PIRAN WORKSHOP

# Tourism Development and Visitor Management

(QUESTIONNAIRES)

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Piran - Slovenia

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North East South WEST INTERREG IIIC

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# 1 Development of tourism

***Shortly describe tourism development in your town (historic background stressing main development moments and present situation)***

## CHESTER

Chester is a highly regarded international tourist destination. In terms of visitor numbers, spend, facilities and customer satisfaction it is inthe Top 3 of British historic cities although less well known than Bath, York, Oxford and Edinburgh. 8.5 million staying and day visitors came to Chester in 2004. Their spending, estimated at £370 million, helps sustain 30% of all Chester jobs – way above the national average of approaching 10%. Chester's economic fortunes, and its quality of life, are inextricably linked to its visitors.

Chester's **tourism appeal** lies mainly in its historic city centre characterised by its black and white architecture, unique medieval shopping galleries ( The Rows),its first class shopping facilities and its wide range of restaurants. It possesses the country's most complete set of city walls, an attractive river and a fine Cathedral. It has some strong visitor attractions, with Chester Zoo Britain's finest and most visited, and a good range of hotels including the luxury Chester Grosvenor and smaller Green Bough, both amongst England's best.

Chester's international appeal means that it features as a place to visit in the promotion of destinations for miles around and in many tour operator programmes. The city is the **visitor focus** for the surrounding countryside and North Wales, and has easy access to the major cities of Manchester and Liverpool. The city has little North West England competition as a historic city of international repute, which helps its appeal to the touring market. Its road and international airport links are good and it features on the national rail network.

Chester's assets make it well placed to benefit from the **national growth markets** of domestic visitors on second and subsequent holidays, business tourism and overseas visitors. It also appeals to the growth motivations of good living and indulgence. Day visitors will continue to be important – particularly those who want a complete historic city experience combining shopping, eating out and sight seeing in an outstanding environment. Evidence suggests that the district has a high proportion of comparatively affluent overnight tourists and a lower than average number of staying families with children. Typical domestic tourists may be older than average, interested in history, gardens and the countryside and on one of several holidays that year. Overseas visitors are likely to be from established markets, on a repeat or touring holiday to the UK, or studying English as a foreign language.

Chester's main **visitor challenge** is to help the city achieve its goal of becoming a significant international city. To achieve this it needs to become a **must-see European historic city** by improving every element of its facilities and its welcome and linking the outside areas of the city centre into the city's core offer.

Planned developments include:
**Northgate** – major regeneration programme to upgrade 20% of city centre featuring new retail, cultural facilities, squares and public realm.
**Culture Park** – a new holistic approach to improve and manage visitors' experience of the city through development of a series of linked themed areas.
**HQ** – a major iconic building featuring a new hotel and other facilities.
**Chester Superzoo** – a plan to expand the Zoo to make it the finest in Europe.

Management Plans include
**Place Marketing Strategy –** a holistic marketing programme to make the city a great place to be for visitors, students, workers, residents and investors

THE GROWTH OF TOURISM IN CHESTER

Chester's origins as a tourist destination began **2000 years ago** when visitors came to this far outpost of the Roman Empire to inspect the mighty legions stationed here or to see friends and relatives. They were followed in the **middle-ages** by religious tourists making pilgrimages to the shrine of St Werburgha.

Modern tourism in Chester really began with the conversion of the city walls from a means of defence to a fashionable promenade early in the **eighteenth century**. By 1800 the Rows had been redeveloped and the city was being promoted as a health resort. The tourism industry really took off in the mid **nineteenth century** with the expansion of facilities at the Racecourse, the introduction of the Music Festival and particularly the arrival of the railway which led to hotel growth.

Tourism expansion continued through the early part of this century and by 1930 there were 167 hotels and guest houses in the city. Chester Zoo opened in **1936** and the same year a magnificent display of illuminations was staged. This rivalled Blackpool as a spectacle but was designed to demonstrate Chester's local distinctiveness by focussing on the city's architectural grandeur.

The combination of the great economic depression of the 1930s and World War II led to a major reduction in Chester's tourism trade so that by **1947** only 27 hotels and guest houses were in business. It was the mid 1950s before the industry started to recover and by **1960** hotels and guest houses could offer a total of 700 bedrooms. This figure grew steadily through the **1970s** and **1980s** and by the early **1980s** the number of hotels and guest houses were back to the 1930 level and the Chester area provided 1300 bedrooms.

The last 25 years have seen continued accommodation and facility growth. By **2005** 2500 bedrooms were available. The number of hotels and guest houses, however, had declined from 140 in 1988 to less than 120 as larger establishments increased their share of the market. There was a corresponding increase in the number of self catering businesses opening over the same period. This growth in larger hotels serving business visitors and self catering operators serving leisure visitors shows Chester reflecting national trends. Growth amongst day visitors is less apparent with numbers appearing largely static since the early 1980s.

## 'S-HERTOGENBOSCH

With 5.3 million visitors in 2004, 's-Hertogenbosch is the 5$^{th}$ most important destination for day trippers after Amsterdam, Rotterdam, The Hague and Utrecht. In addition to the Cathedral of Saint Jan, 's-Hertogenbosch has unique selling points such as the "Binnendieze" (its canal system), Jheronimus Bosch and the fortifications. By tying in a boat trip on the "Binnendieze" with aspects such as the virtual world of Bosch and the history of its fortifications, we can synergize our efforts with special waterway attractions.

With respect to the target group of (tourist) visitors, the following objectives:
Increase in tourist visits (including shoppers) at a supra-regional and national visitor level.
National ranking for tourist visits (day-trippers) (C.V.O.) from 5$^{th}$ to 7$^{th}$ place.
Increase in international visitors, from neighbouring countries.

Binnendieze river

Saint John's cathedral

## VALLETTA

When Valletta was planned in 1565, it was not intended to be a tourist city. Lapparelli - the city architect, designed a military city, intended for defence and to accommodate the requirements of the Military Order of the Knights of St. John. Tourism as we know it today was inconceivable in those days. Travellers visiting Malta were either guests of the Military Order, or friends of the Maltese nobility, and were usually hosted in the families' private homes.

The first traces of tourism development in Malta came under the British rule. In fact, tourism activity in Malta is closely associated with the presence of the British on the Islands in the 19th century. Between 1800 and 1865, Malta started to be included in the Mediterranean itinerary of British and other travellers.

Perhaps there were two particular incidents which were instrumental in transforming Malta and its capital Valletta, into a tourist attraction: the prohibition of piracy on the high seas, and Queen Adelaide's stay in Malta to recover from an illness in 1838 (Cassar, 1973). Very soon, the islands came into the limelight as a tourist centre and soon after, Malta provided a mid-Mediterranean staging post for the Grand tour, which had become fashionable for the learned of those days.

As the Grand Harbour became an important sea terminal and thus Malta's main point of accessibility, Valletta gained in importance, as it became a gateway to the island and was gradually transformed into the most important city in Malta, from a commercial, economic and social point of view.

Tourist amenities were gradually being provided in Valletta, soon after the arrival of the British, as Malta was eventually being transformed into a beehive of commercial activity. By 1856, there were in Valletta 250 Wine and Liquor Shops, 25 Lodging Houses and 22 Hotels and Inns (Cassar, 1973).

Valletta's tourism significance continued even after Malta became an independent state in 1964. Naturally, the country's independence brought about a major change to the whole of the island, and for the first time a formal policy to encourage and develop the tourist industry in Malta was initiated, in order to offset the loss caused by the withdrawal of the British forces from Malta.

Today, Valletta still remains a point of reference to practically all tourists who visit the island. Its importance has not diminished, but it has changed through the years, adapting to meet the exigencies and circumstances of the time. Given the compactness of the island and the close proximity of Valletta to all the other cities in Malta, the capital receives a huge influx of tourists daily, reflecting the pattern of tourist arrivals to the island. It also receives a large number of cruise liner visitors, as the Grand Harbour is the port of call of all cruise liners visiting Malta's shores.

Valletta as the capital of Malta is highly visited by tourists. Valletta is more of an attraction city since tourist accommodation is limited to a few hotels with around 500 beds (if one includes the Phoenicia Hotel just outside the city walls). Over 89% of tourists coming to Malta visit Valletta as well as a high number of cruise liner passengers (based on Malta Tourism Authority MTA market profile surveys – Main markets in 2004, 2005).

The main attractions are the Grandmasters' Palace, St. John's Co-Cathedral, the Armoury and the Barakka gardens, as well as the War Museum and the Malta Experience. Activity in Valletta is not only limited to tourism but also includes commercial and public sector administrations and Ministries which all contribute to the pressures on the city and its residents. Transport related problems, e.g. limited parking and traffic are serious problems in the city, with the latter affecting the historical fabric as regards pollution.

These various activities affect the tourist's experience of this fortified city. Unfortunately, the city is also affected by new constructions which replace old buildings thus transforming the character of the city.

In the past, particularly in the 20s and 30s, Valletta was the main tourist accommodation locality with a number of small hotels, considering that most of the commercial activity was centered around the Grand Harbour area. By time these hotels were converted either into offices or other commercial uses and such a provision moved out of the capital city to the seaside resort towns. Thus this tourism function in Valletta was displaced. There is still scope for more accommodation to attract tourists wishing to stay in such an historic environment. This would also help in revitalising Valletta in the evening since the activity dies off after 7.00 in the evening.

## LÖRRACH

Whereas Lörrach was one of the most important locations in the textile industry only few years ago, the town is the most interesting shopping, service and cultural centre of the region today. The development and growth of Lörrach is very closely linked with the impressive and lovely landscape in the triangle of Germany, France and Switzerland.

Lörrach is the capital of the Markgräfterland region, the cultural and economic centre of this three-country triangle.

The weekly farmer's markets, excellent cuisine and the international »Voices« music festival have made Lörrach widely renowned. The beautiful town centre with its generously designed pedestrian zones an street cafés, spreading an almost Mediterranean atmosphere make you want to stick around and stroll through the town.

The »sculpture route« shows the special flair of the lively town centre of Lörrach also from an artistic point of view. It links the major works of art of national and international artists, which brighten up Lörrach's streets and squares. (See also Item 3 „tourist attraction“).

The cultural flagship and centre for culture and events »Burghof«, the varied cabaret scene the, colourful street parties and picturesque markets have given Lörrach its new identity.
The library, community college, the Burghof museum and music school complete the versatile range of offers.

The town has thus clearly gained attractiveness for its inhabitants and guest from the surroundings, Switzerland and France. More and more people keep moving to Lörrach, constantly increasing the population figures.

With its good tourist and general infrastructure as well as the wide range of cultural and leisure activities, Lörrach is a very interesting location and appeals to many tourist target groups seeking both for downtown activities and trips throughout the tri-national region.

## ARABARRI

During the 19th century, tourism as a holiday activity, basically for summer, was restricted and only accessible to a minority or social elite. The Basque Country was a paradigmatic example of this (San Sebastián).

After the irruption and development of the aviation for passengers' commercial transport, the tourist phenomenon was popularised in Europe, America and Asia and it has got generalized in a progressive way, until the current levels of "masses" in which a good part of the population of the developed countries and territories are important market originators and, in some cases, also receivers.

The Basque Country was famous in remote times for its spas and sea bathrooms, games of chance in some of its towns and, the same as now, its gastronomy.

Tourism is today an outstanding activity inside the Basque economy. And for this same reason it has become frequently main character of the informative contents of the media of inside and outside of its limits.

It is now the moment to refer to the phenomenon Guggenheim, as catalyst of the main flows there have been in the last years. It was another successful idea of some visionary people, above any criticism or initial indifference; it has taken to the Basque society to a discovery of tourism that very few of them could foresee.

Thanks to the phenomenon of the museum -without considering in if the tourists want to see the continent more than the content- Bilbao in particular and the Basque country in general has been positioned in the mind of the tourists of half world.

And, at short distance, the new palaces of congresses have begun to contribute new sap to this social and economic tree that grows in the -until recently- hardly populated plain of the Basque tourism. The congress activity has added one more element to the existent offer of possibilities for tourism in the Basque country, and the media can also confirm it.

Finally, those pillars should not distract the attention on the tourist destinations and of vacationers unaware to this mass tourism, as it is the case of Álava. Those not very well-known destinations, around simple attractiveness -but not for it less spectacular- they appear little in the mass media, but not in some guides and specialized publications that allow curious travellers to discover unexpected places.

## VERONA

Verona is one of the most beautiful cities in Italy, and due to the presence of many historical monuments, since always an important destination for tourists. Nowadays the city is even more valued and considered in the world thanks to its entry in the list of UNESCO sites, in 2000.

The fame of the city depends above all on its architectural heritage since the Roman Age, well symbolized by the Arena, one of the widest Roman amphitheatres still existing, after the Coliseum in Rome: at present it has a seating capacity of about 30000 spectators.

Since 1913, date of the first performance of a lyrical opera –the Aida by Giuseppe VERDI – the Arena is being hosting every summer several opera shows, known and much appreciated all round the world.

The Arena, with its massive stream of visitors, increased its appeal during the last century and in the last decades, becoming the most visited monument in the city in every season of the year. In 2004 the visitors of the Arena were about 639086 and more than 500000 during the lyrical season.

Verona is also famous in the whole world because of an old love story: the Romeo's and Juliet's love story, narrated by William SHAKESPEARE's beautiful verses at the end of the XVI century.

We don't know whether these characters truly existed or not, but, while the historians anxiously tried to study the chronicle of that time to find it out, the city attracted millions of visitors during the centuries who were more interested in looking for the marks left by the two legendary lovers in their own city, rather than in the truthfulness of the story.

In Verona you can always see queues of tourists outside Juliet's house, even the writer Charles Dickens visited the Juliet's house for the same reason in 1844 during his Grand Tour in Italy.

Many others were the intellectuals of the 19th century, interested in visiting Verona for its historical heritage, with its unique architectonical Roman remains, as well as medieval and Renaissance stratification.

Although it was not included in the typical Grand Tour of that period, Verona turned itself in a destination for people in search of a specific cultural atmosphere, in particular for English-speaking intellectual people and artists, some of them also dedicated verses or essays to the city.

Among them, John RUSKIN (1819-1900), a famous poet, who visited the city in 1835 and then came back several times, up to 1841; the painter Sir Frederick LEIGHTON (1830-1896): he visited the city in 1852 and he talked about it with great heat in his diary. In 1853 he painted the "Reconciliation of MONTECCHI and CAPULETI after the death of Romeo and Juliet" and in 1864 he exposed a big canvas entitled: "Dante in exile" alluding to the Italian situation.

Sir Edward BULWER-LYTTON (1803-1873) dedicated in 1840 an essay to Juliet's thumb, after visiting it.

The building, where – according to the legend - the unhappy lover lived, dates back to the 12th century.

In 1905 the house was bought by the Municipality of Verona and acquired the current appearance only 70 years ago. The anonymous ex-stall became the dreamy Juliet's dwelling place thanks to Antonio AVENA , director of municipal museums, who gave the building a medieval scenography, offering to the tourists an official site for this legend, increasing worldwide the fame of Verona as the "City of Romeo and Juliet" and the "City of love".

Moreover, Verona always leant towards the protection of its own huge historical-artistic heritage, faced the development themes in the best way, established itself as a primary economical centre for commerce activities. On a national scale Verona nowadays represents in the tourism business a destination of first importance; a fundamental contribution in this sense is given by the Veronafiere organisation, thanks to which every year millions of visitors from all sides of the world pour into the city of Verona on the occasion of the wide-ranging fairs. In the years 2004 and 2005 Veronafiere registered even more than a million presences in its events.

