



TOURISMO

Interreg
Euro-MED



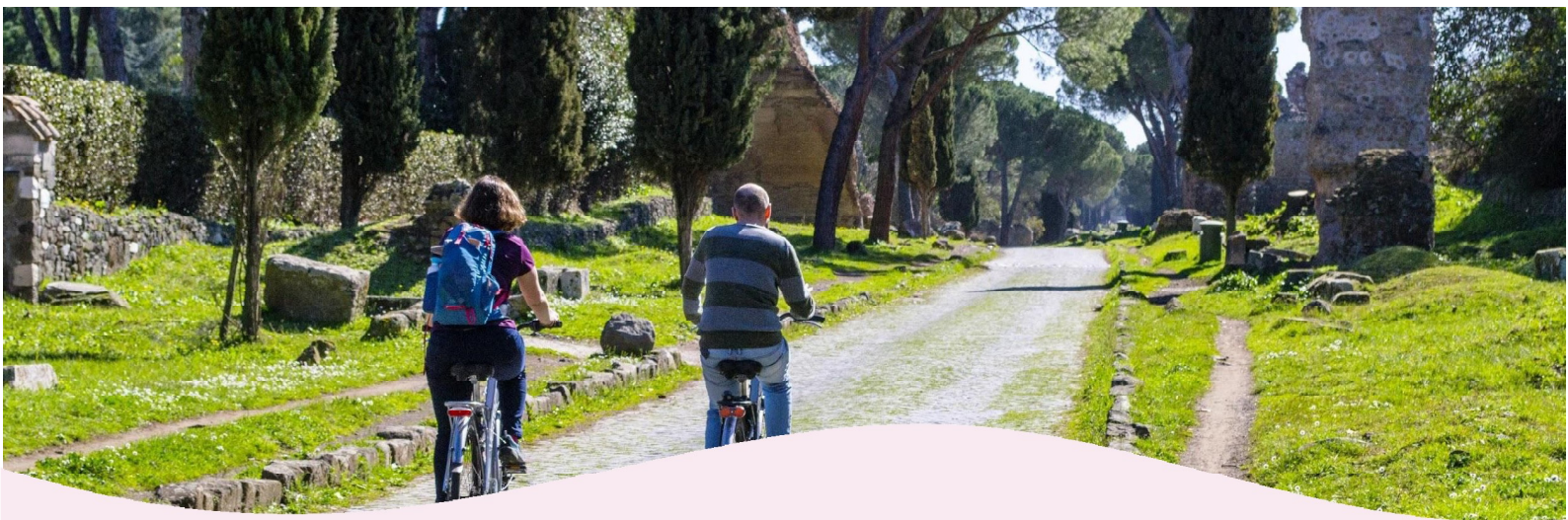
Co-funded by
the European Union

TOURISMO - Tourism Innovative and Sustainable Management of flows

Activity 1.1

Analysis of touristic habits and tourism flows in the selected locations

Project Website: www.tourismo.interreg-euro-med.eu



TOURISMO



Deliverable 1.1.1 Report on Current Situation and Tourism Flows in the selected areas	
Project title	Tourism Innovative and Sustainable Management of flows
Project acronym	TOURISMO
Programme	Interreg Euro-MED Programme
Mission	Enhancing sustainable tourism
Priority	Smarter MED
Deliverable N° & Title	Deliverable 1.1.1: Report on Current Situation and Tourism Flows in the selected areas
Work package N° & Title	WP1 - Design and Setup of Solutions' Deployment
Activity N° & Title	Activity 1.1: Analysis of touristic habits and tourism flows in the selected locations
Partner in charge	FSMLR (Fundación Santa María La Real)
Partners Involved	READ SA, UNIFI, FRI, FV, ANELEM, VEDA, RERA SD, MRDDF, KiNNO, FSMLR
Version of document	1
Distribution (i.e. public, confidential)	Public
Date of production	May 2024

TOURISMO



Table of Contents

1. Summary	5
2. Pilot areas	7
2.1. Rhodes City	7
2.2. Florence City	9
2.3. Valencia Port	11
2.4. Valencia City	12
2.5. Limassol Port	15
2.6. Varna City	17
2.7. Island of Biševo	19
2.8. Golden Bay	20
3. Analysis of Current Tourism Flows	23
3.1. Tourist profiles and seasonality analysis	24
3.1.1. Rhodes City	24
3.1.2. Florence City	27
3.1.3. Valencia Port	28
3.1.4. Valencia City	31
3.1.5. Limassol Port	33
3.1.6. Varna City	34
3.1.7. Island of Biševo	37
3.1.8. Golden Bay	39
3.2 Identification of Spatial Patterns and Tourist behaviours	42
3.2.1. Rhodes City	42
3.2.2. Florence City	44
3.2.3. Valencia port	46
3.2.4. Valencia City	48
3.2.5. Limassol Port	50
3.2.6. Varna City	53
3.2.7. Island of Biševo	55
3.2.8. Golden Bay	58

TOURISMO



4. Mapping of Key Stakeholder Typologies	61
4.1. Stakeholder Analysis	61
4.2. Stakeholder Mapping	63
4.3.1. Rhodes City Key Stakeholders	63
4.3.2. Florence City Key Stakeholders	66
4.3.3. Valencia Port Key Stakeholders	70
4.3.4. Valencia City Key Stakeholders	72
4.3.5. Limassol Port Key Stakeholders	74
4.3.6. Varna City Key Stakeholders	75
4.3.7. Island of Biševo Key Stakeholders	80
4.3.8. Golden Bay Key Stakeholders	85
5. Conclusions	90
5.1 Summary Table of Current Tourism Situation in Pilot Areas	91
6. Bibliography and References	95

TOURISMO

1. Summary

Deliverable D.1.1.1, titled "**Report on Current Situation and Tourism Flows in the Selected Areas**" is a detailed document that includes localized sections on the current state of tourism, tourist flows, and key stakeholders in eight pilot areas: Rhodes City, Florence City, Valencia Port, Valencia City, Limassol Port, Varna City, Island of Biševo, and Golden Bay. This report arises from the tasks carried out in **Activity 1.1 "Analysis of touristic habits and tourism flows in the selected locations"** of the TOURISMO project.

In Activity 1.1, project partners **gathered and analysed existing data on current tourism flows, tourist profiles, and behaviours** to understand how these flows are moved, monitored, and managed in each pilot area. This analysis was conducted using a **common format document** to ensure consistency across the different locations and through **one-on-one interviews** with each pilot area to interpret the **situation of tourist flows from a spatial perspective**, showing how tourist movements are distributed within each area.

The report also includes a **mapping of key stakeholders** involved in the tourism processes of each pilot area. These stakeholders include public authorities, ports, cultural federations, and other relevant entities. By identifying and categorizing these stakeholders, the report provides an understanding of the roles and influences of different actors in tourism management and development in these regions.

The final analysis reveals common challenges and unique opportunities across the pilot areas, with recurring themes of high tourist numbers and the need to preserve cultural and natural heritage sites. By studying how tourists move through these areas, it becomes possible to make informed decisions that better manage tourism during peak times and at popular sites, thereby ensuring a more sustainable and enjoyable experience for both tourists and local communities.

TOURISMO



Activity 1.1			
Title		Analysis of touristic habits and tourism flows in the selected locations	
Start period		Period 1, 1 - 6	
End period		Period 1, 1 - 6	
Description		In A.1.1, partners -based on a common format- will gather and analyze existing data on current tourism flows, tourist profiles and behavior in order to understand how flows are currently moved, monitored & managed per pilot area. Moreover, they will work on interpreting them under a purely spatial perspective per pilot area. Additionally, they will elaborate a mapping of the key typologies of stakeholders (public authorities, ports, cultural federations etc.) per pilot area involved in the processes.	
Partner(s) involved		ANELEM, FRI, FSMLR, FV, KINNO, MRDDF, READ SA, RERA SD, UNIFI, VEDA	

Deliverables 1.1			
Running number	Deliverable title	Description	Delivery period
D.1.1.1	Report on Current Situation and Tourism Flows in the selected areas	Consolidated report with localized sections regarding situation, flows & key stakeholder typologies	Period 1 , 1 - 6

TOURISMO



2. Pilot areas

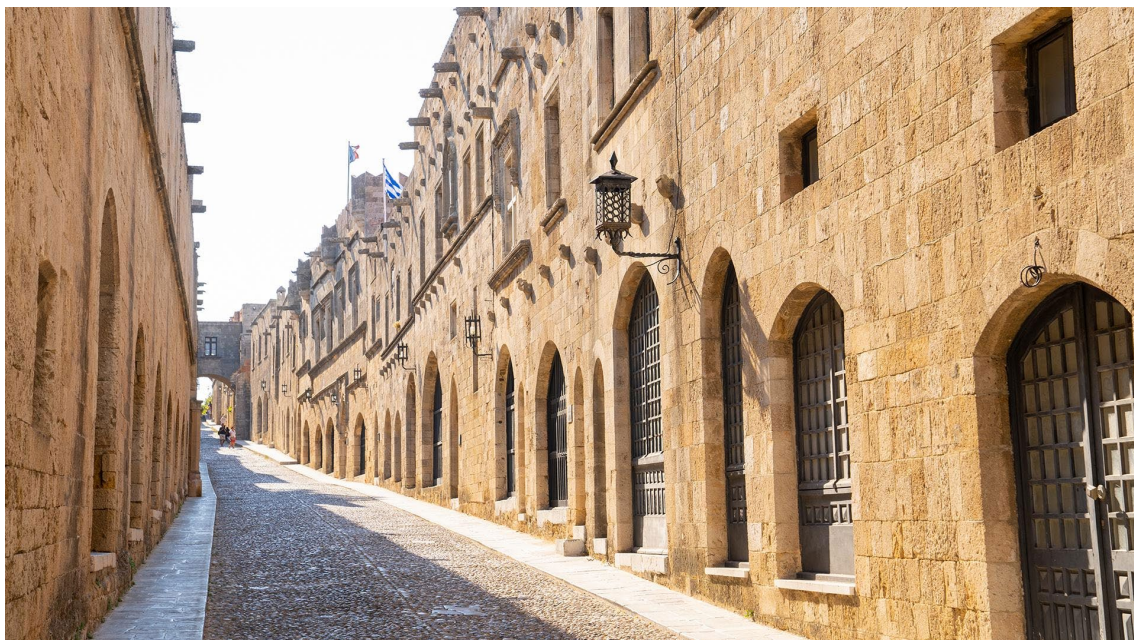
2.1. Rhodes City

The **Medieval Town of Rhodes**, included in the **List of World Heritage Towns by UNESCO**, is the most significant attraction in Rhodes, drawing visitors globally. Characterized by its labyrinthine streets, the town features a rich tapestry of **historical architecture**, including small houses, grand knightly buildings from the 15th and 16th centuries, and numerous medieval churches interspersed with several mosques, adding an oriental flair to its skyline. Notable landmarks include the **Palace of the Grand Master of the Order**, known as the "Castello," which now houses the Museum of Rhodes with its extensive exhibits.



Location of Rhodes in Greece

TOURISMO



Knight's street



Sokratous Street

2.2. Florence City

TOURISMO



Set in the heart of Tuscany, **Florence** is renowned worldwide as the **cradle of the Renaissance** and the global capital of 15th-century art. Its city centre, spanning approximately 5 km², has been a **UNESCO World Heritage site since 1982** and houses some of the most famous museums in Europe and the world. The main characteristic of this pilot area is the **high density of cultural heritage sites**, which, coupled with the significant tourist influx, results in a **substantial tourism impact** throughout much of the year. The City of Florence is facing challenges to enhance its resilience through more sustainable tourism practices and needs to continue expanding the use of data for more detailed and comprehensive tourism-related analyses, ensuring that Florence remains a **vibrant and sustainable destination** that benefits both residents and visitors alike.



Location of Florence in Italy

TOURISMO



City view from Forte Belvedere



Ponte Vecchio area

TOURISMO



2.3. Valencia Port

The **Port of Valencia**, strategically positioned as a **gateway to the Mediterranean**, is one of the busiest container ports in Europe. Its geographical location at the crossroads of major European trade routes not only facilitates significant commercial traffic but also positions it as a **pivotal point for tourist flows, particularly from cruise ships**. The port is continuously developing its infrastructure to enhance **operational efficiency** and visitor experiences, incorporating **cutting-edge technologies** to manage both commercial and tourist activities sustainably.



Location of Valencia in Spain

TOURISMO



Trasmed-Grimaldi Terminal



Cruise Terminal Panoramic

TOURISMO



2.4. Valencia City

Valencia, a vibrant city on **Spain's Mediterranean coast**, is known for its rich **history, diverse architecture, and lively cultural scene**. The city's historic centre features notable landmarks such as **La Lonja**, a **UNESCO World Heritage site**, and the **Valencia Cathedral**. Valencia is also famous for its **City of Arts and Sciences**, a cultural and architectural complex that has become a symbol of the city.

One of the main challenges in Valencia is managing the high tourist numbers that it receives nowadays, which result in **significant congestion in its historic centre**, known as La **Ciutat Vella** (Old City). It is crucial to ensure that this high demand for tourism does not negatively impact the **preservation of its historical assets**, by implementing sustainable tourism practices and improving the management of tourism flows to protect and enhance Valencia's cultural heritage while providing an excellent experience for visitors.



La Lonja of Valencia

TOURISMO



City Market – View from La Lonja



Queen's Square

2.5. Limassol Port

TOURISMO



Limassol Port, situated on the **south coast of Cyprus**, is one of the largest ports on the island and is strategically located near major tourist attractions, making it a primary entry point for visitors arriving by sea. Its proximity to the city centre, which has evolved into a **cosmopolitan tourist hub** while maintaining its traditional charm, adds to its appeal. The Limassol port area, including the **Old Port**, **Limassol Marina**, and the surrounding commercial and cultural zones, experiences high traffic, especially during the peak tourist season. The recent upgrades, including the expansion of pedestrian pathways and the addition of recreational and commercial facilities, have transformed the port into a lively part of the city. However, the influx of tourists can cause congestion and strain on local infrastructure.



Location of Limassol in Cyprus

TOURISMO



Molos Park Promenade



Limassol Marina

TOURISMO



2.6. Varna City

Varna, Bulgaria's maritime capital, is located on the **Black Sea coast** and is renowned for its rich cultural heritage and vibrant summer tourism. Key attractions include the **Varna Sea Garden, Roman Baths, and the Archaeological Museum**, which houses the world's oldest processed gold treasure. The area also features a wealth of historic churches, and vibrant festivals that highlight local crafts, books, and other cultural activities. Restaurants, cafés, and markets add to the lively atmosphere, although they can contribute to congestion, especially when combined with the large crowds attending public events at nearby venues like the Festival Complex.

