical capacity includes the moorings of private associations which statutorily host their members and a limited number of external guests upon invitation or approval of the association, and are therefore essentially private moorings unavailable to tourism proper;
3. on the demand side, the data of the ships completely lack small and very small unregistered units as they are not legally required, which UCINA estimates at 85% of the total and which, despite being in turn often put back in the so-called dry ports in private spaces of individual owners, however they occupy the berths in the season of greatest demand;
4. to the total calculation of the real overall "nautical pressure", but not to the statistically formalized one, the boats registered outside the region that use the Apulian harbor as a permanent shelter, contribute significantly;
5. a dynamics that are not well investigated is that of the units registered in the Apulian nautical registers but moored permanently, for various and interesting reasons, on the other side of the Otranto channel, mainly at the good ports of the Ionian Islands and marginally in Croatia, Montenegro and Albania, growing in recent years but tending to progressively decrease due to the leveling of tariffs with European

standards and the difficulties in moving due to the pandemic emergency.

### *7.2.5 Characteristics of the tourist port demand, development potential of ports and landings*

Currently the Apulian ports satisfy the tourist demand:

- mainly permanent: the number of berths intended for transit is approximately 540, equal to approximately 5% of the total berths available).
- proximity and residents: about half of the demand from boats in transit has a regional origin, in fact 50% of the concessionaires indicate the regional area as the "predominant origin of the boats in transit".

The analysis of the context shows that the Apulian destination can be characterized according to a modality attributable to the great nautical itineraries as regards the Adriatic belt and to the nautical of medium and short routes for the Ionian belt.

The occupancy rate of the berths in the three summer months, as already mentioned, is close to 100%. Therefore, it is of fundamental importance to strengthen the offer both from a qualitative and quantitative point of view of the Apulian ports, and to put in place adequate interventions to create a virtuous synergy between the various ports and landings.

Already from the feasibility phase, sector planning has identified a "Network of Apulian tourist ports", organized in Areas in which Pivot Ports (of great appeal and size, well equipped with a wealth of services and functions) are identified, which attract the pleasure craft in transit, especially in the Adriatic, and to connect the sea to the territory by also enhancing the offer of the Apulian Tourist Itineraries (cultural, religious, food and wine).

All this must be done without neglecting the local and regional pleasure demand.

The Areas and the Pivot Ports of the Puglia Region tourist port network - First level ports and second level ports

The data collected relating to the infrastructural characteristics of the ports, together with a more detailed assessment of the tourist character of each individual locality, led to the identification of the candidate locations to represent the first level system of tourist ports and of those candidates to constitute the second level system.

#### **The Areas:**

The Apulian coast has been divided into seven areas (Garganico, Nord-Bari, Bari, Brindisi, Salentino-Adriatico, Salentino-Ionico, Tarantino) with reference to the following criteria:

- Nautical vocation (major international, regional or sub-regional nautical itineraries);

- An already consolidated image in the nautical tourism field;
- Geographical dimension as homogeneous as possible and such as to guarantee an adequately uniform distribution of pivot, first and second level ports;
- Possibility of agglomerating a critical mass of ports, suitably differentiated (between first and second level ports, with reference to the type of port demand - local or external);
- Reference as unambiguous as possible to local authorities and state bodies with expertise in the yachting sector (Coast Guard, Harbor Master's Office).



Figure 20 Network of Puglia Port system

A Port Pivot has been identified for each area, chosen on the basis of the following criteria:

- Potential of the locality in infrastructural terms (current and potential).
- Potential of the locality in terms of tourism (integrated tourist resource).
- Consideration of the individual realities and territorial specificities;
- Geographic location within the scope.

#### Area n. 1 - Garganico:

- Porto Pivot: Manfredonia
- First level ports: Vieste, Margherita di Savoia, Mattinata

#### Area n. 2 - North Bari:

- Porto Pivot: Bisceglie
- First level ports: Trani, Barletta, Molfetta

Area n. 3 - Bari:

- Porto Pivot: Bari
- First level ports: Monopoli, Mola di Bari

Area n. 4 - Brindisi:

- Porto Pivot: Brindisi
- First level ports: Ostuni

Area n. 5 - Salentino Adriatico:

- Porto Pivot: Otranto
- First level ports: Castrignano, Otranto, Castro, Santa Cesarea Terme, S. Foca

Area n. 6 - Ionian Salento:

- Porto Pivot: Gallipoli
- First level ports: Porto Cesareo, Nardò

Area n. 7 - Tarantino:

- Porto Pivot: Taranto
- First level ports: Maruggio

*7.2.6 Current offer and prospective estimate in the identified areas*

13 years after the original drafting of the Framework Program Agreement (APQ), the areas show a general delay in implementation and a varied situation of plans and planning, not without critical issues mainly due to:

- inconsistency and problematic integration of the projects - largely conceived in the 2000s - with the forecasts, constraints and new standards of quality and sustainability established by the mentioned regional strategic planning;
- poor reliability and transparency of the entrepreneurial team involved in some public-private partnerships;
- absence of an organic and strategic vision of the sector as a system
- lack of public governance

Nevertheless, it can be seen that in areas 1, 2, 4 and 5 there are mature plans and projects that are proposed for the start of works in the short term; among other things, these provide for actions to strengthen the Pivot

Ports and some of the first level identified in the study.

On the other hand, in Sections 3, 6 and 7 they report a clear delay. This criticality is especially important for the ports of Gallipoli and Taranto.

It was positive to note that there are four significant upgrading interventions, two of which have started (Rodi Garganico and Polignano a Mare) and two are in the start-up phase (Manfredonia new tourist port and Lecce San Cataldo) with Project Financing involving consortia between public and private bodies, which testify a capacity of synergy between the business world and the public action.

These initiatives confirm that in Puglia the trend in demand for tourist ports is growing and that it is also able to attract private financial investments.

#### *7.2.7 The connection of the nautical tourism with the transport in the Puglia system*

The tourist system appears more and more like a complex network of subjects (public administrations, private operators, individual citizens) between which increasingly close and diverse relationships exist, whose solidity and efficiency can compromise the competitiveness of a territory.

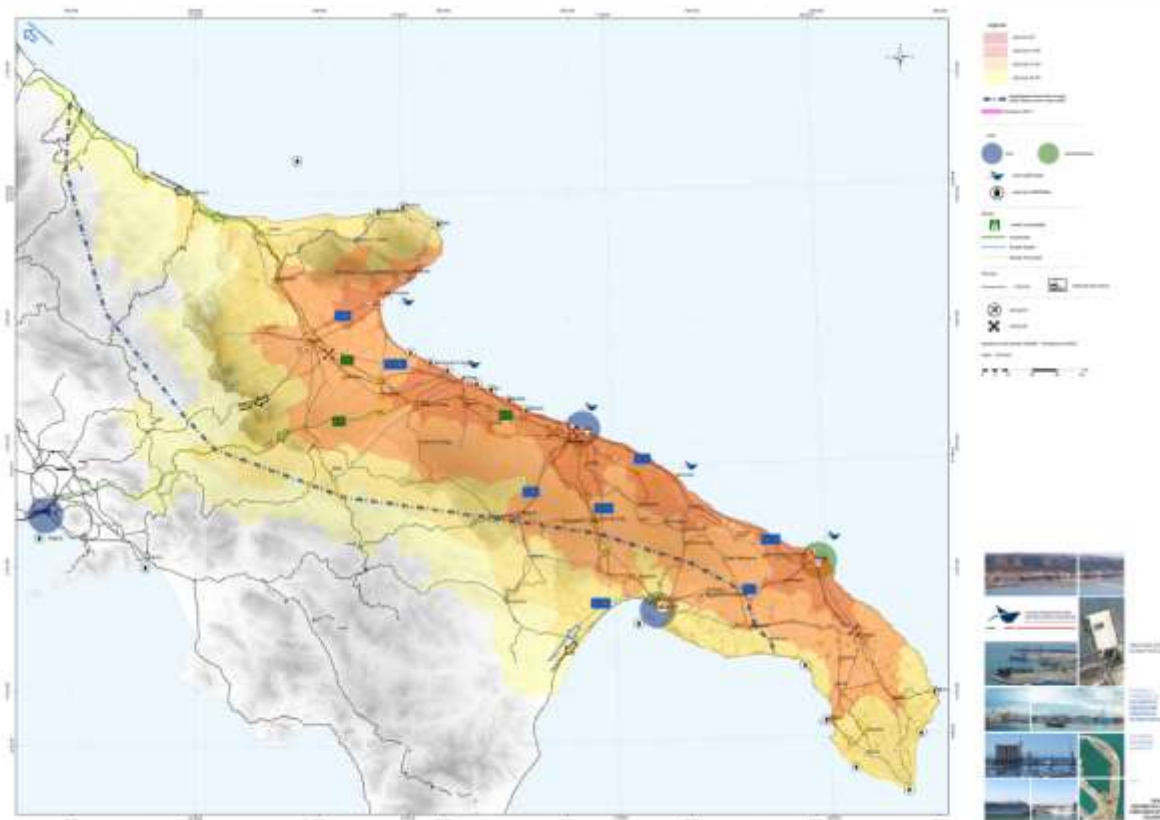
Within this complex network of subjects and relationships, different levels can be identified, integrated with each other:

- physical networks, in particular the infrastructures linked to transport to and from the destination;
- technological networks, to support tourist use and local operators;
- relational networks, which involve all actors, public and private, of tourism development.

Boating is, due to the geographical characteristics and cultural contents of Puglia, the most appropriate approach and the privileged gateway to this region, but to be truly an integral part of the Puglia system it should fully fit in and at all levels of the networks that connect it externally and internally. Starting with that of transport.

Puglia has on its side, among its intrinsic geographical characteristics, a "form factor" that makes its ports close to the innermost parts of its territory, and its most hidden treasures within the reach of the coastal tourist with short and easy trips. even with sustainable means such as the bicycle.





Pic 1 Isochrone and equidistance line Southern Adriatic Port system Authority



Pic 2 The Public transport network and the Hubs in Puglia

Generally speaking, a strategy based on a regional intermodality plan is needed, capable of involving the main means of transport and airports (airports, railways, buses, ports and marinas, bicycle and car rental), according

to the standards of the European tourism market, through more efficient road and rail links between airports and tourist resorts, connecting with the high-speed rail network.

But above all, as the most advanced design standards provide, it is necessary to equip tourist ports and marinas with connection hubs with the soft mobility network, with velostations and relative cycle paths, to connect them in an engaging way to the cities and territories that act as hinterlands, not just physical at the docking.

It is necessary to avoid tourist ports in an open way to the territory and really point of access for tourists, and not just berths for the resident, and then connect them, with public and private carriers efficiently sized in scope, to other hubs from rail to airport ones.



*Pic 3 The new railway connection with the airport of Brindisi*



Pic 4 Connection between the hubs of Apulian Transport Network

in the short term, concrete prospects concern the railway sector, and come from the important planning (about 700 million with construction sites to be closed by 2024) implemented by the Puglia Region with the technological and environmental adaptation of the vast and widespread network of local railway lines (FAL, FdG and FSE) and equally immediate and ambitious projects put in place by RFI itself in connection with the port and airport nodes of Bari, Brindisi and Taranto.

### 7.2.8 The specificities of southern Apulia

The tourist districts established by the Puglia region are: Gargano and Monti Dauni, Bari and the coast, The Apulia of Frederick II, Valle d'Itria and Murgia dei trulli, Magna Grecia and Gravine, Salento.

Below is a description of the Salento tourist district which traditionally includes the province of Lecce and the southern areas of the provinces of Brindisi and Taranto. More of an island than a peninsula, it has strong traditions of seafaring and hospitality, and together with the Gargano it leads the region in terms of both receptivity and turnover in tourism, catering and related economic chain.

There are 28 classified ports and harbors, described in the relative cards in attachment 1



Comune	Numero di posti barca	Porto turistico	Approdo turistico	Punto di ormeggio	N° licenze (*)	Attracco	Acqua	Luce	Carburante	Vigilanza	Info turistiche	Servizi Igienici	Parcheg- gio	Alaggio	Rifiuti	Capitaneria di Porto
Maruggio TA	240	-	240	-	1	100	100	100	100	100	100	100	100	100	100	Taranto
Alessano LE	10	-	-	10	-	-	-	-	-	-	-	-	-	-	-	Gallipoli
Andrano LE	44	-	-	44	1	100	-	-	-	-	-	-	-	-	-	Gallipoli
Castrignano del Capo LE	680	680	-	-	1	100	100	100	100	100	100	100	100	100	100	Gallipoli
Castro LE	171	-	-	171	8	100	100	100	-	100	100	100	100	100	100	Gallipoli
Gallipoli LE	1.084	280	210	594	15	100	59	54	30	75	15	35	54	30	100	Gallipoli
Lecce	102	-	-	102	1	100	-	-	-	100	-	100	-	-	-	Gallipoli
Melendugno LE	466	150	144	172	5	100	100	100	15	100	32	63	72	63	48	Gallipoli
Morciano di Leuca LE	160	-	160	-	1	100	100	100	-	100	100	100	100	-	100	Gallipoli
Otranto LE	504	225	-	279	7	99	99	97	1	97	97	99	-	2	50	Gallipoli
Porto Cesareo LE	927	-	-	927	7	100	80	80	4	80	-	83	80	13	100	Gallipoli
Salve LE	106	-	106	-	-	100	100	100	-	-	-	-	-	-	100	Gallipoli
Santa Cesarea Terme LE	60	-	-	60	2	100	-	-	-	100	-	-	100	100	100	Gallipoli
Squinzano LE	10	-	-	10	1	100	100	100	-	100	-	100	100	100	-	Gallipoli
Tricase LE	241	-	241	-	4	100	91	91	-	92	-	77	71	77	-	Gallipoli
Ugento LE	361	-	-	361	4	100	75	75	-	100	-	25	-	-	100	Gallipoli
Brindisi	1.103	-	928	175	6	100	90	89	58	89	84	84	84	58	90	Brindisi
Fasano BR	215	-	50	165	1	100	56	-	-	58	-	-	23	42	100	Brindisi
Ostuni BR	290	-	-	290	-	100	87	87	-	87	11	49	76	89	100	Brindisi

Table 2 Ports in the South Puglia

A feature of all landings is that they are almost always central to the coastal tourist centers and therefore able to benefit from services and tourist attractions within reach of the quay, as well as nautical excursion services along the neighboring coast.

A dense network of pathways is spread over the territory, centering on the major coastal cities and traveling along the coast (CYRONMED circuit), increasingly safe and usable with the pedestrianization of the coast and innervating towards the hinterland as in the case of the "Salento di Mare" Cultural Environmental System. and Pietra2, where about 400 km of marked and slow-speed roads link Gallipoli by bicycle to the cultural heritage of 13 municipalities, served by stopping points and assistance to cyclists. Coastal are also all the natural parks of southern Puglia, where most of the 30 hiking trails of the Provincial Hiking Network develop, which take us into the heart of the unique nature of this land.

Even the longer-range connections to the most internal and authentic areas, the cities of art or the more distant coastal centers are guaranteed in the summer months by the car connections of the SalentoBus program promoted by the Province of Lecce, which covers a time slot ranging from five in the morning until one in the morning, so that no appointment is missing from the rich program of music and festivals typical of this land.

Another strong point, in addition to the urban redevelopment works and the monumental and natural

heritage, is the decisive growth of widespread accommodation, b & b and rural tourism, which gives authenticity to the experience and above all flexibility to the offer, being able to use even for very short periods and by booking your accommodation last minute according to the typical needs of the nautical yachtsman. Strong critical issues remain in the planning and management of port spaces, docks and stretches of water, disputed between fishing mariners and nautical associations which in fact privatize most of the useful fronts available, making the use of public moorings for pleasure boating in transit problematic.

Even the marinas and private moorings report a series of critical issues regarding the obsolescence of port structures, almost all conceived in the 1960s and 1980s, almost always lacking in technology and services, not just materials, which are really usable.

The number of berths available for transit are also modest and often fictitious, and the rates are not competitive or proportionate to the quality offered.

This has motivated in recent years a strong spill-over of local demand towards more advantageous destinations such as Greece, which in the meantime has strongly strengthened the nautical sector in terms of capacity, updating and quality of services, resulting in a highly attractive and competitive international demand despite the recent realignments in costs to the European sector market.

#### *7.2.9 Study cases*

A strong signal has come just recently from Otranto, where after years of litigation between the municipal administration and the various bodies called to express themselves on the feasibility of the project (from the Puglia Region, to the Province of Lecce, Gallipoli Port Authority and Maritime District Office of Otranto, the State Property Agency, the Customs Agency, the Municipality and the Archaeological Superintendence of Fine Arts and Landscape), there is now the go-ahead for the qualification and adaptation project of the port area, which thanks to the Interreg programming on the Greece-Italy axis aims at a new redevelopment and also to settle the controversial question of floating docks for pleasure boats returned to full municipal usability after the judicial release also confirmed by the review court in June 2020. The overall project for the reorganization of the port system has already obtained a loan of 1.5 million euros from the Region in the Interreg-Ai Smart program, and provides the creation of control and reception services for sea passengers and the remodeling of floating docks destined for to pleasure boating, to define its compatibility with the monumental values present in the area.



Pic 5 Port of Otranto plan

Also in Otranto, the new port has recently adopted a very rapid time schedule for carrying out the works. After years of standstill and uncertainties due to environmental criticalities and various improvements to the initial project, the Apulia Region has already committed itself to issuing the concession and, once the legal deadline has been granted, the works will be able to start and then be completed within 36 months from the start-up.