The origins of the Fair date a long time off, when the Venetian Region Senate founded in Verona a "Fair of Goods" in 1633, near the Bra Square, twice per year, fifteen days each fair.

This Fair continued to be celebrated in Bra for eighty years, until the fire of 1712 that destroyed the structures. Later on it was restored in a suburban zone and ever since was no more in a central zone.

Currently, other examples of consolidated Fairs are: Fieracavalli (fair dedicated to horses exhibition), Fiera dell'Agricultura (Agricultural Fair), Abitareiltempo (furniture and design interior decoration), etc.

Finally, the important and much appreciated Vinitaly, dedicated to Italian wine production, has a tremendous pull, and not only for the experienced people of the wine-making industry.

## PIRAN

Tourism development in Piran started with the development of tourist resort in the nearby bay of Portorož (literally Port of roses). Although the Benedictine fathers used brine and black salt mud to cure rheumatic diseases as early as the 12th century, it was not until late 19$^{th}$ century that these elements were intentionally used to attract tourists. First hotel and thermal facilities were built under the Habsburg monarchy in 1890. In 1897, Portorož gained the official status of a health resort that allowed the collection of tourist tax and granted other privileges favouring tourism. Tourism development took-off with the construction of the Palace Kur Hotel in 1910. Small boarding houses and pensions sprung around Palace hotel and the resort could accommodate around 1000 tourists. A Casino was added just a few years after. Portorož was developing into one of the most fashionable seaside resorts of the monarchy (besides Abbazia/Opatija and Brioni). Unfortunately, WWI started just when tourist numbers started to grow. After the war, the territory passed under Italy. The destination faced entirely different reality. It passed from an exclusive resort of the Habsburg monarchy to a destination that had to compete with hundreds of coastal and spa resorts in Italy. During the 1920's, the *acqua madre*, concentrated seawater, the most competitive tourist attraction, was allowed to be sold in pharmacies around the country and the destination lost its spa appeal. Portorož was forced to develop new products such as a large sandy beach, an airport for hydroplanes, and additional accommodation facilities. Despite those efforts, Portorož was becoming less and less attractive for tourists. Historic records show less tourist arrivals in 1938 (10.000) as there were before WWI (14.000 in 1913).

After the WWII, the borders changed again. During a first after war decade, there was almost no tourism as there was a political dispute between Italy and Yugoslavia over the city of Triest and its surrounding territory that encompassed Piran and Portorož. The agreement was reached only in 1954 when Piran and Portorož become part of Yugoslavia. Another decade passed before new development cycle that started in mid 1960's with large investments in tourism infrastructure. By 1976, the number of available hotel beds in Portorož and Piran grew to 5.000. In addition, there were over 14.000 beds in private accommodations, more than 5.000 beds in worker holiday houses, and over 2.000 places in campings. Mass tourism of the 1980's reached its peak in 1985 with over 1.5 mn nights spent by domestic and foreign tourists. Tourism was mostly centered in Portorož. The old town of Piran had only three small hotels an several holiday houses for workers. Accessibility, need of restauration of buildings, and meagre tourist offer limited development opportunities.

Tourism, and especially international tourism, has been heavily challenged in 1991 with the war of independence of Slovenia. Although the war lasted only ten days and Slovenia soon received full international recognition, tourist arrivals dropped heavily. In 1991 there were 158.000 total arrivals (50.000 foreign) and 700.000 total nights spent (178.000 foreign).

The 1990's were a decade of privatization and renovation of hotels. Today Portorož and Piran have 13.000 beds in all types of accommodations. Investments were made in spa, in wellness, and in congress facilities. The Terme & Wellness Palace spa and wellness centre has over a century long tradition in the area of the health and well-being. Its Sauna Park complex is also unique in Europe, not only because it is the largest, but also because it offers seven different types of saunas. The Wai-Thai Temple of Well Being is the largest centre for traditional Thai massage and natural facial and body care in Europe. Recently enlarged conference facilities also help extending tourist season that has its traditional peak in summer months. With its expanding array of attractions, Portorož has become a lively tourism centre in every season. The number of arrivals is steadily rising and in 2005, 360.000 tourists spent 1.29 mn nights. However, these figures are still around 10% below the record season of 1985.

## 2 Tourism data

### *I. Accommodation capacity and tourist demand*

#### *CHESTER*

| Year | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2005 | | | | | | | | | | | | | | |
| 2004 | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 711.000 | 571.000 | 140.000 | 1.574.000 | 1.259.000 | 315.000 |

#### *'S-HERTOGENBOSCH*

| Year | | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2005 | 21 | 9 | 9 | 3 | 700 | 460 rooms | harbour plac | 240 places | | not available | not available | **150.500*** | not available | not available |
| 2004 | 21 | 9 | 9 | 3 | 700 | 460 rooms | harbour plac | 240 places | | | | | | |
| 2003 | | 10 | | | | | | | | | | | | |

* **9.500** nights in the harbour

## VALLETTA

| Year | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2005 | 8 | 4 | 4 | | 664 | 580 | 84 | | | | 1170610 | | | |
| 2004 | 8 | 4 | 4 | | 664 | 580 | 84 | | | | 1156028 | | | |
| 2003 | 8 | 4 | 4 | | 664 | 580 | 84 | | | | 1126601 | | | |
| 2002 | 8 | 4 | 4 | | 664 | 580 | 84 | | | | 1133814 | | | |
| 2001 | 8 | 4 | 4 | | 664 | 580 | 84 | | | | 1180145 | | | |
| 2000 | 8 | 4 | 4 | | 664 | 580 | 84 | | | | 1215712 | | | |
| 1999 | | | | | | | | | | | 1214230 | | | |
| 1998 | | | | | | | | | | | 1182240 | | | |
| 1997 | | | | | | | | | | | 1111161 | | | |
| 1996 | | | | | | | | | | | 1053788 | | | |

## LÖRRACH

| Year | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2005 | 45 | 20 | 24 | 1 | | 470 | about 150 | no dates | 32577 | | | 68507 | | 13965 |
| 2004 | 45 | 20 | 24 | 1 | | 469 | " " | no dates | 33937 | | | 69307 | | 11647 |
| 2003 | 45 | 20 | 24 | 1 | | 470 | " " | no dates | 33272 | | | 68055 | | 12909 |

## ARABARRI

| Year | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2005 | 89 | 31 | 56 | 2 | 1794 | 783 | 517 | 494 | 102052 | 75442 | 26610 | 170767 | 131744 | 39023 |
| 2004 | 90 | 30 | 58 | 2 | 1755 | 791 | 470 | 494 | 102404 | 73749 | 28655 | 169982 | 131450 | 38532 |
| 2003 | 89 | 32 | 55 | 2 | 1682 | 799 | 389 | 494 | 105477 | 74876 | 30601 | 165180 | 123739 | 41441 |
| 2002 | 86 | 33 | 51 | 2 | 1580 | 707 | 379 | 494 | 102083 | 68055 | 34028 | 155023 | 81185 | 42424 |
| 2001 | 77 | 31 | 44 | 2 | 1662 | 598 | 320 | 744 | 98480 | 69197 | 29283 | 152764 | 111522 | 40612 |
| 2000 | 74 | 32 | 40 | 2 | 1411 | 633 | 284 | 494 | 96900 | 66209 | 30691 | 151661 | 109445 | 42216 |
| 1999 | 63 | 30 | 31 | 2 | 1279 | 531 | 258 | 490 | 68288 | 47978 | 20310 | 114428 | 87037 | 28053 |
| 1998 | 61 | 28 | 31 | 2 | 1586 | 835 | 261 | 490 | 77887 | 53943 | 23944 | 120996 | 89372 | 33276 |
| 1997 | 32 | 31 | n/a | 1 | 1086 | 836 | n/a | 250 | 84754 | 56134 | 28558 | 122018 | 83442 | 38579 |
| 1996 | 31 | 30 | n/a | 1 | 1021 | 771 | n/a | 250 | 72952 | 49421 | 23530 | 100524 | 70813 | 29712 |
| 1995 | 26 | 25 | n/a | 1 | 808 | 558 | n/a | 250 | 62475 | 37321 | 25153 | 87590 | 51715 | 35875 |

Note: Cells blue-shaded don’t include campsites. Cells yellow-shaded only include hotels.

## VERONA

| Year | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2005 | 213 | 68 | 143 | 2 | 9092 | 5759 | 2277 | 1056 | 541333 | 243412 | 297921 | 1409187 | 646502 | 762685 |
| 2004 | 234 | 70 | 162 | 2 | 9247 | 5886 | 2305 | 1056 | 548985 | 244904 | 304081 | 1356985 | 638252 | 718733 |
| 2003 | 185 | 69 | 114 | 2 | 9199 | 5862 | 2251 | 1056 | 521808 | 243990 | 277818 | 1334789 | 585805 | 748984 |
| 2002 | 165 | 72 | 91 | 2 | 9213 | 6045 | 2112 | 1056 | 562332 | 243800 | 318532 | 1344197 | 568160 | 776037 |
| 2001 | 150 | 69 | 79 | 2 | 8856 | 5807 | 1993 | 1056 | 581395 | 235292 | 346103 | 1379501 | 575599 | 803902 |
| 2000 | 138 | 69 | 67 | 2 | 8905 | 6026 | 1823 | 1056 | 548118 | 231611 | 316507 | 1238596 | 537754 | 700842 |
| 1999 | 114 | 66 | 46 | 2 | 7940 | 5591 | 1293 | 1056 | 526427 | 227014 | 299413 | 1174292 | 516519 | 657773 |
| 1998 | 114 | 67 | 45 | 2 | 8010 | 5669 | 1285 | 1056 | 487115 | 204821 | 282294 | 1100659 | 473561 | 627098 |

## PIRAN

| Year | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2005 | 71 | 23 | 45 | 3 | 13120 | 5270 | 5950 | 1900 | 359.717 | 131.599 | 228.118 | 1.288.775 | 463.952 | 824.823 |
| 2004 | 82 | 24 | 55 | 3 | 13458 | 5223 | 6135 | 2100 | 358.195 | 133.460 | 224.735 | 1.303.965 | 478.227 | 825.738 |
| 2003 | | | | | | | | | 359.079 | 141.668 | 217.411 | 1.328.334 | 499.988 | 828.346 |
| 2002 | | | | | | | | | 344.854 | 136.325 | 208.529 | 1.093.464 | 410.944 | 682.520 |
| 2001 | | | | | | | | | 343.200 | 142.430 | 200.770 | 1.345.747 | 528.148 | 817.599 |
| 2000 | | | | | | | | | 340.991 | 151.313 | 189.678 | 1.306.454 | 554.249 | 752.205 |
| 1999 | | | | | | | | | 318.570 | 158.968 | 159.602 | 1.207.962 | 609.049 | 598.913 |
| 1998 | | | | | | | | | 306.752 | 126.236 | 180.516 | 1.219.190 | 515.248 | 703.942 |
| 1997 | | | | | | | | | 318.419 | 130.774 | 187.645 | 1.261.537 | 545.684 | 715.853 |
| 1996 | | | | | | | | | 264.215 | 120.400 | 143.815 | 1.014.323 | 511.609 | 502.714 |

## II. Seasonality

### CHESTER

| Year and month | | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Number of establishments | | | | Beds available in | | | | | | | | | |
| | | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2004 | Jan | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 60,000 | | | 123,000 | | |
| | Feb | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 58,000 | | | 107,000 | | |
| | Mar | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 51,000 | | | 106,000 | | |
| | Apr | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 61,000 | | | 149,000 | | |
| | May | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 65,000 | | | 138,000 | | |
| | Jun | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 45,000 | | | 108,000 | | |
| | Jul | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 67,000 | | | 164,000 | | |
| | Aug | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 63,000 | | | 164,000 | | |
| | Sep | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 60,000 | | | 143,000 | | |
| | Oct | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 60,000 | | | 117,000 | | |
| | Nov | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 63,000 | | | 117,000 | | |
| | Dec | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | 66,000 | | | 141,000 | | |
| 2005 | Jan | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Feb | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Mar | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Apr | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | May | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Jun | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Jul | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Aug | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Sep | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Oct | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Nov | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |
| | Dec | 208 | 28 | 90 | 100 | 6800 | 4100 | 2000 | 700 | | | | | | |

## 'S-HERTOGENBOSCH

| Year and month | Accommodation capacity | | | | | | | | Arrivals | | | Bednights |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total |
| 2005 Jan | 21 | | | | | | | | | | | 28.350 (hotels) + 350 (other)= **28.700** |
| Feb | 21 | | | | | | | | | | | |
| Mar | 21 | | | | | | | | | | | |
| Apr | 21 | | | | | | | | | | | 35.500 (hotels) + 7.700(other) = **43.200** |
| May | 21 | | | | | | | | | | | |
| Jun | 21 | | | | | | | | | | | |
| Jul | 21 | | | | | | | | | | | 32.300 (hotels) + 13.300 (other) = **45.600** |
| Aug | 21 | | | | | | | | | | | |
| Sep | 21 | | | | | | | | | | | |
| Oct | 21 | | | | | | | | | | | 32.300 (hotels) + 700 (other) = **33.000** |
| Nov | 21 | | | | | | | | | | | |
| Dec | 21 | | | | | | | | | | | |

## VALLETTA

(n/d)

## LÖRRACH

| Year and month | | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Number of establishments | | | | Beds available in | | | | | | | | | |
| | | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2004 | Jan | | | | | | | | | | | | 2806 | | |
| | Feb | | | | | | | | | | | | 2777 | | |
| | Mar | | | | | | | | | | | | 4510 | | |
| | Apr | | | | | | | | | | | | 4782 | | |
| | May | | | | | | | | | | | | 3878 | | |
| | Jun | | | | | | | | | | | | 4517 | | |
| | Jul | | | | | | | | | | | | 4599 | | |
| | Aug | | | | | | | | | | | | 3686 | | |
| | Sep | | | | | | | | | | | | 5025 | | |
| | Oct | | | | | | | | | | | | 4307 | | |
| | Nov | | | | | | | | | | | | 4365 | | |
| | Dec | | | | | | | | | | | | 3376 | | |
| 2005 | Jan | | | | | | | | | | | | 3535 | | |
| | Feb | | | | | | | | | | | | 3382 | | |
| | Mar | | | | | | | | | | | | 4486 | | |
| | Apr | | | | | | | | | | | | 4820 | | |
| | May | | | | | | | | | | | | 4234 | | |
| | Jun | | | | | | | | | | | | 4505 | | |
| | Jul | | | | | | | | | | | | 4103 | | |
| | Aug | | | | | | | | | | | | 3418 | | |
| | Sep | | | | | | | | | | | | 4599 | | |
| | Oct | | | | | | | | | | | | 4041 | | |
| | Nov | | | | | | | | | | | | 4405 | | |
| | Dec | | | | | | | | | | | | 3129 | | |

All information here refers to hotels only!