The city faces challenges related to the impact of **high tourist volumes on its historical sites** and urban environment, and aims to monitor and manage tourism flows, developing strategies to balance the city's dynamic tourism industry with the preservation of its cultural and historical assets.



Location of Varna in Bulgaria

TOURISMO



Traffic Alley to the Sea Garden Entrance



Traffic at the Sea Garden entrance

TOURISMO



2.7. Island of Biševo

Biševo Island, located **off the coast of Croatia**, is renowned for its **stunning natural beauty** and the famous **Blue Cave**, a mesmerizing sea cave illuminated by vibrant blue light. Beyond this iconic attraction, Biševo offers visitors the **Biševo Geotrail**, which spans 19 km and provides an in-depth exploration of the island's diverse geological formations, flora, and fauna. The island's picturesque beaches, such as **Porat and Salbunara**, and the **historical coastal artillery battery at Cape Gatula** provide a unique experience for tourists.

While the island attracts numerous visitors, the challenge lies in managing tourist flows to prevent overcrowding at the Blue Cave and to ensure that visitors can make the most of their time on the island by exploring its other attractions.

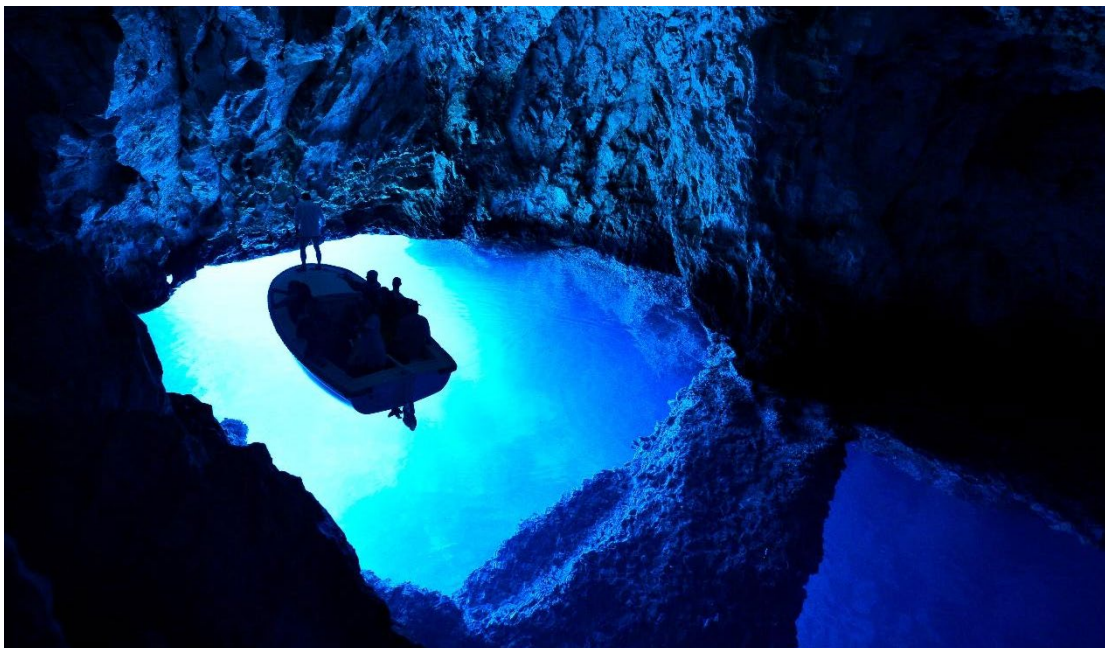


Location of Biševo in Croatia

TOURISMO



Mezoporat Bay



Blue Cave

TOURISMO



2.8. Golden Bay

The **Golden Bay**, located on the **northwest coast of Malta** within the Mellieħa and Mġarr localities, is renowned for its **stunning natural landscapes and rich biodiversity**. This area, known as Rdumijiet ta' Malta: Ramla tal-Mixquqa, spans approximately 33 hectares and includes diverse environments such as clay slopes, beaches, karstland, boulder screes, and agricultural land. Protected under the **Natura 2000 management plans** since 2017, Golden Bay aims to conserve its unique ecological characteristics.

The area's natural features make it a popular destination, particularly during the summer months when tourists flock to its sandy beaches, such as the picturesque **Ramla tal-Mixquqa** and the adjacent **Ramla ta Ghajn Tuffieħa**. Despite its popularity, Golden Bay faces challenges such as seasonality, overcapacity tourism streams, excessive construction, waste generation, resource depletion, desertification, erosion, and biodiversity loss.

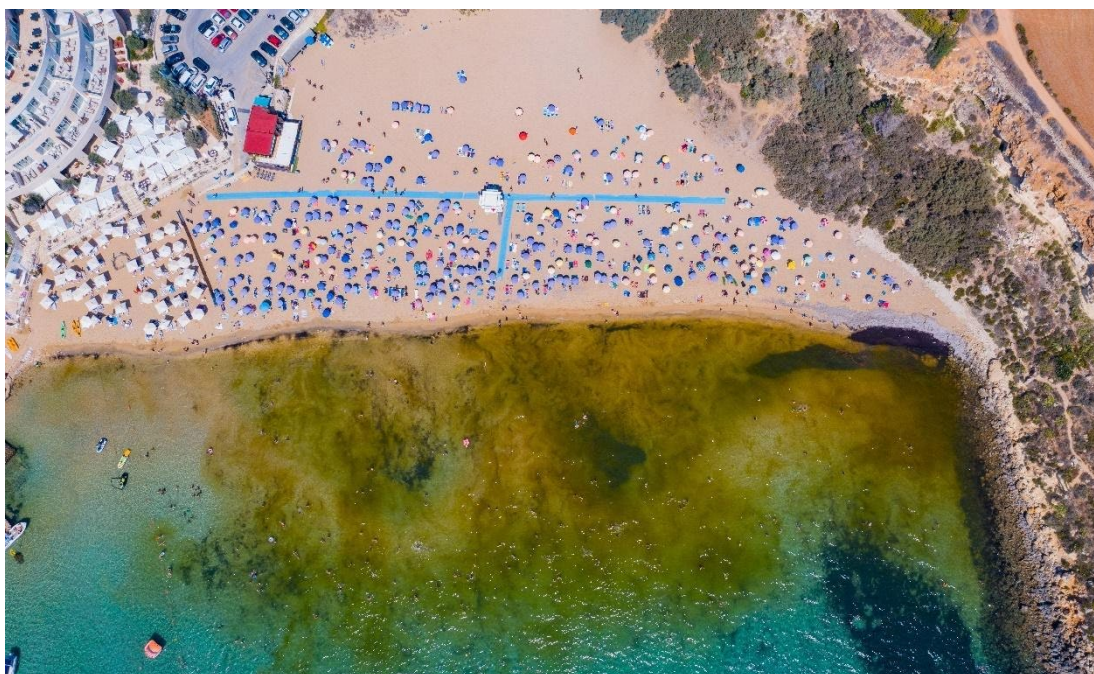


Location of Golden Bay in Malta

TOURISMO



Aerial view - Golden Bay



Aerial view - Golden Bay

TOURISMO

3. Analysis of Current Tourism Flows

The analysis of current tourism flows is crucial for **understanding the dynamics of visitor movement and behaviour** within the TOURISMO project's pilot areas. By examining tourist profiles, identifying spatial patterns, and conducting a preliminary seasonality analysis, this section aims to gather comprehensive data to begin understanding the ways in which tourism affects each study area. The focus is on providing an in-depth look at the current state of tourism in the pilot locations, highlighting key trends and areas that require attention to enhance the overall visitor experience while promoting a balanced and sustainable approach to tourism.

This study represents an **initial assessment of observable trends and flows**, identifying the most visited attractions and areas experiencing evident tourist congestion. However, it is important to note that in most pilot locations, these flows are not currently monitored. Also, in cases where some technologies are applied, there is a need to adjust these systems for more precise data collection.

TOURISMO



3.1. Tourist profiles and seasonality analysis

3.1.1. Rhodes City

The Medieval Town of Rhodes attracts a diverse array of tourists from various demographics. The primary visitor profiles are:

- **Families:** Predominantly visiting during the summer months, attracted by family-friendly accommodations and activities.
- **Older Adults and Couples:** More common during the shoulder seasons of spring and autumn, when the weather is milder and the area is less crowded.
- **Cruise Ship Passengers:** A significant portion of tourists arrive via cruise ships, often in large groups that disembark and visit key sites such as the Grand Master's Palace and Sokratous Street.

Demographic Data:

The majority of international tourists come from **European countries**, including the UK, Germany, and Italy. There are also many visitors from the **USA**.

Domestic tourists from mainland Greece also form a substantial part of the visitor base.

- Tourists aged **between 25 and 44 years old** constitute a significant share, making up **40%** of all visitors.
- Tourists aged **between 45 and 64 years old** comprise **35%** of the total.
- The remaining **25%** is made up of younger visitors **between 18-24 years old** and older tourists (**65+ years old**)

TOURISMO



According to the Air Traffic statistics provided by the airport of Rhodes, the demographic characteristics of the tourists who visited the island of Rhodes in 2023 by plane are:

Country	Total
United Kingdom	1.341.929
Germany	937.844
Greece	850.925
Poland	377.614
Israel	277.576
Sweden	261.116
Netherlands	210.610
Czech Republic	193.329
France	192.540
Finland	191.330
Italy	187.218
Denmark	183.207
Austria	168.192
Belgium	160.750
Norway	157.280
Switzerland	97.739
Romania	66.912
Slovakia	53.160
Hungary	43.348
Ireland	31.807
Cyprus	31.568
Lithuania	29.943
Luxembourg	20.307
Serbia	20.251
Estonia	16.549
Latvia	13.595
Bulgaria	11.656
Slovenia	9.168
Armenia	2.773
Turkey	1.851
Remaining Countries*	726
Total	6.142.813

TOURISMO



Seasonality Analysis

Tourism in Rhodes is highly seasonal, peaking **from May to September**. However, efforts to extend the tourist season have seen success, with an increasing number of visitors **arriving as early as March and staying until November**. This extension is partly influenced by the dates of Catholic Easter, which can attract early visitors.

- **Peak Season is May to September**, with the highest tourist volumes. During this time, the Medieval Town experiences significant congestion, especially at popular sites.
- **Shoulder Seasons: April and October-November**, attracting visitors looking to avoid the peak crowds while still enjoying favourable weather.
- **Off-Peak Season:** December to February, with minimal tourist activity. This period sees a sharp drop in visitors, providing opportunities for maintenance and preservation activities within the Medieval Town.

Supplementary Tourism Information

- The total number of the people that came to Rhodes on cruise in 2023 were 453.832, in a total of 371 cruise ships.

TOURISMO



3.1.2. Florence City

Florence attracts a diverse range of tourists throughout the year, with most visitors interested in its rich cultural heritage. As the cradle of the Renaissance, Florence is a prime destination for those engaging in **cultural tourism**. These tourists are primarily drawn to the city's wealth of historical sites, world-renowned museums, and impressive art galleries.

Florence is known to be a relatively expensive destination, but it offers a range of experiences at varying costs, attracting tourists with diverse financial backgrounds. Similarly, the anthropic impact varies significantly, from low-impact visitors such as those arriving with backpacks from walking routes to high-impact daily visitors transported by cruise ships.

Demographic Data

The majority of international tourists come from **Europe**, with significant numbers from the **UK, Germany, and France**, as well as from the **United States** and increasingly from **Asia**.

Domestic tourism is equally important: in 2022 (data for 2023 is still not available), the majority of **domestic tourists** coming from the Lombardia (17%), Lazio (14%), and Campania (12%) regions, accounting for a total of **42% of domestic stays**.

It is important to highlight that while the geographical origin of tourists is a key factor for analysis, seasonality and the attractions visited by these tourists are equally crucial variables. Different nationalities visit Florence at different times of the year, and this also influences the main attractions they choose to visit (or avoid).

Seasonality Analysis

The pilot area is a world famous cultural destination, as a consequence tourists are practically always present. The less crowded months can be considered November and February, while from March to October and December-January are considered high-season, but overall this is a **deseasonalized location**.

Supplementary Tourism Information

- in 2022 **total stays were 7,4M** in the Municipality of Florence, 11M in the Metropolitan area (plus the non-official stays for both numbers), compared to 367.500 residents (2023 data are still not available).

TOURISMO



3.1.3. Valencia Port

The city of Valencia is a captivating tourist destination known for its **rich history, vibrant culture, and modern attractions**. Visitors can **relax on beautiful beaches, enjoy the birthplace of paella**, and experience unique festivals like Las Fallas. Valencia's Mediterranean climate, accessibility, and opportunities for sports and recreation, such as sailing and hiking, further enhance its appeal, making it a versatile and **attractive destination**.

Demographic Data

Valencia is becoming a very popular destination for the cruise sector. Likewise, the interest from cruise passengers has also grown in the past years, arriving at the Port of Valencia a total of **more than 781,280 passengers in 2023**. Although the years 2020 and 2021 reflected the impact of the pandemic, the post-pandemic data have increased with respect to the averages of previous years due to the increase in cruise calls coupled with the trend of growth in cruise ship capacity as per the following table.

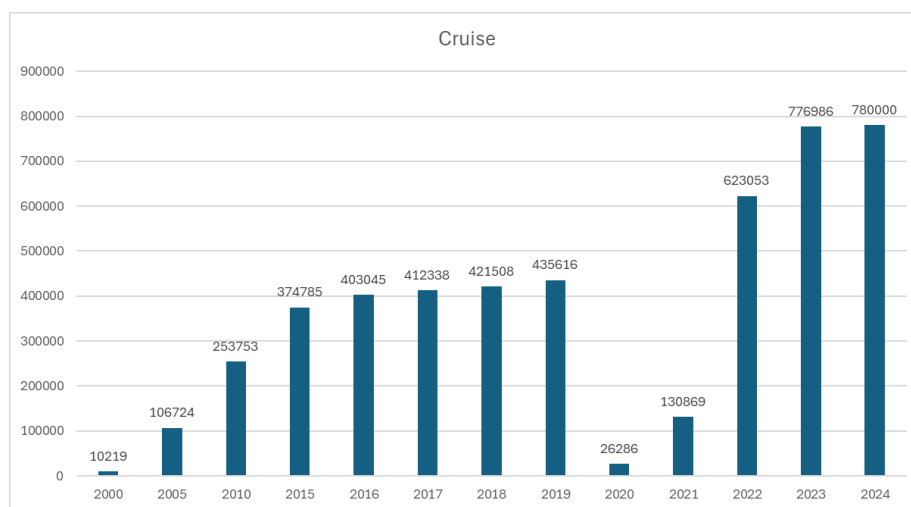


Ilustración 1: Number of passengers in Port Authority of Valencia

Regarding the **number of cruise calls in Valenciaport**, 2022 reached a record number, due to the post-pandemic effect and the closure of some cruise markets during part of that season. In 2023, the port recorded **268 cruises calls**, and projections indicate approximately 287 calls in 2024. This upward trend is expected to continue in the coming years.