Pic 6 Port of OtrantoPic 7 View of the Port of Otranto





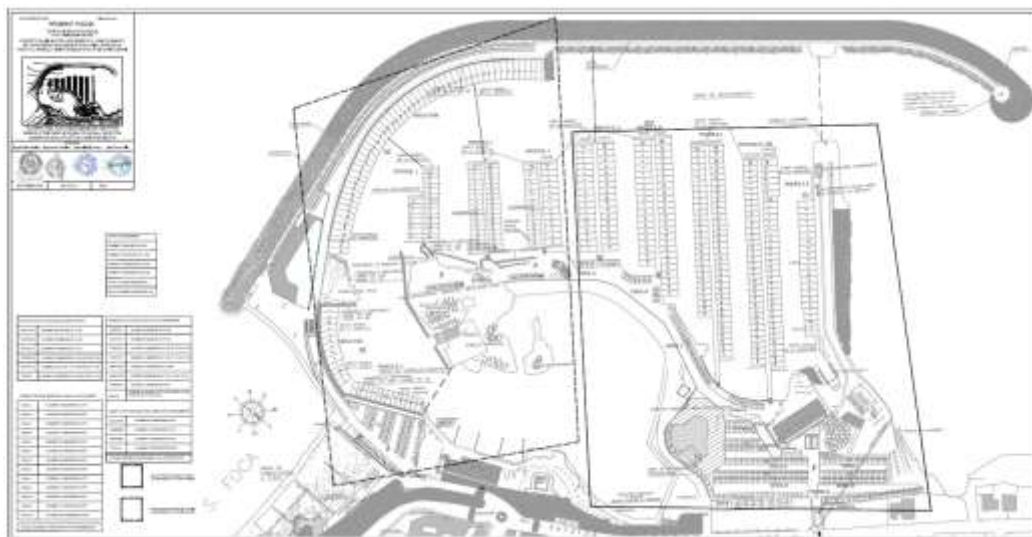
The ports of S. Foca di Melendugno and S. Maria di Leuca have undergone numerous vicissitudes in the last 15 years in the finalization of the expansion project, partly attributable to the legal ones of the private and majority part of the partnership, represented by the same subject. The implementation of the S. Foca project alone would lead to an increase by 230 berths the capacity of the Otranto area.

The first intervention involves an investment of several million euros which, in two years of work, would allow it to equip the coast between the neighboring ports of San Cataldo and Otranto with a port suitable for 431 boats: 14 of six meters; 192 by 11 meters; 173 by 13 meters; 52 by 15.5 linear meters. To understand the extent of the project, it should be considered that, currently, the San Foca marina can accommodate a maximum of 183 boats. The new project would triple its capacity, providing it with the potential to propose itself as Leuca as a hub of the Adriatic.

The project, in fact, envisages "expanding the existing port structures, improving their protection in the South East"; provides "better and more effective protection from waves from the South-East (around 110 ° North), compared to the Prgp forecast, necessary on the basis of what is highlighted by the marine meteo study carried out and the experience gained with the current structure which is definitely sensitive to such waves ". Yet.



«The internal definition has been revised, with respect to the Prgp, with a reduction in some sales areas and an increase in others. This, even to the detriment of the total number of berths, which has actually decreased with the decrease in the water mirror, being instead a priority is specified in the project - to ensure those services necessary for both transiting and permanent boaters ».



*Pic 8 Porto of San Foca Plan*

In Leuca, the realization of the project drawn up by the Municipality of Castrignano to enlarge the marina is expected as soon as it becomes a real "marina" with 700 berths, including those for large boats. There are also ground services, sheds for the shelter of boats and repair shops, as well as a building intended to house offices. Due to the long dispute between the municipality and partner companies and between the latter and the other port operators in the fishing and tourism sectors, Community funding of approximately 2.5 million euros was lost. The total cost of the extension and modernization project amounts to approximately 10 million euros. The administration of Castrignano del Capo is finally ready to put an end to the long history of the functional technical variant of the Port Regulatory Plan for the port of Santa Maria di Leuca.



*Pic 9 Port of Leuca Plan*

### 7.3 Entertainment Facilities

The region of Apulia except the beaches, culture and art, and good food also offers an important number of amusement parks of various types such as aquatic, educational, adventure.

#### **Acquapark Ippocampo**

The park is located in the municipality of Manfredonia, and is easily accessible from the state road 141 Delle Saline to Manfredonia. The park, offers sports activities, music, with the disco working both day and night. The park occupies an area of about 25,000 square meters and is provided with a lot for 800 cars,

#### **Acquafolies**

The Acquafolies water park is located in the province of Taranto, and can be reached from the Ionian coast road or the provincial roads near Pulsano (TA).

It consists of a semi-Olympic swimming pool and several water games, slides and attractions for both adults and children. A staff of animators organizes daily events and initiatives for the amusement of the park's guests. There are various relaxation areas with large green spaces, dining corners, toilets and a large parking lot.

#### **Felifonte**

Another amusement park is the Felifonte, which is located in Castellaneta Marina province of Taranto. The park offers attractions for adults and children, such as the strobe wheel, pony riding, inflatable areas. Of course, there are also shows, entertainment and a well-equipped catering area.

### **Zoosafari e Fasanolandia**

The Zoosafari of Fasano is the largest wildlife park in Italy and one of the largest in Europe. It hosts about 1,700 specimens of 200 different animal species - it also includes a water park, with over 25 attractions, museums, shows and suggestive paths to follow. The structure is located in the outskirts of the city of Fasano, in the province of Brindisi and about 40 km from Bari.

### **Curti Petrizzi Landia**

The park is located in Cellino S. Marco in the province of Brindisi. It includes a large wooded area with entertainment of various kinds, a mini zoo and a brand-new aqua park with 3000sqm of swimming pools, slides for young and old, but also massage service and an entertainment team capable of cheering up your days with games and group dances.

### **Splash Park**

The Splash Park offers its guests a wide choice of water slides for both adults and children. The park also offers a special area dedicated to the infants the Fabilandia. It also provides entertainment and shows such as Afroaerobics and foam party. The structure is located on the coastal road to Santa Maria al Bagno di Rivabella, in the province of Lecce.

### **Felisia**

Felisia is a park structured for thematic routes, such as the evocative Center of the Powers of Nature, which includes laboratories, tunnels and technological equipment that control the planet's moods and the most striking natural phenomena: earthquakes, volcanic eruptions, cyclones, storms. The structure is located in Castellaneta Marina in the province of Taranto.

### **Adrenalin Zone**

It is an acrobatic structure consisting of 60 different passages up to 12 meters high and a breathtaking ropeway with 55% slope. It is a set of high-altitude skill passages, articulated in 5 routes of increasing difficulty. The structure also includes a restaurant-pizzeria and is located in the district Scizzo, Poggioallegro in the province of Bari.

### **BOSCOSAURO**

A nature park for children. It is located in the territory of the city of Altamura (BA) and is presented as a nature trail where children can discover the dinosaurs that millions of years ago had left their footprints on the Murgia Plateau: there are no less than 30000 footprints dating back to 70 million years ago. The park also offers a path with educational activities such as working with clay, paper mache etc.

### The Dinosaur Park and the Paleontological Museum

The park is located in Brogo Celano near San Marco in Lamis province of Foggia. It's located on about 21,000 square meters and inside houses a multimedia museum with the room of sensations and a beautiful museum on garganic karst. Along the path of 2400 meters between local plants and ponds can be seen the fossil footprints, and 27 full-size specimens of animals that have populated these territories in the Cretaceous period.

### Adventure Parks:

Chinunno in Altamura (BA), Park of Briganti in Santeramo in Colle (BA) with tactile paths, barefoot trails and hanging among the trees, relaxation areas, picnic and paths immersed in nature.

## 7.4 Cultural Heritage Mapping

### **Tangible Cultural Heritage**

Apulia is an amalgam of art, culture, landscape and traditions, the evidence of which can be witnessed and discovered throughout its territory.

Below are some figures of these elements divided by categories and their provincial distribution.

	BARI	BT	FOGGIA	BRINDISI	LECCE	TARANTO
<b>Museums</b>	48	20	31	16	22	11
<b>Libraries</b>	253	19	99	44	155	62
<b>Theaters</b>	24	5	17	7	13	9
<b>Castles</b>	15	8	16	13	35	9

Figure 21: No of attractions per type

### Rocky Habitat

Rock settlements are environments created in the rock (caves) in which civil and religious life developed. This form of settlement has several testimonies in the region and concern the area of:

- Taranto north-west including the municipalities of *Massafra, Mottola, Palagianello, Castellaneta, Laterza e Ginosa*.
- The rocky habitat of the High Murgia: which includes the municipalities of *Gravina di Puglia, Altamura and Matera* (Basilicata Region). The rock civilization is the result of a long process of anthropization of the Murgia territory furrowed by the dense sequence of narrow incisions, deep depressions and tortuous crevasses: The Ravines (*Le Gravine*).

- The rocky habitat of the coastal Murgia: with significant examples of the coastal Murgia in the route between *Monopoli - Fasano*, where the jaggedness of the coastline and the absence of marshy and malarial areas have attracted, near the blades, the coastal population and a testimony of one of the largest Apulian dolines that is located a few kilometers from the city of *Molfetta*, “*il Pulo*”.

## 7.5 Natural Heritage

Puglia, thanks to the presence of various habitats, is endowed with a remarkable natural heritage and diversity of species preserved by a careful regional policy of conservation, protection and enhancement of natural and environmental heritage.

The number of Sites of Community Importance in Apulia amounts at 78 and they occupy a land surface of 393.637,6 Ha, corresponding to 20,34% of the regional surface and a sea surface of 74.535,5 Ha.

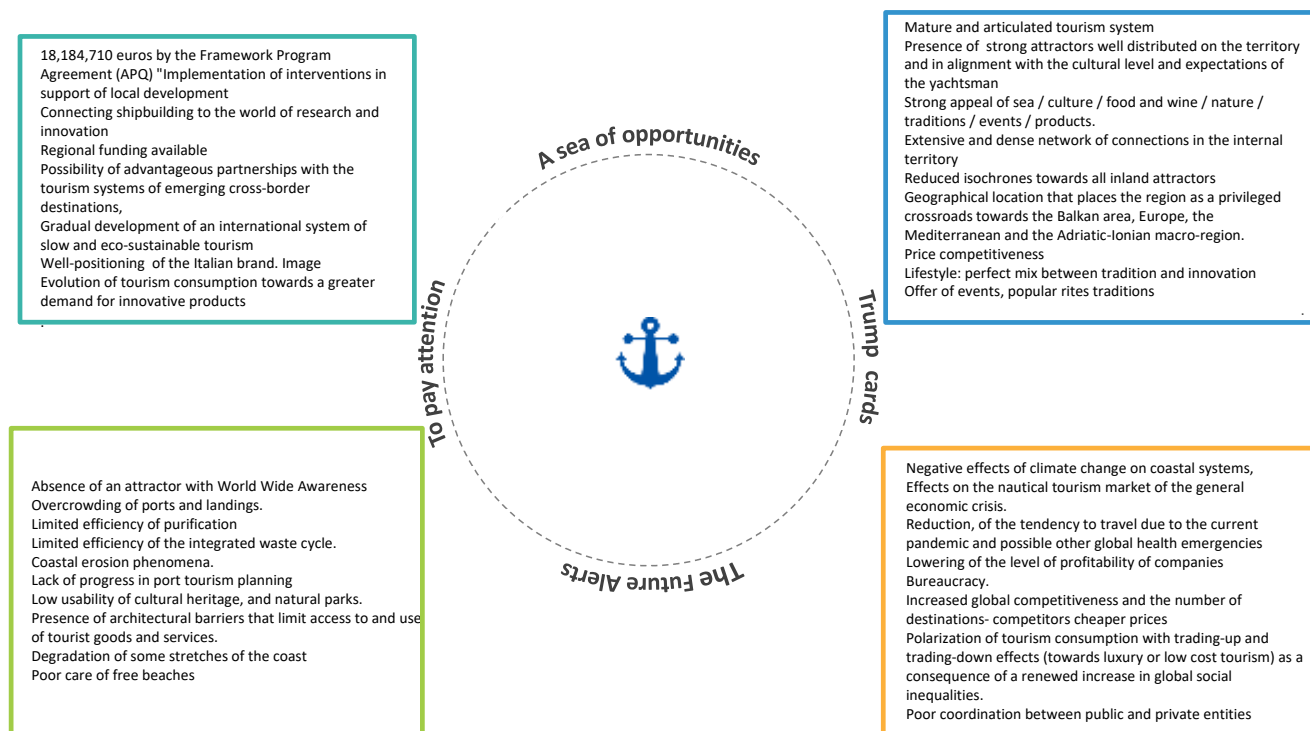
The Special Protection Areas in Apulia are 21 and occupy a land area of 262,134 ha

National protected areas include 2 National Parks (188,586.5 ha), 16 State Nature Reserves (11,183.6 ha), 1 Marine Protected Area, 2 Marine Nature Reserves while regional protected areas include 12 Regional Nature Parks (54,711.5 ha) and 7 Oriented Regional Nature Reserves (5,889.7 ha). On the whole, the protected areas have a surface of 258.108,6 ha, equal to 13,34% of the regional surface on land, and 20.649,2 ha on sea. Three wetlands of international importance (Ramsar Areas) have been identified in Apulia: Le Cesine (620,00 ha), Saline di Margherita di Savoia (3.871,00 ha) and Torre Guaceto (940,00 ha). They enclose ecosystems of fundamental importance for avifauna as they are located on the route that migratory species of birds use to move from the African continent to the Eurasian continent and vice versa. The most extensive protected areas in Apulia are distributed mainly in the provincial territories of Foggia and Bari. Other important habitats can be found in the system of ravines that runs through the low Murgia of Taranto, in the riparian habitats of the Ofanto river in the province of Barletta-Andria-Trani and in the large wetland of Torre Guaceto in the province of Brindisi, while in the province of Lecce there are many small protected areas.



Pic 10 Resources offer Summary

## 8 SWOT ANALYSIS TOURISM SECTOR





## 9 DEFINITION OF OBJECTIVES AND ACTION LINES

This chapter identifies and highlights the objectives to achieve in order to support tourism development in the area. As stated in the methodology section, the objectives framework is crucial in that it creates specific and tangible goals to aim towards.

### 9.1 Objectives of the Tourism Development Plan

#### **Expansion and consolidation of the tourist offer**

While the area of interest offers a great variety of tourism activities and can thus accommodate different types of tourism (cultural, leisure, etc.) there is still room for improvement and consolidation and connection between these activities. For example, while there are excellent opportunities to enhance sport tourism in the area, the subsector is not well marketed. This could be a focal point of improvement without the need of extensive resources and similar to the scope of the REGLPORTS project can provide opportunities to connect subsector of the tourism industry.

#### **Improving and adapting the tourism offer by differentiating it according to different expectations**

More specifically the already established tourism attractions and activities could tailor their services in order to provide “personalized” packages based on criteria such as visiting time, course intensity (for hiking activities for example, etc.).

#### **Enhance community awareness**

The community should be involved to the extend that they can participate in activities, provide feedback and be overally involved in procedures, staying informed on what the area has to offer.

#### **Improve the image of the area**

It is crucial to maintain a high level on the image of the promoted area, specifically shaped towards the targeted tourism.

#### **Seasonal adjustment**

Improve the susceptibility to seasonality. More specifically the area shows a steep decline visitor during the winter months. Thus, it would be beneficial to enhance and incentivize that period of the year.

#### **Increase the share of foreign tourism**

There is significant room to turn outwards and market the area more towards visitors from foreign countries.

#### **Involve as many stakeholders as possible**

Creating a network of facilities, services and activities even not directly related to tourism has proven to be beneficial for the quality of services provided overall, thus enhancing the sector in total.

#### **Facilitate an integrated tourism**

Linking inland activities and nautical tourism (cultural assets, local history and folklore, food and wine products but also buying our artistic handicrafts and participations to the events).

#### **Increase the level of technological and organizational innovation**

It is crucial in this day and age to facilitate visitors as much as possible through the technologies such as smartphone apps, maps, online booking, etc.

#### **Improve the accessibility of the tourist offer**

Prioritize equal opportunity and ease of access to all possible landmarks, activities and attractions.

#### **Adopt the principle of sustainability of the tourist offer**

Prioritize tourism sustainability (in resources, manpower, energy) to ensure long term viability.

#### **Create a destination brand REGLPORTS**

The creation of a unified Touristic Brand is important in providing a holistic approach to visitors and extend an image of connected tourism that can accommodate a variety of visitors.

#### **Increase port capacity**

Increasing and improving port reception by increasing the number of berths and the level of services can attract further tourism which will then be reflected in inland activities as well.

#### **Possible action lines of Tourism development**

- Identification of new and specific "tourism products" to be made available to tourists,
- Informative seminars on specific topics to raise awareness of the various actors: quality, culture of hospitality, territorial marketing, potential of local cultural heritage, etc.
- Training program for tour operators: languages, approach to quality, communication, etc.
- Realization of a program of cultural events and tourist attraction,
- Implementation of information tools (websites and applications for tablets and smartphones, online bulletin boards, tourist guides, etc.).
- Implementation of a management model for tourist quality,
- Creation of rich and possibly unified calendars of events.

#### **Expansion and consolidation of the tourist offer**

It is important to identify and propose other products present in the area in order to also create a clear picture of the tourism potential. It is foreseen the implementation of new thematic itineraries and / or strengthening

of existing ones and their connection with the hinterland in order to promote typical local products and other destinations with tourist potential.

### **Contribution to the economic development of the sector**

Through the integrated promotion of resources and the strengthening of the diversified offer on national and international markets.

Promotion of tourist destinations by implemented communication actions such as:

- Fairs, workshops, events, targeted events
- Educational and press tours
- Communication campaigns
- Marketing projects.

### **Enhance community awareness**

Given the underdevelopment of the nautical tourism destination it is important to enhance awareness about the potential of developing the tourism sector as well as its potential benefits. It is therefore critical that this message is promoted within the community and the community members are able to recognize the opportunities available to them in the tourism sector and to identify ways in which they can become involved.

The promotional campaign should be designed to highlight the current impacts of tourism in the territory and shine a spotlight on the individuals who are helping to develop the sector. While the core message of the campaign will be focused on the real opportunities that tourism can offer to the residents, the campaign should also seek to inspire pride in tangible and intangible assets that define the true sense of place.