## ARABARRI

| Year and month | | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Number of establishments | | | | Beds available in | | | | | | | | | |
| | | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2004 | Jan | | 32 | 55 | | | 791 | 470 | | 4206 | 2883 | 1323 | 5550 | 4134 | 1416 |
| | Feb | | 32 | 55 | | | 993 | 466 | | 4563 | 3249 | 1314 | 6460 | 4723 | 1737 |
| | Mar | | 31 | 55 | | | 997 | 490 | | 5980 | 4641 | 1339 | 8885 | 7135 | 1750 |
| | Apr | | 31 | 54 | | | 1004 | 506 | | 6870 | 4782 | 2088 | 10511 | 7976 | 2535 |
| | May | | 31 | 58 | | | 998 | 547 | | 9759 | 5881 | 3878 | 13234 | 8262 | 4972 |
| | Jun | | 31 | 58 | | | 969 | 539 | | 7881 | 5321 | 2560 | 10799 | 7533 | 3266 |
| | Jul | | 30 | 58 | 2 | | 974 | 536 | 494 | 8699 | 5255 | 3444 | 13399 | 8979 | 4420 |
| | Aug | | 30 | 58 | | | 973 | 543 | | 9767 | 6190 | 3577 | 18101 | 13476 | 4625 |
| | Sep | | 30 | 58 | | | 975 | 521 | | 7585 | 4724 | 2861 | 11334 | 7472 | 3862 |
| | Oct | | 30 | 58 | | | 979 | 544 | | 8599 | 6124 | 2475 | 12711 | 9670 | 3041 |
| | Nov | | 30 | 58 | | | 976 | 530 | | 6805 | 5247 | 1558 | 9580 | 7712 | 1868 |
| | Dec | | 30 | 58 | | | 941 | 538 | | 5650 | 4260 | 1390 | 7859 | 6094 | 1765 |
| 2005 | Jan | | 30 | 58 | | | 783 | 517 | | 3981 | 2981 | 1000 | 5146 | 3850 | 1296 |
| | Feb | | 31 | 58 | | | 950 | 520 | | 4574 | 3408 | 1166 | 6236 | 4851 | 1385 |
| | Mar | | 31 | 58 | | | 985 | 534 | | 7800 | 6033 | 1767 | 12753 | 10311 | 2442 |
| | Apr | | 31 | 58 | | | 1053 | 520 | | 6163 | 4456 | 1707 | 8733 | 6211 | 2522 |
| | May | | 31 | 58 | | | 1052 | 500 | | 8239 | 5355 | 2884 | 12196 | 8361 | 3835 |
| | Jun | | 31 | 58 | | | 1028 | 530 | | 7503 | 5136 | 2367 | 11368 | 7392 | 3976 |
| | Jul | | 31 | 57 | 2 | | 1044 | 544 | 494 | 8206 | 5262 | 2944 | 13349 | 9535 | 3814 |
| | Aug | | 31 | 57 | | | 1076 | 528 | | 11006 | 7283 | 3723 | 20871 | 15734 | 5137 |
| | Sep | | 31 | 57 | | | 1064 | 510 | | 9036 | 5612 | 3424 | 13364 | 8405 | 4959 |
| | Oct | | 31 | 57 | | | 1066 | 543 | | 8267 | 5853 | 2414 | 12341 | 8915 | 3426 |
| | Nov | | 31 | 57 | | | 1040 | 511 | | 5617 | 4508 | 1109 | 7619 | 6186 | 1433 |
| | Dec | | 31 | 56 | | | 972 | 509 | | 5149 | 4065 | 1084 | 8457 | 7128 | 1329 |

## VERONA

| Year and month | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2004 Jan | 188 | 67 | 119 | 2 | 8792 | 5639 | 2097 | 1056 | 27159 | 16021 | 11138 | 74713 | 41837 | 32876 |
| Feb | 187 | 67 | 119 | 1 | 8024 | 5687 | 1281 | 1056 | 31811 | 19566 | 12245 | 81063 | 48768 | 32295 |
| Mar | 259 | 70 | 187 | 2 | 8879 | 5687 | 2136 | 1056 | 38753 | 23455 | 15298 | 100148 | 59806 | 40342 |
| Apr | 259 | 70 | 187 | 2 | 8897 | 5687 | 2136 | 1056 | 40198 | 20508 | 19690 | 112852 | 63390 | 49462 |
| May | 196 | 66 | 128 | 2 | 8833 | 5605 | 2172 | 1056 | 50473 | 22674 | 27799 | 121869 | 58390 | 63479 |
| Jun | 196 | 66 | 128 | 2 | 8833 | 5605 | 2172 | 1056 | 48548 | 17579 | 30969 | 121837 | 46823 | 75014 |
| Jul | 201 | 66 | 133 | 2 | 8872 | 5605 | 2211 | 1056 | 73875 | 18626 | 55249 | 161364 | 47689 | 113675 |
| Aug | 260 | 68 | 136 | 2 | 9067 | 5784 | 2227 | 1056 | 70838 | 17563 | 53275 | 159672 | 45316 | 114356 |
| Sep | 207 | 68 | 137 | 2 | 9069 | 5784 | 2229 | 1056 | 54061 | 22965 | 31096 | 126215 | 58714 | 67501 |
| Oct | 229 | 67 | 160 | 2 | 9057 | 5705 | 2296 | 1056 | 45664 | 20994 | 24670 | 125498 | 56346 | 69152 |
| Nov | 229 | 67 | 160 | 2 | 9048 | 5705 | 2287 | 1056 | 39994 | 27151 | 12843 | 99821 | 66174 | 33647 |
| Dec | 229 | 67 | 160 | 2 | 9048 | 5705 | 2287 | 1056 | 27611 | 14641 | 8763 | 71933 | 44999 | 26934 |
| 2005 Jan | 184 | 67 | 115 | 2 | 8658 | 5705 | 1897 | 1056 | 28224 | 16495 | 11729 | 79106 | 45870 | 33236 |
| Feb | 184 | 67 | 115 | 2 | 8658 | 5705 | 1897 | 1056 | 29433 | 18579 | 10854 | 77453 | 48473 | 28980 |
| Mar | 184 | 67 | 115 | 2 | 8658 | 5705 | 1897 | 1056 | 38789 | 20045 | 18744 | 97949 | 52491 | 45458 |
| Apr | 186 | 67 | 117 | 2 | 8741 | 5705 | 1980 | 1056 | 43148 | 24218 | 18930 | 114089 | 67378 | 46711 |
| May | 187 | 67 | 118 | 2 | 8830 | 5705 | 2069 | 1056 | 45790 | 20396 | 25394 | 121987 | 57368 | 64619 |
| Jun | 196 | 67 | 127 | 2 | 8871 | 5705 | 2110 | 1056 | 48190 | 18293 | 29897 | 126728 | 51050 | 75668 |
| Jul | 200 | 67 | 131 | 2 | 8883 | 5705 | 2122 | 1056 | 71211 | 19172 | 52039 | 165226 | 50039 | 115187 |
| Aug | 200 | 67 | 131 | 2 | 8883 | 5705 | 2122 | 1056 | 71137 | 18508 | 52629 | 169085 | 48782 | 120303 |
| Sep | 204 | 67 | 135 | 2 | 8935 | 5705 | 2174 | 1056 | 52146 | 22143 | 30003 | 141036 | 56628 | 84408 |
| Oct | 208 | 67 | 139 | 2 | 8992 | 5705 | 2221 | 1056 | 45556 | 21262 | 24294 | 125909 | 56767 | 69142 |
| Nov | 288 | 67 | 139 | 2 | 8992 | 5705 | 2221 | 1056 | 39037 | 17059 | 16700 | 106639 | 64049 | 42590 |
| Dec | 210 | 68 | 141 | 1 | 8268 | 5759 | 2269 | 240 | 28672 | 18397 | 10275 | 83980 | 47597 | 36383 |

## PIRAN

| Year and month | Accommodation capacity | | | | | | | | Arrivals | | | Bednights | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Number of establishments | | | | Beds available in | | | | | | | | | |
| | Total | Hotels | Other acc. | Campings | Total | Hotels | Other acc. | Campings | Total | Domestic | Foreign | Total | Domestic | Foreign |
| 2004 Jan | **51** | 20 | 31 | 0 | **5579** | 4177 | 1402 | 0 | **10.316** | 3942 | 6374 | **37.187** | 13793 | 23394 |
| Feb | **46** | 16 | 30 | 0 | **4720** | 3288 | 1432 | 0 | **12.884** | 7245 | 5639 | **39.682** | 22920 | 16762 |
| Mar | **49** | 21 | 28 | 0 | **5608** | 4294 | 1314 | 0 | **19.896** | 8526 | 11370 | **63.186** | 26050 | 37136 |
| Apr | **60** | 23 | 35 | 2 | **9168** | 5092 | 2476 | 1600 | **31.290** | 10921 | 20369 | **93.934** | 27695 | 66239 |
| May | **63** | 24 | 37 | 2 | **9561** | 5204 | 2757 | 1600 | **37.796** | 11665 | 26131 | **112.693** | 32042 | 80651 |
| Jun | **78** | 24 | 52 | 2 | **10700** | 5204 | 3896 | 1600 | **41.272** | 15803 | 25469 | **151.544** | 56404 | 95140 |
| Jul | **85** | 24 | 58 | 3 | **12829** | 5197 | 5532 | 2100 | **48.550** | 20696 | 27854 | **220.573** | 101268 | 119305 |
| Aug | **82** | 24 | 55 | 3 | **13458** | 5223 | 6135 | 2100 | **52.688** | 18706 | 33982 | **248.359** | 91384 | 156975 |
| Sep | **73** | 24 | 46 | 3 | **11984** | 5212 | 4672 | 2100 | **37.395** | 10190 | 27205 | **140.738** | 38158 | 102580 |
| Oct | **56** | 23 | 32 | 1 | **8176** | 5161 | 2615 | 400 | **30.907** | 9742 | 21165 | **93.512** | 25458 | 68054 |
| Nov | **50** | 22 | 28 | 0 | **6865** | 5077 | 1788 | 0 | **19.405** | 9681 | 9724 | **59.391** | 24542 | 34849 |
| Dec | **58** | 22 | 36 | 0 | **7186** | 5070 | 2116 | 0 | **15.796** | 6343 | 9453 | **43.166** | 18513 | 24653 |
| 2005 Jan | **37** | 15 | 22 | 0 | **5754** | 4127 | 1627 | 0 | **10.663** | 3609 | 7054 | **39.577** | 12049 | 27528 |
| Feb | **36** | 18 | 18 | 0 | **5558** | 4157 | 1401 | 0 | **13.635** | 5925 | 7710 | **38.853** | 17969 | 20884 |
| Mar | **50** | 23 | 27 | 0 | **7528** | 5297 | 2231 | 0 | **25.129** | 9028 | 16101 | **77.380** | 26326 | 51054 |
| Apr | **56** | 23 | 31 | 2 | **9904** | 5231 | 3073 | 1600 | **30.212** | 11714 | 18498 | **85.879** | 30641 | 55238 |
| May | **55** | 23 | 30 | 2 | **10196** | 5234 | 3362 | 1600 | **36.965** | 13034 | 23931 | **107.144** | 33503 | 73641 |
| Jun | **68** | 23 | 42 | 3 | **11824** | 5271 | 4653 | 1900 | **41.985** | 16007 | 25978 | **152.409** | 56502 | 95907 |
| Jul | **71** | 23 | 45 | 3 | **13026** | 5269 | 5857 | 1900 | **49.092** | 21645 | 27447 | **219.530** | 101129 | 118401 |
| Aug | **71** | 23 | 45 | 3 | **13120** | 5270 | 5950 | 1900 | **48.514** | 16282 | 32232 | **234.775** | 83251 | 151524 |
| Sep | **63** | 23 | 37 | 3 | **12541** | 5276 | 5365 | 1900 | **38.735** | 10721 | 28014 | **143.668** | 40102 | 103566 |
| Oct | **56** | 22 | 31 | 3 | **10374** | 5192 | 3282 | 1900 | **31.426** | 10.181 | 21245 | **89.695** | 24345 | 65350 |
| Nov | **43** | 21 | 21 | 1 | **8555** | 5141 | 2414 | 1000 | **18.755** | 8510 | 10245 | **58.896** | 22443 | 36453 |
| Dec | **46** | 19 | 27 | 0 | **6730** | 4083 | 2647 | 0 | **14.606** | 4.943 | 9.663 | **40.969** | 15692 | 25277 |

## III – Other relevant data

***Describe tourists and visitors in your area (age groups, average spending, structure by nationality etc.). If possible, give estimation on the number of some-day visitors and their seasonality.***

## CHESTER

Excerpts from Chester Summer Visitor Survey 2004

**Type of visitor**

| | | |
|---|---|---|
| Day Visitor | | 64% |
| Staying in Chester | | 20% |
| Staying outside Chester | | 16% |
| - Cheshire | 4% | |
| - Wales | 7% | |
| - Wirra | 13% | |
| - Other NW | 2% | |

| **Reason for visit** | All | Day | Staying |
|---|---|---|---|
| Leisure / holiday | 80% | 81% | 78% |
| Special shopping trip | 10% | 12% | 1% |
| Friends / Relatives | 8% | 5% | 18% |
| Special event | 2% | 1% | 3% |

| **Home (All respondents)** | |
|---|---|
| Merseyside | 18% |
| Cheshire | 17% |
| Wales | 14% |
| Overseas | 9% |
| Lancashire | 6% |
| Greater Manchester | 5% |
| Staffordshire | 4% |
| Scotland | 4% |
| Other UK | 23% |

| **Home (Staying in Chester)** | |
|---|---|
| England | 58% |
| Overseas | 16% |
| Scotland | 13% |
| Wales | 8% |
| N. Ireland | 5% |

**Length of stay (overnight visitors in Chester)**

| | |
|---|---|
| 1 night | 13% |
| 2 nights | 24% |
| 3 nights | 19% |
| 4-7 nights | 30% |
| 14 nights | 10% |
| 14+ nights | 4% |

Average length of stay (1-14 nights only) - 4.43 nights

**Type of accommodation**

| | |
|---|---|
| Hotel / B&B / Youth Hostel | 62% |
| Self-catering | 5% |
| Friend / Relative | 23% |
| Caravan | 6% |
| Other | 4% |

| **First visit to Chester** | All | Day | Staying |
|---|---|---|---|
| Yes | 20% | 15% | 42% |
| No | 80% | 85% | 58% |

| **Main form of transport used** | All | Day | Staying |
|---|---|---|---|
| Car | 58% | 53% | 70% |
| Bus / Coach | 23% | 26% | 14% |
| Rail | 16% | 17% | 13% |
| Other | 3% | 4% | 3% |

| **Things liked best about Chester** | |
|---|---|
| History / Heritage / Buildings | 36% |
| Atmosphere / whole experience | 24% |
| River / Riverside | 18% |
| Shops | 7% |
| Other specific reasons | 15% |

| **Things that spoilt the visit** | |
|---|---|
| Nothing | 80% |
| Weather | 7% |
| Various types of cleanliness | 3% |
| Parking | 2% |
| Toilets | 1% |
| Cathedral entrance fee | 1% |

| **Chief income earner in party** | All | Day | Staying |
|---|---|---|---|
| Employed | 55% | 54% | 59% |
| Retired | 37% | 39% | 30% |
| Student | 4% | 4% | 6% |
| Unemployed | 4% | 4% | 4% |

| **Socio-economic group** | All | Day | Staying |
|---|---|---|---|
| AB | 25% | 24% | 31% |
| C1 | 33% | 32% | 37% |
| C2 | 15% | 15% | 15% |
| DE | 27% | 30% | 16% |

| **Party Size** | All | Day | Staying |
|---|---|---|---|
| | 2.1 | 2.1 | 2.0 |

## 'S-HERTOGENBOSCH

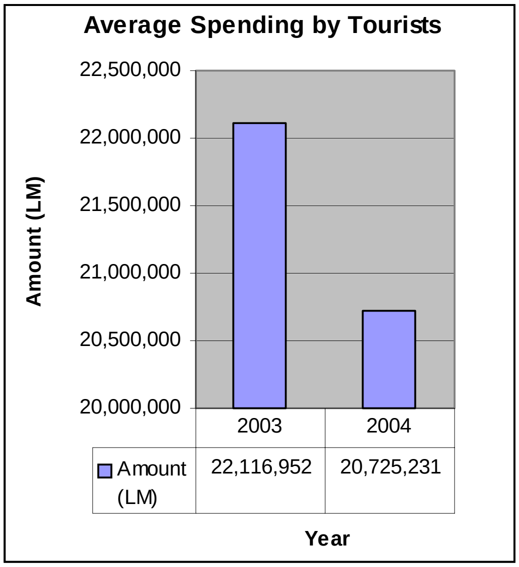
Visits to the city:

Annual number of visits in general
Visits to the inner city (including habitants) 15,000,000
Tourist day visits to the city 5,3 mln
Hotel nights 130,500

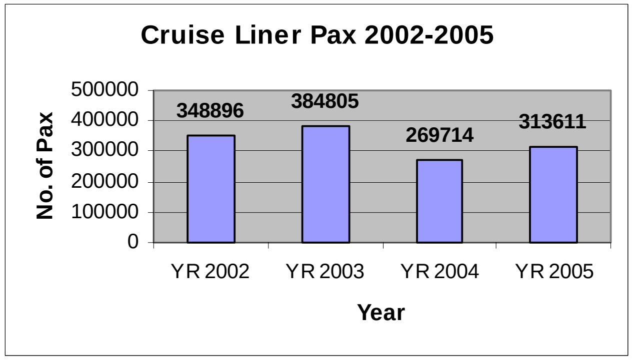
Annual number of visits major attractions
Saint John's Cathedral 200,000
Canal trips "Binnendieze" 180,000
Museum of the county of North-Brabant 250,000

Annual number of visits major events
Jazz in Duketown (May) Jazz-festival 300,000
Maritime (September) Boating- event100,000
Theaterfestival Boulevard (August) Open-air Arts and Theatre festival 90,000
Indoor Brabant (March) Equitation event 65,000
Ordina Open (June)
International Lawn tennis event (ATP ranking) ( just prior to Wimbledon) 58,000

## *VALLETTA*




| CRUISE LINER PASSENGER ARRIVALS 2002-2005 | | | | |
|---|---|---|---|---|
| MONTH | YR 2002 | YR 2003 | YR 2004 | YR 2005 |
| JANUARY | 3,748 | 1,999 | 0 | 3,144 |
| FEBRUARY | 529 | 854 | 353 | 4,534 |
| MARCH | 7,918 | 4,336 | 2,200 | 7,997 |
| APRIL | 20,374 | 15,748 | 19,117 | 22,564 |
| MAY | 41,057 | 55,135 | 28,287 | 35,881 |
| JUNE | 43,524 | 45,472 | 21,239 | 30,940 |
| JULY | 52,489 | 54,477 | 33,273 | 40,230 |
| AUGUST | 48,157 | 53,946 | 37,591 | 33,847 |
| SEPTEMBER | 46,517 | 56,972 | 43,411 | 40,441 |
| OCTOBER | 51,798 | 62,375 | 41,392 | 51,503 |
| NOVEMBER | 26,127 | 22,704 | 32,069 | 33,887 |
| DECEMBER | 6,658 | 10,787 | 10,782 | 8,643 |
| TOTAL | 348,896 | 384,805 | 269,714 | 313,611 |




Distance from Airport to Valletta: 7.44km
Distance from the Cruise Passenger Terminal to Valletta: 1.4km

## LÖRRACH

Visitors are found in the fields of short-break vacation, business trips, in conferences and trade shows. But also the regular daytrip is a main pillar of tourism.

Visitors of:

| | |
|---|---|
| Museum am Burghof: | 2003: 14,529 visitors,<br>2004: 10,092 (slump due to economy measures);<br>2005: 16,004 visitors |
| Burg Rötteln: | To be supplied |
| "Voices" festival: | 2003=39.215 visitors;<br>2004=<br>2005= To be supplied |

The »Nellie Nashorn« cabaret theatre: Hundreds of visitors annually
(Internationale Theatertage theatre festival: International young amateur and semi-professional ensembles show their productions and discuss them with the audience. The performances take place at different locations every year).

## ARABARRI

(n/d)

## VERONA

(n/d)

# PIRAN

Piran and Portorož depend on summer season. July and August represent 27% of total arrivals and 35% of total nights spent. Weekend tourism is characteristic during other months.

Piran and Portorož are4 accountable for 17% of overnights spent in all types of tourist accommodation Sovenia and for 22% of overnights spent in hotels. 77% of overnights in Piran-Portorož are spent in hotels. There are three five star hotels in Portorož (and seven in Slovenia).

The majority of tourists are foreign tourists (62%). Italian market is the most important foreign market with 25.3% of total arrivals and 21.4 % of total overnights. Second market is Austria (12.7% of arrivals and 13.6% of overnights), and thirs market is Germany with 7.7% of total arrivals and 10,0% of total overnights. United Kingdom has 2.1% and 2.4% share.

Average lenght of stay is falling and was 3.58 days with only a slight difference between domestic (3.53days) and foreign (3.62days) lenght of stay.

# 3 Tourist attractions

***Describe main tourist attractions in your area. Provide info on their location within the destination (central, peripheral, clustered, dispersed), number of visitors (at least the estimated number), and their operating time (seasons, hours...)?***

## CHESTER

| Name | Location | Visitors | Open |
|---|---|---|---|
| Chester Zoo | Peripheral | 1,200,000 (Paying) | All year |
| Chester Cathedral | Central | 800,000 (Free) | All year |
| Blue Planet | Dispersed | 300,000 (Charging) | All year |
| Grosvenor Museum | Central | 100,000 (Free) | All year |
| Deva Roman Experience | Central | 50,000 (Charging) | All year |
| Boat Museum | Dispersed | 50,000 (Charging) | All year |

## 'S-HERTOGENBOSCH

Main tourist attractions of ‘s-Hertogenbosch (figures under 2):

Boattrips

A BOAT TRIP ON THE BINNENDIEZE RIVER

The town river "de Binnendieze" is older than the 800 year-old town itself. Seated in a characteristically open boat you sail through 's-Hertogenbosch alternating between being out in the open and amidst town buildings.

A BOAT TRIP ON THE GROOTE STROOM CANAL

During the new sailing route on the “Groote Stroom” you will meet Jheronimus Bosch (the Bosschian painter). The centuries old town river winds its way under picturesque arches and bridges, along picturesque town sights and pleasant countryside: A fascinating combination of the past and the present.

A BOAT TRIP ON THE DOMMEL RIVER

Sail with the boating company “Wolthuis” on the Dommel along the fortifications, the Citadel and various fortress towers. During the trip you can enjoy Burgundian sweets and food.

Fortress town

Town rights were bestowed upon 's-Hertogenbosch in 1185. Since then the town has successively grown beyond its original borders. The town is continuously reminded of its famous fortress history by various locations within its perimeters. Today's fortifications and towers of the fortress town of 's-Hertogenbosch together with its Citadel stem from the 16th and 17th century and are still almost completely intact!

CITADEL

The fortress building, the Citadel, a five-cornered entrenchment with characteristic bastions was built in 1637 in the northern part of ´s-Hertogenbosch where the "Dommel" river and the "Aa" river flow together in to the "Dieze". The state archives are currently located in the fully restored complex.

Cultural history

Cultural history is ever-present in the streets, museums and trades of Den Bosch. Allow yourself to be surprised by what the fortress town has to offer.

SAINT JOHN’s CATHEDRAL AND "DE BOUWLOODS" MUSEUM

The Saint John's Cathedral is one of the most interesting cultural and historical buildings in the Netherlands. The late gothic basilica was built between 1380 and 1530 and extensively restored in the period 1975 to 1985. With its numerous sculptures, the exterior of the Saint John’s Cathedral is one of the most decorated buildings in the Netherlands. Subsequently you can visit the "Bouwloods" Museum of the Saint John’s Cathedral. The history of the building and the restoration of the Cathedral can be seen here. Characteristic for the Saint John’s Cathedral are the floating arch figures or 'hemelbestormers' (the heavenly assailers): Similar figures are not to be seen anywhere else.

SINT JOHNS' TOWER

Climb up the 73 metre high tower of the Saint John’s Cathedral and visit, among other things, the carillon and an exposition over the history, building and restoration of the tower. A video presentation informs you over everything pertaining to the trade of casting bells. And at the end, you will be rewarded with a magnificent view of the beautifully decorated cathedral and the moody silhouette of the inner town.

TOWN HALL

A guide leads you through the Town Hall of the city of ‘s-Hertogenbosch, a classic baroque style building. The 17th century jousting game (chimes), monumental council room - adorned with goblins from the 17th century - and impressive hall make the city hall one of the most special historical monuments in 's-Hertogenbosch.

NORTH BRABANT MUSEUM

A rich collection encompassing culture, history and fine arts from the South-Netherlands, depicted chronologically from prehistoric times to today, is located in this former 18th century government palace. A widespread programme of changing exhibitions, a model of the old town of 's-Hertogenbosch and a multimedia programme are shown parallel to the collection. The sculpture garden is also worth visiting.

SLAGER MUSEUM

This spacious museum is influenced by a century of painted art from three generations of the Bosschian Slager Family. The museum displays, among other things, town outlines of ´s-Hertogenbosch, Brabant and Belgian landscapes, still-life and self-portraits. You are also shown a slide presentation and given a guided tour of the museum.

OETELDONKS GEMINTEMUZEJUM

This is the one museum in the Netherlands which is totally dedicated to carnival. There are all manner of artefacts to be seen, such as carnival floats, paintings, hats and headgear, which in the course of time have been designed in, among other places, South America, Asia, neighbouring European countries and, naturally, in the Netherlands.

BOSSCHE PRENTENMUSEUM

This museum harbours a collection of ancient maps and original sketches by Hendrik de Laat and Herman Moerkerk. The museum is a part of the Kringhuis, the historico-cultural information centre of the Kring "Vrienden van 's-Hertogenbosch" (circle of "friends of 's-Hertogenbosch). They have made it their task in the past 28 years to maintain and nurture the cultural inheritance, which is richly present in the town and in the surrounding areas. Thus contributing to the enrichment of the cultural climate of the town centre.

ZWANENBROEDERHUIS
Worth more than a visit: the neo-gothic Zwanenbroederhuis, the brotherhood house of the "Illustre Lieve Vrouw Broederschap." One of the members of the brotherhood was the famous painter Jheronimus Bosch. Even now members of the Royal House are still listed as members of the brotherhood. Here you will see, among other things, very extensive archives and unique music books.

PROVINCIEHUIS
The Brabantian Provinciehuis (regional government house), designed by Hugh Maaskant, harbours an international collection of art, including wall coverings by Magdalena Abakanowicz and Sheila Hicks. A guide also leads you along works by Karel Appel, Corneille and, of course, the famous bronze door of the State Hall.

## VALLETTA

| MAIN TOURISTS' ATTRACTIONS | | |
|---|---|---|
| | | |
| Attraction | Location | No. of Visitors in 2005 |
| Fort St. Elmo | Peripheral | 8,700 |
| Museum of Archaeology | Central | 93,200 |
| Museum of Fine Arts | Central | 23,200 |
| War Museum | Peripheral | 60,100 |
| Palace Armoury | Central | 100,900 |
| St. John's Co- Cathedral | Central | 435,800 |
| Barakka Gardens | Peripheral | 640,000 |
| Grand Masters' Palace | Central | 125,500 |
| No. of visitors annually (2005) | | 1,487,400 |

| | |
|---|---|
| Opening Hours: | 09:00hrs. To 17:00hrs. |
| | Public Holidays Closed |
| 5 days (Closed) | Good Friday |
| | Christmas Eve/Day |
| | New Year's Eve/Day |

## LÖRRACH

a) In Lörrach and its townships:

Rötteln Castle ruins
Founded in the 11$^{th}$ century, Staufen brickwork, family seat of the noble family “von Rötteln”. Small museum with finds and a model of the castle. In summer, open air theatre.
Opening hours: Upper castle open daily from 11.00 16.00 hours.

Church of Rötteln (Rötteln)
Late gothic church
Monthly evening chamber music events.

Ev. Stadtkirche (Protestant town church)
Erected 1817 ion the classical Weinbrenner style, tower is older (1514).
“Musikalischer Herbst” evening organ concerts every year in November

Museum am Burghof
The new permanent “Expo TriRhena” exhibition is the first comprehensive representation of the changeful history of the German, Swiss and French border region.
Opening hours: Wed-Sat 14.00 – 17.00 hours, Sun 11.00 – 13.00 hours + 14.00 to 17.00 hours

Hebelpark
Statue of the regional writer, Johann Peter Hebel.

Recreation area close to town – “Landschaftspark im Grütt”
Large park with a lake, adventure playgrounds, rose garden cafe (approx. 120 types of roses), fair grounds, sports facilities.

Roman estate (Brombach)
Archaeological excavation of the ground plot of a Roman estate from the 2nd century AD.

Lörrach Sculpture route (town centre)
Discover the town centre on foot walking the sculpture route with works of international artists such as Bernd Goehring, Ulrich Rückriem, Stephan Balkenhol, Franz Bernhardt, Bruce Nauman and Beatrix Sassen.

Rudolf Scheurer foundation
Permanent exhibitions of the sculptor R. Scheurer in an ensemble of the studio house, showrooms, sculpture gardens and the sculpture tower of the foundation.

b) In the region (national and international):

Lörrach is the ideal starting point for any trip to the tri-national region of Germany-France-Switzerland!
The entire Black Forest as well as our neighbouring countries of Switzerland and France offer a vast array of opportunities. Here only a few highlights:

Amusement parks:
**Vogelpark Steinen:** Open daily March through November
**Europa-Park Rust**: Largest European amusement park with theme parks on European countries; opens in summer and winter
Zoo »Zolli« Basel: Open all year

Spas/wellness:
Laguna Badeland & Sauna Vier Jahreszeiten, Weil a.Rhein:
Adventure pool with giant waterslide, sauna facilities, outside facilities etc. Open all year

Cassiopeia Therme Badenweiler:
One of the most beautiful hot springs spas in Europe. Open all year geöffnet.

Balinea Therme Bad Bellingen:
Balinea hot springs with more than 1000 sqm water surface, 600 sqm state of the art sauna park, generous indoor and outdoor area sunbathing lawn and terrace.

Museums:
**Vitra Design Museum**: Is one of the worldwide leading museums for design; it researches the historic and current development of industrial furniture design.
**All museums of Basel:** Varied and comprehensive offerings for all interests
Automuseum Mulhouse
**Ecomusée d'Alsace:** Famous museum village with half-timbered houses true to the original
**Augusta Raurica:** Roman town on the river Rhine with many buildings and a "route of roman history".

Nature and countryside:
Naturpark Süd-Schwarzwald (D)
Winter sports offerings in the entire southern Black Forest (D), the Voges mountains (F) and the Swiss Alps (CH)
Rhine falls in Schaffhausen (CH)

Towns and cities:
France: Colmar, Mulhouse, Strasbourg
Switzerland: Basel, Zürich
Deutschland: Freiburg, Baden-Baden

## ARABARRI

The tourism of business in Euskadi is an emergent sector that occupies the biggest percentage in the tourist activity. The main conclusions of the report point to a considerable development thanks to the inauguration of the palaces of congresses Euskalduna in Bilbao (February of 1999) and Kursaal in Donostia (June 1999) that next to the already existent Palacio Europa of Vitoria, they constitute the basic infrastructures to welcome this type of events, besides other enclosures and rooms of smaller size located in hotels, singular buildings, technological and managerial parks, etc.