The average **age of these passengers is 52 years**, with a gender distribution of **54% female and 46% male**. The age groups are distributed as follows: 42% are over 60, 32% are between 41-60, 13% are between 21-40, and another 13% are 0-20 years old. In terms of origins, a significant portion of the passengers come from **Germany (23%)**, followed by **Spain (13%)**, **Italy (13%)**, **the USA (11%)**, **England (11%)**, and **France (8%)**.

TOURISMO



As far as the Shorex offer in Valencia and its province is concerned, a wide range of options has been generated. Although **54% of the excursions contracted visit the historic centre of the city** and **26% the City of Arts and Sciences**, **15% of cruise passengers visit other municipalities** such as Xàtiva, Requena or Sagunto.

Cruise industry trends show that this cruise market is growing in multigenerational families and creating a lot of interest among **younger generations such as Millennials or Generation Z**. Moreover, as in other sectors, sustainability is also a concern for both passengers and the shipping industry.

Seasonality Analysis

In the case of Valencia, cruise ships represent around **20% of the total number of visitors to the city** and in terms of seasonality, while tourists are mainly concentrated in the months of July and August, cruise ships avoid these months and increase their stopovers in the months of **April-May** and **September-October**, helping to balance the total number of tourists.

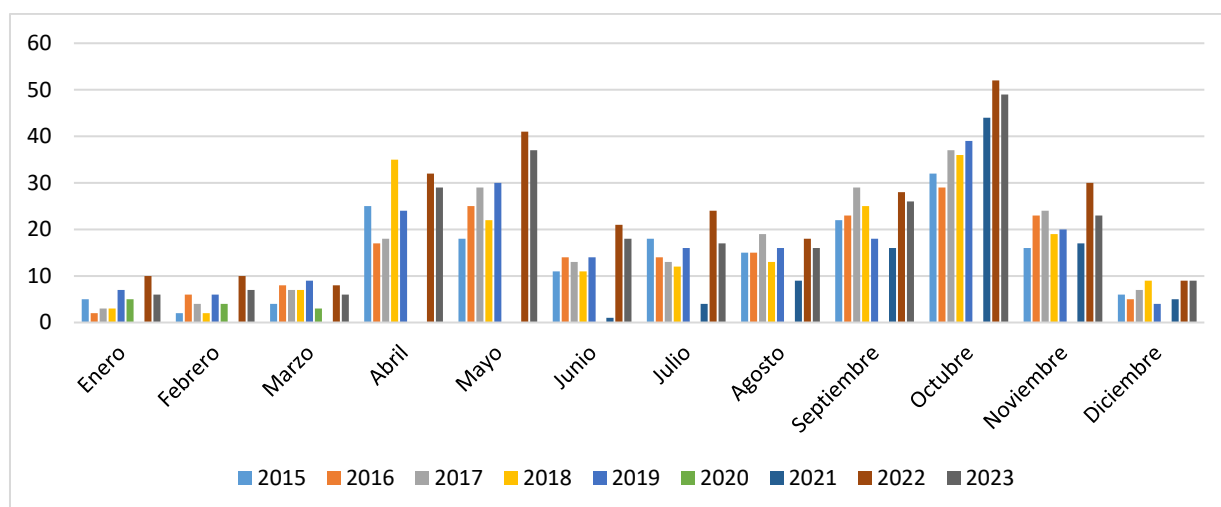


Ilustración 2: Seasonality of cruise ship stopovers in Valencia (2015-2023)

Valenciaport is developing a cruise strategy based on sustainability, with a focus on maintaining the total number of cruise passengers and calls it receives, as well as working on the deseasonalisation and deconcentration of the number of cruise passengers in the destination.

TOURISMO



Supplementary Tourism Information

- The Port of Valencia is well connected to the two main tourist areas of the city, the historic centre and the City of Arts and Sciences.
- At the very entrance of the port there are two municipal bus lines (EMT BUS) to visit the historic centre and admire the architecture of the modern part of the city. Buses for excursions can stop at different places in the historic centre.
- The port has two areas for operations and attention to cruise ships:
 - The quays adjacent to the TRASMED passenger terminal for vessels of less than 300m in length
 - The quays located in the northern extension of the port for vessels over 300m in length, which have all the services necessary for passenger services.
- The TRASMED terminal is located at the northern entrance to the port, the closest to the city and in a freely accessible area.

TOURISMO



3.1.4. Valencia City

Valencia attracts a wide variety of tourists, offering a diverse range of experiences. Known for its rich **cultural heritage** and excellent **gastronomic tourism**, Valencia was also the **World Design Capital** in 2022. The city boasts iconic sites such as the City of Arts and Sciences and the historic old town, which includes important landmarks like La Lonja and the Cathedral. Additionally, Valencia has established itself as a **sustainable and safe destination for conferences and conventions**, drawing attendees from around the world.

Demographic Data

In 2022, Valencia received a total of **2,197,133 visitors**, a figure close to pre-pandemic levels. **International visitors** accounted for 1,139,816 (approximately **51.9%**) of the total, while **domestic visitors** numbered 1,057,317 (approximately **48.1%**).

Among international tourists, **Europeans** make up the majority, with significant numbers coming from the **Netherlands, Italy, France, the UK, Germany, and Belgium**. Additionally, the **USA** represents the largest non-European source of visitors, with notable numbers also coming from **Mexico, Brazil, and China**.

	Visitors	Overnight stays		Visitors	Overnight stays
Europe (excl. Spain)	859.496	2.565.439	International	280.320	682.894
ALEMANIA	83.512	254.801	AMERICA	198.606	488.357
AUSTRIA	13.419	43.401	BRASIL	10.571	25.769
BELGIUM	50.667	159.983	CANADA	8.851	21.647
DENMARK	4.163	12.945	USA	81.557	202.226
FINLAND	3.695	10.691	MEXICO	10.009	22.378
FRANCE	92.414	251.854	AFRICA	18.182	48.032
NETHERLANDS	144.364	485.192	ASIA	36.036	82.526
IRLAND	16.072	49.135	JAPAN	2.856	6.677
ITALY	159.977	467.271	CHINA	8.623	17.853
POLAND	16.402	46.395	AUSTRALIA	4.486	10.253
PORTUGAL	24.619	59.654			
UK	90.328	262.863			
ROMANIA	19.451	56.335			
SWEDEN	9.043	23.365			
NORWAY	8.434	21.651			
RUSSIA	11.229	29.812			
SWITZERLAND	25.177	75.676			
TÜRKIYE	3.656	9.837			

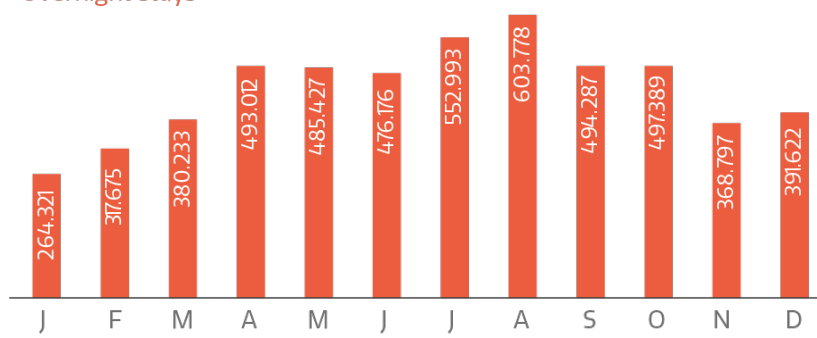
Source: INE (EOH + EOAT).

TOURISMO

*Seasonality Analysis*

Valencia enjoys mild temperatures year-round, a climate that allows visitors to enjoy its natural and cultural offerings at any time. While the city does experience peak seasons, such as during Las Fallas and the summer months, tourism remains relatively constant throughout the year.

Overnight stays



Source: INE (EOH + EOAT).

Supplementary Tourism Information

- In 2022, **total overnight stays reached 5,325,710**, according to the National Institute of Statistics (INE). This figure is close to that of 2019 and represents a 62.1% increase compared to 2021.
- In 2022, Valencia recorded a total of **209 registered hotels and hostels**, providing **21,406 beds**. Additionally, there were **5,470 registered tourist rental apartments**, offering **26,046 beds**.
- The average length of stay in hotels and apartments was **2.85 nights** for international tourists and **1.96 nights** for domestic tourists.

TOURISMO



3.1.5. Limassol Port

Limassol attracts a diverse range of tourists throughout the year. Known for its vibrant cosmopolitan atmosphere, the city offers a mix of **cultural, historical, and leisure experiences**. Visitors are drawn to its modern amenities, beautiful beaches, and historical landmarks, making it a popular destination for both **relaxation and exploration**.

Demographic Data

Even though there are no statistical data or information about demographic characteristics of the pilot area., there some data for Cruise Tourism that arrive in Limassol Port. According to DP World Limassol, the port operator, **93 cruise ships** have made calls at Limassol port in 2019, an increase of 40% compared to 2018, with the number of passengers arriving reaching 125,000.

Over **80%** of visitors come from **Northern, Western, and Eastern Europe**, with **British** tourists remaining the most numerous. Most of the visitors in the area **families with children**. In 2022, the **United Kingdom** is the main source of tourism for Cyprus, with a percentage of **37,9%** of the total tourist traffic, followed by **Israel** with **8,7%**, **Germany** with **6,2%**, Poland with **5,8%**, **Greece** with **5,3%**, **Sweden** with **3,7%**, **Austria** with **2,2%** and **Denmark** with **2,1%**.

Tourist arrivals **increased by 65.3%** and reached **3.201.080 in 2022** from 1,936,931 in 2021.

Seasonality Analysis

The peak tourist season in Limassol is between **June and August**. Over the past decade, there have been changes in the tourism season driven by various factors, including economic conditions, geopolitical events, and traveling trends. One notable trend is the extension of the tourist season beyond the traditional summer months, leading to a **more prolonged period of high visitor numbers**.

TOURISMO



3.1.6. Varna City

Varna attracts a diverse range of tourists throughout the year. The primary visitor profiles are:

- **Family Tourists:** Predominantly visiting during the summer months (June to August), families are drawn to Varna for its beaches and summer attractions. They typically engage in sea tourism and spend their days at the beach, visiting local restaurants, and enjoying summer events.
- **Cultural Tourists:** These tourists visit Varna year-round but are particularly prominent between the spring (April to May) and autumn (September to October) months. They are interested in the city's rich history and cultural heritage, visiting museums, the Roman Baths, and attending cultural events and concerts.
- **Health and Medical Tourists:** Varna's reputation as a destination for health and medical tourism brings in tourists seeking wellness and spa treatments, especially during the off-peak seasons.
- **Business Tourists:** Present throughout the year, notably during the off-peak seasons. Varna hosts numerous conferences and business events, attracting business tourists who stay in the city's luxury hotels and utilize its conference facilities.
- **Senior Tourists:** Often visit during the winter months. Senior tourists tend to stay longer in Varna, taking advantage of all-inclusive packages and enjoying the city's more relaxing environment outside the peak tourist season.

Demographic Data

In 2022, Varna welcomed **896,934 tourists**. 290,907 of the visitors were **Bulgarians**. The ratio is 32.43% to 67.57% in favour of foreigners' tourists.

The majority of tourists come from **European countries**, with significant numbers from **Germany, Russia, Romania, Poland, and the United Kingdom**. Approximately **40%** of visitors are aged **between 25 and 44 years old**, while tourists aged **between 45 and 64 years old** make up about **35%** of the total. Younger visitors **between 18-24 years old** and older tourists (65+ years old) comprise the remaining **25%**.

The country of origin of tourists visited Bulgaria in 2022 is presented in the following table:

TOURISMO



Country of origin	Total
TOTAL	12 627 547
Of which:	
EU	6 274 597
Austria	183 926
Belgium	128 725
Croatia	32 218
Cyprus	23 514
Czech Rep.	198 727
Denmark	48 332
Finland	20 997
France	200 950
Germany	897 480
Greece	1 109 412
Hungary	99 704
Ireland	47 844
Italy	181 514
Malta	5 339
Netherlands	185 584
Poland	467 505
Portugal	20 686
Romania	2 106 097
Slovakia	78 424
Slovenia	13 605
Spain	86 655
Sweden	67 133
Other countries from EU	70 226
Other European countries	5 074 511
Norway	49 312
Republic of North Macedonia	425 012
Russian Fed.	139 799
Serbia	643 488
Switzerland	35 193
Turkey	2 200 341
Ukraine	1 181 911
United Kingdom	399 455
Other countries	348 592
Canada	20 225
Israel	206 570
Japan	7 204
USA	114 593
Rest of the world	929 847

TOURISMO



Seasonality Analysis

Tourism in Varna peaks during the summer months of **June, July, and August**, driven by the warm climate and long days, with temperatures often exceeding 30 degrees Celsius. This period sees the highest influx of tourists, leading to significant demand for accommodation, beach facilities, and other tourist services.

Spring (April to May) is also a season of medium-high demand with pleasant temperatures, especially along the coast which enjoys climatic influences from the Mediterranean. September can also offer good weather though temperatures drop dramatically from October onwards when the country is often carpeted in snow.

However, Varna is no longer just a summer tourism destination. In recent years, the city's recreational characteristics, mineral springs, cultural and historical monuments, archaeological sites, protected territories, and well-developed infrastructure have fostered the development of **diverse types of tourism** throughout the year. Varna, along with the Golden Sands and St. St. Constantine and Helena resorts, offers excellent opportunities for **year-round health and medical tourism**. Additionally, the city's modern amenities and infrastructure support **congress tourism**, enhancing the activity of luxury hotels during the off-peak seasons. This makes Varna and its surrounding resorts preferred locations for international conferences, congresses, and business events.

Supplementary Tourism Information

- There are **2,684 guest accommodation facilities** in the municipality.
- The **overnight stays** in Varna for 2022 are **5.9 million**, including the accommodation of refugees from Ukraine. Almost 88% is the increase compared to the previous year.
- Almost **14% growth of urban tourism** in 2023 in Varna, the Ministry of Tourism reported.
- The **average length of stay** of tourists in Varna is **5 nights**.
- For the period from 2015 to 2019 **the average stay decreased** from 4.6 nights to 4.4 nights. The general decrease is due to the **shortening of the average stay of foreign tourists** - from 5.8 nights to 5.09 nights. With the Bulgarians tourists also saw an increase from 2.8 to 2.7 overnight stays per tourist.

TOURISMO



3.1.7. Island of Biševo

The primary visitors to the Island of Biševo are predominantly visitors seeking **natural tourism** and unique geological phenomena.