### **Seasonal adjustment**

The tourism sector, both at national and international level, is extremely dynamic and competitive thanks to the globalization of markets and, consequently, to the presence of new players who take over and expand the tourist offerings of the destination. Therefore, it is necessary to create a tourist product that includes all the characteristics that the region offers (Nature, Culture, Sport, Flavors and Taste) to be used for the specific and often diversified demands of tourists from different parts of the world and can be proposed in all seasons.

Therefore, it is possible to consider other types of tourism aside from nautical tourism which could allow for an " amplification " and " lengthening " of the tourist season in Puglia. In the short term, it would be possible to focus on those elements that are already present but need further development in terms of information and marketing, sharing of objectives among operators, and a systemic relationship with public governance such as food and wine tourism, religious tourism, cultural tourism and green tourism.

**Facilitate an integrated fruition of the tourism and nautical tourism linked with (cultural assets, local history and folklore, food and wine products but also buying our artistic handicrafts and participations to the events)**

The nautical tourism can be further expanded enhanced other activities offered as part of tour packages include windsurfing, sailing, live aboard yachting and sport-fishing.

On the terrestrial side additional services that can be developed and offered as part of tour packages include birding, wildlife, night walks, hiking, camping etc. Also, there is the opportunity to develop agri-tourism attractions and experiences in the destination. The Region offers a large number of farms and farmhouses with numerous large-scale agriculture activities that include oil, wine, livestock farms, production and processing. Tourist excursion products can easily be designed around these agriculture activities.

### **Strengthen local capacity to provide tourism services**

Having a well-trained workforce is critical to the development of a high-quality tourist destination product Training of front-line personnel—those individuals that spend the most time with visitors such as front-desk personnel, waiting for staff in restaurants and tour guides—is vital to delivering a memorable experience. While there are some persons who are already working in the tourism sector, according to business operators, many do not always come with the requisite skills and understanding of the tourism sector. Many end up providing on-the-job training for those persons they hire. Additionally, there is a need for expanded services, especially in tour guiding. There are now several specialties that can be pursued which would make the tour guide more effective in delivering different types of experiences.

### **Providing training in hospitality and tour guiding services**

There needs to be an immediate expansion of the training provided in hospitality services management. This is an area in order to develop high quality and memorable service to visitors who come to the destination. This training can be done at the local educational institutions. The tourist guides must be trained in various sectors of tourism from nautical to more niche such as birding, archaeology etc. in the aim of satisfy the tourist demand. Moreover, it is recommended that the training activity be carried out in the territory of interest in order for residents to take advantage of the training opportunity provided.

### **Enhancing tourism market**

Local entrepreneurs will be able to succeed if they have the right level of technical support. There is a need to provide assistance in developing and pricing services for the tourism industry and to improve business

management skills. There are opportunities for local residents to become involved in the tourism industry and to develop their own businesses however many have not had the experience of actually being in business.

### **Improve the accessibility of the tourist offers**

Internationally, the accessible tourism market has been identified as a growing segment that could lead the way for social inclusiveness, as well as providing the industry with financial gains and destination competitiveness. Despite the increased number of people who travel with access requirements, the sector still lacks an understanding of the expectations and experiences of access tourists. In the Apulia Region for example there is low accessibility to cultural heritage and natural parks with presence of architectural barriers that limit access and use of tourist goods and services.

The accessible tourism covers an array of impairments from people who are immobile, visually impaired, an invisible impairment, parents with pushchairs, and seniors. There is the need to achieve dignity in service offerings to gain experiences that facilitate independence and equity of access, access to information before the travel that is clear and accurate to aid planning, and accessible transport and education.

### **Clear Information about the tourist venue**

It is necessary to provide transparent information about the tourist venue. The tourist with special needs have the necessity to identify how accessible the accommodation, transport, and activities are at the venue and if it would be suitable for their needs. Therefore, the availability of clear information that is communicated via a variety of channels and especially online information is an essential information resource for the access consumer. These types of communications can provide accurate information for a person with access needs to make informed decisions about what to expect at their travel destinations and to ensure they experience a pleasurable trip.

**Education and training** that creates awareness and opportunities for providers to meet people with different access needs is essential.

**Accessibility Guides** that give customers information about the accessibility of a business, through photos and descriptions of the business's premises, services and facilities.

### **Detailed Accessibility**

Information info about parking, bedroom detailed description, entrance etc.

### **Create a destination brand REGLPORTS**

The implementation of REGLPORTS Area Brand will contribute to convey and transmit to potential and real users the characteristics of the territory and its products in order to increase the reputation of the destination. It will encompass a set of marketing and communication methods that will help distinguish REGLPORTS' touristic product (destinations, routes, activities, etc.).

#### **Involve as many stakeholders as possible**

Through networking activities among the stakeholder, which include the exchange of expertise, knowledge and best practices, information and awareness activities, business consulting etc., aiming to establish synergies and strengthen cooperation between authorities and organizations of nautical tourism and support the tourist economic activity in the intervention area, with respect to the nautical/coastal environment.

## 10 IDENTIFICATION OF REFERENCE TARGETS

In order to identify the reference targets, the different types of tourism have been aggregated into two sub-categories:

### *Environmental and sports tourism*

Environmental and sports tourism, including nautical tourism, rural tourism and agro-tourism, adventure sports tourism, eco-tourism, school tourism, religious-spiritual tourism, leisure tourism, social tourism. This target, generally, moves in search of outdoor recreation, contact with nature, adventure, relaxation, socialization, rural and sporting activities; it looks for comfort and guarantee of naturalness; it gives importance to protected areas and parks, woods, paths, nature museums, sports facilities, sporting events, festivals and typical and organic products. Among the factors of attractiveness there are functional accommodations (beauty farm, agritourism, camping, small hotels, residences, boarding houses, rooms), typical restaurants, sports facilities (tennis, swimming pool, horseback riding, mini golf, various team and individual sports), theme parks and information services such as guides, excursions, courses and rural activities, bike rental, boats, etc.

Marine	Cultural	Rural	Urban	Environmental
Traditional sea use	Historical and archaeological heritage	Wine and food	Conference	Nature
Sailing	Art	Sport	Business	Adventure
Cruises	Religious	events, festivals etc.	Shopping	Ecotourism
Fishing tourism		Local crafts	Night life	Wellness
Snorkeling				
Diving, etc.				

Figure 22: Activities per type of tourism

### *Urban and Cultural tourism*

Urban and cultural tourism which also includes minor cultural tourism, youth tourism, congressional and business tourism, health and therapeutic tourism, educational tourism, ethno tourism, religious-spiritual tourism, leisure tourism. This macro-target seeks knowledge, cultural and historical deepening, recreation,



discovery, experimentation, relaxation, quality, safety and information; it emphasizes urban parks and green areas, museums and itineraries, cultural and folkloristic events, festivals, fairs and markets. Among the factors of attraction are comfortable and quality accommodation (especially hotels, historic houses, etc.), typical local restaurants with quality assurance, shopping, leisure services such as cinema, theater, dance halls and information services on history, events and excursions

With reference to the tourist offer available in the area, the following tourist destinations can be hypothesized: Cultural, Rural, Urban, Marine, Environmental and the corresponding thematic channels on which elaborate tourism products

All these kinds of tourism must be integrated and / or been complementary to the marine tourism, which constitutes the current strength of the region.

Referring to the selected target and namely families, young people, schools, couples, groups, seniors, business below is a table indicating the motivation of the destination by type of target.

		Motivation	Families	Young people	Educational institutes	Senior	Organized groups	Business
Marine	Traditional seaside tourism	Relaxation	T	H <sup>6</sup>		T	T	H
	Sailing, Cruises	Sports, Prestige	T	T		T	T	
	Marine activities (fishing, snorkeling diving etc.)	Fun	T+H	T+H		T	T+H	
Cultural	Historical and archaeological heritage	Thematic routes; education	T+H	H	H	T+H	T+H	
	Art	Events; competition	H	T+H	H	T+H	H	T+H
	Religious	Interaction and	H	T+H	H	H	T+H	

<sup>6</sup> T & H

**Tourist** activities are those that people spend at least one day overnight in a location other than their usual residence. **Hiking** refers to those activities that are completed within the day and do not use the overnight service

		socialization; events						
Rural	Wine and food	Taste itineraries	T+H	T+H	H	T+H	T+H	
	Sport	Organized activities	T+H	T+H	H	T+H	T+H	
	Events, festivals etc.	Entertainment	T+H	T+H	H	H	T+H	
	Local crafts, traditions	Workshop; visits; purchase	T+H	H	H	H	T+H	
Urban	Conference	Meetings; Business					T+H	T+H
	Business	Meetings					T+H	T+H
	Shopping	Urban walking	T+H	T+H	H	T+H	H	T+H
	Night life	Entertainment	H	H			H	T+H
Environmental	Nature	Nature itinerarie	T+H	T+H	H	T+H	T+H	T+H
	Adventure	Different itineraries: bike, trekking etc.	T+H	T+H	H	T+H	T+H	
	Ecotourism	Workshops and activities	T+H	H	T+H		H	
	Wellness	Relax	T+H	T+H		T+H		

Figure 23: Visiting motivation per target type

## 11 MONITORING INDICATORS

In order to ensure the effective implementation of the Tourism Development Plan it is necessary to carry out a frequently process of monitoring and measurement. These actions will be able to provide a clear overview of the progress made in achieving the foreseen goals using some measurable indicators reported here.

However, given the complexity of the tourism industry and its interconnection with other sectors, the process of monitoring, measurement, timing and governance of the Plan should be clearly and thoroughly defined by the appointed body in charge, in the framework of an integrated tourism strategy, since it is a process that will require regular updates to allow the strategy to be in line with potential changes in the Authority's policies, initiatives and priorities.

### **Enhancing awareness**

- % of residents with knowledge about the benefits of tourism
- Number of cultural groups that access technical & financial support
- % increase in the number of events/shows/activities hosted by cultural groups
- % increase in the number of formal cultural groups.

### **Develop cultural heritage and cultural attractions and experiences**

- % increase in the number of events/shows/activities hosted by cultural groups
- Increase in number and variety of artisan products available in the destination

### **Increase tourist offer**

- % increase in the number and variety of tourism product offers in the destination
- Number of tourism businesses registered

### **Strengthen local capacity in tourism services**

- Number of women/men/youths who receive tourism training
- Number of specialized training conducted

### **Create a destination brand**

- Increase awareness about REGLPORTS destination brand
- Number of promotional items that mention the destination
- Social media reach
- Increase in the number of visitors to the destination.

## 12 IMPACTS OF TOURISM PLANNING AND DEVELOPMENT

Tourism and nautical tourism represent a very important economic resource for coastal towns. Nevertheless, many of them, in order to increase their economic and financial level, have adopted massive interventions to encourage this growth. This over development can lead to environmental degradation and generally generate negative impacts on the surrounding ecosystem that can lead, as time goes by, to irreversible conditions.

As a result, examples are often found of regions that have fallen victim to a casual and poorly planned tourist development without giving due consideration to the negative environmental, socio-cultural and economic impacts on the community. In fact, the planning and development of tourism inevitably leads to impacts, both positive and negative.

### 12.1 Economic Impacts

Proper planning and subsequent management of tourism development leads to a number of economic benefits including direct and indirect employment opportunities, tax revenues, economic spillovers that other economic sectors usually have.

But on the other hand, tourism development can cause other economic problems such as losses, inflation and sacrifices that are made when developing tourism. In the territories with less economic development, it is possible to detect commodity price inflation, i.e., the increase in prices of tourist products/services by the locals due to the perception that tourists are wealthy and therefore can afford such an increase. However, this trend soon spreads throughout the entire economy, leading to higher prices for locals as well.

Losses in tourism can result from the import of goods and services or labor for tourism purposes. As a result, any income from tourism is used for their payments which results in income being taken out of the local economy.

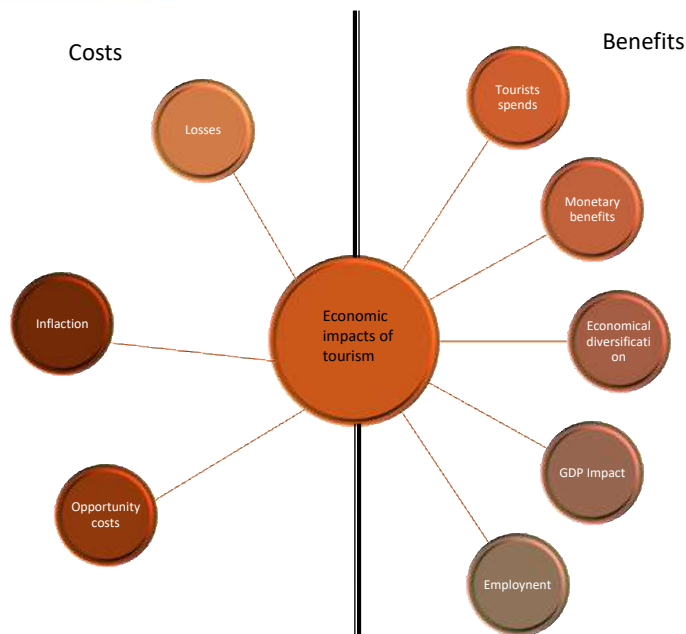


Figure 24: Tourism financial impact (1)

The Cost-benefits analysis of the economic impacts of the tourism in the coastal and inland area can be summarized as follows

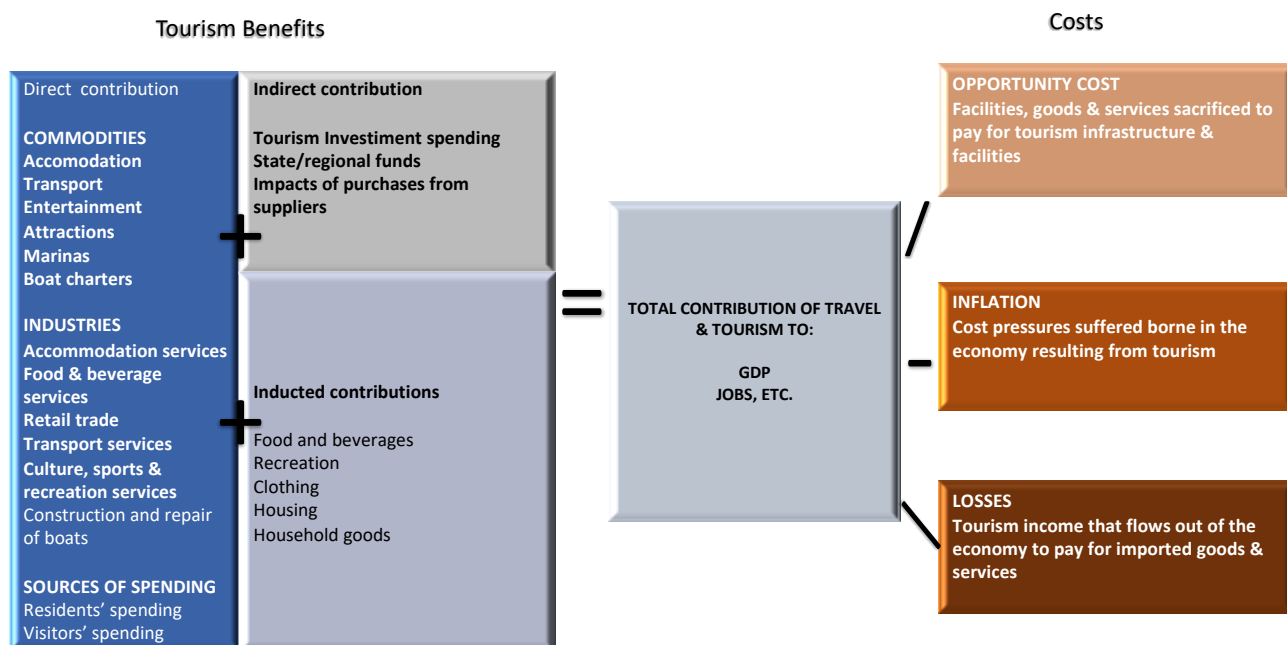


Figure 25: Tourism financial impact (2)

### Impacts in relation to the building of tourism facilities

The construction of tourism facilities of various kinds increases the pressures on natural resources and landscapes. Direct impacts on natural resources can be caused for example, by the use of land to provide housing and other infrastructure, the use of resources stone quarries, wood as construction materials etc. In

coastal areas it is possible to observe the phenomenon of filling for the creation of land for the construction of tourist facilities and infrastructure but also that of mega buildings, often illegal, as hotel complexes. Because of these human interventions, large-scale beach dune and coastlines erosion occurred. Another generator of negative impacts, however, can also be the no planned construction of marinas and touristic port in general, as their breakwater can cause changes in sea currents.

Excessive uncontrolled construction of the coastline and coastal area (ports, marinas) may generate negative impacts associated with the attractiveness of the nautical tourism offer (overcrowding, lack of moorings, cost.), which in the long term may lead to a loss of interest and a decline of the overall economic value of this sector.

All these interventions generate impacts both from the ecological and economic point of view of long term difficult to remedy.

### **Recreational impacts**

Recreational impacts may be associated with intensive tourism development in urban and/or rural areas. Noise from motor boats and jet skis, automobiles, and buses are some of the problems raised by these. However, these developments also impact dune soils by altering them, contribute to the loss of natural vegetation, disturb sensitive wildlife, and require extra demand of water resources.

### **Environmental impact**

The environment, either natural or man-made, constitutes the primary ingredient for the tourism product. As UNEP defines “*Environment is all of the external factors, conditions, and influences that affect an organism or a community. Also, everything that surrounds an organism or organisms, including both natural and human-built elements*”. The strong association between tourism and the environment is intensified by the fact that the tourism product is consumed at the point of production.