## VERONA

Verona, with its enchanting and uninterrupted symbiosis of art and history, offers a dazzling cultural programme for all seasons and for all tastes.

Every corner of the historic town centre is overflowing with art, from the portals, piazzas, streets, to the frescos on buildings and churches, not to mention the museums.

The town's treasures housed within the city walls, its extensive and extraordinary patrimony, its history and works of art earned Verona inclusion in the list maintained by the international World Heritage Programme administered by UNESCO in 2000.

As visitors pass through the town's historic centre along the banks of the Adige River, they can enjoy millennia-old works of art every step of the way. Important remnants from different eras, from Roman times to the Barbarians' invasion, from the della Scala dynasty to Venetian and Austrian rule, coexist harmoniously and provide a magnificent panorama for visitors. The town offers so much for free that visitors only need to enter the museums when something unique and exceptional is on show. This may explain the disparity between the estimated number of tourists visiting the city and the number of visitors to the museums and monuments.

The perfect itinerary would perhaps begin at the central Piazza Bra, dominated by the imposing Arena amphitheatre, one of the town's prime tourist attractions. The third largest in Italy, built during the Flavia Dynasty (1st century BC), it is a clear symbol of Verona's importance. It was built to seat over 20,000 spectators, and still today welcomes such crowds who come to hear leading opera singers. In 2004, 639,086 people visited the Arena.

The Museo Maffeiano (Maffei museum) rises on the other side of the piazza in the Teatro Filarmonico (Filarmonica Theatre) courtyard, where Roman and medieval epigraphy collected by the eighteenth century scholar Scipione Maffei are displayed. In 2004, 8,474 people visited the Museo Maffeiano.

One of the most exclusive shopping streets in Italy, Via Mazzini, runs to the north-west of Piazza Bra. Luxury and prestigious shops line the street, closed to traffic, all the way to Piazza Erbe, which was the ancient "forum", the civil, political and religious centre in the city's early days.

The Arco della Costa (arch) marks the entrance to the Piazza dei Signori where the heritage of the della Scala family is prominent in the impressive family buildings and the Capitano building, and the beautiful Arche Scaligere (arches), which are monumental tombs to Cangrande della Scala and his family.

One of the architectural landmarks of the city, Juliet's house, is found in Via Cappello at the end of Via Mazzini. The balcony overlooking the courtyard where one of Shakespeare's best-known characters lived draws crowds of visitors every day who come to see where the most famous lovers that drama has ever known, Romeo and Juliet, fell in love. In 2004, 185,857 people visited Juliet's House.

The Roman bridge della Pietra carries visitors across the river to the Roman Theatre. Here, excavations begun in the early 18th century have uncovered one of the most momentous monuments of the early imperial age built from rock cut from the San Pietro hills, the oldest residential zone in Verona. The Theatre is one of the finest in northern Italy. Sitting aloft a bend in the Adige River, it offers a vista of the entire city. In 2004, 59,061 people visited the Roman Theatre.

The current Duomo (cathedral) is on the west bank back across the River Adige. In this part of town where ancient baths once stood, considerable evidence of an early Christian basilica have been uncovered (4th-5th century BC). The basilica of the current day Duomo sits on the ruins. In 2004, 80,089 people visited the Duomo.

The wide bend in the river circling the historic town centre ends at the unique arches of the fortified Castelvecchio bridge, also constructed by the della Scala family in the 14th century. The Mastio tower houses the museum's important collections. In 2004, 89,128 people visited the Museo di Castelvecchio.

The tour along the river draws to a close at the Basilica di San Zeno, one of the most beautiful and important Romanesque churches in Italy. Undisputed masterpieces like the raised bronze figures on the entrance door and Mantegna's triptych on the high altar are dignified reminders of an era when the city was particularly thriving, historically and artistically. In 2004, 72,412 people visited the Basilica di San Zeno.

Many diverse activities and cultural initiatives take place in the area.

The Arena Festival is one of the most popular. It has become a captivating tradition spanning more than eighty seasons of operas, ballets and concerts performed on the enormous stage and where leading artists have given some great performances. The festival attracts thousands of people to the city considered the world's capital of opera, bringing an important economic contribution that extends throughout the entire province and region.

From October to May, the winter opera and ballet performances as well as the symphonic seasons organised by the Arena Foundation of Verona are given in the Filarmonica theatre.

The Verona Summer Festival runs alongside the Arena's opera season in June, July and August and is set in the splendid Roman Theatre. The festival began in 1948 with a performance of Romeo and Juliet and has since run non-stop, hosting distinguished theatrical companies from Italy and abroad. In addition to these artistic-cultural resources, the city offers an abundant natural and environmental heritage bestowed by the geomorphologic diversity of the area.

The radiant beauty of Garda Lake which enchanted Catullus, Virgil, Carducci and numerous other poets today provides the backdrop for popular tourist resorts of international fame. Renowned for its lush coastline and historic villas, beaches, entertainments and sports, cuisine based predominantly on fish, olive oils and wines, the lake is home to the resort of Peschiera del Garda and two theme parks, Gardaland and Caneva. Both are very important for the area, in particular Gardaland which is the most popular theme park in Italy, attracting 3 million visitors a year.

The mountain regions also offer very interesting tourist itineraries, such as Valpolicella, the land of internationally acclaimed vines and cellars, and the Pre-Alpine Lessinia with its mountain traditions.

## PIRAN

Most of the attractions in Piran are linked to the history of the town. Among them are:

- Tartini square, named after famous violinist Giuseppe Tartini, born in Piran in 1692.
- Church of St. George and other churches
- City walls

There is also a maritime museum and a small aquarium. Both are of local character.

Outside of the town are salinas where the salt is stil extracted in traditional way. Salinas are declared as natural preservation area. Besides salt extraction, the natural park attracts bird wathers and nature lovers of all ages.

Portorož as tourist destination is primarily sun&sea destination with entertainment, festivals and music. Casino is stil attracting some market groups but it is loosing its appeal as there is HIT casino in Nova Gorica, just 100 km away with better access from main italian market.

More on www.portoroz.si

# 4 Organisation of tourism at the destination level

***Describe organisation structure of tourism (public and private sector, civil society initiatives etc.). Include organisational chart, if possible.***
***(who is involved; who is responsible for tourism destination development, marketing and promotion; financing of activities)***

## CHESTER


## 'S-HERTOGENBOSCH

Tourism planning and policy is part of the department of economic affairs of the city council of ‘s-Hertogenbosch. Besides tourism the Fortifications project (Vestingwerken) and Water in the historic city centre of ‘s-Hertogenbosch are main issues in local governmental projects. Tourism policy is a main issue in the city-marketing of ‘s-Hertogenbosch, as increasing the number of overnight and day visitors is a main objective of city-marketing policy.

‘s-Hertogenbosch is one of the Dutch cities obtaining national funding for tourism development (‘Grote Steden Beleid’), especially for developing themes Jheronimus Bosch, Fortifications and water-tourism and international marketing.

Local government and local private tourism organisations are organised in a Visitors Management group, based on public-private funding of tourism marketing. This includes organisations such as hotels, restaurants, retail, cultural tourism organisations, boat trips and so on. The marketing organisation of the local and regional tourism product is managed by the regional tourism organisation.

On a national level ‘s-Hertogenbosch is organised in a national network of the main (historical) tourist city destinations of the Netherlands under auspices of the ministry of economic affairs.

## VALLETTA

The following entities collectively manage tourism in the Maltese Islands

**The Ministry for Tourism and Culture** – responsible for tourism policy, EU affairs, overall direction of tourism in Malta, representatives on international bodies such as the UNWTO etc…

**The Malta Tourism Authority –** responsible for tourism strategy and the implementation of tourism policy guidelines. Responsible for tourism product development, marketing the destination overseas, ensuring quality and standards in tourism including accommodation, and food and beverage establishments, industry human resource requirements.

The Airline industry – Airmalta and other Airlines, Malta International Airport – to ensure good airline connections and sufficient seat capacity.

**The Private sector** – the accommodation sector, the food and beverage sector, leisure and entertainment facilities (casinos, fun parks, night clubs etc…), Destination management companies, travel and tourism agencies etc…

**Representative organisations – MHRA** (Malta Hotels and Restaurants Association), **FATTA** (Federation of Travel and Tourism Agencies), **GRTU** (General Retailers and Traders Union) – tourism sme's, **GTA** (Gozo Tourism Association), **FMHPCE** (Federation of Malta Hotels, Pensions and Catering Establishments), **MUTG** (Malta Union of Tourist Guides), **PDA** (Professional Diving Association), **FELTOM** (Federation of English Language Teaching Organisations Malta), other…

**Civil society and NGOs** – a number of tourism related civil society groups and NGOs including Skal International, the Tourism Society as well as heritage NGOs such as Din L-Art Helwa, Fondazzjoni Wirt Artna, Valletta Alive Foundation, Fondazzjoni Patrimonju Malti, other…

Who is responsible for tourism destination development?

Government through the Ministry for Tourism and Culture and the Malta Tourism Authority, the private sector – various forms of tourism destination development such as government funded, private sector funded, or public-private sector partnership.

Who is responsible for destination marketing?

MTA is responsible for destination marketing of the destination. The Authority concentrates in a number of identified market segments which constitute the most important forms of tourism to Malta. These are leisure and tour operating, history and culture, conference and incentive, English language learning, emerging markets, Gozo-based holidays and sports tourism. The MTA has sales teams led by experts in the respective market segments whose role is to market the destination and facilitate sales in the different geographical markets overseas.

**Financing of activities –** the MTA receives an annual Government contribution and also contributions from the private sector as follows:

| MTA Budget 2006 | Lm | Lm |
|---|---|---|
| Government contribution<br>Additional Government contribution for branding Malta | 8.0 m<br>0.5 m | <br>8.50m |
| Airmalta contribution | | 0.30m |
| MIA contribution | | 0.20m |
| Private sector contribution (less rebate for prompt payment) | | 0.73m |

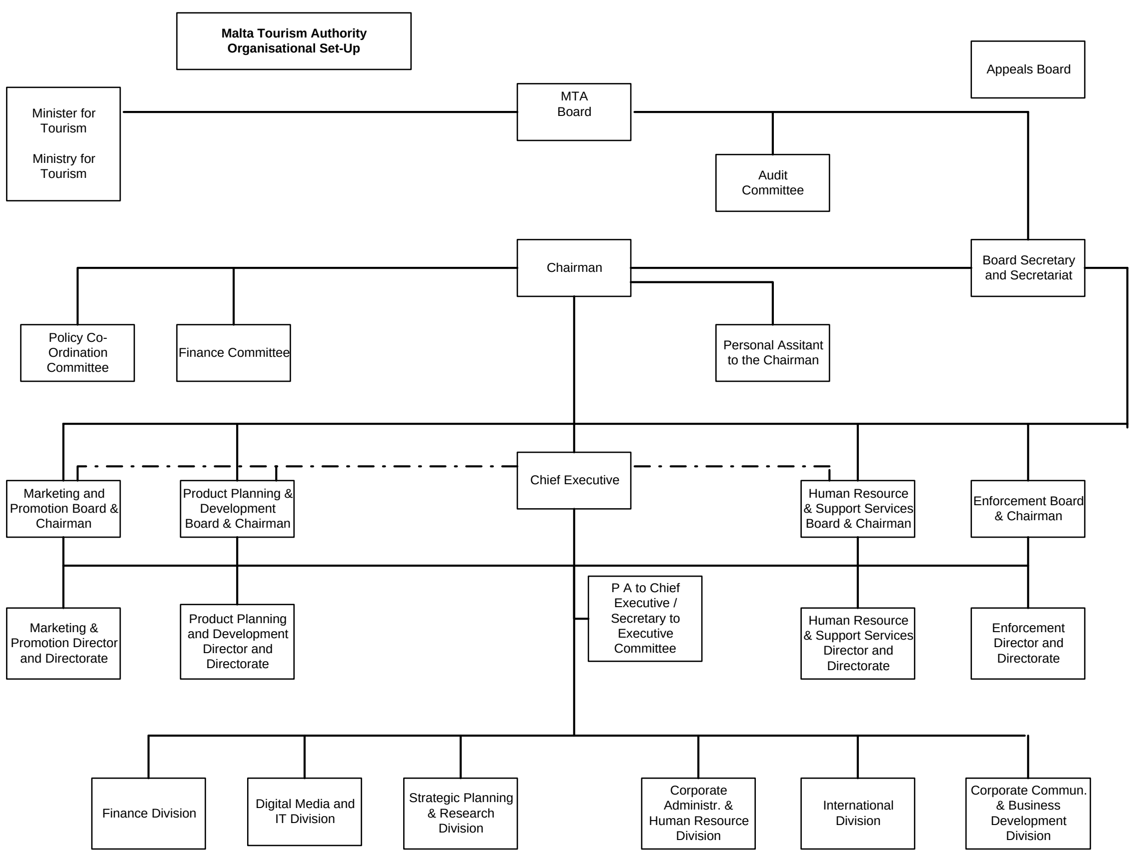
| | | |
|---|---|---|
| Total MTA Budget | | 9.73 million |

Of these, Lm 5.2 million is spent on marketing, including advertising, fairs, strategic support to tour operators, overseas payroll, rent and administration – direct marketing spending amounts to Lm4.7 million. Other financing include EU Structural Funds – tourism projects managed by the Ministry of Tourism and Culture and MTA.

The Malta Tourism Authority (MTA) has a diverse role, but one which in essence is all about creating and fostering relationships. MTA is basically the tourism industry's regulator and motivator, its business partner, the country's brand promoter, and is there to form, maintain and manage meaningful partnerships with all tourism stakeholders.

Primarily, this means talking to visitors to the Islands, but they also work closely alongside their private sector partners. Importantly, MTA is there to help strengthen the industry's human resources, ensure the highest standards and quality of our tourism product, and foster relations with local and international media.

The Authority was formally set up by the Malta Travel and Tourism Service Act (1999). This clearly defines their role – extending it beyond that of international marketing to include a domestic, motivating, directional, co-ordinating and regulatory role.



## LÖRRACH

Tourist information (TI) Lörrach has been integrated into Burghof GmbH, and is thus a 100 % subsidiary of the Lörrach town administration, from where it also receives its budget. The annual budget is at around € 110,000.
A performance contract between the town administration and Burghof GmbH defines and determines its tasks. These comprise the following major elements:
- Management and administration of TI
- Tourist advertising, PR and marketing including the preparation of all brochures and advertising media
- Planning and conducting representative tasks such as trade shows, workshops and events
- Cooperation with local, regional and national tourist funding agencies and partners (e.g. associations)

Tourist structures in Germany:

Altogether, there are 7 levels in Germany from the operation to international marketing (world market):

1. The **funding agencies** are organised in ***Tourist information offices*** or similar town facilities.
2. **Towns and municipalities** are increasingly organised in **advertising communities.** These can take the form of loose associations through to tightly organised GbmHs.
3. On a regional level, there are the **districts**. In the Lörrach region, it is the District of Lörrach.
4. Tourism in the Black Forest is organised in the ***Schwarzwald Tourismus GmbH (STG)*** in which the individual districts are represented.
5. On the state level, there are state associations, here namely the ***Tourismus Marketing GmbH Baden-Württemberg***, of which the STG in turn holds shares.
6. The state tourism organisations join together on a federal level in the Deutscher Tourismus Verband (German Tourism Association, DTV). The DTV predominantly assumes the task of internal marketing.
7. The **Deutsche Zentrale für Tourismus (German Central Office for Tourism, DZT)** maintains branches in many countries of the world marketing German destinations such as the Black Forest.