Visitors to the island of Biševo are predominantly **foreign tourists**. Modern tourism trends show that trips are becoming shorter and more frequent, with tourists seeking not just attractive destinations but also **unique experiences, novelty, activities**, and educational opportunities. These characteristics define the typical tourist profile visiting Biševo.

The **Blue Cave** is the central attraction, drawing visitors from around the globe to witness its stunning natural light display. Additionally, the island attracts adventure tourists interested in exploring its other natural and **historical sites**, such as the Monk Seal Cave and the remnants of military installations from the Yugoslav era.

Demographic Data

The majority of visitors to Biševo come from economically developed countries and tend to have higher spending capacities. In recent years, there has been a noticeable increase in VIP guests, including those arriving on **mega yachts and luxury mini cruisers**. However, Biševo attracts visitors from all social classes. The island's natural beauty and opportunities for active vacations make it particularly popular among **younger tourists**, especially those aged **25-35**, but mature adult couples, young singles, and families with children also frequently visit the island.

Regarding the ratio of domestic to foreign guests in the nearby town of Komiža over the past five years, with 2019 as the reference year (pre-COVID-19), the percentage of domestic visitors has varied: 34.42% in 2019, 58.74% in 2020, 48.60% in 2021, 44.75% in 2022, and **44.73%** in 2023.

During this period, the majority of foreign visitors to Komiža have come from **Slovenia, Germany, the Czech Republic, Poland, the UK, Austria, Serbia, France, and Italy**. This diverse international presence underscores Biševo's appeal to tourists from across Europe and beyond.

Seasonality Analysis

The peak of the tourist season in the area of Komiža **begins in June and lasts until September**, mostly thanks to one of the most famous natural beauties of the Adriatic – Blue Cave on the island of Biševo.

The possibility of visiting the Blue Cave is mostly **conditioned by weather conditions** (sea conditions), which have been changing rapidly in the last 10 years.

The largest number of visitors is during **June, July, August and September** when the daily number of visitors reaches **2 500** (70% in period from 9 a.m. to 1 p.m.).

TOURISMO



MONTH	YEAR / NUMBER OF VISITORS					
	2018.	2019.	2020.	2021.	2022.	2023.
June	25.619	31.299	3.297	9.153	24.505	29.902
July	40.110	47.038	19.061	29.020	37.458	35.551
August	50.257	53.705	29.737	34.800	38.346	36.569
September	26.097	28.639	7.490	26.517	13.075	25.033

Among the major events is **Yacht Week**, which lasts 12 weeks during the summer and is held in four countries, including Croatia, with routes in both northern and southern Croatia. Another important event is the historical regatta **“Rota Palagružona”** (Rota Cicibela), which follows the historic fishermen's 75 km long route. In Komiža, the **“Big Game Fishing”** international qualification tournament is a significant event. **Every first Saturday in August** features the popular celebration **“Fisherman's Night”** marking the peak of the tourist season. The **“Komiža Summer”** event, held from July 4 to August 30, includes various social and cultural events on the island of Biševo.

Events and visits to main tourist attractions are **organized to reduce pressure during the high season**, with many events taking place in the pre- and post-season. These events are mainly **cultural and gastronomic**, leveraging the natural monuments and attractions of Komiža and Biševo, areas rich in cultural history and heritage and characterized by unspoiled nature.

TOURISMO



3.1.8. Golden Bay

The Golden Bay attracts a diverse array of tourists. Key visitor profiles include:

- **Families and Leisure Seekers:** Particularly during the summer months, Golden Bay is a popular destination for families and individuals seeking leisure and relaxation. The beach's natural beauty and amenities make it ideal for a day out.
- **Young Adults and Students:** Notably, English language students frequent the beach in large groups, especially after school hours. This demographic is significant during the summer when Malta hosts numerous language courses.
- **International Tourists:** The primary market for Golden Bay are European visitors.

Demographic Data

Most visitors come from **Italy, the United Kingdom, France, Germany, Poland, and Spain**. Malta has seen an 8% increase in tourists, surpassing pre-pandemic levels, with international tourists contributing significantly to this rise.

For the first time, Italy has surpassed the United Kingdom as the top tourist market, amounting to 18.4% of tourists, while British tourists amounted to 18.1%. France (9.6%), Germany (7.3%), Poland (5.6%) and Spain (3.8%) follow Italy and the UK as top markets for Malta.

Tourists aged **between 25 and 44 years old** constitute the largest share, making up **39%** of all visitors in 2023, and tourists aged **between 45 and 64 years old** comprise **30%** of the total.

TOURISMO



Demographic Profile

	2019	2021	2022	Change 2022/2021
GENDER				
Males	1,368,550	502,914	1,135,265	125.7%
Females	1,384,689	465,223	1,151,332	147.5%
AGE GROUP				
0-24	544,597	211,890	539,645	154.7%
25-44	1,101,842	408,670	909,967	122.7%
45-64	826,816	274,576	646,602	135.5%
65+	279,984	73,000	190,383	160.8%
ORGANISATION OF STAY				
Package	818,014	221,645	541,553	144.3%
Non-package	1,935,226	746,491	1,745,043	133.8%
FREQUENCY				
First time tourists	2,056,139	695,562	1,720,984	147.4%
Repeat tourists	697,100	272,574	565,613	107.5%
DURATION OF VISIT				
1-3 nights	600,879	174,627	509,404	191.7%
4-6 nights	821,265	257,584	733,882	184.9%
7 nights or more	1,331,096	535,925	1,043,311	94.7%
Total inbound tourists	2,753,239	968,136	2,286,597	136.2%

Source: NSO (Inbound Tourism)

Seasonality Analysis

Tourism in Golden Bay is **highly seasonal**, with **significant peaks during the summer months**. However, efforts to extend the tourist season have led to increased visitor numbers even in the first and fourth quarters of the year.

Peak Season: July and August are the busiest months, with an estimated peak of 8,000 visitors per day. Overcrowding is a significant issue during this period.

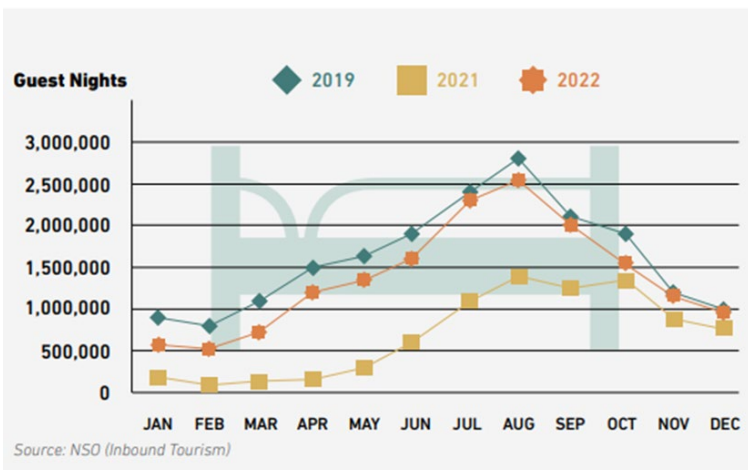
Shoulder Seasons: The spring and autumn months see a steady flow of tourists, benefiting from milder weather and reduced crowding.

Off-Peak Season: Winter months see fewer tourists, with the beach frequented mostly by locals and some international visitors. The demographic shift towards year-round tourism has been observed, driven by Malta's mild climate and ongoing promotional efforts.

TOURISMO



Seasonality of Guest Nights



Supplementary Tourism Information

- Overcrowding is a major issue in Malta since **over three million tourists** visited Malta in 2023.
- Peak **beach density** was **4.8m² per person** in August 2019 - well above the average for Europe (6.8 sqm per person).
- In terms of tourist expenditure, in 2023, tourists in Malta spent a total of **€2.7 billion**, or **€898 spent per capita**.
- 2023 marked a record number of nights, exceeding **20 million overnight stays**, as compared to the 19.3 million recorded in 2019.
- Collective accommodation has marginally increased to 63%, where nearly **two thirds of inbound tourists stayed in collective accommodation**. 27% stayed in other rented accommodation.

TOURISMO



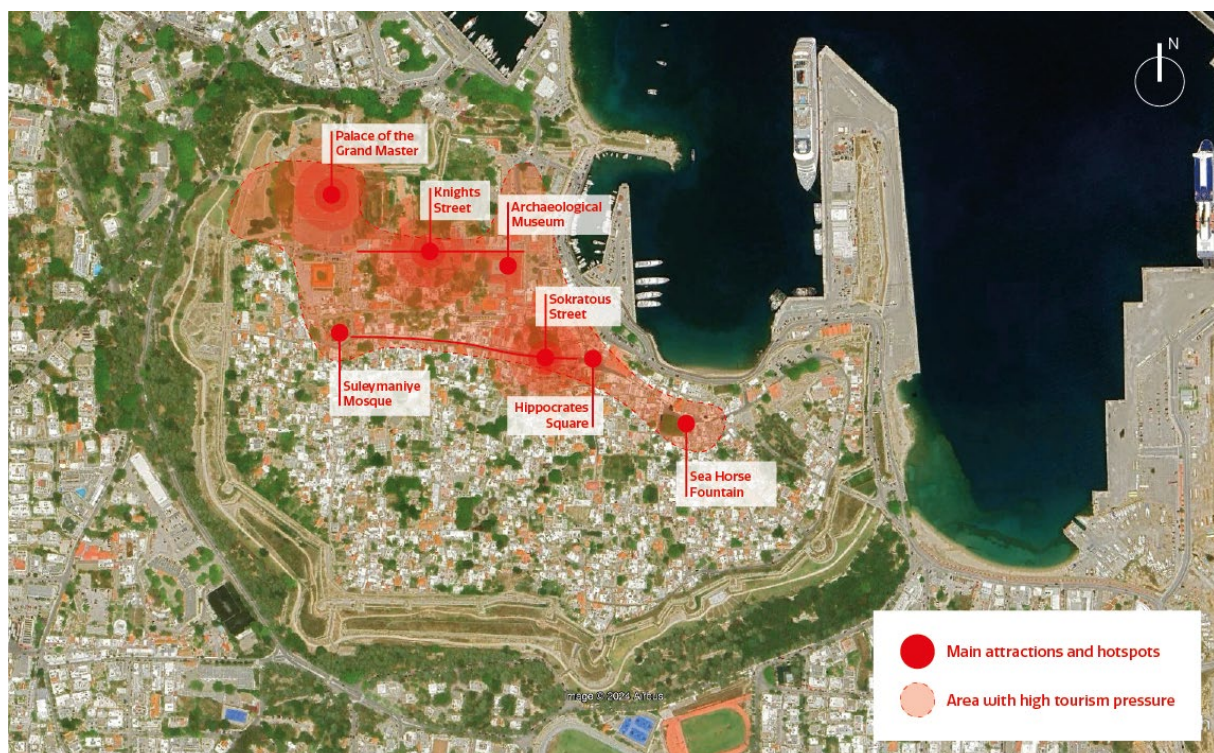
3.2 Identification of Spatial Patterns and Tourist behaviours

3.2.1. Rhodes City

Tourist movement within the Medieval Town of Rhodes primarily follows a few key routes and attractions:

- **Grand Master's Palace - "Castello":** The central attraction, drawing the largest crowds, particularly during peak hours.
- **Knights Street:** A 600-meter long medieval street, lined with historical buildings.
- **Sokratous Street:** The main thoroughfare that leads visitors through the town, ending in the bustling Ippokratous Square.

Tourists arrive in Rhodes via various modes of transport, some arriving on **cruise ships** that dock at the nearby port, but also by air, landing at **Diagoras International Airport**, and then travel to the town via buses, taxis, or rental cars. The cruise passengers often enter the Medieval Town through organized tours.



Upon entering the Medieval Town, tourists **often start their route at the Grand Master's Palace**, one of the main attractions. They then move along the **Knights Street**, which is lined with historical buildings and leads to other notable sites such as the **Archaeological Museum**. Key thoroughfares like

TOURISMO



Sokratous Street guide tourists through the town, ending at bustling squares like **Ippokratous Square**. These routes are heavily trafficked due to their concentration of historical sites, shops, and restaurants, making them popular paths for both guided tours and independent visitors.



Currently, **there are no official methods for monitoring tourism flows in the Medieval Town**. The only available data comes from ticket sales at the Grand Master's Palace. Plans to install thermal cameras and electronic signs aim to better track and manage these flows, providing data on visitor numbers and peak congestion times.

TOURISMO



3.2.2. Florence City

Florence's main tourist routes and areas of high concentration are:

- **Piazza del Duomo:** Home to the Cathedral of **Santa Maria del Fiore**, Baptistry, and Giotto's Campanile, this area is a central attraction for most visitors.
- **Galleria dell'Accademia:** Famous for housing Michelangelo's David, this gallery is a key cultural destination attracting numerous visitors year-round.
- **Piazza della Signoria:** This square, featuring the **Palazzo Vecchio** and the **Uffizi Gallery**, is another major hub of tourist activity.
- **Ponte Vecchio:** The historical bridge lined with shops is a must-visit for tourists.
- **Palazzo Pitti and Boboli Gardens:** These attractions draw significant crowds, especially during the spring and autumn months.
- **Santo Spirito:** Located just south of the river, this area is known for its historical churches and cultural sites.



Tourists typically arrive in Florence by air, landing at **Florence Airport**, which is about 10 km from the city center. Many visitors also arrive by train, with Florence's **Santa Maria Novella station** being a major hub for domestic and international travelers.

Cruise ship tourists also represent a significant portion of visitors to Florence. These tourists typically arrive at the **port of Livorno** and are transported to the city by large tour buses, which cause traffic

TOURISMO



jams on the road to the city and create significant congestion in the area where these buses park, just outside the highly concentrated tourist zone (UNESCO area).

Upon arrival, tourists generally move towards the city center, with the majority of them heading directly to the Piazza del Duomo. From there, they follow a well-trodden path to other major attractions such as Piazza della Signoria and Ponte Vecchio. This creates significant congestion in these areas, particularly during peak tourist seasons.



There are several sensors in place that track Wi-Fi usage, parking availability, weather conditions, and environmental data. Additionally, Florence employs some mobile and web apps like “FeelFlorence”, “IF Infomobilità Firenze” or “Tuscany in a Snap” webapp. While these tools aid in managing tourist flows and reducing congestion, there is potential for **enhancing monitoring efforts**, particularly in the UNESCO areas across the river, to ensure a comprehensive approach to sustainable tourism management.

TOURISMO



3.2.3. Valencia port

As mentioned above, there are three main locations where cruise ships berth in the port of Valencia. It is worth noting that not all cruise passengers disembark to visit the city. Measuring the proportion of tourists who disembark versus those who stay onboard is one of the pilot's objectives.