### **Natural resource exhaustion and pollution**

Tourism Pressure Causes Resource Depletion. Coastal regions are primary tourism destinations, sensitive marine and coastal environments and coastal communities suffer dramatically under these pressures. Uncontrolled and unplanned tourism development stresses natural resources especially in those areas with fragile ecosystems. Tourism has an impact on the quality of the environment - treatment and disposal of solid and/or liquid waste, particularly during peak tourist seasons, may be inadequate or, in the worst case, non-existent, increased water consumption etc.



### **Water resources**

Water, and especially fresh water, is one of the most critical natural resources. The tourism industry requires an excessive amount of water for its needs. This can lead to water shortages and dwindling water reserves, as well as generating an increased volume of wastewater. In regions such as Apulia, which are characterised by a hot climate, there is an excessive increase in water demand during the peak tourist season, which can reach 400/500 litres per day. Moreover, if the water comes from wells, excessive pumping can cause saline intrusion into the groundwater, a phenomenon that is well present in the coastal areas of the region.

### **Other Resources**

Tourism can create great pressure on resources such as energy, food and other raw materials that may become lacking. The increased demand for them and their transport aggravates the physical impacts associated with their exploitation. Due to the seasonal nature of the industry, many destinations have ten times more inhabitants in the high season than in the low season. These resources are in high demand to meet the high expectations of tourists (heating, hot water, etc.).

### **Pollution generated by tourism activities**

Tourism can cause the same forms of pollution as any other industry: air emissions, noise, solid waste and rubbish, waste water discharges, oil and chemicals, even architectural/visual pollution.

#### **Air pollution and noise**

Air, road and rail transport is also increasing due to the growing number of tourists and their increased mobility. Emissions from transport and emissions from energy production and use are linked to acid rain, global warming and photochemical pollution. Air pollution from transport has global impacts, including carbon dioxide (CO<sub>2</sub>) emissions from energy use for transport and can contribute to severe local air pollution.

#### **Solid waste and littering**

In areas with high concentrations of tourist activities and attractive natural attractions, improper disposal can be a major disruptor of the natural environment - rivers, landscape roadsides but also historical/archaeological areas. Solid waste and littering can degrade the physical appearance of water and shoreline and cause the death of marine species.

#### **Wastewater and groundwater pollution**

The construction of tourist facilities often leads to an increase in wastewater pollution. Wastewater pollutes the seas, lakes and rivers in the area, damaging flora and fauna. Wastewater runoff causes serious damage to underwater ecosystems because it stimulates algae growth, hindering the ability of marine flora to survive.

Another phenomenon that can be observed in the study area, is the salinization of water aquifers and the loss of wetlands. Salinization is directly linked to the increase in population and the over-exploitation of wells, which causes an intrusion of saline water, as the amount of water needed to supply the population is often insufficient.

#### **Impacts on marine environment quality**

Excessive development of nautical tourism also brings other disadvantages that directly affect the quality of the environment. They may be due to:

- Development of marinas in inadequate places
- Uncontrolled increase in the number of anchorages in bays of natural interest, which, together with visitors from the mainland, leads to increased pollution of the area.
- At the high season's peak, many seaside cities are invaded by anchored and moored boats, leading to enormous crowding which can significantly compromise the safety of navigation and mooring, the safety of boats and their crew members.

#### **Impacts on biodiversity**

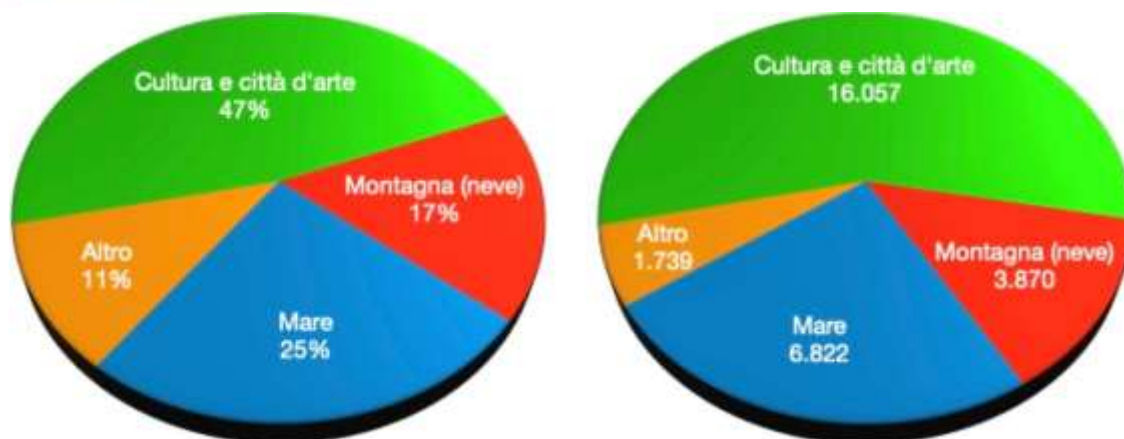
Attracting landscape sites, such as sandy beaches, lakes and riverbanks, are often transitional areas, characterised by species-rich ecosystems. Typical physical impacts include the degradation of such ecosystems. An ecosystem is a geographical area that includes all living organisms (people, plants, animals and microorganisms), their physical surroundings (such as soil, water and air) and the natural cycles that sustain them. The ecosystems most threatened by degradation are ecologically fragile areas such as wetlands and seabeds. One example is the effect of anchoring boats in Posidonia seagrass beds, where the survival of algae is threatened. One of the most striking effects on marine fauna is caused by the increase in recreational fishing, particularly underwater fishing.

## **13 MOLISE**

In order to work out a touristic development strategy, it is important to introduce a context analysis to explore the attractive capacity of the Molise region which also includes its harbor area.

Last summer 81% of Italian tourists had changed their travel behavior, they choose their destinations based on the perceived safety. In 2020 the number of tourists coming from the same region was around 24,4% with a peak of 28,3% in the south and on the islands.

During 2020 Molise region registered a huge touristic development, around 150%. The 48,7 % of the tourists came from other Italian regions, with peaks of 54,8% in the south and on the islands. One of the most interesting aspects is the analysis of what the tourists look for when they travel:



It should be emphasized that the city destinations, whose incidence has always been growing, in 2019 for the first time find themselves almost equaling the marine ones. About a quarter of leisure or leisure holidays are characterized by having more places of interest: 17.4% have two and 5.7% at least three. In particular, a visit to one or more cities is combined in 32.1% of trips with a beach holiday.

It is important to highlight that in 2019 towns and cities destinations had, for the first time, nearly the same number of tourists as the beach destinations. A quarter of the leisure holidays consists in visiting more than one place, that is to say that 32,1% of tourists tend to combine city destinations with beach destinations.

With regard to the accommodations 54,2 % of travels and 62,1% of nights are spent in private accommodation. Private accommodations are the vast majority in central and southern Italy, respectively 58,7 % and 58,6%.

58,2 % of tourists book their accommodation through websites, among them, 69% of the reservations are made through an intermediary, the remaining 31% has a direct contact with the chosen facility.

10,8 of private accommodations are booked through specific platform. While travel agencies, real estate and tour operator with their websites and app reach only the 9,6% of reservations.

The data of the city of Termoli during 2020 show that diffused hotels and residences gained the +2,6% of Italian tourists. According to the data, 47% of tourists come from southern Italy.

The comprehensive data of tourism in Termoli (hotel and various accommodation) is of 132.028 people, among them 125.574 Italians that is to say -12,3%. Last year arrivals were 37.021, among them 35.125 Italians, that is to say -30,7%.

The tourists came from different Italian regions, 37% from northern Italy, 16% from central Italy and 47% from southern Italy. The negative data is the absence of foreign tourists, due to the increased covid-19 cases. In Autumn, especially in October, tourists preferred extra-hotel facilities. The latest data, referring to December, show that hotels regained value, tourists preferred hotels over residences. Hotels registered +1,6% of presence, while non-hotels facilities registered -39%.

To promote tourism, the tourism sector in general must provide not only a digital showcase of the destinations, but it is necessary a specific vision and a strategic management that put together entrepreneurial interests, professional competencies specifically on tourism, on its laws, on environmental protection and its revaluation and also on cultural heritage.

These factors together cannot be solved solely by creating a digital showcase, it requires a strong organizational work, where local institutions must cooperate to express and reevaluate the authenticity and the cultural heritage of the area.

The individual experience is the core of the contemporary travel. The tourist satisfaction and the appeal of a location are based on experiences, such as gastronomy and the authenticity of culture of each destination. During the covid-19 restrictions, the consumers even though they were forced to stay home, they continued to explore local culture, history and to get passionate about every county peculiarity, therefore it is compulsory to develop a narration of the destination. It is possible only through an active cooperation between every operator.

### 13.1 Focus Areas & Strategic Actions

focus areas that are the most significant for the strategic development planning are: marketing, social media, influencer marketing, website, life-long learning of human resources, reevaluation of the territory, modification and increase in terms of structure for nautical tourism.

strategic actions:

- brand positioning: Molise as an interesting region. Reevaluation of the coastline, of gastronomy, culture, dialects and villages.
- development and care of web sites in more than one language, creation of social media pages where tourist can find pictures, information, clips on the treasures of the city.
- management of tour desks that can show routes, that can offer both all-inclusive package and customizable tour package.
- training of the staff: they have to speak more than a language and they have to know the peculiarity of the area. They should be counselor, not only tour guide.
- development of a new concept of tourism: tourism as authentic experience, not only bathing tourism.
- establishing relations and contact with the territory and with the local population.
- identification of the regional peculiarities to develop a communication strategy designed to make them available to national and international tourists.
- increase the level of services, facilities and accommodation. It is mandatory to take care of the territory perception, the tourist should have the possibility to choose the kind of vacation: bathing tourism, cultural tourism, wellness, etc... it is essential to make Termoli a location where people can find every kind of vacation,
- promoting and advertising on the local festivities: “San Basso” etc...
- inviting influencers or famous people to spend a holiday in the city, to discover its beauties.
- up-to-date website, translated in at least 3 languages (English, German and French because those are the languages of the majority of tourists).
- ensure taxi and shuttle to the attractions, establishing guided tours that should be well-publicized on the web-site, social media and also through the most used online platform (tripadvisor; booking; tiketone).
- hosting national and international exhibition to the MACTE.
- life-long learning of the staff both of the private and public. They should know how to handle their social media profiles, how to use marketing strategies and how to welcome the tourists, this is possible only with the cooperation of the Tourist Board.

- adaptation of the accommodation to various kind of tourism and to the welcoming of international tourists.
- card Termoli: tourists who book a holiday in a hotel/ residence etc in Termoli... receive the “card Termoli”, with which they have a percentage of discount in each affiliated restaurant or shop in the city. The “card Termoli” has to be seen as an advantage for local entrepreneur and for tourism in general.
- ensure taxis and shuttles from the touristic harbor to the city center and to various hotels and accommodation.
- promoting typical products through dedicated markets, workshop etc...
- enhancement of the fish market: festivals during the opening and closing of the fishing week; experiences on fishing boats.
- experiential routes: learn how to fish, seashore in e-bike, seashore on horseback, Trabucchi seashore by boat with guided tours and new routes.

### 13.2 Development Planning in Action

The nautical tourist needs not only personal services, but also to his boat: it should be possible for the tourist to leave his boat to the staff. The staff must take care of the boat, they can give refueling services or cleaning the boat while the tourist enjoys his holiday.

Welcoming the tourist when they arrive at the harbor is essential: the staff have to welcome them and provide information, that is why it is important to know more than one language and to know the services that the tourist can have.

The main touristic attractions are:

- borgo medievale, history and origine.
- Torre sinarca, history and origin.
- Castello Svevo. (castle)
- Cattedrale. (cathedral)
- A Rejecell
- Various churches.
- I trabucchi
- Belvedere della torretta.

Through the listed attractions a narration can be shaped and told, the narration of the city can be useful to attract tourist interested in the cultural heritage and to history. A new narration of the city has the purpose to attract different kind of tourists.

Accommodations should offer more services and the staff should be tourist-oriented, they should be able to give information not only about the bathing sites.

Some accommodations in Termoli are:

- B&B Albysuite
- Mar&sol
- Hotel Giorgione resort & beach
- lamartino Rooms
- Hotel Santa Lucia
- Hotel Meridiano

- Albergo Quarantadue Quindici
- Hotel Mistral
- Locanda San Giorgio
- Pensione Villa Ida
- Dimore dei Marinai - Stanza del Faro
- Zio Tonino B&B Country House
- Locanda Alfieri Albergo Diffuso
- Residenza Sveva

A list of the local festivals is also compulsory to make an effective touristic planning:

- Altari di San Giuseppe (18 Marzo).
- San Basso (4 Agosto).
- Incendio del castello (15 Agosto).
- Sagra del Pesce (ultima settimana di Agosto).
- Festival del Folklore.

One of the most important works on the reevaluation of tourism in the Molise region is the development of 5 thematic routes. The routes design 5 different itinerary from Termoli harbor toward the center of the region itself. Through these routes, tourists can see and appreciate lots of the villages of the central Molise such as Montenero di Bisaccia, Portocannone, Ururi, San Martino in Pensilis, Palata, Guglionesi, Larino, Casacalenda, Guardialfiera, Acquaviva, San Felice del Molise, Montefalcone del Sannio, Trivento, Macchia Valfortore, Campomarino, Montemitro.

For further information the documents are available on the website.

The cooperation with the local facilities is compulsory, in order to give tourists a positive impression in terms of responsible and safe tourism.

### 13.3 Policies and Practices of the Associated Authorities

The “card Termoli” draws an actual line of cooperation between the public and private, that can be profitable for both.

The eating out facilities on the territory, such as restaurants, bar, wine bar should enhance and promote the local gastronomy, because tourists look for an holistic experience, to taste and smell everything around them. The culture of a place is also its food.

The suggestion is to shape also a narration of the local gastronomy: why is the brodetto termolese so important? What is the scescill? What do those dishes tell? What is their cultural connotation?

Last but not least, wines and oils are to be experienced. Local becomes global through marketing, social media and moreover through the training of the staff.

The slogan is: hospitality and promotion.

Actually, in the Termoli harbor the tourists can park their own boat and refuel it. They also can enjoy some of the tastiest restaurant of the city and bars.



### 13.4 REMARKS

Summing up what said before, it is mandatory the cooperation between every interested person and institution. What matters the most is also the development of new activities, from the harbor towards the whole city, to promote the tourism.

Communication is then the key to attract the tourists, it is important to give a choice, to give them routes and different kind of options, not only in the summer. We believe that eno-gastronomy should be highly promoted and, to conclude, the staff must be trained in a constant way.

## 14 ALBANIA TOURISM DEVELOPMENT PLAN

### 14.1 Planning of coastal area Development, Ports and Marinas as well as Tourism

#### Development In the respective areas

The objective of the integrated coastal plan is to provide a vision and development strategy that will guarantee prosperity for the near future and the protection and preservation of the coastal zone for future generations, where the integrity of marine ecosystems remains a priority. The figure 1 below shows the urban territorial hierarchy seen in the coastal area in Albania.

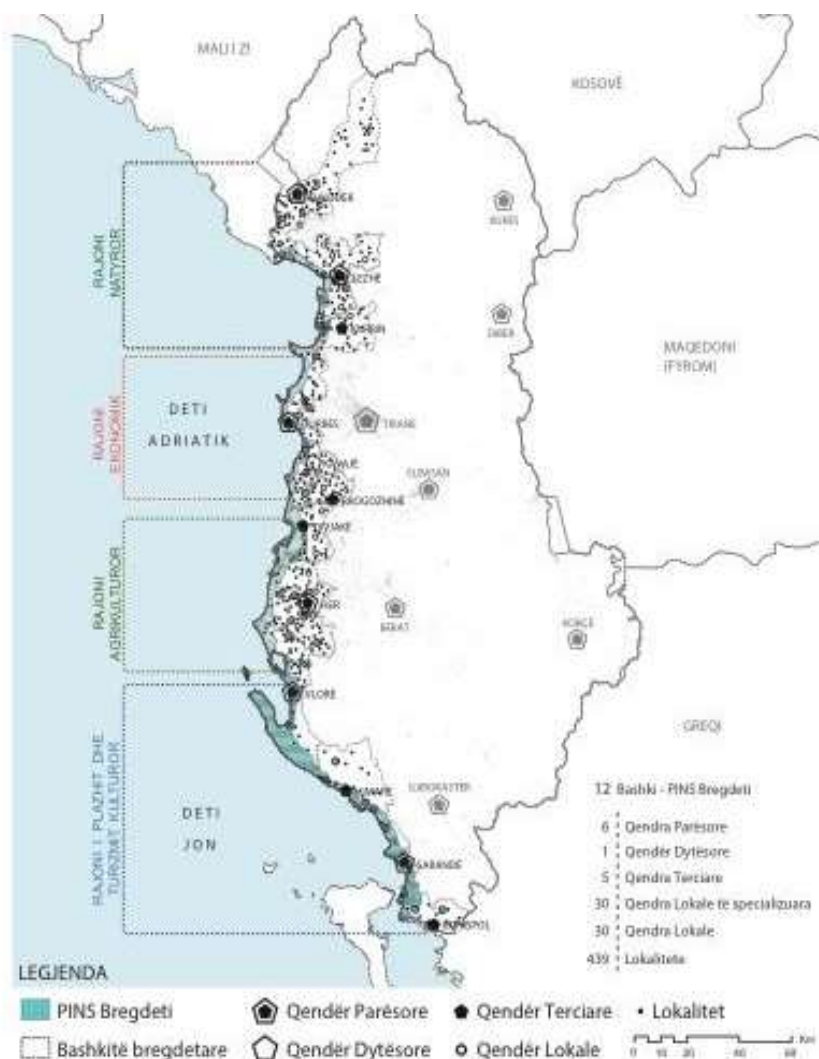


Figure 26 Distribution of development centers in the coastal area

Since 1993, the National Government has been engaged in building a strategic framework for tourism, having identified its potential and importance for the social and economic development of the country. Hereby a table reporting the latest strategies carried out by the Albanian Government.