## ARABARRI

According to the Spanish Constitution, the Basque Government has exclusive authority over Tourism matters.

A Law of Ordination of the Tourism exists in the Basque country, with which is sought to give an unitary and systematic treatment of the tourism, to offer the best development in the tourist companies by favouring their quality and competitiveness, by guaranteeing the due protection to the consumers and users and by retaining for itself the right of administrative punishment.

For these ends the Law defines its own application framework and its aims, the companies and tourist establishments to which it is applied and the classification of these companies; it defines the tourist non-managerial actors, it orders the resources by means of a Sectoral Territorial Plan and it is supplemented with the Regional Strategic Plans; and lastly it establishes the disciplinary regime.

The Basque government is currently processing the so-called PLAN FOR TOURIST PROMOTION AND EXCELLENCE (PEDT). The term “excellence” is used to define the group of best practices in an organization’s management and the achievement of results based on fundamental concepts including: the orientation toward the results, orientation to the client, leadership and perseverance, processes and facts, people's implication, continuous improvement and innovation, mutually beneficial alliances and social responsibility. It is therefore a concept related to a best administration of resources and that has been adopted in Spain in a generic way or related with some specific initiatives promoted by the Administration.

The PEDT provides new intervention tools whose implementation demands the coordination between different administrations and the participation of the private initiative, to get an improvement of quality of the tourist destinations. This new generation of plans means figures of interest in the consolidation of a competitive and sustainable tourist model for several reasons:

- They mean a qualitative leap on the traditional plans, too focused in the promotion and tourist information.
- They incorporate in some cases a vision of strategic intervention in the territory.
- They foment the application of planning tools, linked to renovation policies for mature tourist destinations and development of emergent tourist areas.
- They reinforce the recognition of the local scale as the best one for public and private interventions.
- They encourage the principle of co-responsibility between the different administrative levels, through co-financing agreements.
- They propitiate the appearance of new organizational formulas and objectives of the local tourist management.

The Basque Government's aims for next years cover six intervention axes:

- Creation and recreation of tourist products in strategic segments that allow to attract growing quotas of tourists and excursionists in Euskadi.
- Support to the creation of new companies and invigoration of the current structure in the markets.
- Encouragement of the competitiveness of the sector on the basis of quality and innovation in the generation of tourist products and the managerial administration.
- Development of the human resources and of the knowledge management to allow a professional development of the activity.
- Reinforcement of the presence of Euskadi as a tourist destination in the markets.
- Tourism management of the territory by completing, consolidating and strengthening the territorial network of entities of tourist cooperation.
- Implementation of necessary supports and tools for the reinforcement of the competitiveness of the sector.

At a provincial level it is the Álava County Council the responsible for the sector; it develops the Regional Strategic Plans inside which it establishes programs of grants for tourism activities, new tourism initiatives, studies on tourism, development of the tourism legislation, administrative procedures and calendars of activities.

## VERONA

(n/d)

## PIRAN

At the local level tourism is part of Economic Department of the Community of Piran. Main executive organisation is Turistično združenje občine Piran (local tourism organisation) that is a result of public and private sector organisation. This organisation is financed through tourist tax, community budget, membership fees and through own activities.

Civil sector is active in tourism clubs. Their work is voluntary and is partly financed from the local lovernment's budget.

Tourism clubs are located in six urban centres of the Community of Piran.

| | | |
|---|---|---|
| Tourist Society Škurša | Padna 11, SI-6333 Sečovlje | Tel.: +386 (0)5 672 51 40 |
| Tourist Society Sečovlje | Sečovlje 24, SI-6333 Sečovlje | Tel.: +386 (0)5 672 06 50 Fax.:+386 (0)5 672 06 55 |
| Tourist Society Fiesa | Fiesa 68, SI-6330 Piran | Tel.: +386 (0)31 248 404 |
| Tourist Society Portoroz | Obala 16, 6320 Portorož | Tel.: +386 (0)5 674 08 99 |
| Tourist Society Piran | Levstikova 7, SI-6330 Piran | Tel.: +386 (0)5 673 03 30Fax.:+386 (0)5 673 03 30 |
| Tourist Society Solinar, Strunjan | Strunjan Strunjan 28, SI 3320 Portorož | Tel.: +386 (0)5 678 20 00 |

# 5 Communication practice

***What means of communication are available for tourists (e.g. tourist info centres, brochures, road signs, web...)? How is tourist info service organised (who is providing the service, and who is financing it...)? Is there any communication with local residents (local newspaper, public meetings, events for residents, other activities...)?***

## CHESTER

Services Provided Through Customers' Visitor Journey
All services are funded by the organisation shown often with private sector support

Motivation
Press & PR – CWTB
Strategic Promotion – CWTB
Tactical Promotion – Chester CC

Information
Website – CWTB
Main Brochure –Chester CC
Telephone / Email – Chester CC

Booking
Website – CWTB
Telephone / Email – Chester CC
At Tourist information Centre – Chester CC

During Visit
Tourist Information Centres (x2) – Chester CC
Information Panels – Chester CC
Signposts – Chester CC
Information leaflets – Chester CC
Guided Tours – Chester CC
Events – Chester CC
Museums – Chester CC

Back at home
Customer survey – CWTB / Chester CC

Stakeholder Engagement
Both CWTB and Chester CC have numerous means of considering the views of local people, businesses and organisations.

## 'S-HERTOGENBOSCH

In 2006 a total package of tourism information infrastructure will be realized in ‘s-Hertogenbosch. This contains of digital road signs, banners, digital information points at the main tourism sites and so on, as well as a renewed visitor website of ‘s-Hertogenbosch. This is a result of a new tourism marketing strategy.

## VALLETTTA

Tourist information offices are available in Valletta, St. Julian’s and at the Airport in Luqa. A brochure set is available and distributed in all tourist information offices. There are also a number of dedicated websites and portals on Malta as a tourism destination, such as the MTA consumer website – www.visitmalta.com, the MTA trade website – www.mts.com.mt, the conference and incentive website – www.maltaconferences.com

Other dedicated websites (private) eg. www.choosmalta.com

The tourist information offices in Valletta, St. Julian’s and in Luqa are run by the MTA. We also have a tourism information office in Gozo at Tigrija Palazz in Rabat.

## LÖRRACH

Burghof operates the Tourist Information office together with the ticket office. The entire ticket sales and general tourist inquiries are dealt with here.
The opening hours are Mon – Fri from 10.00 – 18.00 hours, Sat from 9.00 -14.00 hours.

In all, 8 persons covering a labour load of 390% are assigned to the field of TI / ticket office at the Burghof. Tourism accounts for 100 % of this labour. In addition, there is the managing position as a 100% post (Manager of Tourist Information) and a college place for the “Tourism” line of studies at the University of Cooperative Education of Lörrach. The University of Cooperative Education (UCE) is a special training concept in which the studies are combined with a practical training in a total of 3 years.

The tasks are assigned as follows:
Ticket office/Tourist Information: - General place of information for all kinds of tourist inquiries
- Dispatch of brochures
- Sale of tickets, brochures, books, etc.

Management of Tourist Information:- Planning and production of all tourist pamphlets
- Planning, training and organisation of guided tours of the town
- Advertising, , PR, marketing; including maintenance and design of internet sites
- Organisation and conducting of events presentations of all kinds.
- regular exchange of information with the various partners on a local level (press, gastronomy, retail and others), as well as on a regional / inter-regional level (District, Black Forest, neighbouring countries of Switzerland and France)

## ARABARRI

The Basque Network of Offices of tourism - ITOURBASK, was born in 2003 with the purpose of providing the users with an uniform tourist information, updated and homogeneous of the whole Basque Country from anyone of the Tourist Information Points, giving this way a global service of tourist information about the destination Euskadi.

ITOURBASK, will provide a number of services: databases of resources and tourist services in Euskadi, with the purpose of facilitating the exchange and communication among them in their respective functions, to endow them with some homogeneous characteristics as for their covering and informative contents, to offer the tourist users an integral group of services, to improve their satisfaction level and to impel the communication and diffusion of the tourist resources of the Basque Country.

PRINCIPLES ON which THE NETWORK IS BASED

- UNITY-AUTONOMY. Each of the Offices joining the Network maintains its autonomy in operation but it works in cooperation within the Network.
- QUALITY. Because a Network system allows a homogeneous model of attention to the user of the Offices.
- MODERNITY. Because the information in the Network will be managed through advanced information and communication technologies.
- CORPORATE IMAGE of coordinated, quality and modern service.

NETWORK MODEL

The Network ITOURBASK is based on some main services:

- DOCUMENTATION AND INFORMATION SERVICE: It will gather all the tourist resources in Euskadi, in common databases updated by the joined Offices.
- EVALUATION AND STATISTICS SERVICE: it allows to maintain the quality of the joined Offices and gather data on their users.
- TRAINING SERVICE: To solve the training necessities of the technicians assisting the Offices, with a plan of annual training.
- DIFFUSION AND COMMUNICATION SERVICE: It will look after the corporate image.

All these services have as their main support the web tool INTRANET; this tool is the main nexus of union between the Offices and is provided with:

- Knowledge area (with relevant information for all the Offices)
- Communication area (it provides communications shipment and reception)
- Data capture (activate survey)
- Working groups
- Pamphlets Administration System (Knowledge of pamphlets of the Net).

## VERONA

All regional tourist boards draw on all types of information and communication tools for marketing on all levels. The tour operators in the region communicate with the world primarily through their websites.

In the regional tourist information system, Regione Veneto has the task of planning and coordinating initiatives of regional importance and providing financial resources to promote the image of Veneto tourism throughout Italy and abroad, and it monitors the effectiveness and efficiency of marketing by associate organisations.

It is also the regional authority's job to gather, process and circulate statistics and information relating to supply and demand of tourism in the region, as well as handling financial aid from the European Union (see article 2, Regional Law 33 dated 4 November 2002).

Planning marketing activity, welcoming visitors, tourist information services and promoting individual resorts are all tasks for the provincial authorities and are carried out through IAT centres ("Informazione e Accoglienza Turistica", tourist information and welcoming bodies).

These provincial offices located at different points of the town (in Piazza Bra, the town centre and the railway station) welcome visitors and provide tourist information, offering also special information and promotional material. It is not the job of the IAT to provide bookings for hotels or other tourist accommodation, put together tourist itineraries or sell tickets for public transport, events and/or shows.

Brochures, catalogues and leaflets about the city, exhibitions, events and shows for IAT tour operators of interest to tourists are often published in collaboration with the Municipality of Verona and the consortium "Verona Tuttintorno", which handles promotions and tourism-related sales in the Verona area.

The IAT centres, therefore, provide visitors with printed information and promotions about all the museums and monuments in the historic town centre. Information is also available from the Regional, the Provincial, Municipality and Consortium websites, and there are also plenty of special street signs to direct visitors unfamiliar with the area.

Cultural activities and generally the events organised by the Municipality and the Province of Verona are not reserved just for the tourist, but they also widely involve residents. Local daily newspapers and more specialist publications advertise and promote events, so residents are well aware of what is happening in their city and are encouraged to participate.

## *PIRAN*

Basic information for tourists is provided through tourist information centres that are run by LTO – local tourism organisation.

| TOURIST INFORMATION | | |
|---|---|---|
| TOURIST INFORMATION PORTOROŽ | TEL: +386 (0) 5 674 22 20<br>FAX: +386 (0) 5 674 82 61<br>E-MAIL:ticpo@portoroz.si<br>Obala 16, 6320 Portorož | September - June:: 10.00 -17.00<br>July, August: 9.00-13.30 and 15.00 - 21.00 |
| TOURIST INFORMATION PIRAN | TEL: +386 (0) 5 673 44 40<br>FAX: +386 (0) 5 673 44 41<br>E-MAIL:ticpi@portoroz.si<br>Tartinijev trg 2, 6330 Piran | September - June: 10.00 - 17.00<br>Saturday, Sunday: 10.00 -14<br>July, August: 9.00 -13.30 and 15.00 - 21.00 |

Information for touristsis also provided through brochures and through destination's web page (www.portoroz.si). Brochures are published by LTO and by tourism companies. Main "image" brochures are co-financed by the national tourism organisation as part of image management strategy of sSlovenia.

A program of marking interesting pathways for tourist is currently on the way. The project will extend tourism demand into hinterland and thus diminish pressure on the coastline and/or improve satisfaction level of visitory by offering new experience. The scope of the project is to mark the pathways, put up information roadsigns, produce a map anr information boklet that wil give necessary information to tourists.

Communication with local population is done mostly through public media (tadio, TV, press). There is a local newspaper Portorožan (monthly) and two regional journals – Primorski utrip (monthly) and Primorske novice (daily). Besides public and commercial TV on the national level there are several local radio stations and private-commercial TV stations of local or regional character.

# 6 Residents attitude

***Describe in your own words how residents look at tourism (is there positive attitude, hostility or apathy). What are main issues related to tourism development and residents (e.g. traffic problems, littering, attitude of tourists etc)?***

## *CHESTER*

Residents Survey 2001

In 2001a Chester Residents' survey was conducted at the same time as the visitors' survey so that opinions and satisfaction levels could be directly compared.

Although the profiles of the respondents are not surprisingly different (76% of the visitors were from the ABC1 socio-economic categories against 53% of residents), and shopping rather than general leisure was the key motivating factor for residents' visits, their opinions of the city were very similar.

Both groups were asked to give their satisfaction with Chester as a place against 24 indicators. Although the average score amongst residents was 6% lower, perhaps reflecting the greater familiarity residents have of Chester, their relative satisfaction with the indicators they were asked to score is similar.

Top 5 Satisfaction Scores

Visitors

| | | | |
|---|---|---|---|
| 1. | Range of shopping | 4.55 | 91% |
| 2=. | Shopping Environment | 4.48 | 90% |
| 2=. | General atmosphere | 4.48 | 90% |
| 4. | Range of places to eat & drink | 4.42 | 88% |
| 5. | Upkeep of parks & open spaces | 4.41 | 88% |

Residents

| | | | |
|---|---|---|---|
| 1. | Range of places to eat & drink | 4.49 | 90% |
| 2. | Range of shopping | 4.34 | 87% |
| 3. | Shopping Environment | 4.29 | 86% |
| 4. | Upkeep of parks & open spaces | 4.27 | 85% |
| 5. | General atmosphere | 4.25 | 85% |

Bottom 5 Satisfaction Scores

Visitors

| | | | |
|---|---|---|---|
| 20. | Ease of parking | 3.89 | 78% |
| 21. | Not overcrowded | 3.64 | 73% |
| 22. | Cleanliness of public toilets | 3.34 | 67% |
| 23. | Availability of public toilets | 2.94 | 59% |
| 24. | Cost of parking | 2.76 | 55% |

Residents

| | | | |
|---|---|---|---|
| 20. | Road signage | 3.35 | 67% |
| 21. | Not overcrowded | 3.22 | 64% |
| 22 | Cleanliness of public toilets | 2.85 | 57% |
| 23. | Cost of parking | 2.61 | 52% |
| 24. | Availability of public toilets | 2.53 | 51% |

The category with the biggest divergence of views was the **quality of road signing**. Visitors rated it highly, 0.23 (5%) above their average category score. In contrast residents rated it 0.47 (9%) below their average. The explanation may be that familiarity means residents are less likely to notice road signs; 27% of those questioned were unable to offer a view.

Residents felt less safe from crime during their visit. Their score was 0.11 (2%) below their average. The visitors score was 0.24 (5%) above their average.

Residents were particularly proud of their city as a place to eat and drink. Not only did they award it their highest mark, it was the only indicator that they scored higher than visitors. Impressive since visitors had scored it higher than any other city surveyed.