Those who do disembark and visit Valencia may follow different routes. Some may head directly to the City of Arts and Sciences and then move to the old town, or vice versa. Visiting only the old town of the city is a possible scenario too. If one of their stops is the Oceanogràfic, due to the ship's short stay (approximately 8 to 10 hours), passengers might decide to remain in the museum area, likely not having enough time to visit the old town. Other passengers might opt to explore areas outside the city, such as the Albufera or the northern part of the city in the Alboraya district, where they can taste the Valencian traditional Horchata drink.

TOURISMO



Gaining a more accurate understanding of cruise passengers' behavior and movement patterns within the city is also a key objective of the pilot.

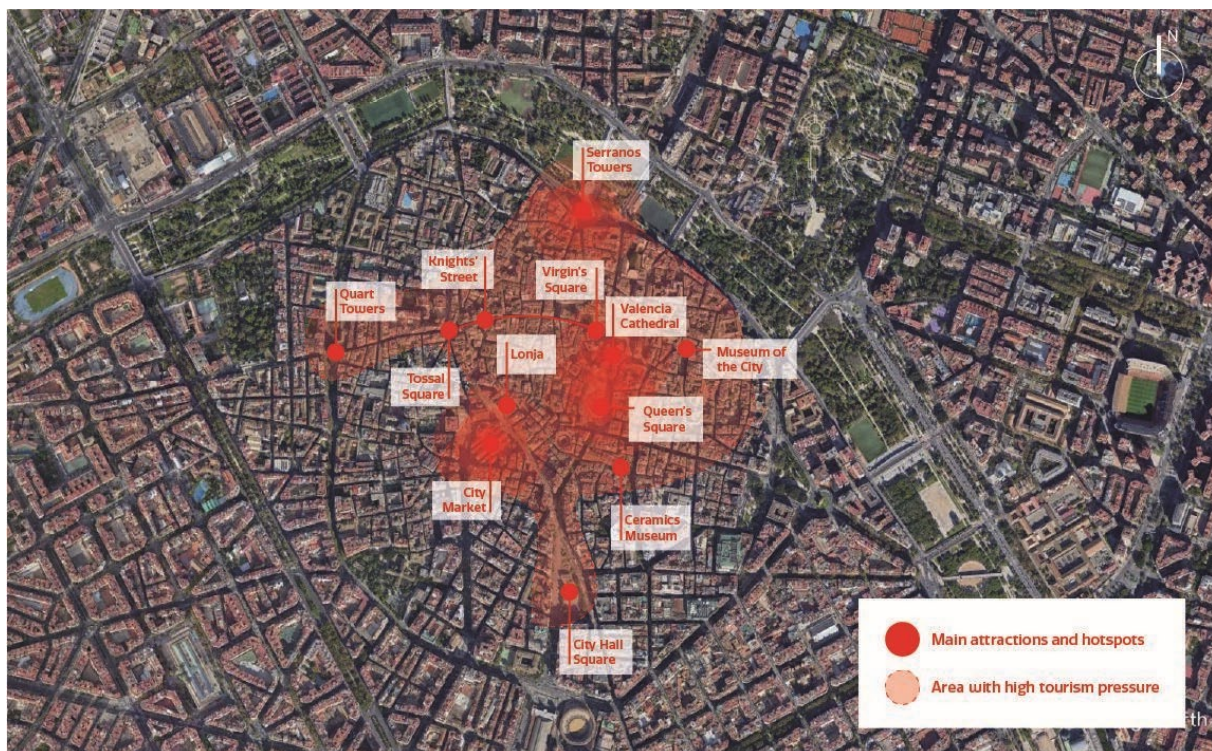
TOURISMO



3.2.4. Valencia City

In the city of Valencia, some of the most popular tourist attractions include the **Oceanogràfic** and the **City of Arts and Sciences**, which have become iconic symbols of Valencia. However, this study will primarily focus on another urban area experiencing significant tourist pressure: the **Ciutat Vella**, or old town. This historic area, once the medieval city, still preserves many **important heritage buildings** that are crucial to both the city's history and its current tourism.

Key sites within this area include **La Lonja**, a masterpiece of Gothic architecture and a UNESCO World Heritage Site, and the **Cathedral**, known for its eclectic mix of architectural styles and its claim of housing the Holy Grail, both of which attract numerous visitors annually. Additionally, the **Central Market of Valencia** and the **Museum of the City of Valencia** are significant landmarks in the Ciutat Vella. The Museu de la Ciutat de Valencia, originally built in the seventeenth century and later extended and remodeled in the mid-nineteenth century, is an exemplary piece of Valencian stately architecture, and it was declared a BIC (Asset of Cultural Interest) in 2007.



Tourists arrive in Valencia by various means of transport. **Valencia Airport** is located **10 km** from the city and offers 72 international connections and 18 domestic ones, making it a major entry point for visitors.

TOURISMO



On average, **2,091 passengers** per day arrive by **cruise ships**, infusing the city with a substantial number of tourists for a short period time, thereby influencing the city's tourism dynamics.

The main **train station** is **Valencia Joaquín Sorolla**, but visitors generally take a shuttle bus to **Estación Nord**, which is closer to the historic centre.

Within the old town, tourists typically explore on foot. However, to visit the various attractions across the city, Valencia offers an efficient public transport network, including metro and bus services, as well as 179.52 km of cycle lanes.



Tourist activity in the old town area is monitored with some counting cameras, although it is unclear if they are still active. Regarding the impact of tourism on the heritage sites in this area, **La Lonja and the Museum of the City currently do not have any monitoring systems** in place (surveillance cameras only), and only keeps a record of visitor numbers through ticket sales. Implementing a **real-time counting system** would be beneficial to measure visitor capacities and manage tourist pressure in key areas.

On the other hand, the Cathedral also tracks visitor numbers through ticket sales and has a monitoring system for environmental conditions in certain areas, which is currently in a trial phase and being developed by the Polytechnic University of Valencia.

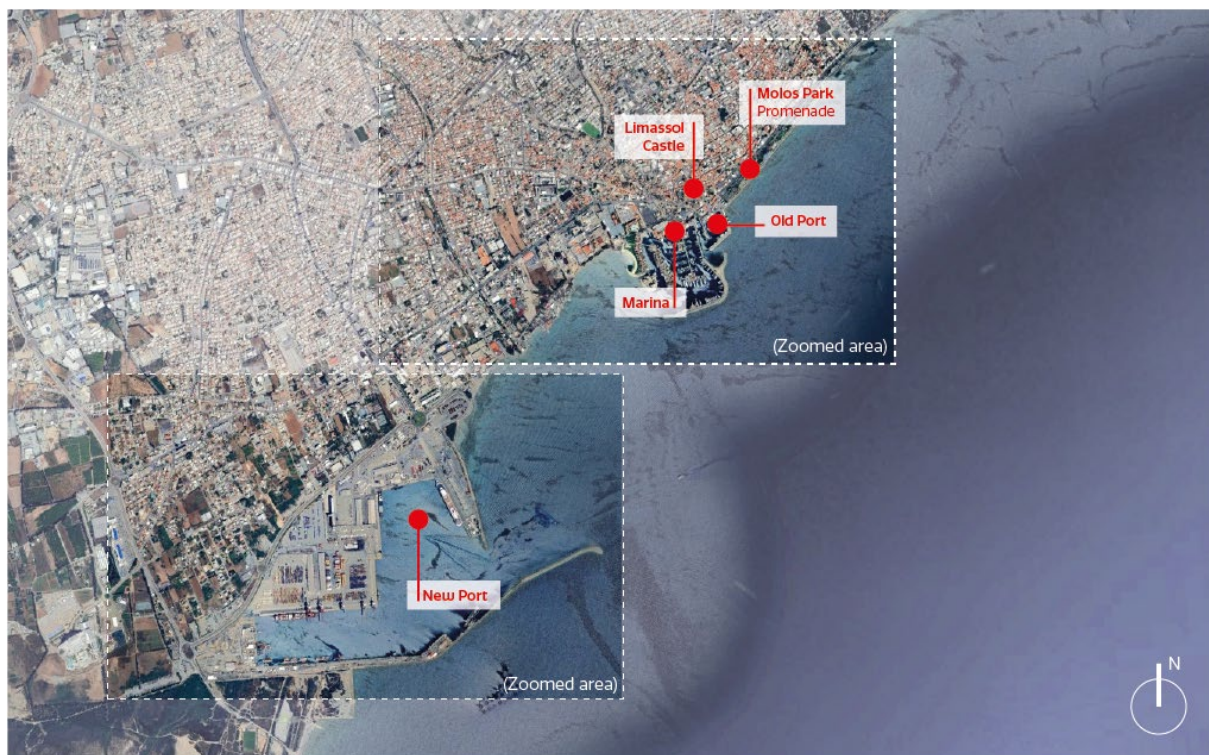
TOURISMO



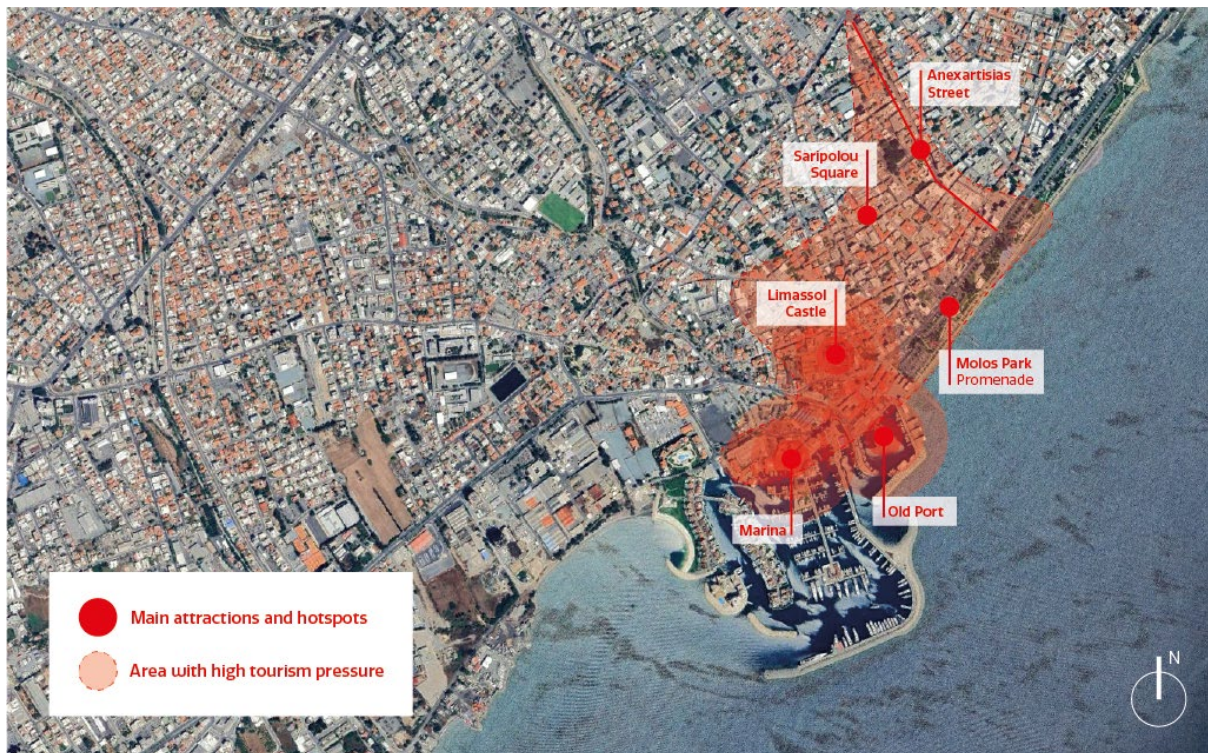
3.2.5. Limassol Port

Some of the main attractions in the Limassol Port area include:

- **Limassol Castle and Old Town:** Attracts visitors interested in its history and architecture. The area sees increased foot traffic during weekends, holidays, and cruise ship arrivals.
- **Limassol Promenade (Molos Park):** A popular spot for both locals and tourists, especially during evening hours and weekends.
- **Limassol Old Port:** This area gets crowded during holidays, weekends, and special events, causing congestion in pedestrian areas, parking lots, and dining spots.
- **Limassol Marina:** Experiences congestion during the peak tourist season, especially in the summer, due to a high influx of visitors.
- **Saripolou Square:** Known for its nightlife, this area has many bars, cafes, and restaurants that become overcrowded during the night, especially on weekends.
- **New Port of Limassol:** The largest port in Cyprus, accommodating cruise lines. The docking of cruise ships at Limassol port significantly contributes to passenger traffic, especially near the old port.



TOURISMO



Tourists arrive in Limassol by various means. The main entry points are the **airport** and the **New Port**, which accommodate **international flights and cruise ships**, respectively. Many visitors also travel by car or public transportation within the city.

Many tourists that arrive at the Limassol Port also go to **Omodos**, a traditional village with many attractions, including the Timios Stavros Monastery, which is part of the Troodos Painted Churches, a UNESCO World Heritage Site. This village is known for its traditional charm and famous wine routes. The area of Limassol has **six vineyards** offering wine tastings, which some tourists visit through travel agencies that sell organized tours.

TOURISMO



Currently, the tourist activity in the Limassol ort area is monitored through **parking sensors** installed in public car parks. These sensors detect cars entering or leaving the parking space and provide real-time data on available parking spots. Additionally, **data from mobile apps like Google Maps and TripAdvisor** are used to estimate traffic and tourist flows. However, there is no official method in place to study tourism flows comprehensively.

TOURISMO



3.2.6. Varna City

The main tourist routes and areas of high concentration in Varna are:

- **Sea Garden, Central Beach and South Beach:** This area is a significant draw for tourists due to its extensive parks, beaches, and recreational facilities. Tourists typically access this area via the main entrance points along **Slivnitsa Boulevard**.
- **Slivnitsa Boulevard and Knyaz Boris I Boulevard:** The high concentration of commercial and food establishments in these streets attracts many visitors, leading to significant congestion, especially during peak tourist seasons.
- **Varna Archaeological Museum and Roman Baths:** Located in the city center, these cultural heritage sites attract tourists interested in the rich history and archaeology of the region. Visitors often combine trips to these sites with visits to nearby cafes and restaurants.



The space in front of the **Central Entrance of the Sea Garden** is particularly crowded during peak tourist season. This area is not only the gateway to the beaches but also a major pedestrian zone, facilitating access to numerous attractions such as the Sea Garden, museums, restaurants, and shops. The high intensity of tourist flow in this area is due to its strategic location as the main route connecting various touristic hotspots.

TOURISMO



Overall, the movement patterns of tourists in Varna are heavily influenced by these key routes. Significant pedestrian traffic occurs along the boulevards and the **beach promenade**, leading to congestion in these areas, especially during the summer months.