2014	<i>Draft Tourism Strategy 2014 – 2020 (Ministry of Urban Development and Tourism, 2014)</i>	<p><i>Government authority: The Ministry of Urban Development.</i></p> <p><i>It was based on the most important elements of the previous strategies, including the best practices of the OECD countries, as well as sustainability issues.</i></p>
2018	<i>The Strategy for the Sustainable Development of Tourism 2018 – 2022</i>	<i>Ministry of Environment and Tourism, the strategy remained incomplete and in draft form until it was substituted by the 'Strategy for the Sustainable Development of Tourism 2019 -2023'</i>
2019	<i>The Strategy for the Sustainable Development of Tourism 2019 – 2023</i>	<i>Elaborated by the Ministry of Urban Development and Tourism the strategy set up new future directions of Albania tourism development: It sets up a new philosophy and implementation platform, with guiding principles for sustainable development, clear and comprehensive strategic directions, priorities, measures and feasible institutional, implementation framework and resources</i>

*Table 3 Latest Strategies related to the tourism sector*

One of the National Tourism Strategic goal (2.1) foresees the definition of priority areas for tourism development and orienting private investments towards them “For sustainable and well-planned development, the public and private investments should be directed to areas of priority tourism development. In line with the National Sectoral Plan for the Tourism Field, detailed development plans will be developed for each of these areas and specific policies will be developed to encourage private investments in them”. These Priority areas identified can be viewed in the table below



TOURISM DEVELOPMENT PLAN

## 15 SWOT ANALYSIS

The following analyses is part of the strategic planning process, since the components of SWOT are needed to develop strategies and plans and also impact their implementation. The list of Strengths, Weaknesses, Opportunities and Threats should be frequently updated, according to the environmental analyses and all data gathered for a destination with the focus of Nautical Tourism. The action plan should be in line with the SWOT analyses. Actually, after taking in consideration the conditions of the country, the list includes the following:

Strengths	<p>Geographic positioning</p> <p>Natural environment – considered as an important attraction for NT</p> <p>Other cultural and heritage assets that may be complementary to the NT supply and product</p> <p>Territory appropriate for development of Ports and other marinas</p>	<p>Problems related to environment and pollution in the port areas</p> <p>Lack of tourist and marine appropriate infrastructure</p> <p>Short tourism season</p>	Weaknesses
Threats	<p>Competition in the area, especially from countries with developed NT</p> <p>Lack of knowledge and information of tourists for incentives in Albania</p> <p>Centralization of decision making</p>	<p>Development of coastal planning in national territory and also territorial plans in municipality level, (PPVs) that have taken in consideration the development of sustainable tourism and including NT.</p> <p>More focus in financing in EU level in maritime economy and Maritime tourism, Nautical Tourism</p> <p>Raised investment of GoA in ports with aim of improving infrastructure for cruise and other components of NT</p> <p>Legal initiatives for 0 tax for Sailing boats and other appropriate vehicles for NT</p>	

Table 4 SWOT Analysis - Tourism sector Albania

## 16 THE VALUE OF TOURISM

Nowadays, Albania signs the fastest growing tourism sector among EEA countries with over 5.3 million international tourist arrivals reported for 2018. According to the Economic Impact Report of 2018 of the World Travel and Tourism Council<sup>1</sup> (WTTC), along 2017, the tourism sector recorded a direct contribution of 8,5% of the Country's while including indirect multiplier effects, total contribution is almost three times higher than \$ 3.47 billion, accounting for about 26.2% of the GDP, positioning this sector as one of the main contributors to the development of the national economy.

In terms of employment the tourism employs about 7.7% of the total labor force in Albania, while by 2028 this number is projected to grow to 8.8%.

Referring to the same report of the World Council on Travel and Tourism (WTTC), investments in this sector accounted for about 7.5% of all investments in the country, while by 2028 this figure is projected to rise to 8.2%.

In the year 2017, there has been an increase in employment in the sector amounting to 93,000 employment directly related to tourism and 291,000 jobs attributed to the other indirectly related sectors while there are approximately 22,785 active companies operating in the sector . The accommodation and food services sector includes restaurants, facilities, and other food and accommodation facilities such as hotels, guesthouses, hostels etc. This sector accounts for about 15% of the entire service sector and 11% of the entire economic activity in Albania.

According to data from the Institute of Statistics of Albania in 2018, foreign tourists stayed an average of 4.3 nights in Albania, with 76% residing in hotels while spending an average of 52 EUR/day.

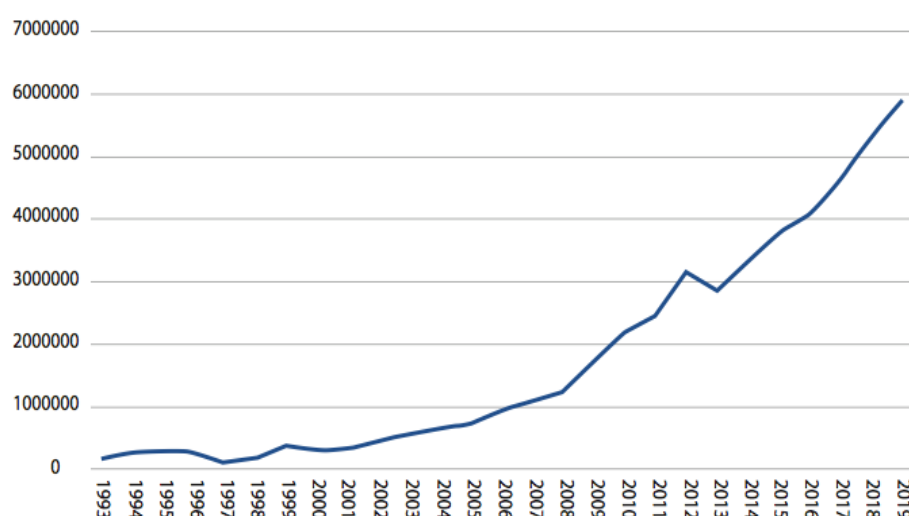


Figure 28 Tourist presences in Albania 1991-2019



## 17 THEMATIC ROUTES

In order to define the Thematic Routes better analyzed in the dedicated study it has been considered the following forms of alternative tourism

- i) Cultural and Heritage tourism, based on the unique identity of visited site,
- ii) Health Tourism, depending on the resource and type of facility,
- iii) Conference-Congress Tourism, depending on the type of activity, and the aim of the meeting,
- iv) Sports Tourism, based on both excitement and the ability to perform the activity,
- v) Contact with Nature: Ecotourism activities, based on preserved environment having natural riches a
- vi) Entertainment Tourism, based on availability of wide range activities depending on amusement

The tourism typologies to be developed and/or enhance in the country are:

### **Coastal tourism**

This category includes coastal tourism concerning all activities that take place on the seashore or that proximity to the sea, and maritime tourism referring to activities that take place at sea, including tourist cruises (yachting, sailing, cruising), marinas with all related services and activities, and marine sports.

### **Heritage tourism**

The historic and cultural resources associated with people, events, or aspects of a community's past give that community its sense of identity and help tell its story. These resources are the most tangible reflections of a community's heritage. History can and should be used as a selling point for a community. The recognition of an area's historic resources can bring about neighborhood revitalization, increased and sustainable tourism, economic development through private investment, and citizenship building. When communities' travel-related entities partner with public or private organizations, the historic, cultural, and natural resources are more effectively promoted to meet the heritage traveler's desire for an integrated and enriching experience.

### **Cultural tourism**

Referring to cultural tourism, this form of alternative tourism became one of the largest and fastest growing global tourism markets. In recent years, the dynamic growth of cultural tourism can be explained by the fast growth of demand for trips to various cultural attractions and amenities. The increase of educated people globally, the evolution of technology especially of internet, giving the chance to tourists to create their own

cultural tourism products supported the aforementioned growth. Technology has influenced deeply tourist consumption as cultural sites are now experienced individually through the earpiece of an audio guide or the viewfinder of a camcorder. As culture tourist become more interactive and creative, the cultural tourism need to be repositioned and to become also more “creative”.

### **Ecotourism**

Ecotourism has become the fastest growing sector of tourism industry. Ecotourism developed in 1970s and 1980s within the boom of the environmental movement which was taking actions against the negative impact of mass tourism to environment. The environmental movement recognized that nature is essential to human well-being. Recently, this belief has been enhanced by science confirming that biodiversity is necessary both for human well-being and survival. Gradually, demand for nature-based experiences of an alternative nature, that mass tourism didn't provide, increased. Less developed countries found the optimal solution to their problems in the face of nature-based tourism as they realized that offers a means of earning foreign exchange without destroy their natural resources. Many of these countries identified ecotourism as a useful tool that serves conservation and development goals (Blamey, 2001). Anyway careful planning should take place since ecotourism has its own problems like not supporting economically the local communities or causing problems in the ecosystems if not planned properly.

### **Creative Tourism**

Creative tourism is considered to be a new generation of tourism. It involves more interaction, in which the visitor has an educational, emotional, social, and participative interaction with the place, its living culture, and the people who live there. They feel like a citizen. This third generation requires that managers also evolve, recognizing the creativity within their city as a resource, and providing new opportunities to meet the evolving interests of tourists”. The new challenge for the regions globally is to detect ways of incorporating creativity and making tourists to believe that they are in the unique place they desire for their quality holidays.

Today, tourists visit places both for their creative atmosphere and the opportunity of doing creative activities themselves. In fact, “creative tourism” can be broadly defined as the cro-creation of creative experiences with tourists. It needs careful design, according to the principles of visibility, permeability and flexibility.

#### ➤ **Some suggestions**

Some of the routes identified and built as part of this project can support a range of initiatives and networks of private businesses, tour operators and agencies and tour guides, as well as agencies or public administration offices in the municipality to promote and develop destinations.

Collaboration between Vlora, Himara and Saranda municipality can develop support for NT in the Riviera, where the opportunities are enormous for the tourist to stay and experience the Albanian tourism product. Local guides can develop further their services, not to mention local restaurants and entertainment businesses. Other services in the naval industry are advantages since the University of Vlora in the southern region has its naval engineering branch and tourism branch. Better knowledge opportunities can arise through collaboration between academia and businesses to support NT in the future.

A series of collaborative consortia between public and private partners can be oriented through this study and the creation of routes to develop their destinations towards sustainable NT.

## 18 STRATEGIC TOURISM PLANNING

### 18.1 Strategic Planning of Tourism of Albania

When planning to develop NT as important Maritime tourism, the discussion about best practices and measures that should be undertaken in the related policies and plans, is of special importance. Exactly these measures will serve to the related authorities to be careful and to take into account the environmental impacts of NT development. The measures to be taken and the recommendations will certainly consider the listing of impacts from the environmental analysis and also the SWOT analysis above. It will be based on the elements and activities on which the Tourism industry is based and specifically the operators offering the NT and Nautical tourists forms.

Albania is one of the Mediterranean countries, which together with other countries are trying to create a profile for the development of the NT, due to the sustainable resources of the coastal area, not only in terms of water resources, but also in terms of resources directly or indirectly related to the coastal area, such as culture, heritage, nature and environment.

Based on these important resources, the Albanian government has recently focused on promoting NT development by drafting the appropriate legal framework and promoting tourists and maritime tourism activities. But this development faces challenges such as the reduction of some of the problems observed in the development of NT in other countries: seasonality and problems with sustainable development, especially in terms of infrastructure developments. So, the development of clear objectives related to NT is necessary and they are oriented in this study in 4 main aspects:

- Increasing general level of development of the space and increasing the standard of living of the inhabitants, increasing employment and quality of living
- Developing the harmony of the space and traffic corridors in the important coastal and sea routes
- Spatial, economic and infrastructural solutions and protecting of sea and coastal goods in accordance with the development and preservation of the quality of neighboring areas.
- define the development priorities in which protection of sea environment will have the primary importance, and the expansion of nautical tourism ports will be complying to the main ecologic criteria.

The development of NT has to be planned, but the development policy depends on the stability of the system, or the development level of a particular country. The developed countries mostly have established system in which NT has its development policy in compliance with the general policy of economic development. Problems are present in less developed counties or transition countries where there is focus on economic growth and lack of awareness and attention about environment problems, which have their impact on

people's welfare. Development presumes integral managing, especially coastal and sea area. The growth is only one component of development and one of its promoters, while development is a process of changes in all spheres of life.

There are four main factors that are impacting the development of nautical tourism in ports according to their business model, including sustainable development function

1. **investments in human resources** permanent professional training (lifelong education of personnel);
2. the achievement of the **quality standard**;
3. **the assessment of the location and the building level achieved**;
4. **Technical and technological conditions for sustainable development.**

The development of tourism in general and its various forms as in this case the development of NT requires some avanguard actions as well as cross-border type projects or projects and initiatives where different countries interact to benefit from the common experience. This helps to promote the resources to build a product that suits the needs of international tourists, to compete in a market with clear standards and requirements, as well as considerable competition.

This study first of all presented a variety of resources where the further development of NT along the Albanian coast could be supported, as well as ways to select and promote some important elements from the point of view of alternative sustainable forms of tourism such as cultural, heritage, adventurous and natural tourism. This new product in interaction with the existing tourist product, but especially being developed in a sustainable way meets the requirements of a tourist profile, not only with the desire to explore the sea, but also the local culture and tradition associated with the sea, make them stay more along the coast and thus have an unforgettable experience.

## 18.2 Tourist profiles

There are missing studies on nautical tourist profile/segments in the national and international markets. If this study has to count on other studies on different forms of tourist profiles, this is to understand that what other combinations can be done to achieve objectives of sustainability and seasonality reduction as well as raising the economic benefits of NT. In the light of combining NT with other forms, a list of different forms of tourism and tourist profile can help. The tourist industry offers a wider range of holidays than ever before, and is continually seeking out newly- emerging or potential niche consumer groups, such as:

- Cultural tourism and heritage tourism – in combination with NT, this type of tourist wants to travel by sea and explore the coast with the mentioned forms of NT, but also wants to explore the Cultural and heritage part of the places. It can be
- Sustainable tourism – the tourist profile here should be seen in the light of the one who might use light infrastructures with care about the environment and also who sees the NT activity as one helping the communities, with the desire to explore and buy local products, cuisine and gastronomy, handicrafts etc.
- Rural tourism (gaining a lot of ground in recent years), can be developed in Villages of Albanian Coast, and other similar countries with villages along the coast, to attract the kind of tourist who wants to explore
- Adventure tourism. In the area and the proposed itineraries, types of tourist's profiles want to explore other adventurous activities in the coastal area that together with NT can bring tourist satisfaction. Such activities can be cycling, climbing, skydiving, etc.
- Health or relaxation tourism – this type of tourist wants to experience good health and structures of relaxation, but may be not very much related with NT.
- Gastronomic tourism – tourist who wants to enjoy local food and cuisine
- Sports tourism - related directly to nautical sports.

To this list, many alternatives could be added, which have arisen as a consequence of the drive towards diversification and whose objective is to attract tourism to specific destinations via a variety of methods.

The same thing happens with campaigns to promote tourism. Digital marketing and, above all, social networks are important channels in tourism marketing.

Cruise tourism is a form of NT that is more developed and there are studies that have explored the tourist profile as higher yield tourists, spending, on average, much higher amounts per day 7 than other categories of international tourists. Diversifying the offer towards older and younger generations is important.

Older generations with a higher purchasing power and availability outside the main season may be kept in NT activities until a higher age if the offer is better adapted to their particular needs. This may be achieved by a combination of infrastructure and service improvements such as

- i.) Boats designed for easy circulation between roof, cockpit and interior,
- ii.) Mooring platforms adapted for easy access to yachts and mooring assistance services offered by marinas for leaving and entering the berth
- iii.) And adapted socio-cultural service offer in marinas and their hinterlands.
- iv.) The offer for younger generations may further include:



1. Easy rental of NT equipment,
2. Activities for children, nautical schools and organized competitions
3. Innovative ways to use marina space outside main seasons. In general, a diversified offer linking marinas and their hinterlands should seek to develop activities that benefit and integrate both the local population and tourists.

Diversifying the offer may be facilitated by including marinas and any SMEs as profit centres into local, regional, national and cross-border development plans. These actors may use appropriate ICT facilities to advertise and sell their diversified/combined offer.

### 18.3 Resource mapping

When planning about NT and the location of a nautical port from spatial perspective, multiple development effects have to be considered including economic, social and ecologic effects. Successful factor analysis will contribute in deciding about the nautical tourism areas and port location and their formation into a model that is subordinated to basic sustainable development principles, which requires inclusion of local inhabitants, local and/or regional government and private investors.

When planning sites for the construction of NT ports it is necessary to establish the:

1. Natural and spatial features of each site:
  - ↳ its geographical position
  - ↳ its basic geological characteristics (vegetation, flora and fauna)
  - ↳ its climate features (winds, sea currents...)
2. Condition of traffic infrastructure, energy production infrastructure and municipal infrastructure
3. Means and possibilities of disposing of waste generated in ports of nautical tourism.

#### 18.3.1 Tourism Attractions

In the country there are an important number of natural attractions including nature park, protected areas wetlands etc. There are 2000 cultural monuments and the historical centers of Berat Gjirokastra and Butrint are listed as UNESCO World heritage sites.

The attraction list also includes the archaeological parks of Apollonia, Shkodra, Bylisi, Amantia and national museums in Tirana, Kruja (Museum "Gjergj Kastrioti Skanderbeg" and the Ethnographic Museum), Berat (the Iconographic Museum "Onufri" and the Ethnographic Museum), Shkodra (Marubi Museum), Korça (Museum of Medieval Art).

### *18.3.2 Accommodation facilities*

In 2018, there are 2,437 active accommodation facilities in the country, of which 65% of the total are hotels and the rest are houses and rooms for rent. In addition, according to National Business Center data, 75 tour operators and 322 travel agencies are licensed in the country with different distribution in the regions, with most concentrated in Tirana.