Residents agreed with visitors that it is Chester's combination of fine buildings in an historic environment with a large variety of shops that makes it an appealing place to visit. However when they were asked the factors that differentiate Chester from other places they focussed in on the built environment and the river. Shopping scored far less highly. Visitors thought that shopping was more of a differentiating factor but still rated it well below history and architecture.

Residents and visitors were both asked what if anything spoilt their visit to Chester. Their top answers were:

Visitors

| | | |
|---|---|---|
| 1. | Nothing | 70% |
| 2. | The weather | 9% |
| 3= | Vagrants / buskers | 2% |
| 3= | Expensive car parks | 2% |
| 3= | Litter / unclean pavements | 2% |
| 3= | Mix between old & new | 2% |
| 3= | Pigeons | 2% |

Residents

| | | |
|---|---|---|
| 1. | Nothing | 30% |
| 2. | Vagrants / buskers | 12% |
| 3. | Youths causing trouble | 7% |
| 4= | Litter / unclean pavements | 6% |
| 4= | Overcrowding – especially at night | 6% |

## 'S-HERTOGENBOSCH

The attitude is either positive ore neutral. Traffic problems are not considered to be tourism-related.

## VALLETTA

Residents are more likely to be adversely affected by the commercial functions of Valletta than by tourism as in the case of Mdina for example. On the whole residents' attitude towards tourists is very positive, although most tourists come in groups and therefore are led along established routes which entail little opportunity to intrude in the residential enclaves of the city.

Problems affecting residents - traffic, lack of parking, neglect of the city in terms of infrastructure (e.g. pavements),

## LÖRRACH

All residents and hosts of Lörrach are generally positively disposed toward the guests and foreign visitors due to Lörrach's vicinity to the border.

In addition, the hotel / catering trade and retail benefit largely from the adjacent countries; particularly the visitors from Switzerland account for a significant part of the turnover.

There are no traffic problems on principle. Lörrach is directly connected to the Motorways A98 and A5, as well as some federal roads. There is a good bus and railway connection, and the Euroairport Basel/Mulhouse, has facilitated and accelerated mobility and accessibility.

The public transport connections across the boarder to Switzerland are also very good; merely France has some room for improvement.

However, public transportation across the borders is rather insignificant, since the most traffic moves to the neighbouring countries via the streets.

## ARABARRI

Most of them think that every time more tourists come. They regard tourism as an element of economic development and of employment and therefore positive for their daily life. Most of them think that tourists come for the gastronomic offer, for the scenery and the nature and for the cultural and museums offer. They think that the tourist sector needs to be improved, particularly as regards with prices and quality.

If we include the weekend and seasonal visitors among tourists, the denominated residents of leisure housing, we can see relationship problems caused by the very different demands of services demanded by these and by the stable ones; the first ones demand leisure services, while the seconds they require basic services for the daily development of their activities. Furthermore, the cost of these services has to be assumed by the stable residents. This problem increases proportionally to the size of the city.

## VERONA

A survey carried out between December 2002 and February 2003 by Studio RPM (Verona's Institute for Market Psychology Studies) on "Tourism in Verona: from a resident's point of view" revealed that the great majority of people interviewed have a very positive general image of tourism in the city.

In fact, 84.2% of the 600 people interviewed view tourism as an integral part of the city and significantly, they consider it "good tourism" "that brings wellbeing".

A small percentage of respondents think that Verona could or should do more for tourism, offering additional "out of season" cultural initiatives to broaden tourism, which they currently consider "fragmentary with inadequate organisation".

The survey revealed that 5.3% of those interviewed believe that problems do exist for the tourist in Verona. They list them in order of priority as lack of public bathrooms, exorbitant prices asked by businesses exploiting tourism, a meagre welcome for tourists because of inadequate tour services, the degree of chaos experienced near the most popular attractions, and the quality of public transport.

Few people cite any inconvenience posed by tourists to Verona residents (2.7%), and those who do, refer to such inconvenience as difficulty walking and/or crossing the street in the vicinity of the most popular tourist attractions.

As far as the perception of the importance of the tourism industry for the Verona economy generally, 78% of people surveyed said that it contributes positively to the economy. A notable section of the people interviewed believe about 10,000 people are involved in the industry.

## PIRAN

Two researches done in 1992 and in 2001 show that the population strongly supports tourism. There is also some hostility and apathy towards tourism development. The following issues were pointed out:

- traffic problems (parking, noise)
- cleanliness of the place (beach and lateral streets)
- arrogance of the tourists
- low salaries intourism
- concern for the environment (extensive urbanization, ecology...)
- noise during the night (music, drunk tourists...)

The studies have shown issues that are characteristic for developped tourism destination. Most of the population see tourism as an opportunity for the future. Residents with higher education level have more concern over environmental impact of tourism,

# 7 Description of residents and importance of tourism

Please provide some demographic data for local residents (number of residents, age groups, gender). Who are main job providers in the area? How important is tourism in terms of providing jobs and its contribution to the local economy? What is the percentage of second home owners vs. permanent residents? Is this an issue?

## CHESTER

Chester has an urban population of 90,000 with a further 30,000 living in the surrounding rural area that falls within Chester district. The demographic split is similar to Britain as a whole with slightly more women than men and an ageing population.

Although there are pockets of deprivation Chester is a relatively wealthy area. Unemployment is around 1% and GVA is 114% of the national average. House prices are well above average for the Northwest of England.

The main areas of employment are Financial Services, Retail and Hospitality / Tourism. This stores up a potential problem as all are service industries that would be affected by a severe economic slump.

Chester's economic success is very much based on its attractiveness as a place to live and visit and its excellent access to and from the large population centres of England's North and Midlands. Many Chester residents travel outside the city to work with many workers commuting into the city to take the often less well paid jobs in the service industries.

The importance of Chester's visitor economy is reflected by its ranking as one of England's highest volume turnover and most profitable retail centres (11$^{th}$ in the UK) despite only having a resident population of 90,000 and massive regional competition. At Christmas 2005 only 20% of shoppers were Chester residents. The visitors chose to come because of the combination of Chester's shops, its complementary facilities (restaurants) etc. and its attractive built environment making the experience a pleasure not just a shopping trip!

## 'S-HERTOGENBOSCH

Economic core figures 2003/2004
Population 133,500
Expected population 2020 148,700
Number of jobs 94,700
Number of business establishments 9,810
Office locations 825,000 m2 gfa
Shopping centres 255,000 m2 sfa

Economic prosperity
's-Hertogenbosch is the capital of prosperous Noord-Brabant, the largest province of the Netherlands. Many national and international companies consider 's-Hertogenbosch to be an attractive location for their establishments. And understandably so, since apart from good facilities, such as a beautiful historic inner city, the city also offers high quality office and business sites. In addition, our city is

situated directly alongside the main transportation artery of the Netherlands, the A2. New and innovative office and business sites will be developed alongside this A2 during the years to come.

Dynamic city of services
Spread over the city, various office and business locations have been filled with high-quality buildings. Directly adjacent to the central railway station, the Palace Quarter is presently under full development. The Palace Quarter is an office complex with an international allure. Some very striking projects have already been realised, such as the buildings of the Court of Justice, Malmberg Publisher, ING Bank (the RIVA building) and the Van Lanschot Bank; others are still under construction. The Palace Quarter is the showpiece for high quality offices in 's-Hertogenbosch. Through the Passerelle, a covered shopping and walking promenade, you can walk from the Palace Quarter straight into the historic inner city.

High level of facilities
The level of facilities offered in 's-Hertogenbosch is high. The area served covers the entire region of Noordoost-Brabant (with a population of more than 500,000). The historic inner city has been richly provided with attractive shops, bars, and restaurants, and breathes an atmosphere of exuberance. In 's-Hertogenbosch, doing business and a cosy atmosphere are combined in a harmonious way.

Numerous cultural activities and well-known (sports) events are organised in the city. The city is very much alive, which is also apparent from the growth of employment and the many new (business) premises. Within a radius of 50 kilometres, five universities can be found. 's-Hertogenbosch has many beautiful residential areas. Through the development of the new residential areas, De Groote Wielen and Haverleij, exclusive residential opportunities are added, close to, and partly surrounded by woods and nature.

(Inter)national location
's-Hertogenbosch not only borders the main Dutch transportation artery, the motorway A2, but also is close to important water- and railway connections. From 's-Hertogenbosch, six international and regional airports are within 1.5 hours driving distance. 's-Hertogenbosch has a central location within The Netherlands, but other European economic core zones, such as the Randstad and the Ruhr area, are located nearby as well. Within the European context the vicinity of the European capital Brussels (150 km)is an advantage. 's-Hertogenbosch – Airport Eindhoven 35 km

For (inter)national companies the favourable location within Europe and the good establishment climate for entrepreneurs in the Netherlands is of decisive importance in selecting 's-Hertogenbosch as their place of establishment. For this reason many foreign companies and major Dutch enterprises have their offices in 's-Hertogenbosch. A few examples are: Acer Computers, Heineken, KPN Telecom, Casino /Laurus, OMRON (semi-conductors), Nashuatec, SAP. A number of these companies has its national headquarters and/or main European offices in 's-Hertogenbosch. 's-Hertogenbosch is the leading financial centre for the southern part of the Netherlands. Several banking, accountancy, and consultancy headquarters are established here.

Excellent business climate and authorities that are friendly towards entrepreneurs.
According to studies of the Ministry of Economic Affairs, 's-Hertogenbosch forms part of the main national economic structure. The city has an excellent business climate. Of course, we wish to realize opportunities and make use of favourable qualities. City authorities conduct an active development and stimulation policy that offers space and opportunities to both existing and new companies. You may expect from the city authorities, and in particular, our account managers, that they will guarantee a customer-oriented and entrepreneur-friendly attitude.

The economic significance of urban tourism in ’s-Hertogenbosch
The economic significance of tourism in the urban economy is considerable. Total spending (direct and indirect) is estimated at 280 million euros per year. The biggest beneficiary of tourist expenditure is the retail sector (120 million euros / 43%), followed by catering establishments (115 million euros /

41%). The remaining 45 million euros is shared by providers of accommodation and other sectors. Tourism in ’s-Hertogenbosch employs around 4,300 full-time workers: around three-quarters involves work that is a direct function of the tourist attractions and activities in the city.

## VALLETTA

According to latest statistics issued by the National Statistics Office for 2004, the number of residents totaled 7111. (3394 males and 3717 females).

Tourism is one of the mainstays of the Maltese economy. It has grown from an almost negligible economic activity to the complex and large industry that it is today, over a period of some forty years. Benefits from tourism in the local sense have accrued from increased employment, investment and foreign earnings

Tourism supports 27% of the total employment in Malta amounting to more than 41,000 jobs. In March 2003 the total number of persons employed amounted to 148,798. Tourism is important to the residents, although not all gain from this sector. However, tourism does not provide a high level of employment opportunities to the Valletta residents themselves since most of the tourist infrastructure and employment is in other localities outside Valletta. Nonetheless, the commercial aspect which also depends to some extent on tourism may create indirect employment opportunities for locals. Souvenir shops are limited in Valletta and therefore there are few businesses than can be attributed directly to tourism activity. The restaurants and bars are likely to be dependent more on local clientele than tourists.

Tourism contributed LM 109 million (Euro 265 million) to Government in 1998. For every Maltese lira spent by tourists, 34 cents go to Government funds. In the year 1998, the direct impact share from tourism to the national economy was 10.45%. The full effect of tourism on the Gross National Product is 24.3%. The Gross earnings from tourism for the same year were LM 217.64 million.

As for other sources of data, the difficulty lies in the fact that most economic data refers to the whole of the country and not specifically to areas within the country.

Valletta does not attract second home buyers. This market is more prevalent in the coastal towns, for instance Marsascala, Bugibba and Mellieha.

## LÖRRACH

Inhabitants of Lörrach: 46.835
Total jobs in Lörrach: 18.183
The largest employers are:
KRAFT Foods ( do not state any employee figures)
GABA (ditto)
KBC: 560 staff members

Commuters to Switzerland:

| | April 2001 | April 2002 |
|---|---|---|
| Town of Lörrach: | 3'019 | 3'329 |
| District of Lörrach: | 13'043 | 14'037 |

Lörrach as a central town is also a location of the service industry:
Table 10: Service offerings in the Lörrach town centre

| Service | Total |
|---|---|
| Pharmacies | 5 |
| Post office | 1 |
| Banks/business/law | 58 |
| Medical field | 59 |
| Gastronomy | 49 |
| Food trade | 9 |
| Services similar to retail and other services | 73 |
| Total | 5 (254?) |

Economic information on tourism:
Almost half of the turnover in Lörrach is accounted for by people from the Lörrach town region.
About a quarter of the turnover is generated by customers of the German surroundings.
About a fifth of the retail sales in Lörrach is generated by Swiss customers.
The other areas play a rather insignificant part. However French customers contribute more to the Lörrach retail sales than they did in 1998.
General:
The Euroairport Basel/Mulhouse and the Easy-Jet airline will gain importance for Lörrach in the immediate future. Also the upgrading of connections to the airport will be intensified.
Second homes and permanent holiday flats are not significant or hardly existent. This is rather the case in more rural areas of the Black Forest. Lörrach moreover benefits from the good situation of the town and the outstanding infrastructure, as well as the vast range of leisure activities, which is confirmed by the growing population.

## ARABARRI

Population in Álava, excluding Vitoria: 55.119 p. (2001).
Population in Vitoria: 216.852 p.
Population in the Basque Country: 2.082.587 p.
As regarding age and gender, we can notice a prevalence of aged people in the countryside (in some areas, people over 65 represents more than 25% of the population) and also a prevalence of male population over female in villages.

As regarding the activity sectors, Tourism appears in 7th place, with 3,28% of the employed population. Tourism contributes a 4,4% of the GDP in Álava and a 5,2% in the Basque Country.

Almost one of each five families in Álava owns a second residence, apart from the habitual one; they use it for weekends, holidays, mainly in summer, or also as a way of investing in the real state sector.

According to the Eustat (Basque Statistics Service), 17.590 families in Álava have an extra place to reside. 38,5% of them locates it inside the Basque Country, some 60% in other places of Spain, while the percentage of residences abroad descends until not very significant figures.

In fact an endogenous proportion of housings exists inside the province. People in Álava look toward inside and concentrate good part of their leisure houses in the province. 1.370 families admit to possess a second home inside their own city -Vitoria, mainly - and other 4.209 in towns within the province. 648 frequently move to Biscay and 542 go often to Guipúzcoa.

Laguardia has hardly 1.500 neighbours, but during the weekends, bank holidays and months of summer its population gets multiplied until for four, if you include the more and more numerous tourists. Right now you can hardly find a house to buy in the town and the few ones available can be worth up to 360.000 Euros. Therefore the Town Council has had to develop a plan to build 243 affordable houses for permanent residents.

The Territorial Planning Guidelines (DOT) of the Basque Country propose the following as regarding second residences: One of the big assets of the Basque Country is the magnificent distribution for the whole territory of very attractive rural centres. These DOT we try to encourage the phenomenon of the second residence and the tourist development, associated to the existent centres and especially to those of rural character trying to maintain their idiosyncrasy and elevating their accessibility and equipment level.

On analysing the phenomenon of the second residence and the tourist activity associated to it, one can deduce that in Euskadi there are two different types of tourist offer and of second residence and that they are located in different areas of the territory:

A tourism and second residence, usually for summer season, with a variable mixture of demand interior and external to the Basque Country and with a significant level of quality; it is mainly associated fundamentally to the coast of Guipúzcoa.