Tourists predominantly arrive in Varna by air, landing at **Varna Airport**, which is about **10 km** from the city center. Many visitors also arrive by train, bus, or car from other parts of Bulgaria and neighboring countries. Upon arrival, tourists generally move towards the main attractions located in the city center and along the coast.



Current monitoring of tourism flows in Varna is limited. However, it is evident that during peak tourist seasons, congestion occurs at key attractions and along the primary access routes. There is a need for improved data collection and analysis to better manage tourist flows and alleviate pressure on heavily visited sites.

TOURISMO



3.2.7. Island of Biševo

The main attractions in Biševo Island are:

- **Blue Cave:** The primary attraction on Biševo, famous for its glowing blue light phenomenon, which occurs when sunlight passes through an underwater opening and illuminates the cave in a brilliant blue.
- **Monk Seal Cave:** Another notable cave offering a unique underwater experience, historically inhabited by monk seals.
- **Mezoporat Port:** The main entry point for tourists arriving by boat from Komiža.
- **Visitor Center Modra špilja – Biševo:** Provides information and amenities for visitors, serving as a central point for tourist activity.
- **Abandoned Yugoslav Military Forts:** These historical military installations add a unique element to the island's attractions, providing insight into the island's more recent history and offering exploratory opportunities for visitors.



TOURISMO

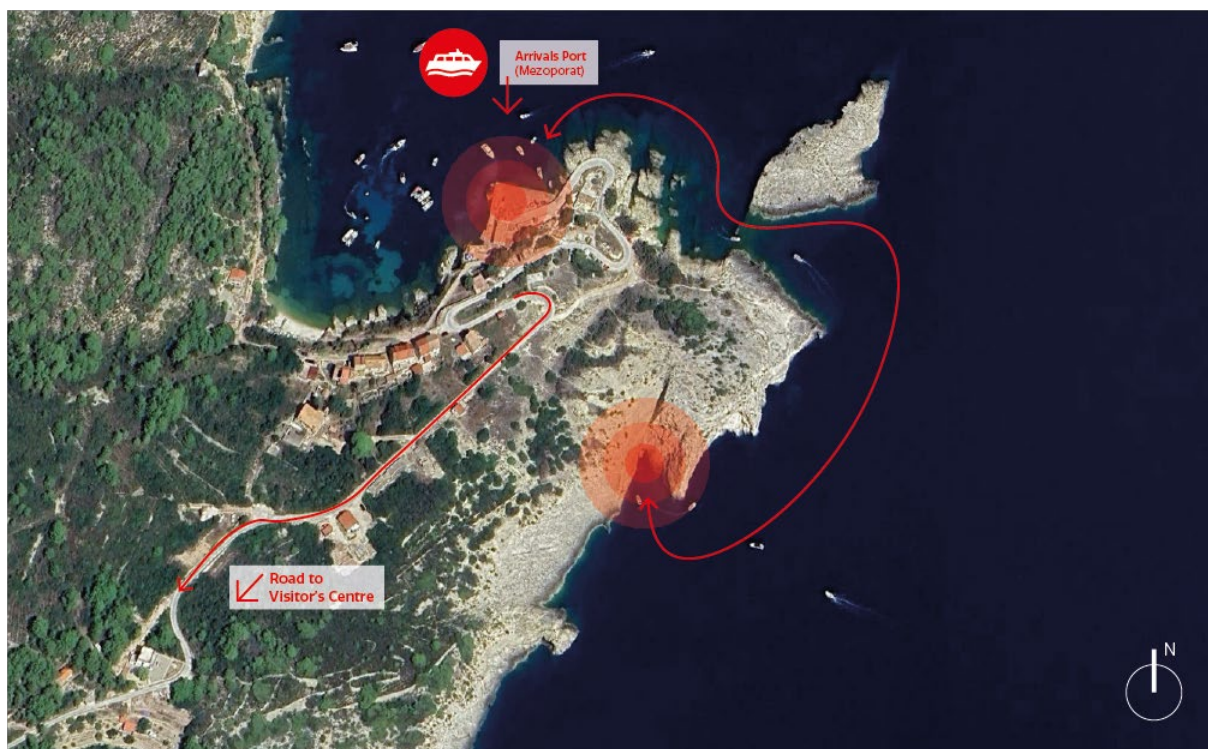


Tourists typically start their journey to Biševo from **Split**, one of the major cities on the Croatian coast. From Split, they travel to the island of **Vis**, and then move across the island to the town of **Komiža**, which is a key starting point for excursions to Biševo. Most visitors spend the night in Komiža, taking advantage of the town's accommodations before embarking on day trips to Biševo. Excursions to Biševo from Komiža are popular, with tourists often taking small boats that ferry them to the island, focusing on visiting the Blue Cave and other attractions.



Upon arriving at **Mezoporat Port** on Biševo, tourists typically make their way to the **Blue Cave**. The boat trip from Komiža to Biševo takes about 30 minutes. Once at the port, tourists board small boats that accommodate 10 to 12 people for a brief two-minute ride to the cave entrance. Visiting the cave requires the expertise of experienced boat operators who skillfully navigate the narrow entrance, ensuring that visitors can safely enjoy the unique light display inside the cave.

TOURISMO



TOURISMO



3.2.8. Golden Bay

Golden Bay is one of the island's most popular and beaches in Malta. Adjacent to this area is the **Majjistral Nature and History Park**, a protected area that provides visitors with opportunities for hiking, bird watching, and enjoying the natural landscape.



The beach currently sees around **8,000 visitors per day** in August, leading to significant congestion in the area due to limited parking space.

TOURISMO



Tourists typically arrive at Golden Bay and Ġhajj Tuffieħa by car, utilizing the nearby parking facilities, or by public transportation, with buses frequently servicing the area from major urban centers such as Valletta and St. Julian's.

Tourist movement and congestion patterns at Golden Bay are influenced by several factors. The beach has **only one main entrance**, which leads to significant congestion of cars at the access point, especially during peak times. Illegal car parks often open up around the main entrance, exacerbating **congestion** and leading to **environmental degradation**.

The site offers some tourist amenities, including a kiosk in the parking area. Stone steps connect the car park to the beach, where a beach bar/restaurant operates on a concrete platform adjacent to the sandy shore. However, Golden Bay faces challenges with **inadequate sanitary facilities**, having only a few toilets available for the large number of daily visitors. This insufficiency leads to hygiene issues and has a significant environmental impact, as inadequate facilities can result in improper waste disposal and pollution.

The current parking area near the beach (highlighted in orange on the map below) provides only 63 slots and is frequently at full capacity. There are plans to close this parking area and redirect visitors to a newly developed parking facility (marked in green on the map) situated further from the beach.

TOURISMO



To encourage tourists to explore other activities besides the beach, a **new pathway has been created leading from the new parking area to the Maestral Nature and History Park**, part of the Natura 2000 network. This pathway is designed to persuade visitors to engage in activities such as hiking and nature walks, thereby **reducing the pressure on the beach and promoting the natural and cultural heritage of the area**.

Currently, there is **no structured method for monitoring tourism in this area**. However, it seems that manual sample counts are being used to estimate visits on peak days. Enhanced surveillance and data management are necessary to ensure rapid response and prevention of potential fire hazards, protecting both the natural environment and the safety of visitors. Illegal camping and campfires pose a severe threat to Golden Bay, particularly to the boulder scree and sand dunes, which are ecologically sensitive zones.

TOURISMO



4. Mapping of Key Stakeholder Typologies

Stakeholders play a pivotal role in the development, execution, and sustainability of the project initiatives. This section aims to **map the key stakeholders involved in each pilot area**, and to understand their roles and influences. The mapping process involved an initial identification exercise by each pilot, which will be revisited and refined at the end of Period 2.

4.1. Stakeholder Analysis

Stakeholders have been classified based on several criteria to ensure a comprehensive understanding of their roles, influence, and engagement levels. The classification process involves **identifying each stakeholder and describing their role or relationship with the pilot area**, followed by evaluating them based on the following criteria:

Directly or Indirectly Impacted by or Influencing Tourism Activities: This criterion assesses whether the stakeholder is directly involved in or affected by tourism activities in the pilot area, or if their influence is more indirect.

Stakeholders directly impacted by tourism activities or who have a direct influence on these activities are often **more engaged** and have a **higher stake** in the project outcomes. They are more likely to provide critical insights, and their support is essential for successful implementation.

Operational Level: Stakeholders are categorized based on their operational scope, which can be **global, national, regional, or local**. This helps in understanding the scale at which they operate and their potential impact on the project.

The operational level helps determine **the reach and potential influence** of a stakeholder. Local stakeholders might have more detailed knowledge and vested interests in specific pilot areas, while national or global stakeholders can provide broader perspectives and resources.

Type: Stakeholders are classified into **public sector** (government bodies, municipal authorities), **private sector** (businesses, tour operators), **academia** (universities, research institutions), and **social entities** (NGOs, community groups).

Classifying stakeholders by type helps in **understanding the diverse interests and expertise** they bring to the project. Public sector entities might focus on regulatory aspects and funding, private sector stakeholders on business opportunities, academia on research and data analysis, and social entities on community engagement and sustainability.

Data Provider: This criterion identifies whether the stakeholder can provide valuable data that supports the project's monitoring in the pilot.

Level of Participation: Stakeholders are categorized based on their level of participation:

TOURISMO



Non-Active Participation: The stakeholder receives information in a one-way manner, without opportunities for feedback.

Active Participation: There is a two-way communication channel, allowing for feedback, consultations, and information exchange.

Pro-Active Participation: The stakeholder is directly involved through partnerships and/or has delegated power (for example, owners of the pilot).

By considering all these factors, we can visualize the relevance and influence of each stakeholder in the project.

Each pilot area identified their stakeholders by filling out the **stakeholder mapping table**, detailing the stakeholders' roles, relationships with the pilot, and their classification according to the criteria mentioned above.

TOURISMO



4.2. Stakeholder Mapping

4.3.1. Rhodes City Key Stakeholders

Stakeholder	Description of their roles/relationships within the pilot	Directly or Indirectly impacted by or influencing the tourism activities in this pilot area	Operational Level	Type	Data Provider	Level of participation*
Hellenic Ministry of Culture	The Ministry of Culture is in charge of the Greek cultural heritage and monuments, among them the Medieval City of Rhodes as a UNESCO World Heritage Site.	Indirectly	National level	Public	Yes	Non-Active Participation
Hellenic Institute of Transport	HIT has recently established a regional branch based in the island of Rhodes, which analyses the offer and demand for transportation services by touristic destinations and tries to optimise their relation, so we believe that their views and experience will be useful in the development of the pilot.	Indirectly	National level	Academia	Yes	Active Participation

TOURISMO



South Aegean Regional Authority	SAR is responsible for the implementation and adaptation of the national tourism strategy at regional level.	Directly	Regional level	Public	No	Active Participation
Ephorate of Antiquities of the Dodecanese	The Ephorate of Antiquities of the Dodecanese is the department of the Ministry of Culture that is responsible for the antiquities and the monuments situated within the Medieval City of Rhodes.	Indirectly	Regional level	Public	Yes	Pro-Active Participation
Chamber of Commerce and Industry of the Dodecanese	The CCI represents the businesses based in the Dodecanese, which of course include those situate in the pilot area.	Indirectly	Regional level	Private	Yes	Active Participation
Association of Travel Agents of the Dodecanese	The ATA represents the travel agents based in the Dodecanese, which of course include those who operate in Rhodes and in particular in the Medieval City.	Indirectly	Regional level	Private	Yes	Active Participation

TOURISMO



Qualified Guides' Association of the Dodecanese	The Association represents the travel agents based in the Dodecanese, which of course include those who operate in Rhodes and in particular in the Medieval City.	Indirectly	Regional level	Private	Yes	Active Participation
Municipality of Rhodes	The Municipality is the "land owner" of the pilot area of the Medieval City of Rhodes.	Directly	Local level	Public	Yes	Pro-Active Participation
Rhodes Hoteliers Association	The Association represents the hotel owners based in Rhodes, which of course include those who own a hotel within the Medieval City.	Indirectly	Local level	Private	Yes	Active Participation
Association of Businessmen and Professionals of the Medieval City of Rhodes	The Association represents the professionals that own and operate a business within the Medieval City.	Indirectly	Local level	Private	Yes	Active Participation

TOURISMO



4.3.2. Florence City Key Stakeholders

Stakeholder	Description of their roles/relationships within the pilot	Directly or Indirectly impacted by or influencing the tourism activities in this pilot area	Operational Level	Type	Data Provider	Level of participation*
Municipality of Florence	Pilot project area owner	Directly	Local level	Public	Yes	Pro-Active Participation
Metropolitan City of Florence	Owner of the macro area within which pilot project area is situated	Directly	Local level	Public	Yes	Active Participation
Tuscany Region	Owner of the Region within which pilot project area is situated	Directly	Regional level	Public	Yes	Active Participation
University of Florence	Pilot implementation	Directly	Local level	Academia	Yes	Pro-Active Participation
Florence Chamber of Commerce	Interface with the business actors of interest	Directly	Local level	Public	No	Active Participation

TOURISMO



Promo Firenze	Dissemination to the business actors of interest	Directly	Local level	Public	No	Active Participation
Confindustria Toscana Centro e Costa	Trade association tourism business actor	Directly	Regional level	Private	No	Active Participation
Artex	Artisan association	Directly	Regional level	Private	No	Active Participation
Rete sviluppo	Civil society and environmental society actor	Directly	Local level	Social	No	Active Participation
CNR	Cultural Heritage research entity and potential data provider	Directly	Global level	Academia	Yes	Active Participation
Centro Studi Turistici Firenze	Local company/VET	Directly	Local level	Private	No	Active Participation

TOURISMO



IRPET	Tuscany Regional Institute for Economic Planning	Directly	Regional level	Public	No	Active Participation
Destination Florence Convention and Visitors Bureau	Official entity promoting Florence destination and partner of Florence Municipality	Indirectly	Local level	Private	No	Active Participation
Florencetown	Local company, tour operator	Indirectly	National level	Private	No	Active Participation
Fondazione Sistema Toscana	Foundation to manage Tuscany web portal and promote the regional territory and its identity	Directly	Regional level	Public	No	Active Participation
Toscana Promozione Turistica	Regional Agency working side-by-side with territories to build and promote destinations and touristic products	Directly	Regional level	Public	Yes	Active Participation
Angeli del Bello Foundation	Local Foundation	Indirectly	Local level	Social	No	Active Participation

TOURISMO



Nana Bianca startup studio	Local company	Indirectly	Local level	Private	No	Active Participation
Local Global	Local company	Indirectly	Local level	Private	No	Active Participation
Here lab	Joint Lab between Unifi and Florence UNESCO office	Indirectly	Local level	Public	No	Active Participation
BTO-Be Travel Onlife	local company	Indirectly	Local level	Private	No	Active Participation
ANCI Toscana	Tuscan association of Municipalities	Directly	Regional level	Public	No	Active Participation
Hoopygang	Local company	Indirectly	Local level	Private	No	Active Participation