## 19 OBJECTIVES AND ACTION LINES

The NT development in the area will follow an integral approach in managing all its activities in the line to sustainable development.

The vision is to develop NT considering sustainable development as a crucial for managing coastal economic and ecological system, with necessary ecologically acceptable infrastructure, encouraging direct users (tourists, businesses and community) of coastal resources in their sustainable development orientation and preventing possible deviations.

The mission is to bring economic development through encouraging those investments and NT Activities that will attract tourists and fulfill their needs through the SD model for bettering lives of the communities now and in the future.

Strategic goals for NT development will follow four areas:

- ✚ Development of human resources necessary for NT, through permanent professional training, lifelong education of personnel), in all the value chain following the supply for NT development. It is also important to develop awareness and to focus the development on education of managerial personnel in order to preserve natural resources for future generations.
- ✚ Establishing economic and demographic balance of growth and development not only in coastal and sea area, but also inland around the coastal area, through developing quality standards for NT and other related businesses and activities of the value chain, tourism businesses as well as other businesses non directly related to tourism.
- ✚ Developing systems for development of tourism destinations and tourism products in order to achieve reduction of seasonality as a main aim in NT areas.
- ✚ Developing and establishing the system of management of the space and natural resources, according to the principles of sustainable development
- ✚ Protection of sea and coastal environment on the principles of accepting capacity of the environment, integrated approach of protection and development, and preventing pollution of the environment
- ✚ Technological and ecological aspect of protection of sea environment will be based on clear legislation and measures contributes to efficient management of coastal and sea resources.

### **More specific objectives include:**

- ✚ Increasing general level of development of the space and increasing the standard of living of the inhabitants, increasing employment and quality of living
- ✚ Developing the harmony of the space and traffic corridors in the important coastal and sea routes

- ✎ Spatial, economic and infrastructural solutions and protecting of sea and coastal goods in accordance with the development and preservation of the quality of neighboring areas.
- ✎ Therefore, it is necessary to define the development priorities in which protection of sea environment will have the primary importance, and the expansion of nautical tourism ports will be in compliance to the main ecologic criteria.
- ✎ The action plan follows three important lines regarding important levels of implementation in national, regional and local territory.
- ✎ In order to define the best implementation strategy an action plan needs to be defined. It follows three important lines regarding important levels of implementation in national, regional and local territory.

In relation to business operators the action plan should have in focus:

- ✎ Tour operators and tourism agencies, agents, in their process of developing services and new products related to NT, but also aiming at reduction of seasonality.
- ✎ The development of friendly business environment, infrastructure, financing, legal support, etc.
- ✎ The proper incentives for developing new production and service industries to deliver in the value chain.

In relation to territorial planning, which is the line of implementation from the viewpoint of local and central government the action plan focuses in:

- ✎ Achieving a better quality of life in the coastal cities and in the villages around them and for a sustainable tourism development, some services should be provided in these centers to ensure their importance as public and private places in particular for services.
- ✎ Tourist sites such as marinas, resorts, sports and cultural activities should encourage the creation of synergy effect in tourist centers to increase the sustainability of these centers.
- ✎ The preservation of the natural values of public beaches as well as green spaces should be guaranteed, starting from mountainous areas to coastal areas.
- ✎ Municipalities should take into account the requirements for these services to ensure a high quality of urban style and structure of local and tourist residential areas.

The professional management of territorial development in the Albanian development plan is realized through the inclusion of new residential areas in the existing areas, to avoid the expansion of scattered and detached settlements, and by protecting the free space by defining a network of open spaces. In this way, on the one hand, urban sprawl in vacant spaces is interrupted, and on the other hand, the necessary space is given to economic development.

- ✎ In relation to environment and sustainability, the action plan should focus in implementation for the benefits of communities and society.
- ✎ It should be prohibited to anchor boats, yachts and other vessels in areas that have been specially designated as such on-sea maps and other publications of appropriate institutions, particularly in environmentally protected areas.
- ✎ Proper anchoring is vital to the safety of all stakeholders in a port (anchorage place) as well as to the safety of the seafloor.

The development must not be sporadic as it has been so far, but it is necessary to plan localities systematically, to qualify managers for running business, to draw public attention to balanced development of NT.

**The action plan includes the development of micro locations for:**

- Dry marinas
  - ✎ free space in the landside has to be able to accommodate minimum 500 yachts at dry dock
  - ✎ berths in aquatorial part have to be built only as transit berths
  - ✎ dry marina may also have a small shipyard for building or big repairs of 25 m yachts, and if possible, for larger yachts
  - ✎ dry marina has to be directly connected to the surrounding area with a road of County - category as the minimum.
- Marinas
  - ✎ if the space for accommodating yachts at dry docks is not sufficient, pursuant to special regulation that all accessing roads to the port are of County category as the minimum, and that they can take special cargo
  - ✎ as a rule, marinas are built in direct contact with the area of significant tourist accommodation or recreation capacities, or within port basins by large urban centers
  - ✎ marinas must have the possibility of expanding to immediate surroundings, but not on account of beaches or other maritime recreational amenities, or the protected locations
  - ✎ the number of yachts per hectare of aquarium should not be under 50 or over 120 yachts.

## 20 IMPACTS

Human activities determine dramatic changes in natural systems, especially in marine coastal areas. This is true when economic development is fast and scarcely, without offering the necessary infrastructure. It represents a serious threat to biodiversity and the quality of marine water. Territorial protection and especially natural resources and national waters, is presented as a necessity in developing the coastline.

Development of tourism industry, when not planned properly regarding environmental impact, often results in pollution because of lack of proper infrastructure, polluted water plants and urban wastes, air pollution because of transportation etc.

When discussing about NT as part of Marine tourism, all activities included in this type of tourism, in company level and individual tourist level should be taken in consideration to evaluate environmental impact. It also should be underlined that there is a lack of studies for measuring Environmental footprint of NT. But, identification of Tourism activities and NT vehicles that impact the environment and different impacts in cases of NT development will serve as a baseline for further measurements in the future.

### 20.1 Recreational Marine Vehicles

Recreational marine vehicles, can, therefore, affect air quality during transit to a destination and while their owners' boat in and around that destination. Recreational marine vehicles do not emit as much carbon monoxide as automobiles, but they do emit significantly more of it than recreational land vehicles (such as off-road vehicles) and aircraft.

### 20.2 Direct Impacts of the Cruise Industry

The cruise industry is the fastest growing segment of the tourism industry, but especially part of Maritime tourism and Nautical Tourism.

The majority of coastal regions in visited by cruise ships now provide the function to 'touch down' for a brief or single-day or half-day visit. Consequently, over a short time span a large number of tourists can create concentrated negative impacts on local economies and societies breaching the carrying capacity of the host environment and thus threatening natural and cultural heritage. In most cases impacts on the host environment cannot be adequately absorbed, due to a lack of infrastructure designed to process pollution of such magnitude and intensity especially with the growth in capacities of cruise because of benefits in lowering costs from volume production/service.

The European cruise market is one of the largest cruise markets in the world, ranking only behind North America for passenger numbers. Over seven million cruise passengers from Europe were carried on cruises

worldwide in 2018. Europe is also a leading cruise market destination. The Mediterranean, together with other Northern European routes, held an almost equal market share to the Caribbean in terms of cruise industry deployment in 2019. There are 7.17 million cruise passengers from Europe in 2019.

### 20.3 2.1 Solid Waste

As with recreational boats, the amount of solid waste (excluding sewage) generated by the cruise industry is difficult to document. Various types of waste are dumped at sea creating problems such as eutrophication, hypoxia and bio-accumulation of toxins. In low water exchange environment such as the Adriatic Sea as part of the Mediterranean, a persistent waste which slowly decomposes is an increasing problem. Storing waste on-board cruisers on the other hand is a significant problem, because space is at a premium. New ships have applied board waste incineration systems, as a solution in regions where port facilities lack appropriate disposal mechanisms. The cruise industry is attempting to move towards zero discharge of these materials. Total waste on cruise vessels has been reduced by almost 50% over the past 10 years

### 20.4 Air Pollution

The cruise industry has the potential to affect air quality through engine emissions. Most marine fuels are residual fuels with higher concentrations of contaminants such as sulfur. Recent studies have suggested that ocean-going vessels have the potential to affect air quality in coastal regions, port areas, and heavily traveled trade routes where annual sulfur emissions from ships equal or exceed land-based emission. If the ship is on the open sea, maneuvering, or at berth, the gases emitted will vary, but they always consist of NO<sub>x</sub>, SO<sub>x</sub>, CO<sub>x</sub>, O<sub>3</sub> and suspended particles.

### 20.5 Oil and Chemical Effluent

Cruise ships also produce toxic chemicals and hazardous waste from dry-cleaning procedures, used batteries, and paint waste from brush cleaning. Waste oil is produced from normal leakage from the main engines and generators, the cleaning of fuel filters, losses during maintenance, and leaks from hydraulic systems. Nutrients introduced into the marine environment through wastewaters can cause alterations in the structure of ecosystems and reduce oxygen levels.

### 20.6 Positive Impacts of the Cruise Industry

It is important to comment on some of the positive impacts of the cruise industry. The industry contributes to the economy of destination areas, since their passengers and crew spend time and money on different shores and destinations.



In addition, the exposure of tourists to beautiful, pristine areas such as those in Mediterranean can improve understanding of the need for conservation. To that end, some cruise lines have programs to foster environmental awareness, that focus on ecology, nature, indigenous culture, and environmental responsibility.

The cruise industry can aid in raising awareness of threatened or endangered species and also donate money raised through shipboard sales of selected items and other shipboard events to the foundations or communities, for environmental problems.

## 21 SWOT ANALYSIS OF NT IN THE LIGHT OF IT'S ENVIRONMENTAL IMPACT

The impacts of Nautical tourism in both tourist level and also sectorial level in NT, can serve to analyze the Strength Weaknesses, Opportunities and Threats of developing NT in Albania, in the light of the relation of this kind of tourism to the environment.

### **Strengths**

Developing NT can have positive impacts. Although tourism has been the impetus for much destructive development, it has also been the motivation for

- Economic benefits, as natural parks serve as attractions for tourists, which in turn can help in preserving environmental areas. The economic benefits are more obvious than other benefits from fostering tourism along the coast, as revenue is generated from entrance, parking, and other fees, as well as from sales and employment.
- Preserving sensitive ecosystems which will serve for NT in the future.
- Fostering other types of tourism such as tourism with an emphasis on cultural and historic sites near the coastal areas
- Another benefit of NT development, that can produce strength, is its role in fostering an appreciation and understanding of nature. Tourism development can facilitate an increasing awareness and appreciation of the natural world, especially that related to the sea and marine resources.

### **Weaknesses**

- Development undertaken to cater to tourists in coastal areas can have adverse impacts. Jetties and breakwaters built to create artificial harbors can increase erosion of those areas on the downstream side of the littoral drift (i.e., the movement of sand along the nearshore underwater propelled by the prevailing current). In addition to their physical impacts, these structures can detract from the aesthetics of an area. The construction of marinas can alter water levels and nutrient concentrations, as well as destroy habitat (Mathieson & Wall, 1982, p. 114).
- Construction of facilities supporting the NT industry can damage wetlands, mangroves, coral reefs, and estuaries. Wetlands have been destroyed to make way for marinas, sewage treatment plants, and recreational facilities (Andereck, 1993, p. 29). This destruction is problematic because wetlands provide many crucial functions, including acting as a nursery ground for a diverse aquatic community, and helping to buffer the impacts of pollutants to the water body.
- Recreational boating can adversely affect water quality is through the discharge of solid waste (garbage). There are listed some of the adverse impacts of marine debris in the environment: (1) aesthetic degradation of surface waters and coastal areas; (2) physical injuries to humans; (3)

ecological damage resulting from the interference of plastics with gas exchange between surface waters and deeper waters; (4) alterations in the composition of ecosystems because opportunistic organisms use debris as their environment; (5) entanglements of birds, fish, turtles, and cetaceans; and 6) ingestion of plastic by marine mammals (NRC, 1995, p. 52).

### **Opportunities**

- Public access, and political while often increases with tourism development, will lead to focus of public authorities and the public at large to environment needs for legislation requiring developers to maintain some public access with development.
- Furthermore, tourism injects the resources along a coast and adjacent waters with political and economic value, helping to ensure their protection. The political value stems from the significant constituency of summer residents and day tourists who want to maintain their recreation area.
- Raised collaboration with other countries through projects can be an opportunity since tourism in general, but especially different forms of Maritime Tourism such as NT can be focus for sustainable development and environmental protection.
- Technological developments for improving nautical vehicles and processes that cause negative impacts to the environment and serve for lowering these impacts.

### **Threats**

- Pressure from governments. Local authorities and communities, as well as destination Management Organizations for economic benefits to develop NT in an unplanned manner and without regard to environmental costs analysis and effects on the environment.
- Competitive pressure from other sites that are strongly developing Nautical Tourism, which may cause attempts to avoid care for identification of negative environmental impacts, as well as reduce costs that serve for environmental analysis or care for the environment.
- Lack of resources to develop new ways and systems to improve environmental impacts, as well as develop plans and proper infrastructure that require more investment to be environmental friendly.
- Lack of data and data systems, as well as studies for Environmental impact of specific activities related to NT.

## 22 RECOMMENDATIONS FOR BEST PRACTICES AND SUGGESTED MEASURES

As port policy is being brought into line with transport policy, not only generally, but also specifically related to sustainable development requirements and EU requirements in different economic and legal aspects in the process of integration of Albania in EU, ports are faced with a more challenging policy framework. The search for sustainable transport has faced government with a broader based approach, with a lot more considerations in place than simply market and economic development. Developers of major projects in ports and marinas of course must develop firstly the environmental assessment analyses and prove the feasibility on the environmental aspect of every project.

### 22.1 Communication between responsible authorities

Lack of careful, integrated, and well-coordinated management by the local and central authorities that operate in the field should be taken in serious consideration for being solved through proper planning processes in NT destinations and areas. Integrated management of environment and coastal territories in general, requires particular measures that start from drafting management plans on marine and land protected areas, and continue in promoting and massively educating the local population on such areas in order to protect the irreplaceable values of our valuable ecosystem. The stable economic development cannot be achieved without marine economy being developed, where it is included not only the development of infrastructures, but also fishing and aquaculture. Formalizing the activities of this sector and monitoring the economic activity that is developed in the shores and its resources, are two primary steps that need to be undertaken from the central and local authorities. Currently ports, as aforementioned in other sections of the analysis, do not work on their full potential. So careful planning and implementation of plans according environmental impact analyses require collaboration and communication among Port authorities, local and central government, other stakeholders such as tourism associations and tourism Destination Management Organizations.

### 22.2 Measures to be taken against climate changes

Central and local government have to take into consideration the necessary measures to adapt and mitigate the risk of climate changes through initiatives such as: reforestation, planting trees in endangered areas, building dams to prevent floods but also by limiting urban expansion, using ecological materials, utilizing renewable energy, etc.

#### 22.2.1 Marine environment measures

In the marine environment it must be prohibited to:

- a. dispose dangerous poisoning and explosive matter and waste;

- b. dispose solid waste, of every type, excluding vessels and tools used for fishing and the necessary substances and tools used to construct ports, berths and other constructions, based on the projects approved from Ministry of Environment and its determined conditions;
- c. dispose of every kind of waste from ships, platforms, installations and from the coastline;
- d. transport of dangerous substances and wastes;
- e. sinking ships, freight and every other type of goods;
- f. sinking and abandoning every type of installment that has served for different activities;
- g. constructing and utilization of tools that emit ionizing radiation;
- h. burning every kind of material and substance;
- i. Entering in ports with dirty ballast of marine vessels of every kind, type of tonnage.

## 23 RECOMMENDATIONS FOR THE NT IN ALBANIA

NT as a growing industry can bring economic development depending on its main forms which are:

- The cruise ship industry a rapidly growing sector and the ship-building industry
- Yachting and marinas as important sectors of the NT industry both in terms of private yachting and in terms of major yachting events and races.
- other significant nautical tourism sectors, namely marine parks, fish watching and scuba diving and snorkeling at coral reefs, etc.

Sustainability is a basic concept today in economic development from which even the NT industry can not be seen separately. The development and implementation of sustainability concepts is necessary both in terms of the development of a sustainable NT, but also in terms of the development of the territory, given that port and navy infrastructures are necessary for the development of the NT.

Environmental impact is a component that must be considered during this NT development process.

From the point of view of tourism development as a priority sector that brings employment and sustainable economic development, NT should be seen in close connection and interaction with other forms of tourism development, depending on the profile of the country and its basic tourism resources. For this reason the development of a strategy, based on the necessary analysis of the economic, political, social, cultural, technological and environmental environment is a priority

## 24 MONTENEGRO TOURISM DEVELOPMENT PLAN

Nautical tourism as a selective tourist and economic phenomenon has gained a significant place in the Montenegrin tourist economy. It is still in the development phase, and in that sense many official strategic documents state that nautical tourism represents a development opportunity for the Montenegrin economy. Special benefits for the development of nautical tourism provide continuous development of nautical tourism marinas according to relatively high standards, reflected in the implementation of projects Porto Montenegro, Luštica Bay and Porto Novi.

The tourist offer of Montenegro contains many natural and attractive factors, nautical-tourist contents and services. Important natural and anthropogenic conditions, which constitute absolute and comparative advantages on the market, include: climatic conditions, geographical position, diversity and beauty of the sea coast (high quality sandy beaches, etc.), satisfactory depth and spaciousness of the waters, wind strength and visibility, suitable temperature, color and transparency of the sea, sea currents and wave size, moderate tides, diversity of the seascape, proximity to mountains, rivers and lakes, proximity to airports and important tourist destinations, numerous cultural and historical monuments where the Bay of Boka Kotorska stands out as an area under UNESCO protection, and numerous entertainment, cultural and sport events.