A tourism and second residence with a strong component of demand from the Basque Country itself and that is located mainly in the coast of Vizcaya and in diverse municipalities of Álava.

In the European Atlantic Region important structural changes are taking place in connection with the tourist activity. Concretely, from the early 80s a division of the holiday periods can be detected. More and more the periods of vacations get shorter and equipment and services of higher quality are looked for. The tourism of business associated to congresses and conferences is greatly expanding for the last years. Also, the denominated active vacations in environments of high quality and with tourist products of more added value are reaching bigger levels of demand and acceptance. Sports, preferably nautical activities and golf and leisure parks; therapeutic activities, farm-tourism and healthy tourism, thematic tourist circuits, natural and architectural heritage, etc.; they are factors that are reaching a growing relevance in the European Atlantic Region and that undoubtedly will also have to be introduced in the Basque country.

The offer of second residence will be guided especially to the strengthening of the existent urban centres and will be typologically and structurally integrated in them, completing its urban structures and guaranteeing an appropriate level of services and equipment, making it possible a hypothetical conversion in permanent housing. For this purpose, the land reservation for equipment will be similar to the standards for the areas of permanent housing. The DOT define in which municipalities second residences can play an relevant role in the Territorial Pattern.

## *VERONA*

The resident population – about 840.000 people- and the density of inhabitants -268 inhabitants per km2- are considerably high if compared with the national and regional averages, so Verona ranks itself in 24th position among the Italian provinces.

The population distribution per age bracket presents a quota of people younger than 15 years which is lower than Italian average. In this sense, Verona holds the 47th position, even if the demographic gap is very positive.

Absolutely remarkable is the presence of foreign people: with 33.000 foreigners Verona raises the 3rd position in the national list.

A satisfactory unemployment rate of 3,6% resulted from a local survey in 2002.

Even though other cities of Veneto, such as Vicenza and Treviso, have a lower unemployment rate, Verona holds the 23th place in the national list.

Considering the different employment sectors in our Province, Verona inhabitants mostly work in the services sectors (commerce, tourism, credit, transports, service and P.A).

## PIRAN

The Community of Piran has 17.500 permanent residents. The ratio of visitors vs. residents is 3 vs. 1 during the summer season when daily visitors and second-home owner numbers are added to tourists staying in commercial accommodation. When taking into consideration that tourism is concentrated in four locations (Portorož, Strunjan, Piran and Fiesa) the ratio iseven higher.

The attractiveness of the coast is pushig real estate prices up. Everybody wants to have a second home ion the coast. Prices for a two or three bedroom appartment can vary between 2000 and 4000 Euro/m2.

Piran has a large proportion of second homes. There are no official figures but estimations are in a range of over 30% of all housing stock.

**Population of the community of Piran, 30. June 2005**

| Age groups | TOTAL 17486 | Male 8486 | Female 9000 |
|---|---|---|---|
| 0-4 let | 602 | 296 | 306 |
| 5-9 let | 657 | 324 | 333 |
| 10-14 let | 765 | 382 | 383 |
| 15-19 let | 944 | 518 | 426 |
| 20-24 let | 1217 | 612 | 605 |
| 25-29 let | 1376 | 714 | 662 |
| 30-34 let | 1258 | 653 | 605 |
| 35-39 let | 1216 | 597 | 619 |
| 40-44 let | 1382 | 665 | 717 |
| 45-49 let | 1500 | 776 | 724 |
| 50-54 let | 1567 | 772 | 795 |
| 55-59 let | 1220 | 624 | 596 |
| 60-64 let | 900 | 419 | 481 |
| 65-69 let | 862 | 371 | 491 |
| 70-74 let | 843 | 358 | 485 |
| 75-79 let | 642 | 233 | 409 |
| 80-84 let | 378 | 130 | 248 |
| 85-89 let | 102 | 29 | 73 |
| 90-94 let | 47 | 11 | 36 |
| 95-99 let | 8 | 2 | 6 |
| 100 + let | - | - | - |

# 8 Additional info on tourism development in your area

## CHESTER

Chester is a very well researched city for tourism. There are numerous reports and plans available including several which compare the experience of visiting with other English cities. One of the most recent is an ongoing on-line survey started in May 2005 which enables visitor motivation, profile, activity and response to be measured throughout the year to show variations.

## 'S-HERTOGENBOSCH

Ambition of the waterway product in ‘s-Hertogenbosch

The waterways on the Binnedieze represent an important tourist attraction on the cultural tourism scene in ’s-Hertogenbosch. In 2005, around 180,000 visitors took a boat trip on the Binnendieze.

The local authority’s ambition is the following:
"With 300,000 visitors, the future ’s-Hertogenbosch waterway product is the most important tourist attraction in the city and one of the biggest cultural tourist attractions in the south of the Netherlands”.

This ambition is based on the following principles:

- the waterway product comprises four separate routes with an independent product-market approach. These are:
    - The Hidden City (1,465 metres, duration ca. 35 minutes: core qualities “hidden city’, “surprise”, concealed character);
    - The Fortifications route (1,500 metres, duration ca. 35 minutes: core quality fortifications theme reinforced by the use of contemporary multimedia techniques);
    - Historic ’s-Hertogenbosch (2,200 metres, duration ca. 50 minutes: core quality overall perspective founded on a cultural historical setting);
    - The Hieronymus Bosch route ‘Heaven and Hell route’ (art as core quality, less on cultural heritage);
- a phased doubling of capacity to just over 300,000 persons, based on a proper balance between experience and pressure of numbers;
- choice of more mooring stations;
- the principle that – in the light of the size of the local authority investment – concessions must contribute to the restoration of the Fortifications and Tourist development (marketing, reservations, etc.);
- the core qualities need to be put to the boat companies;
- the local authority fulfils a leading role as concession provider.
- quality requirements need to be set including;
    - continuity (number of boat owners, future input of personnel on the basis of developing the volunteer market, etc);
    - professionalism (introduction of professional management)

- cooperation with tourist board (VVV) and Visitor Management partners in the field of marketing and promotion (central information number, internet site, joint marketing etc);
- cooperation with tourist board (VVV) with respect to ticket sales and reservations;
- cooperation with respect to quality of waterway products in working groups (e.g. training, storyline, explanation formula);
- sophisticated logistical systems (including timetables);
- installation of a tourist umbrella organisation for waterways (steering and working groups) in which these subjects are jointly addressed.

**Product offer for waterway routes**
4 different routes can be identified
The 'hidden city route' and the 'historic 's-Hertogenbosch route' are two routes for which a personal guide tells the (historical) story of the city to visitors in the boat.
The 'fortifications route' is a documentary-like route where the story is told by means of an interactive audio guide, supported at two locations by an audio-visual about the origin of the fortifications and the assault by Frederik Hendrik in 1629.

The Hieronymus Bosch 'Heaven and Hell route' is the 4th route with a clearly identifiable core quality. The 'Heaven and Hell route' forms part of the product offer which will be developed around our world-famous inhabitant in the coming years, so that the city can continue to be associated with Hieronymus Bosch. For example, the *Noordbrabants Museum* has been slowly building a collection of Bosch' successors since the Hieronymous Bosch centenary. Next year, we hope to open the Hieronymus Bosch centre in the St Jacobskerk. The aim is to use the Museum, Centre and waterway route as a triptych based around these activities and theme in the marketing. It gives the visitor a chance to experience the paintings and metaphors of Bosch in 3D, in a very special historical setting below the city in the concealed waterways. In addition, there will be additional special routes which incorporate cruises on the outer waters and walks in the *Bossche Broek* in collaboration with SBB; also winter routes around Christmas and evening cruises in season.

**Organisatio**
The main contractor is *Stichting Binnendieze* of the *Kring Vrienden van 's-Hertogenbosch* (Friends of 's-Hertogenbosch)

**Visitor profile and market potential**
Current visitors to the Binnedieze are diverse in character and composition, i.e. in terms of demographics as well as education qualifications. *Tourism Monitor* shows that, with the development of the product offer in respect of the waterways, the distant-market can be exploited (national) as well as the local international (day-trippers') market (2 hours' drive). To promote international tourism the product needs to be multilingual (supported at least in English).

**Capacity**
2005: 180,000 visitors per year (growth possible to a maximum of 300,000 visitors)
Season is assumed to be April to October

The tourist waterway product on the Binnendieze forms one of the USPs of the tourist offer and will therefore be used in the City marketing campaign and tourist marketing campaign of the city (Visitor Management). The Binnendieze product will be used to attract tourist visits and contributes to the image of the city.

## VALLETTA

Because of the compactness and short distances of the island, and also because it is difficult to clearly distinguish tourist activity in terms of geographical areas, most available data pertains to the whole of Malta, and very little, if any, official statistics exist in terms of Valletta as a separate tourist locality.

Valletta, today, receives a great influx of tourists everyday, and the presence of this constant influx of visitors, and steady tourism activity contribute to a significant tourism dimension in the city. The volume of tourist visitors in Valletta reflect the number of tourists who visit Malta.

On the other hand, seasonal patterns for tourist activity in the city do not necessarily reflect the seasonal patterns of tourism in the Maltese Islands. This is because the summer peak is characterised by those tourists who visit Malta typically for the beach and the sun.

The arrival of cruise liners at Valletta harbour also affects business in Valletta. The typical visitor to Valletta spends a couple of hours, although some stay in the accommodation available in Valletta.

Given this scenario, the task of managing the often conflicting interests of residents, tourists, retailers, and daily commuters to the city is a very complex and challenging one. The various city users cannot be treated in isolation, and all decisions which will affect any of these functions must be taken in the light of all the other functions, as a positive decision to improve one function may be to the detriment of another.

Although the great majority of Valletta's visitors are tourists who dedicate an afternoon or a day in Valletta, there are also a number of tourists who chose to stay within the city's accommodation. The provision of comfortable accommodation is an all-important factor for these kind of tourists, as well as city attractions, accessibility, and tourist amenities.

## LÖRRACH

The entire advertising and marketing of the Lörrach is always done on a tri-national level. It is always the target to develop and implement the projects and sales promotion measures with and/or for all three nations.

Group tourism at present plays an insignificant part. This is mainly due to the fact that the existing hotels and inns do not or are not able to provide sufficient accommodation in one house.
For Lörrach's development, it would thus be important to set up or locate a facility with an according capacity in Lörrach.

## ARABARRI

The Basque country hosts one of the main artistic institutions of the international panorama, the Solomon R. Guggenheim Foundation, work centre of the most renowned architects in the world, reference point in the circuits of congresses, or tourist destination for more than 1.500.000 people a year. One decade only, looks little time, but the achievements have been many and all together speak of a bet: the culture as an engine for social and economic regeneration.

After leaving a crisis in which the industrial activity suffered the hardest attacks in the early 90's, the Basque country has gradually rubbed the chimneys and the smoke out of its landscape and has settled infrastructures like the Museum Guggenheim Bilbao, the Basque Centre of Contemporary Art Artium, Chillida-Leku, the Palacio Euskalduna, the Kursaal, the Marine Museum of Bilbao Creek, a new Aquarium or Saint Mary's Cathedral in Vitoria-Gasteiz, among many other projects and realities, with a work planning in which public and private institutions have gone hand in hand.

The influence of this cultural bet can be seen in the urban regeneration and in the reuse of heritage for cultural purposes, as it is the case of the shipyard "Euskalduna", where now the of Congress Palace is erected and where soon the mentioned Museum Marine Creek of Bilbao will be inaugurated, the Tobacco Factory in San Sebastián, that will be the venue for the International Contemporary Culture Centre, the Gas Factory, that will house the Basque Film Archive, the example of the Foundation Lenbur and its 'Museum Territory' or the Cathedral of Vitoria whose restoration is by itself a reason for architects and public in general pilgrimage. The new poles of attraction have conformed an offer of such a soaked one that there are you imbricate with the tourist products, including the Basque country in the main circuits of the international tourism.

The "Guggenheim Effect"

The total overturn toward a cultural industry has been denominated "Guggenheim effect" as a summarizing expression to refer to the regeneration of a country; not in vain the bet of the Foundation Solomon R. Guggenheim of New York to build one of its museums in the area of Abandoibarra in Bilbao has been the trigger for that resurgence of Bilbao, of Vizcaya and of the Basque country. Some 5.150.000 people have visited the Museum Guggenheim Bilbao in its first five years of life, 6 of each 7 of them come from away of the Basque Country.

The cultural and artistic offer of the Basque country is extraordinary, and it is clearly an activity for the future whose only way is forwards. The endowment of high quality cultural infrastructures has become a powerful magnet to attract visitors; little by little a phenomenon has taken place: the perception of the tourist fact has experienced a qualitative change and now it is appreciated as a positive element for economic development among Basque people.

The effort carried out by the tourist sector that supports 3,5% of the employment of the Basque Country, the same weight as in the Basque GDP, has facilitated the generation and enlargement of tourist resources and the creation of 6.000 new hotel beds, having 17.000 beds at the present time.
Between 1992 and 2002 Euskadi has increased the entrances of travellers in 82%, passing from 830.119 to 1.512.081 people, while the bednights have increased in 92% from 1.486.662 in 1992 to 2.847.751 in 2002.

As for the origin of our visitors, it's the affluence of foreign tourists the one that more significantly has grown constituting 31% of the visitors at the present time, while those coming from other communities of Spain 53%, and the own Basque tourists add the remaining 16%.

In spite of the fact that something has grown in the last ten years, the visitors' short stay Euskadi continues to be one of the big weaknesses of the Basque tourist sector. 70% of the entrances of travellers belongs to the business tourism looking for short stays, compared to 30% of leisure tourism.

Another tendency, now sociological, is the change in the holiday customs that tends to break up the holidays, makes the average stays to drop. Nevertheless, the true produced change, this time in a positive sense, it has been that of the mentality of the Basques themselves. Tourism is now perceived as a sector with important economic effects and both the private initiative, with remarkable investments, and the administrations in whose promotion policies the tourism already has a strong weight, have placed Euskadi in the tourist map.

The three specific axes around which the tourist offer of Euskadi is structured are the congresses, the cultural offer of high quality and the natural tourism, in which the rural guesthouses, integrated in the "Nekazalturismoa" Association (Rural Tourism), have experienced a strong take off since 1998.

If the inducement of nature is more and more high thanks to the high quality of the rural guesthouses, the gastronomy as a "hook" to attract tourists is every bit as good as it. According to the study commissioned by the Basque Government to the University of the Basque Country in order to measure the effectiveness of the advertising campaigns on Euskadi as a tourist destination, the most valued aspects in the main markets, Madrid and Barcelona, are the contrasts, and therefore the width of possibilities that the Basque Country offers, from rural to urban, from modern to traditional destination, as well as their gastronomy.

Indeed, in the last years, together the big names of the Basque cuisine, Juan Mari Arzak, Pedro Subijana or Martin Berasategi, among other, new professionals are appearing whose restaurants are true pilgrimage centres to taste their creations.

Iniciativa de colaboración transfronteriza.

## VERONA

(n/d)

## PIRAN

Piran is easily accessible by road, air and sea.

The area is well connected with the european network of highways. There are four international airports in a range of 200 km (Ljubljana in Slovenia, Venice and Triest in Italy, and Pula in Croatia). Portorož has its own airport for small aircrafts (not over 50 seats).

Marina in Portorož is well equipped and is considered one of the best in the Adriatic. It has over 1200 berths. Slovenian coast is not in a rute of any cruise line as there is no adequate infrastructure to anker large ships. However there is intention to build the necessary infrastructure to ensure accessibility of this market segment.

Transportation by rail is also available but is not very convenient as the closest sation is in Koper some 25 kilometres away.