TOURISMO



4.3.3. Valencia Port Key Stakeholders

Stakeholder	Description of their roles/relationships within the pilot	Directly or Indirectly impacted by or influencing the tourism activities in this pilot area	Operational Level	Type	Data Provider	Level of participation*
Touropersors	Organize and offer excursions to cruises and cruise passengers	Directly	National level	Private	No	Active Participation
Port Authority of Valencia	Manages the cruise port calls at the port of Valencia. It is the land owner of the port.	Directly	Regional level	Public	Yes	Pro-Active Participation
Valencia Regional Council	Associate partner of the project which manages a parallel project monitoring the visitors flows in the Valencia region.	Directly	Regional level	Public	Yes	Pro-Active Participation
Cruise Terminal	Provides berthing services to cruises in the port of Valencia. It has a public concession granted by the Port Authority of Valencia. It is a terminal managing cruises and ferries.	Directly	Local level	Private	Yes	Active Participation

TOURISMO



Cruise Shipping Companies	Agencies organizing cruise travels, scheduling the cruise stops in Valencia City.	Directly	Global level	Private	No	Active Participation
Oceanogràfic	Aquarium. Tourist attraction for cruise passengers located in the 'Ciudad de las Artes y las Ciencias'	Directly	Local level	Public	No	Non-Active Participation
Ciudad de las Artes y las Ciencias	Museums. Tourist attraction for cruise passengers.	Directly	Local level	Public	No	Non-Active Participation
Association of traders of the historical center	Association of small traders (shops, etc.) in the old town of Valencia	Directly	Local level	Social	No	Active Participation
La Lonja	Museum. Tourist attraction for cruise passengers.	Directly	Local level	Public	Yes	Active Participation
Mercado Central	Historical grocery store. Tourist attraction for cruise passengers.	Directly	Local level	Public	Yes	Active Participation
Basílica de la Virgen de los Desamparados	Historical church located in the Valencia's old town. Tourist attraction for cruise passengers.	Directly	Local level	Private	Yes	Active Participation
Catedral de Valencia	Historical cathedral in the Valencia's old town. Tourist attraction for cruise passengers.	Directly	Local level	Private	No	Non-Active Participation

TOURISMO



4.3.4. Valencia City Key Stakeholders

Stakeholder	Description of their roles/relationships within the pilot	Directly or Indirectly impacted by or influencing the tourism activities in this pilot area	Operational Level	Type	Data Provider	Level of participation*
Valencia City Council	The Valencia City Council oversees various aspects of the city's administration, including tourism development, cultural heritage management, and urban planning. It plays a crucial role in implementing policies and initiatives that affect tourism in the city, particularly in the historical center. As the owners of La Lonja, they are directly involved in its maintenance and promotion.	Directly	Local level	Public	Yes	Pro-Active Participation
Regional Government of Valencia	The Generalitat Valenciana is responsible for the broader regional policies and regulations concerning tourism and heritage preservation. It provides support and resources for local tourism initiatives and collaborates with municipal authorities to enhance the tourism experience in Valencia.	Directly	Regional level	Public	Yes	Non-Active Participation

TOURISMO



State Commercial Company for Management of Innovation and Tourism Technologies, S.A.M.P.	SEGITTUR is a state-owned company focused on integrating innovation and technology within the tourism sector. It supports projects aimed at enhancing tourism management through technological solutions and provides valuable data and insights.	Indirectly	National level	Public	No	Pro-Active Participation
Valencia Historical and Artistic Heritage Service Office	This office is responsible for the maintenance and promotion of Valencia's historical and artistic assets. It plays a critical role in ensuring that tourism activities do not negatively impact the city's heritage sites.	Directly	Local level	Public	No	Active Participation
Polytechnic University of Valencia	The Polytechnic University of Valencia contributes through research and data analysis on various aspects of tourism and its impacts. It collaborates on projects to monitor the effects of tourism on cultural heritage.	Indirectly	Regional level	Academia	No	Non-Active Participation
Museum of the City	The City Museum is directly involved in the project, owning one of the pilot sites to be monitored in the historic city of Valencia. Their participation is crucial, as museums—especially those with regional collections—are key to promoting local identity and culture.	Directly	Local level	Public	Yes	Pro-Active Participation

TOURISMO



4.3.5. Limassol Port Key Stakeholders

Stakeholder	Description of their roles/relationships within the pilot	Directly or Indirectly impacted by or influencing the tourism activities in this pilot area	Operational Level	Type	Data Provider	Level of participation*
Municipality of Limassol	The Municipality is the "land owner" of the pilot	Directly	Regional level	Public	Yes	Pro-Active Participation
Cyprus Port Authority	Cyprus Port is the "land owner" of the pilot	Directly	National level	Public	Yes	Pro-Active Participation
Limassol Tourist Board	The Limassol Tourism Development and Promotion Company Ltd has been created to promote the further development of the basic and tourist infrastructure of the Limassol region and market the area as the distinct cosmopolitan seaside destination it is	Directly	Regional level	Public	No	Active Participation

TOURISMO



Deputy Mistry of Tourism Cyprus	Deputy Ministry of Tourism is to establish a strategic and supervisory authority with powers to develop a national strategy for tourism, promotion and projection of Cyprus as a tourist destination, as well as implementation of tourism legislation, among other responsibilities.	Indirectly	National level	Public	Yes	Active Participation
The Association of Cyprus Enterprises (ACTE)	The Association of Cyprus Enterprises (ACTE) was founded in June 1997 by a group of tourism entrepreneurs who share the common view that the development of quality and sustainable tourism is a one-way road for Cyprus Tourism. Hence, ACTE is composed of a group of prominent top quality hotels and tourist enterprises all over Cyprus.	Indirectly	National level	Private	No	Active Participation
Association of Travel Agents Cyprus	The Association of Cyprus Travel Agents is par excellence the NGO agency involved in tourism and travel affairs.	Indirectly	National level	Private	No	Active Participation

TOURISMO



4.3.6. Varna City Key Stakeholders

Stakeholder	Description of their roles/relationships within the pilot	Directly or Indirectly impacted by or influencing the tourism activities in this pilot area	Operational Level	Type	Data Provider	Level of participation*
City region Odessos, Varna Municipality	Associated Partner, Responsible for the territory on which the pilot actions will be carried out	Directly	Local level	Public	Yes	Pro-Active Participation
Varna Municipality, Tourism Directorate	Responsible structure for the tourism development at municipal level	Directly	Local level	Public	Yes	Active Participation
Varna Tourist Informational Center	Providing a feedback on tourism flow i.e profile, preferences, etc. Participation in meetings with local stakeholders.	Directly	Local level	Public	Yes	Active Participation
Regional Informational Center - Varna	Provision of information, participation in stakeholders' meetings, dissemination info for project activities and results	Directly	Regional level	Public	Yes	Active Participation

TOURISMO



Union of Bulgarian Tourist Guides (a headquarter in Varna)	Participation in stakeholders' meetings, feedback provision on tourist preferences and challenges met.	Directly	National level	Social	Yes	Active Participation
Tourist Chamber - Varna	Participation in stakeholders' meetings and feedback provision on tourism in the municipality and Varna region	Directly	Regional level	Social	Yes	Active Participation
Regional Agency for Entrepreneurship and Innovations-Varna	Participation in stakeholders' meetings and feedback provision on tourism sector development	Directly	Regional level	Social	Yes	Active Participation
Center for sustainable social development	Participation in stakeholders' meetings and feedback provision on tourism sector development in Varna region.	Directly	Regional level	Social	Yes	Active Participation
Economic University - College of Tourism – Varna	Participation in stakeholders' meetings and feedback provision on tourism.	Directly	Local level	Academia	Yes	Active Participation
Balkan Agency for Sustainable Development	Participation in stakeholders' meetings, experts' groups, and feedback provision on tourism.	Directly	National level	Social	Yes	Active Participation

TOURISMO



Black Sea NGO Network	Participation in stakeholders' meetings, experts' groups, and feedback provision on tourism.	Directly	Global level	Social	Yes	Active Participation
Tourist Association "Native Balkans"	Participation in stakeholders' meetings, feedback on tourists' preferences.	Directly	Local level	Social	Yes	Active Participation
Travel Agency Franga	Participation in stakeholders' meetings, feedback on tourists' preferences.	Directly	Global level	Private	Yes	Active Participation
Bulgarian Hotel and Restaurant Association	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	National level	Social	No	Non-Active Participation
Bulgarian Association of Experts in Tourism	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	National level	Social	No	Non-Active Participation
Association of Bulgarian Tour Operators and Travel Agents	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	National level	Social	No	Non-Active Participation

TOURISMO



Events' organizer: Farmer's market (at Festival Complex)	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	Local level	Private	No	Non-Active Participation
Events' organizers:Craftsmen Association (at Sea Garden)	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	Local level	Private	No	Non-Active Participation
Events' organizer: Book Fair (at Sea Garden Entrance)	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	Local level	Private	No	Non-Active Participation
Events' organizers:BeeKeeper s Fair (at Sea Garden entrance)	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	Local level	Private	No	Non-Active Participation
Ministry of Tourism	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	National level	Public	No	Non-Active Participation
District Varna – Administration, Tourism section	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	Regional level	Public	No	Non-Active Participation
Regional Historical Museum/ Archeological Museum Varna	Informed about project and planned events. Potential participants in stakeholders and other meetings.	Indirectly	Regional level	Public	No	Non-Active Participation

TOURISMO



4.3.7. Island of Biševo Key Stakeholders

Stakeholder	Description of their roles/relationships within the pilot	Directly or Indirectly impacted by or influencing the tourism activities in this pilot area	Operational Level	Type	Data Provider	Level of participation*
Ministry of Tourism RH	Performs administrative and other tasks related to: tourism policy of the Republic of Croatia, strategy for development of Croatian tourism; development and investment in tourism; development of congressional, seaside, hunting, health, youth and other selective forms of tourism; promotion and development of small entrepreneurship in tourism and hospitality.	Indirectly	National level	Public	Yes	Non-Active Participation
Croatian National Tourist Board	The Croatian National Tourist Board (Croatian: Hrvatska turistička zajednica or HTZ) is Croatia's national tourist organization founded with a view to promoting and creating the identity, and to enhance the reputation of, Croatian tourism. The tasks of the Croatian Tourist Board, as a national tourist organization, are to create, manage and strengthen a recognizable tourism brand of the Republic of Croatia, marketing tourism at the national level.	Indirectly	National level	Public	No	Non-Active Participation

TOURISMO



Croatian Tourism Association	Founded in 2018 as an umbrella sectoral organization of the most important industry in Croatia – tourism. The mission of the association is to coordinate activities and content of public communications as well as lobby harmonized interests of professional associations in catering, hospitality, and tourism in Croatia.	Indirectly	National level	Public	No	Non-Active Participation
Split Dalmatia County	Department for Tourism and Maritime Affairs - Carries out administrative work in the field of tourism and maritime affairs, monitors the situation related to the tourism and maritime affairs and prepares reports, proposals and drafts of acts in order to achieve a better and more balanced tourism and maritime development on the county level.	Directly	Regional level	Public	Yes	Active Participation
JU Krš i more Split	The public institution MORE I KRŠ carries out the activity of protection, maintenance, and promotion of protected areas of the Split-Dalmatia County with the aim of protecting and preserving the originality of nature, ensuring the undisturbed development of natural processes and sustainable use of natural resources, as well as supervision over the implementation of conditions and measures of nature protection in protected areas which managed by the Institution.	Indirectly	Regional level	Public	No	Active Participation
Croatian Chamber of Economy	The Croatian Chamber of Economy (HGK) is an independent professional-business organization that promotes, represents and coordinates the common interests of its members in front of state and other bodies in Croatia and abroad.	Indirectly	Regional level	Public	Yes	Active Participation

TOURISMO



Split Dalmatia County Tourist Board	Creates and promote the identity and of Croatian tourism on the regional level (Split Dalmatia Couty), plans and implement a common strategy and its implementation and promotion, etc.	Directly	Regional level	Public	Yes	Active Participation
NGOs "Sunce" Split	Non-governmental, non-partisan and non-profit organization founded in 1998, which today, in addition to members and volunteers, also has a team of employees, experts from various fields, united in achieving the goals of environmental and nature protection.	Indirectly	Regional level	Social	No	Active Participation
City of Komiža	Monitors the situation in tourism, proposes measures for engaging city resources in order to promote tourism as an economic activity, monitor and analyse the possibilities of long-term offer of the city in the part of sustainable development of individual urban areas and resources, and in cooperation with institutions in tourism and economy in general coordinates city activities in its field of work.	Directly	Local level	Public	Yes	Pro-Active Participation
Tourist board Of Komiža	Tourist board is organization that operate according to the principle of destination management and are established for the purpose of promoting and developing tourism in the Republic of Croatia and the economic interests of legal and natural persons who provide hospitality and tourism services or perform other activities directly related to tourism in such a way as to manage the destination on the level of Vis Archipelago.	Directly	Local level	Public	Yes	Pro-Active Participation

TOURISMO



Nautical centre Komiža	Established for services in nautical tourism and other port services, communal utilities, etc. It has concessions for tourism activities in the area of islands Vis and Biševo, where project case study is situated.	Directly	Local level	Public	Yes	Pro-Active Participation
Ars Halieutica Komiža	Study of the cultural heritage of authentic localities of the Croatian Adriatic coast in the field of traditional shipbuilding, fishing and maritime technology, for the purpose of reconstruction and creation of replicas and models; specific traditional vessels, folk costumes, shoes, furniture, dishes, authentic wine products, essential oils and traditional dishes, and in this connection the organization of exhibitions, thematic lectures, forums, courses, publishing activities, recording and screening of documentaries	Indirectly	Local level	Social	No	Active Participation
Geopark Viški Arhipelag	The initiative for establishment of the Geopark Vis Archipelago was realized in April 2019, and the Geopark Vis archipelago became a part of the European Geopark Network and UNESCO list of world heritage. The Geopark visitor Center is located in Town of Komiža, where you can find out more about the rocks of the Vis island, about the natural, cultural heritage, the tradition and about preservation of heritage with the welcome and guidance of Geopark's Vis archipelago.	Directly	Local level	Public	Yes	Pro-Active Participation
FLAG Škoji	Group for partnership between the fisheries sector and other local stakeholders (private and public sectors) with the aim of sustainable development of fisheries and mariculture through developing and implementing a common strategy for their area.	Directly	Local level	Social	No	Active Participation