### 24.1 Strategic Tourism Planning

The last tourism strategy in force of the country is referred to the period until 2020. The strategy aims at positioning Montenegro as a high-quality destination and defines measures such as upgrading accommodation infrastructure, raising service quality, diversifying the offer through nautical tourism, mountain tourism, golf tourism, congress tourism, agri-tourism, wellness tourism, camping, cultural/religious tourism, and national parks, and linking tourism with other industries.

The Tourism Development Strategy of Montenegro 2020 has identified six tourism clusters that differ in the characteristics of regions and cultures, and are planned with the aim of forming areas of greater scope, quality and diversity instead of uniformity and municipal closedness.

Herceg Novi belongs to cluster No.3: The Bay of Boka Kotorska.

Cluster No.3. The Bay of Boka Kotorska - unique in the Mediterranean, is the most suitable for the development of high quality and diversified tourism offer. Development is turning to selective forms of tourism: beach tourism, cultural tourism, nautical tourism, sports tourism and health tourism. In this offer,



nautical tourism stands out as one of the most prestigious selective type, with the aim of making cluster No.3: The Bay of Boka Kotorska an exceptionally high-quality destination throughout the year.

With the further development of tourism and hotel management in the municipality of Herceg Novi and the implementation of selected strategies and the realization of the competitive advantage of Herceg Novi's tourist product, it is possible to achieve priority aspects of the development of selective tourism.

As one of the types of selective tourism, nautical tourism in the municipality of Herceg Novi is based on the offer of marinas, nautical tourism ports and commercial berths at locations: Škver (City port), Meljine, Zelenika and Porto Novi, which is permanently strengthened by developing new accommodation facilities in hotels of high categories (five and four stars).

The development of additional facilities in nautical tourism ports would enrich the tourist offer and achieve the development of selective tourism.

The Government has been engaged in building a strategic framework for tourism, having identified its potential and importance for the social and economic development of the country. Hereby a table reporting some of the latest strategies in force.

2008	<b><i>TOURISM DEVELOPMENT STRATEGY UNTIL 2020</i></b>	<b><i>Elaborated by the Ministry of Tourism and environment aims at positioning Montenegro as a high-quality destination and defines measures such as upgrading accommodation infrastructure, raising service quality, diversifying the offer through nautical tourism, mountain tourism, golf tourism, congress tourism, agri-tourism, wellness tourism, camping, cultural/religious tourism, and national parks, and linking tourism with other industries</i></b>
2015	<i>National Strategy for Integrated Coastal Zone Management</i>	<i>National Strategy for Integrated Coastal Zone Management has defined a strategic framework for sustainable development of country coast. Elaborated by the Ministry of Sustainable Development and Tourism in cooperation with the Mediterranean Action</i>

		<p><i>Plan (MAP) of the United Nations Environment. Describes a process for the management of the coast using an integrated approach, regarding all aspects of the coastal zone, including geographical and political boundaries, in an attempt to achieve sustainability.</i></p>
2018	<i>The Law on Tourism and Hospitality</i>	<p><i>This Law regulates the conditions for the performance of tourism and hospitality activities and other matters of importance for tourism and hospitality. Stipulates that beneficiaries of incentive measures may be companies, other legal entities, entrepreneurs and natural persons performing catering activities, related to tourism and catering”.</i></p>
2020	<i>Strategy for the development of the maritime industry for the period 2020–2030</i>	<p><i>The main aim of the Strategy is to define the directions of the maritime economy in Montenegro and adequately valorize the potentials of the sectors through the prism of the BE activities. It covers almost all economic activities related to the sea and its strategic goals are related to increasing the contribution and growth of the economy, strengthening the capacity of the maritime administration, greater involvement of the civil sector, and the inclusion of the professionals as a precondition for a prosperous maritime economy</i></p>

*Table 5 Latest strategies on Tourism sector*

## 25 SWOT ANALYSIS

The following analyses is part of the strategic planning process, since the components of SWOT are needed to develop strategies and plans and also impact their implementation. The list of Strengths, Weaknesses, Opportunities and Threats should be frequently updated, according to the environmental analyses and all data gathered for a destination with the focus of Nautical Tourism.

Strengths			Weaknesses
	<ul style="list-style-type: none"> <li>Natural beauty of the Adriatic coast;</li> <li>Rich cultural and historical heritage with world-renowned and protected locations;</li> <li>Maritime tradition;</li> <li>Hospitality;</li> <li>Suitable climatic and maritime conditions;</li> <li>Ecologically preserved underwater world;</li> <li>Existing tourist infrastructure;</li> <li>Higher education in the field of tourism and maritime affairs;</li> <li>Spatial possibilities for the construction of new nautical tourism ports;</li> <li>- Possibility of expanding existing ports.</li> </ul>	<ul style="list-style-type: none"> <li>Insufficient capacity of nautical tourism marinas;</li> <li>Seasonal nature of nautical tourism port operations;</li> <li>Insufficient number of berths for mega yachts;</li> <li>Lack of certain types of services;</li> <li>Low level of service quality;</li> <li>Reconstruction of the coastal zone;</li> <li>Insufficient development of traffic connections;</li> <li>Inadequate waste disposal and wastewater treatment;</li> <li>Corruption activity;</li> <li>Offer based only on berth services, without additional content;</li> <li>Untapped potential;</li> <li>Insufficient number of quality staff.</li> </ul>	
Threats			
	<ul style="list-style-type: none"> <li>Political instability in the region;</li> <li>Reconstruction of the coast;</li> <li>Environmental pollution from ships;</li> <li>Rapid development of other destinations;</li> <li>Inadequate privatization;</li> <li>World security crises;</li> <li>Uncontrolled development of nautical tourism;</li> <li>Inadequate legislation;</li> <li>Occurrence of infectious diseases;</li> <li>Construction of new berths in competing countries;</li> <li>Growth of competition in the Mediterranean countries;</li> <li>Growth in the number of low-paying tourists.</li> </ul>	<ul style="list-style-type: none"> <li>Increased demand for nautical tourism;</li> <li>Adoption of a strategy for the development of nautical tourism in Montenegro;</li> <li>Accession to the European Union;</li> <li>Rich natural and cultural heritage;</li> <li>Increased demand for cruising tourism;</li> <li>Easily accessible, close destinations;</li> <li>Development of small shipbuilding;</li> <li>Extension of the season;</li> <li>Montenegro is becoming a more popular tourist destination;</li> <li>Increasing the quality of the tourist offer;</li> <li>Great potential for investments</li> </ul>	

Table 6 SWOT Analysis - Tourism sector Montenegro

## 26 THE VALUE OF TOURISM

In 2019, travel and tourism direct contribution to GDP for Montenegro was 0.6 billion US dollars. Travel and tourism direct contribution to GDP of Montenegro increased from 0 billion US dollars in 2000 to 0.6 billion US dollars in 2019 growing at an average annual rate of 18.18%. While the direct contribution of travel and tourism to employment growth in the same year was 0.3% which means 13000 employees directly employed in this sector. Even though the direct contribution of travel and tourism to employment growth has fluctuated substantially in recent years, tended to decline over the past decade but 2019 showed an increase of 0.3 percent from previous year.

In 2019, arrivals for Montenegro was 2.51 million. Arrivals of Montenegro increased from 272,000 in 2005 to 2.51 million in 2019 growing at an average annual rate of 21.32%.

Focusing in the arrivals by sea, in 2019, the total of 4 775 foreign vessels for entertainment, sport or recreation entered the internal sea waters of Montenegro that indicates an increase of 1.4% in comparison with 2018. Of the total, there were 4 211 vessels which arrived by sea and 564 vessels which were transported by land.

By type of foreign vessels for entertainment, sport or recreation in the internal sea waters of Montenegro, there were the largest number of arrivals of sailboats (39.9%), motor yachts (33.7%) and other vessels (26.4%).

Number of persons arrived on these vessels in 2019 was 28 562, which is an increase of 3.2% in comparison with 2018. By citizenship, the largest number of arrived persons on these vessels was from: Great Britain (10.8%), USA (5.7%), Croatia (5.7%), Italy (4.9%), Germany (4.2%), France (3.9%) and other countries (64.8%).



Figure 29 International arrivals 2015-2019

The Strategy for tourism development until 2020 indicates the orientation of Montenegro to the extension of the tourist season. In fact, official data show that tourism traffic is realized in the period of two months during the summer, which points out to the prominent seasonality and a serious issue of long-term development strategy.

## 27 STRATEGIC TOURISM PLANNING

### 27.1 Focus Areas & Strategic Actions

The Republic of Montenegro is a country that boasts numerous natural resources. Spatial aspects such as attractive relief adorned with untouched flora and fauna, and crystal-clear sea for Montenegro were the triggers in the development of nautical tourism. Tourism as an economic branch, especially in the segment of nautical tourism has a very large impact on the overall development of Montenegro.

Special benefits for the development of nautical tourism are provided by internal development factors, including the great natural potential of the Bay of Boka Kotorska, gradual settlement of the situation in the economy, continuous development of nautical tourism at relatively high rates of development and giving priority to nautical tourism, which is reflected in the projects of Porto Montenegro, Luštica Bay and Porto Novi.

In the most general sense, the mission of the future development of nautical tourism can be defined as follows: sustainable economic development tailored to man (tourist boaters and domicile population), which will:

- ✎ respect the ancestral heritage, the existing natural environment and the needs of future generations,
- ✎ contribute to the development of the national economy, the coastal region and Herceg Novi,
- ✎ contribute to employment and living standard growth and
- ✎ increase the level of services qualitatively and quantitatively.

### 27.2 Promotion and Marketing

Further marketing activities will be focused on creating a marketing mix consisting of four elements: nautical-tourism product design, pricing, distribution and promotion. The optimal combination of elements of the marketing mix will formulate the future marketing strategy for the development of nautical tourism.

The application of marketing strategy in nautical tourism is a necessary precondition for the development and inclusion of nautical tourism in global nautical-tourist flows.

Marinas Porto Novi, Porto Montenegro and Luštica Bay have a strong marketing promotion. Their promotion strongly influences the promotion of Montenegro as a nautical destination. This is supported by the fact that for several years' international superyacht fair MYBA Pop-Up Superyacht Show has been held in the marina Porto Montenegro.

Attendance at fairs is just one form of promotion that will be actively used through participation and promotion conducted by local and national tourism organizations.

Modern business and the influence of the market impose the need to move to the online sale of berths. In the coming period, the City Port Management Agency plans to develop an attractive website with a booking system in order to enable easy and fast online booking of berths as well as the availability of all important information.

The realization of the stated mission presupposes the definition and realization of the following strategic development goals;

- sustainable use and management of existing and future resources (realization of the strategic project "Luka Škver" Herceg Novi),
- establishing strict institutional oversight of development,
- installation of equipment for protection of the sea from pollution and application of new technologies and environmental standards,
- stimulating the development of repair and service centers,
- strengthening the competitiveness of all subjects of nautical tourism,
- increasing service levels and diversity of service content,
- increasing the general level of communal equipment,
- conducting marketing activities,
- organizing events that contribute to the advertising of the marina (regattas, festivals on the theme of the sea, fairs, etc.)
- establishing a system of continuing education for participants in nautical tourism.

These activities are made with a goal to improve the relationship with nautical guests, to adapt to modern nautical trends, to apply proactive marketing, which would result in the creation of an innovative and unique offer.



## 28 DEVELOPMENT PLANNING IN ACTION

The strategy of the development of nautical tourism must be correlated with the tourist development of Herceg Novi, the Bay of Boka Kotorska and Montenegrin coast. Nautical guests must find everything that the most demanding tourists are looking for (restaurants, cafes, discos, nightclubs, casinos, sports facilities, shops, etc.), because it serves them as a supplement to the experience of sailing. It is necessary to develop selective forms of offer based on sports, recreational, entertainment and cultural programs, including specific offers such as:

### **Biking Herceg Novi Municipality**

- The wealth of experiences that Orjen Nature Park selflessly offers will be extremely complete and experienced "on two wheels", by direct contact with nature. Depending on the degree of physical readiness, experience, wishes and interests of the tourists themselves, various bicycle tours can be found on offer. Certainly this is a destination that leaves breathless all lovers of active holidays and lovers of pure and untouched nature.

### **Spaleology – Municipality of Herceg Novi**

- Orjen mountain is very rich in speleological objects and as such represents a real paradise for practicing these sport-scientific disciplines. Cave-type objects predominate. The deepest pit is 662 m deep!

### **Walking and Trakking in Municipality Herceg Novi**

- The Herceg Novi hinterland has a very diverse and high-quality network of marked mountain trails, both hiking and walking, in total more than thirty trails, mostly located within the Nature Park "Orjen".

## 28.1 Tourism Attractions

### **GUIDED TOURS in MUNICIPALITY OF HERCEG NOVI**

- TOUR 1. TREASURE FROM THE HEART OF ORJEN MOUNTAIN

The hiking tour is performed within the Nature Park "Orjen", in the attractive mountain environment of the Herceg Novi hinterland, and we recommend it for all nature lovers from 7 to 77 years of age.

- TOUR 2 PANORAMIC TOUR "TSAR'S ROAD"

It is a panoramic tour with off-road cars in the central part of the Orjen massif, with the Orjensko sedlo pass (1600 m) as the main destination. At this altitude, ideal microclimatic conditions prevail during the summer, which allow you to fully enjoy the activities under the open sky.

- TOUR 3 THE VILLAGE OF ŽLIJEBI

The old serpentine pedestrian path, with many beautiful lookouts of the coast, is as important attraction as the destination itself - Žlijebi. The serpentines and the village are connected by the same architectural heritage and the same local sedimentary stone, since when everything was done without binding material: from borders and roads, to houses and roofs. After sightseeing Žlijebi, we will visit the lookout on the plateau of the Church of St. Nikola, built on the very top of the cliff, a place with the best view of the entrance to the Bay of Boka Kotorska and the peaks of Orjen. The possibility of enjoying local specialties in the tavern of household Sikimic.

- TOUR 4 HERCEG NOVI TIME MACHINE - OLD TOWN, FORTRESSES

It starts under the popular Clock-tower, the symbol of Herceg Novi, and we continue to the dominant fortifications over the city, Kanli Kula Fortress and Spanjola Fortress, reminders of both, long-term Turkish and short-term Spanish rule. By walking through history, we follow the route of the main footpath that for centuries connected Herceg Novi with the mountainous interior to the area of the Battle of Kotobil, a crucial event for the liberation of the Herceg Novi region from Turkish rule. Today it is a place in a pleasant environment of dense forest of coastal pine and cypress, with several rest areas for walkers.

- TOUR 5 "TOPLJANSKA" TOUR

It includes a tour of the City Museum Mirko Komnenović, the House of Nobel Laureate Ivo Andrić, the School of Njegos and the Church of the Holy Savior.

### **SIGHTS OF HERCEG-NOVI**

Located geographically between two important cities, Dubrovnik and Kotor, Herceg Novi based its entire profane-urban development on a defensive function with the help of strong fortresses, not only in the city and the surrounding area, but also at the entrance to the Bay of Boka Kotorska. Get to know the exciting history and rich cultural heritage of Herceg Novi through a tour:

- Forte Mare Fortress

Forte Mare Fortress (Sea Fortress) is located on the coast.

Fortress was built between the 14th and 17th centuries, restored in 1833, and since 1952 has been adapted into a summer cinema. The fortress was built on solid rocks, above the promenade, and in the walls there is a passage from the sea shore to the top of the fortress.

On the upper side there is the "SEA DOOR" (Porta di mare), with preserved elements of fortifications from the Bosnian period. Forte Mare is certainly one of the most beautiful examples of fortification architecture, and it is quite realistic to assume that the nucleus of the Old Town was there.

Forte Mare Fortress is open for individual and group visits every day from 9 a.m. to 8 p.m.

- Kanli Kula Fortress

Kanli Kula Fortress (Bloody Tower), is a monumental fortress in the old town. It was built on the site and foundations of an earlier fortress. In its current size, fortress is the work of Turkish builders and for the most part has preserved the authentic architecture of that time.

Kanli Kula Fortress was built at an altitude of 85m, on the north side of the city, and with its position and ramparts it completes the complex fortification system of the old town.

The Turks gave final appearance to the fortress, while the Venetians made certain repairs and additions after major damage, especially in 1687, during the conquest of Herceg Novi after two hundred years of Turkish rule. The interior of the fortress contains a well-preserved cistern which over time lost its original purpose and became a prison cell. On walls we can still see numerous drawings of various types of galleys, a representation of fish, crosses, coats of arms and dates. The drawings were engraved in mortar and made by prisoners, especially in the time of the Turks which can be seen by the type of galleys used by the Turks in the 16th and 17th centuries.

The fortress, which in its turbulent past witnessed the intertwining of different cultures, today is a true oasis of culture and the pride of the citizens of Herceg-Novi and is a generator of numerous cultural and artistic events.

- Španjola Fortress – Upper city

The fortress called by the locals Španjola, has kept its name to this day, although the Turks rebuilt it around 1539-1548, on the site where it was built by the Spaniards, briefly conquering the city in 1538-1539, and at the same time had destroyed a smaller Turkish fortification.

On the construction of this monumental and their best-preserved fortification on the entire Adriatic, the Turks left a written testimony of an inscription in Turkish (Turkish was written in Arabic until 1928, and then in Latin) above the entrance to the fortress, which means: "This fortress by order of the Sultan, was

raised by Suleiman, the son of the great Emir Selman Khan, a powerful and honorable knight, whose brother was Sinan-beg, the Grand Vizier of the Sultan."

Due to the strategic advantages of the Bajer hill, the Španjola Fortress is located on the northwest side of the city at an altitude of 170m and dominates the entrance to the Bay of Kotor. The fortress is surrounded by massive walls with four protruding circular bastions at the corners. It always had the purpose of a fortification of a military character, all the time along the beginning of the 20th century and during the Second World War Španjola Fortress had been a prison.