TOURISMO



Alternatura Tourist Agency	The first and most important provider of adventure tourism on the island of Vis, with programs based on the interpretation of natural and cultural heritage.	Directly	Select option	Private	-	Active Participation
Srebrna Tours Komiža	Tourist agency-as its primary activity, it emphasizes complete services in the field of tourism.	Directly	Local level	Private	-	Active Participation
Ames Tours Komiža	Family business that started in 2012. Ames was awarded by Croatian tourist board as the Best small tour operator in Croatia for year 2016.	Directly	Local level	Private	-	Active Participation
Modra špilja d.d. Komiža	Joint-stock company for hotel, catering and trade, with headquarters in Komiža (Komiža City). Hotel "Biševo" - your oasis of peace, a place for rest and contemplation and a starting point from which you will discover the charm of the town of Komiža.	Directly	Local level	Private	-	Active Participation

TOURISMO



4.3.8. Golden Bay Key Stakeholders

Stakeholder	Description of their roles/relationships within the pilot	Directly or Indirectly impacted by or influencing the tourism activities in this pilot area	Operational Level	Type	Data Provider	Level of participation*
Majjistral Nature and History Park	<p>The area in the northwest of Malta, which includes the coastal area from Golden Bay to Il-Prajjet and ix-Xagħra l-Ħamra, was declared a national park by the Government of Malta in September 2007. The management of the Majjistral Nature and History Park has been entrusted to 3 non-governmental and non-profit organisations that have been involved in the management of cultural, natural and coastal resources for a number of years. Majjistral includes a coastal stretch of about in length covering the area from Anchor Bay (Il-Prajjet) to Golden Bay (Il-Bajja tal-Mixquqa) and inland toward ix-Xagħra l-Ħamra (2.6 square kilometres of land, circa 6 km along the coast). Majjistral is committed to the conservation of Maltese nature by promoting environmental awareness, managing areas of natural or scientific interest, and lobbying for effective environmental legislation.</p> <p>The 3 organisations have set up an association called the 'Heritage Parks Federation' to facilitate the integrated management of the Majjistral Park. This was registered by public deed in the acts of</p>	Directly	National level	Public	No	Pro-Active Participation

TOURISMO



	<p>Notary Dr. Hugh Grima on the 6th of February 2008.</p> <p>The Federation has a distinct legal personality, and is run by an executive committee made up of persons appointed from amongst its 3 founder members, and chaired by a rotating presidency.</p>					
Radisson Blu Resort & Spa, Malta Golden Sands	The operators of this 5-star hotel (Corinthia Group) have the capacity to host circa 144 bedrooms and 164 suites. It also manages 4 on-site restaurants and 3 on-site bars. Their involvement is critical since their operations are very dependent on the environs and beach.	Directly	Global level	Private	No	Active Participation
Corinthia Group and QP Architects	The Corinthia Group has engaged QP Architects in order to develop a redundant tourist complex next to the beach (Hal-Ferh complex). This project is already having an impact on the area due to its construction, and alteration of most main roads around it. Furthermore, they have recently financed the development of the Scouts car park on private land (320-spaces) in an effort to support more sustainable transport options. Regular contact is being maintained to ensure the works do not have unintended consequences on the beach.	Directly	Global level	Private	No	Pro-Active Participation
The Scout Association of Malta	Founded in 1908, The Scout Association of Malta manages the Ghajn Tuffieha International Scout Campsite. The campsite includes a big car park that is capable of accomodating	Directly	National level	Social	Yes	Active Participation

TOURISMO



Malta Tourism Authority	The Directorate is directly responsible for the management and cleaning of all beaches and encourages service/product diversification, development or improvement, while enhancing the visitor experience. They also manage the presence of life guards, coordinate bathing water quality press releases, while maintaining Blue Flag environmental and educational activities. They also regulate beach operators and venue licences.	Indirectly	National level	Public	Yes	Active Participation
Malta Red Cross	The Malta Red Cross Lifeguards are on duty at Ghajn Tuffieha during the summer lifeguard season (June 1 - September 30).	Indirectly	Local level	Private	No	Non-Active Participation
Ambjent Malta	Ambjent Malta Department (AM) is responsible for the preservation and enhancement of Malta's natural capital and biodiversity in rural, urban, coastal and marine landscapes. AM is responsible for implementing green infrastructure projects and habitat restoration measures for maintaining and restoring natural areas and protected sites, including zones forming part of the Natura 2000 network. Since Golden Bay (Ramla tal-Mixquqa) is under the management of Majjistral Park, interventions by AM are minimal here. However, they manage entirely the adjacent N2k beach of (Ramla ta Ghajn Tuffieha), so it is important for them to follow the efforts next door.	Indirectly	National level	Public	No	Non-Active Participation

TOURISMO



Munchies Golden Bay Spiaggia d'Oro	Munchies is a catering establishment right on the beach itself, and adjacent to the beach entry points. Their presence on the beach requires regular liaison since they are on the ground operationally 24/7.	Indirectly	Local level	Private	No	Non-Active Participation
Salesian Brigade	The Salesian Brigade is a Catholic uniformed young people organisation which was founded in 1910. a programme of informal education (non-formal learning)	Indirectly	Local level	Social	No	Non-Active Participation
ERA	The Environment and Resources Authority (ERA) is responsible for setting out the ecological priorities and conservation orders for the management plans of all land-based Natura 2000 sites, including Golden Bay and the Majjistral Park.	Indirectly	National level	Public	No	Active Participation
Transport Malta	Transport Malta's mission is to promote and develop the transport sector in Malta by means of proper regulation and by promotion and development of related services, businesses and other interests both locally and internationally. This includes the management of the traffic infrastructure around the study site, including the marine environment.	Indirectly	National level	Public	Yes	Active Participation

TOURISMO



Cleansing and Maintenance Division	The main purpose of the Cleansing and Maintenance Division is to keep urban and non-urban areas free from litter and illegal dumping, thus, enhancing Malta's environment. Cleaning operations are carried out early in the morning to ensure the beaches are clean and tidy before the bathers arrive. Cleaning operations include the removal of seaweed and the emptying of rubbish bins. In the particular case of Golden Bay, the beach cleaning section, through the collaboration of the Malta Tourism Authority, has, this season, maintains around 70 new bins that are lined with garbage bags and replaced with fresh bags on a daily basis.	Indirectly	National level	Public	No	Non-Active Participation
Lands Department	The Lands Department is responsible for the management of Government immovable property. The study area is in the most part public land, rented or leased to 3rd parties. A	Indirectly	National level	Public	No	Non-Active Participation
Infrastructure Malta	Infrastructure Malta is the agency entrusted with the development, maintenance and upgrading of roads and other public infrastructure in the Maltese Islands. Since the beach is straddled with a road, liaison with IM on our efforts is deemed important since only they can consider the better management of vehicles driving to the beach, and can also help in terms of traffic data collection.	Indirectly	National level	Public	Yes	Non-Active Participation

TOURISMO



5. Conclusions

This report provides an analysis of the current tourism situation and flows in eight pilot areas: Rhodes City, Florence City, Valencia Port, Valencia City, Limassol Port, Varna City, Island of Biševo, and Golden Bay. Each of these areas presents unique opportunities and challenges in managing tourism sustainably while preserving their rich cultural and natural heritage.

A common theme across all pilot areas is the need **to balance high tourist numbers with the preservation of historical sites and/or natural ecosystems**. For instance, Rhodes City and Florence City, both UNESCO World Heritage sites, face significant pressure from high visitor volumes. Being able to study and analyze tourist flow movements and apply strategies to redirect tourists to other areas to alleviate congestion at certain points is crucial in alleviating congestion and protecting these heritage sites.

Valencia, both its port and city, exemplifies the challenges and opportunities of managing diverse tourist profiles, including cruise passengers and cultural tourists. The city's efforts to distribute tourist flows more evenly throughout the year and to less congested areas highlight the importance of strategic planning in tourism management and **to preserve historical heritage sites that are impacted by mass tourism**.

Similarly, Limassol Port and Varna City are focusing on **enhancing infrastructure and monitoring systems to better manage the influx of visitors**, particularly during peak seasons. These measures are vital in maintaining the quality of the tourist experience while safeguarding local communities and environments. A better distribution and use of infrastructure will enable both citizens and tourists to make better use of the main attractions in the cities.

The Island of Biševo and Golden Bay in Malta illustrate the **delicate balance needed to protect unique natural attractions from the impacts of tourism**. Biševo's Blue Cave and Malta's Golden Bay are prime examples of how targeted management strategies can prevent overcrowding and encourage tourists to explore other attractions, thereby reducing pressure on the most popular sites.

In conclusion, the analysis of these pilot areas underscores the necessity for innovative and sustainable tourism management practices. By leveraging technology, data-driven insights, and stakeholder collaboration, TOURISMO aims to enhance the resilience and sustainability of tourism in the Mediterranean region.

The following **summary table** encapsulates the key characteristics, demographic data, and challenges for each pilot area, offering a concise overview of the current tourism situation in each pilot area:

TOURISMO



5.1 Summary Table of Current Tourism Situation in Pilot Areas

PILOT AREA	COUNTRY	KEY ATTRACTIONS	TOURIST PROFILES	PEAK SEASON	VISITOR DEMOGRAPHICS	VISITORS NUMBERS (Recent year)	CHALLENGES
Medieval Town in Rhodes City	Greece	Medieval Town of Rhodes, Grand Master's Palace, Sokratous Street	Families, Older Adults, Cruise Passengers	May to September	Origin: Mainly from European countries (Greece, UK, Germany, Italy) and the USA. Age: 25-44 years old = 40%, 45-64 years old = 35%, 18-24 and 65+ years old = 25%.	453,832 cruise passengers in 2023	Significant congestion during peak season, extending tourist season, protecting the UNESCO area, and improving the quality of life for residents of the Medieval Town.
Florence City	Italy	Santa Maria del Fiore Cathedral and Piazza del Duomo, Galleria dell'Accademia, Piazza della Signoria, Ponte Vecchio, Santo Spirito Square	Cultural Tourists, Backpackers, Cruise Passengers	March to October and December-January (but overall a deseasonalized location)	Origin: Europe (UK, Germany, France), USA, increasing from Asia. Domestic: Lombardia (17%), Lazio (14%), Campania (12%)	7,4M total stays in Florence Municipality in 2022	High density of cultural sites, maintaining resilience through sustainable tourism, protecting the UNESCO area.

TOURISMO



Valencia Port	Spain	Port of Valencia, City of Arts and Sciences, Oceanogràfic	Cruise Passengers, Multigenerational Families	April-May, September-October	<p>Origin: Germany (23%), Spain (13%), Italy (13%), USA (11%), England (11%), France (8%)</p> <p>Age: Average 52 years, 54% female and 46% male.</p>	More than 781,280 cruise passengers in 2023	Managing high cruise passenger numbers, enhance operational efficiency and visitor experience.
Old Town (Ciutat Vella) Valencia City	Spain	La Lonja, Valencia Cathedral, Mercat Central, Serranos Towers, Quart Towers, Municipal History Museum	Cultural Tourists, Gastronomic Tourists, Cruise Passengers	Relatively constant, with peaks during Las Fallas and summer	<p>Origin: Netherlands, Italy, France, UK, Germany, Belgium, USA, Mexico, Brazil, China.</p> <p>International: (51.9%). Domestic: (48.1%)</p>	2,197,133 visitors in 2022	Managing high tourist numbers in the historic centre through sustainable tourism practices, that help preserve the condition of historic buildings and UNESCO heritage (La Lonja).

TOURISMO



Limassol Port	Cyprus	Limassol Castle, Limassol Marina, Old Town, Molos Park	Families with children, Tourists from Northern and Western Europe	June to August (recently expanding, starting earlier and ending later)	Origin: UK (37.9%), Israel (8.7%), Germany (6.2%), Poland (5.8%), Greece (5.3%), Sweden (3.7%), Austria (2.2%), Denmark (2.1%)	3.201.080 in 2022	Managing congestion and strain on infrastructure, and during peak season.
Varna City	Bulgaria	Sea Garden, Roman Baths, Archaeological Museum, South and Central Beach, Slivnitsa Boulevard and Knyaz Boris I Boulevard	Family Tourists, Cultural Tourists, Health and Medical Tourists, Business Tourists, Senior Tourists	June to August	Origin: Bulgaria, Germany, Russia, Romania, Poland, UK (32.43% domestic, 67.57% foreign). Age: 25-44 years old = 40%, 45-64 years old = 35%, 18-24 and 65+ years old = 25%	896,934 tourists in 2022	Impact of high tourist volumes on historical sites and at the entrance of the Sea Garden, managing tourism flows.

TOURISMO



Island of Biševo	Croatia	Blue Cave, Monk Seal Cave, Porat Beach, Salbunara Beach, Visitor's Centre	Natural Tourism Seekers, Adventure Tourists, "VIP" guests, mature couples, young singles, families with children.	June to September	Origin: Croatia, Slovenia, Germany, the Czech Republic, Poland, the UK, Austria, Serbia, France, and Italy. 44.73% of foreign visitors in 2023 (Komiža).	Varies, peak daily 2,500 in summer	Preventing overcrowding at the Blue Cave by managing tourist flows, encouraging visits to other attractions on the island, and protecting the natural heritage.
Golden Bay	Malta	Golden Bay Beach, Majjistral Nature and History Park, Riviera Beach	Families, Young Adults, International Tourists	July and August	Origin: Italy (18.4%), UK (18.1%), France (9.6%), Germany (7.3%), Poland (5.6%), Spain (3.8%). Age: 25-44 years old = 39%, 45-64 years old = 30%	Over 3 million tourist in Malta 2023	Managing overcrowding during peak season, protecting the area's unique ecological characteristics.

TOURISMO



6. Bibliography and References

Visit València. (2022). *Estadísticas de Turismo 2022*. Visit València.

Port Authority of Valencia. (2023). *Boletín Estadístico Diciembre 2023*.

UNESCO. (2022). *Piano di Gestione UNESCO - Firenze 2022*. UNESCO.

National Statistical Institute of Bulgaria. (2023). *Tourism in Varna 2023*.

Development Agency of Lemesos & Premium Consulting. (2017). *Cruise Value Chain Operational Analysis in the Port of Limassol*. Larnaca and Famagusta District Development Agency.

Development Agency of Lemesos. (2018). *Business Location and Research Analysis*. Development Agency of Lemesos.

European Travel Commission. (2023). *European Tourism: Trends & Prospects (Q3/2023)*. European Travel Commission.

European Union. (n.d.). *Transition Pathway for Tourism*. European Union.

Aston Centre for Europe - Aston University. (2012). *Sustainable tourism in the Mediterranean*. European Union

UNWTO, UNEP, & UNDP. (n.d.). *Tourism and the Sustainable Development Goals – Journey to 2030*. UNWTO.