- Citadela Fortress or Macel or Mezzaluna

A small fortress by the sea, the Citadel, is a fortress with walls built during the time of various invaders. Near the Capuchin monastery, as a witness of the Venetian period, stands the inscription from 1702. Traces of the beginning of Herceg Novi should be sought in Citadela Fortress foundations. It was severely damaged during the 1979 earthquake and has crashed into the sea. In 1702, Petar Anđelo Manjo connected by a strong wall the upper part of the Lower Town with the Citadel and thus surrounded the entire city with thick walls.

- Clock Tower, Sahat kula, Tora

The Clock Tower- Tora was erected in 1667 by order of Sultan Mahmud. During Turkish rule this was the main city gate. In the inner passage through the Clock Tower, there is a sculpture of the Mother of God (called "BLACK MOTHER OF GOD", because it is made of burnt wood) and a memorial to the founder Tvrtko I Kotromanić, made by artist Afran Hozić from Sarajevo.

The old city clock on this tower was replaced in 1995 by a new - electric clock, which the city of Herceg Novi finally received from Zemun - city friend.

- The walls of the old town Herceg Novi – Medieval town Herceg Novi

The city is bounded by a fortification system, which in its present form was defined during Turkish domination during the 16th and 17th centuries. Remains of the Bosnian period (14 – 15 centuries) are possible at important defensive points (Kanli Kula, Forte Mare), and even traces of the ancient route in the coastal part. The initial fortification was built by King Tvrtko I, and developed by Herceg Stefan Vukčić Kosača to protect his salt pans and trade. During the 200 years of Turkish rule, the city walls were fortified and strengthened with towers. The damage that the fortification suffered during the Venetian siege in 1687, as well as due to landslides and earthquakes, was repaired without significant changes to the original assembly.

- Religion Sacral monuments

Sacral monuments occupy the first place in the immovable monument fund in the Herceg Novi area, not only in terms of number, but also in terms of territorial distribution and cultural and historical value. There are 89 church buildings in the area of the Municipality of Herceg-Novi, 74 Orthodox churches and 14 Roman Catholic churches, as well as 11 ruins.

### **LOCAL GASTRO OFFER**

#### • RIBARSKO SELO

It offers its visitors a unique local experience. Every day between 11 and 12 a.m. the village is visited by fishermen who bring the fish and seafood they caught that morning. All culinary specialties prepared in the village are made from the freshest, organically grown ingredients, and some of the vegetables served are grown in the village itself. A special specialty is homemade ice tea, which is the perfect refreshment while relaxing on the beach.

The beach of Ribarsko selo is spacious and comfortable with a beautiful view of the entrance to the Bay of Boka Kotorska and the open sea. Everyone who wants additional relaxation can enjoy a massage, and for those who like an active vacation, kayaks are provided for visit of the neighbor beaches Miriste and Zanjice, also known for its exceptional beauty.

#### • KLINCI VILLAGE RESORT

In the interior of the Lustica peninsula, among olive groves and orchards, the village of Klinči is tucked away.

Klinči Village Resort consists of a group of hundreds of years old stone houses that are restored over time and turned into comfortable apartments. The apartments have a beautiful view of the nearby olive groves, churches and the open sea in the distance, and also a view of the cape and the fortress Prevlaka, the proud guardians of the entrance to the Bay of Kotor.

In addition to the apartment, the complex also consists of a village hut, village square (gumno), tavern, family olive grove that spreads over one hectare of property, as well as a swimming pool that is reserved for real hedonists. The entire complex meets the high standards of rural and gastro tourism.

In this sleepy green village, you can enjoy the specialties of Mediterranean and local cuisine of Lustica with the consumption of local wines, brandies and liqueurs produced from indigenous plant species from Lustica.

For curious guests who are ready to explore the surroundings, Klinči Village Resort has prepared an interesting attraction - the game "Treasure Hunt", ie, the first Escape Room in Montenegro. Embark on

a historical story that takes you two hundred years back and tries to solve ten puzzles to reach the hidden treasure. This game is educational and fun, and is intended for everyone who wants to learn more about the history and tradition of this charming place.

## **EVENTS**

### • BIG GAME FISHING

The international competition "Big game fishing", in fishing for swordfish and tuna, is usually held in Herceg Novi in the second half of September.

The competition will be held in the waters of Montenegro, on the open sea, 12 miles from the coast, and it will start from the City Port "Škver".

### • FILM FESTIVAL Herceg Novi Montenegro

J.U.K. Herceg Fest is the executive producer of the Herceg Novi Film Festival - Montenegro Film Festival. The idea of a film festival at Kanli Kula Fortress in Herceg Novi has been constantly evolving since 1987, when the first Yugoslav Film Directing Festival was held in the most beautiful open-air summer cinema. The festival has the status of an event of special importance for the culture of Montenegro.

### • DAYS OF MUSIC

The International Festival of Art Music, Days of Music, is held from 10th to 20th July. The summer festival of classical music has a long tradition, which we are constantly enriching. The artistic director of the festival is the celebrated pianist professor Boris Kraljevic. At his invitation, international artists are preparing concerts to be held in open-air spaces (Forte Mare Fortress, locations in the Old Town).

### • GITAR ART SUMMER FEST

Guitar Art Summer Fest is an international summer festival of classical guitar. Concerts, master workshops, exhibitions and accompanying programs are organized within the festival. The permanent term of GASF is 15th-20th August. The organizer of the festival is the Association of Classical Guitarists of Serbia and GAF Belgrade, headed by professor Boško Radojković. Herceg Fest provides technical and logistical support to the Festival.

### • HERCEG NOVI COMIC BOOK FESTIVAL

The Association of Comic Book Lovers and Herceg Novi Comic Book Festival were founded in 2007 by fine artist and comic book artist Nikola Ćurčin. The festival is designed as a cultural event that extends

the summer tourist season. It starts on the first Friday in September and lasts for six days. Herceg Fest logistically and spatially supports the Festival.

- OPEROSSA Montenegro Opera Festival

Operosa is an international project - an organization founded in 2006 for the purpose of promoting young opera singers, with the aim of presenting opera as a modern and entertaining form, working with top producers. Herceg Fest is a long-term partner of Operosa, so premieres and concerts are held on the most beautiful open-air stages on Kanli Kula Fortress and Forte Mare Fortress.

- JAZZ BAY FESTIVAL

It has been organized since 2013 in the last decade of August. Appart from concerts performed by internationally renowned jazz artists and ensembles, it offers an educational program for young musicians from our and other cities. With technical support for concerts in the Old Town, along with the Music School of Herceg Novi, the institution provides support to the jazz festival in space and logistics.

## 28.2 Active Tourism Offer

### SAILING SCHOOL

Sailing club "Jugole Grakalić" from Herceg Novi is organizing a sailing school that can be attended by all interested tourists staying in Herceg Novi. Theory and practical training on the cruiser are led by experienced skippers, members of JK Jugole Grakalić.

The locals have traditionally enjoyed this sport even since 1948. We every year organize numerous national and international regattas.

The most famous member of the club is the Montenegrin Olympian Milivoj Dukić, a participant in the Olympic Games in London in 2012, as well as the Olympic Games in Rio de Janeiro in 2016. In addition to the sailing school, it is possible to rent one of the sailing boats included in offer (with or without a skipper).

### DIVING

The Montenegrin coast is becoming more and more attractive to the lovers of the underwater world. The beauty of the depths, the clarity of the sea, the diversity of flora and fauna as well as the multitude of sunken ships, submarines and planes at the bottom of the sea, and unexplored Bay of Boka Kotorska, are all part of the beauty of the Montenegrin seabed. Considering that the Herceg Novi aquatorium is located in a place where there is a open sea, the coast and the seabed are extremely rocky and harsh due to the influence of the waves, and that causes great challenges and unforgettable moments for diving fans. Diving club "Adriatic Blue"



allows you all activities related to diving, whether it is for beginners or advanced divers. Diving instructors and guides organize trips to shipwrecks, underwater caves and other attractions where you can get to know all the splendor of the underwater world as well as everything else that hides in the depths of our underwater world. In the Diving Club "Adriatic Blue" Herceg Novi you can complete all diving courses - from beginner to advanced, our diving instructors work according to the curriculum of the world's most famous diving associations CMAS, PADI, SSI and CEDIP, and after successfully completing the training with our diving instructors you can complete additional ability.

#### „SBS“ TENNIS CENTER

The center has four clay courts with lighting and grandstands. Professional tennis coaches are constantly hired at the "SBS" Center. The center is equipped with all the necessary modern equipment needed for the functioning of such a complex. Due to the mild climate, throughout the year, "SBS" organizes a tennis school, trainings, tournaments for active and recreational competitors, and camps, both for players and referees.

#### PARAGLIDING CLUB „ADRIA FLY“

Adria fly is a full member of the Aviation Association of Montenegro and the Paragliding Association of Montenegro. If you want to test yourself at paragliding, you have the opportunity in a paragliding school run by an expert team consisting of an internationally licensed instructor and two licensed tandem pilots. The airfield, which was built in 2010, is located in Dizdarica, 16km away from Herceg Novi and at 900m above sea level. From there there is a beautiful view of Bay of Boka Kotorska. In the world's most widely read magazine about paragliding, the French "Parapente Mag" in 2012, the airfield on Dizdarica was described as the best airfield on the Adriatic. The shortest flights last 20 minutes, and the longest 5 hours.

The offer should be enriched with specific and significant events that would be held at the location of the City Port "Škver", such as: fishing nights, concerts of traditional singing klapas and folklore societies, various theatrical and other art performances, art exhibitions, philatelic exhibitions, wine festivals, etc. It is understood that these events must not disturb guests, but must fit into creating a pleasant and attractive atmosphere for all, which aims to improve relations with nautical guests, adapt to modern nautical trends, apply proactive marketing and innovative and unique offer.

The future development of nautical tourism in Herceg Novi should develop the provision of the following types of services: renting berths that meet all standards for accommodation of vessels and tourists who stay on them, renting vessels for rest and recreation (charter, cruising, etc. ), skipper services, reception, storage and maintenance of vessels at berth in the sea, services for boaters (water, fuel, food, spare parts, equipment, etc.), arrangement and preparation of vessels, establishment of information center which would provide

various information to boaters (weather forecast, nautical guides and offers in the city, etc.), training for skippers and boat guides and other services for the needs of nautical tourism.

### 28.3 Accommodation facilities

According to MONSTAT data in 2019, Montenegro holds about 49,000 beds referred to facilities including: hotels, campsites, resorts, vacation facilities, guesthouses, motels, inns etc., while a percentage distribution according to the quality of these facilities in Montenegro shows that about 49% of hotels in the country are of high quality fig 30.



Figure 30 Percentage distribution of accommodation facilities by category

Due to the high level of comfort and content, hotel capacities with 4 and 5 stars generate the highest economic effects for GDP, employment rate and income. However, in recent years, there has been a new trend of renting apartments and private villas, which has reduced the utilization of hotel capacities. A new trend in tourism is present, which involves booking accommodation in households so that the guests can feel the spirit of culture, hospitality and the way of life of their hosts. However, this raises issues of the legalization of accommodation and accommodation units, as well as tax regulation of tourist traffic.

The Government encourage the tourism industry in the realization of projects for construction of facilities and improvement of the offer, which is, raising the categories of 4-star and 5-star hotels. With the aim of creating a high-quality offer, the state has envisaged simulative measures for real estate taxes. The Real Estate Tax Act states that non-categorized buildings are taxed at a rate of 5 to 5.5% of the market value of the real estate

property. 1-star category is taxed from 4 to 4.5%, 2-star category from 3 to 3.5%, 3-star category at a rate of 2 to 2.5%. The state has anticipated possible tax reduction for 4-star category up to 30% and 70% as an incentive development measure. By these measures, the state seeks to improve the offer or encourage hotel owners and businesses to use loans and provide funds they will invest in higher-category hotels in accordance with the standards of tourism activity and contemporary trends in tourism development. However, hotel owners and businesses do not think of this stimulative measure as a progressive measure, but the inability of a 3-star hotel to survive on the tourism market.

## 28.4 Policies and Practices of the Associated Authorities

The development strategy of Herceg Novi until 2020 defines further development of tourism through priority 2.1 where it is stated:

*“Tourism will continue to be the carrier of the development of the municipality, but work will also be done on the introduction of those types of tourism that were not sufficiently represented in the offer, such as congress tourism, religious tourism, fair tourism and etc. Development must be divided into two phases: the adaptation phase and the dynamic development phase.”*

The adjustment phase will be a period of continuing the necessary confrontation with the real situation and preparation for dynamic development. This phase was also recognized during the analysis of tourism development for the needs of making of Spatial Urban Plan of Herceg Novi with an emphasis on:

- Significant improvement of private accommodation capacities and its partial reduction due to the transition to new types of accommodation (smaller hotels, boarding houses, diffuse hotels, etc.);
- Development of Herceg Novi as the leading Adriatic health destination especially for selected segments of the health product and tourism of the third age;
- Development of cultural tourism through the development of additional cultural offer and events;
- Construction of infrastructure for MICE and nautical tourism, as well as activation of tourist mountain potential.

For all the above-mentioned new tourist products and services, it is necessary to perform strict standardization, in order to create the expected competitive advantage. Standardization of products and services is one of the offer strategies. It represents a trend that is applied everywhere in the world at different levels of services and prices. The emphasis on quality and security is the result of competition around the world in the fight for the customers with high consumer buying power, and represents a prerequisite for creating a brand.

## 29 THE TRANSNATIONAL CLUSTER

Considering the only team involved in the present REGLPORTS project, Montenegro and Albania see, net of the pandemic blockade, the tourist flows increase exponentially, no longer attracted only by consolidated tourist destinations along the coast, able today to attract Western European markets and no longer just Eastern Europeans by virtue of raising the standards of facilities and services, but also of the complete rearrangement of public spaces and services: the cases of Kotor, Budva, Ulcinije, Valona and Saranda. A policy more responsive to the requirements of the European Union and the undoubted wealth and attractiveness of the cultural and natural resources of those territories have by now consolidated demanding tourist flows in the top markets such as North American, North European, Australian and New Zealand, in search of new destinations and good standards of service and safety. This is how important destinations such as Gjirokastra, Berat, Shkodra, the splendid archaeological area of Butrint and the more inland Elbasan and Lake Ohrid, and parks and geosites such as the famous Blue Eye or the Osumi or Tara gorges have consolidated positions of absolute importance in the Mediterranean area, also intercepting the cruise flows of primary destinations such as Corfu and Dubrovnik towards the hinterland.

The port situation sees deep differences between the two countries. Much more advanced and on Croatian standards is the one of Montenegro, which boasts an excellent sector of chartering, shipbuilding and good quality facilities in Budva, Erceg Novi, Bar, and boasts an important cruise stop in Kotor and hosts one of the major tourist ports in Tivat of the Mediterranean, capable of mooring superyachts up to 250 m.



*Pic 11 Marino Porto Montenegro at Tivat*

The situation in Albania is much less evolved, where until a few years ago the internal market simply did not exist, and this not only because of the poor nautical culture of a country traditionally suited to an agricultural and mountain economy, but also because of the moratorium on boats, adopted as part of the measures to prevent smuggling, which the Albanian government adopted in 2005 and remained in force until 2013. Today the yachting sector is among the priorities of Tirana's tourism development programs, and the development of maritime transport is part of the National Transport strategy and the 2016-2020 Action Plan through development investments in compliance with regulatory plans and with an orientation towards the market economy by 2020. It envisaged the rehabilitation of the infrastructures and superstructures of the four main ports and the tourist ports, and the development of tourist ports, including the construction of infrastructure and superstructures, in order to increase the number of tourism ships and tourists with an increase in related industries.

There are currently two concessions for marines in Albania. The only port for yachts is Marina di Oricum in the Gulf of Vlora, in concession to the Italian investors of the Giorgi Group, with about 625 berths, the related infrastructure and an hotel. The other port with concession, still in the project stage, is Porto Palermo, near Himarë, where there is a village with 12 bungalows and a tourist area with good potential for the development of boating.

Finally, the port of Saranda is located about 160 km south of the port of Durres and is mainly dedicated to passenger traffic. The renovation of the port is being financed from the state budget and World Bank loans for tourist destinations.

Shipbuilding in Albania is not very developed: there are no large shipyards, except for Durrës-Gdansk Shipyard SA in Durres, which is specializes in the construction of cargo ships and fishing boats. 260 employees work on this site. The other shipyard is that of Pasha Liman, in the Gulf of Vlora, where military ships are built and where is also located the Albanian navy base. The yard was restored last year in collaboration with the Dutch company Damen. Nevertheless, the nautical sector in Albania has good prospects for the immediate future. On the one hand, the varied Albanian coast offers good opportunities for the development of nautical tourism, on the other hand also the foreign producers of boats and nautical equipment see in Albania a good long-term potential, where they can produce, maintain and store boats from all over the Mediterranean, with very low operating costs, thanks to

taxation and the cost of labor, among the most advantageous in Europe. In the immediate perspective, the grafting of the technological skills of the Apulian nautical supply chain in a rapidly evolving socio-economic context such as the Albanian one is undoubtedly one of the greatest, concrete and reciprocal opportunities for both sides of the Otranto Canal.



*Pic 12 Cruise ship in port at Saranda*



## 30 CONCLUSIVE REMARKS

This document has the primary purpose of developing some reflections that may be useful to the REGLPORTS Partners in the drafting of their Integrated Strategic Tourism Plan. The study highlighted the weaknesses but also the strengths that the territories can offer by developing an integrated and diversified product where various aspects of the "holiday" can be combined, within a framework where sea, culture, folklore, faith, food and wine act as a connecting link in defining a quality tourist circuit.

It is to be hoped that the partners and more the entities they represent will be able to implement a strategic plan if not yet implemented or improve the existing so as to strengthen the tourism sector and in particular that of nautical tourism in order to contribute to the strengthening of local development, not only from the economic point of view, but also in terms of territorial identity.



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