Common Speleo-adventure and Cultural Strategy

*Sofia, Montana and Nis*

under

the Interreg-IPA Cross-border Cooperation Bulgaria-Serbia Programme, co-financed by the Instrument for Pre-Accession Assistance II (IPA II) of the European Union.

Priority Axis 1: Sustainable Tourism

Specific objective 1.1: Tourist Attractiveness

2018
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Introduction:
The current Strategy is developed in the framework of the project CB007.1.11.268 “Increasing the tourist information services in the CBC region” under the Interreg-IPA Cross-border Cooperation Bulgaria-Serbia Programme, co-financed by the Instrument for Pre-Accession Assistance II (IPA II) of the European Union. The priority axis in which the project positions itself is PA1. Sustainable Tourism.

The general aim of the project is the establishment of relevant conditions for cultural exchange among people and functioning platforms for constructive dialogue between the relevant stakeholders, as well as enhancement of the potential of the region for sustainable and balanced socio-economic development.

It promotes the betterment of the niche tourism activities, exploiting various forms of practices and concepts in the utilization of natural resources as a (i) generator of new products and employment possibilities, (ii) source of financial and non-financial benefits for the individual and the societies and (iii) contributor for more resiliency of the image of the border area as an international tourism destination.

The identified target groups are as follows:

- Touristic organizations;
- Institutions in the field of nature protection, culture and sustainable tourism;
- Local authorities;
- Rural development institutions/organizations;
- Tourists, general citizens, vulnerable groups;

The definitive purpose of the Joint Strategy is to designate the main strategic direction and the time and content framework of the concrete actions, necessary for the transformation of the region into a dynamic and recognizable territory for the active development of the three types of tourism with explicitly stated importance: speleology, adventure and cultural. In order to do so the Strategy will be constructed on the basis of the “Situational analysis and analysis of prospects for the development of cultural, adventure and speleology tourism in the cities of Sofia, Montana and Nis”, elaborated on a previous stage within the scope of the current project.

The internal structure of the document is constituted in compliance with its main purpose and strives to present the interested agents with a relevant foundation for a coherent and rational formulation and implementation of various tourism-related activities; it explores the general (as the first part of the Strategy is dedicated to the presentation of broad market tendencies, functioning trends in the development of niche tourism along with analysis of EU best
practices and policies in the field of tourism – necessary for obtaining an objective and multi-layered perspective) and the peculiar, as it acknowledges the socio-economic differences of the regions within Europe, which in a certain way have the potential to overcome some of the general tendencies, which do not correspond to the inherent logic of their reality. In line with the above, the current document focuses on the concrete steps for the construction of a tourism identity of the region and the three cities – Montana, Sofia, Nis through elaboration of strategic long and mid-term plans (including financial, marketing and communication measures, etc.), which hold the possibility to substantially improve the perspectives of the region for a more balanced and predictable growth.

The legitimacy of the Strategy’s suggestions and specific measures for the development of speleology, adventure and cultural tourism is in direct correlation with the chosen approach, combining several means for achievement of inclusivity and critical comprehensibility:

➢ Research on the most successful tourism and marketing strategies on international level:

i) Tourism Strategy Vienna 2020, ii) “The End of Tourism as We Know It”: a 4-year destination strategy of Copenhagen, iii) Edinburgh 2020 : The Edinburgh Tourism Strategy, iv) The City of Helsinki marketing strategy 2016–2020, The Strategic Plan for Tourism – their (i) form and content, (ii) specific objectives and priorities, (iii) approach, followed by a comparative analysis in order a profoundness of the initial perspective to be achieved;

➢ Examination of contemporary studies with regional and/or international significance on the topics of tourism, most relevant to the current problematic:

i) Tourism industry in the new member states. Key countries and destinations, year 2018\(^1\);  
ii) Sixty years of tourism higher education and research in Bulgaria, year 2017\(^2\);  
iii) Serbia’s competitive position in the regional tourism destination market\(^3\), year 2017;  
iv) European tourism in 2018 – trends and prospects, year 2018;  
v) The efficiency of the tourism industry in the Balkans\(^4\), year 2017;

\(^1\) Maria-Irina ANA, The Bucharest University of Economic Studies, Bucharest, Romania  
\(^2\) European Journal of Tourism Research, Maria Vodenska, Sonia Mileva  
\(^3\) The European Journal of Applied Economics, Milivoj Teodorović, Jovan Popesku
vi) Cultural Heritage and Tourism Competitiveness in Central and Eastern Europe, year 2015;

➢ Exploration of successful cases of regional cooperation between cities/countries in the field of tourism: internal logic of partnership, structure of interrelations, functioning channels for constructive communication, analysis of direct and indirect, financial and non-financial benefits, followed by identification of deficits and organizational/marketing weaknesses;

On the basis of the presented sources of information, the Strategy makes attempts to give means for the creation of a resilient, viable and competitive joint tourism identity of the cities Sofia, Montana and Nis in compliance with the internationally recognized principles for sustainable and responsible growth: it aims to connect the region in the long-term and establish a paradigm of mutual understanding and enduring cooperation, however not by blindly following the analyzed “success stories” and common methods, but by adapting them to the peculiar reality of the cities. The formation of a meeting point between the specificity (history and language, cultural tradition, socio-economic indicators) of the territories and the universally valid methods (tourism product tailored in accordance with the visitor’s expectations, strong digital presence and innovative marketing campaign, able to capture the attention of the audience and to “transform” it into real actions) is the explicit objective, that dictates the rationale behind the current strategy.

Strategic short and mid-term plan for the development of common Speleo-adventure and cultural tourism in the region of Nis, Montana and Sofia

The abundance of vibrant natural and cultural resources within the region as well as the shared historical past and intertwined tradition are factors, which if explored systematically

4 Proceedings of the Faculty of Economics in East Sarajevo Year 2017, Issue 14, Violeta Cvetkoska, Petra Barišić
and with sustainability of the perspective, can lead to the establishment of a positive tourism image of the three cities – taken collectively and/or individually.

The idea is for the three cities to be connected in a way that will contribute to a steady economic growth in terms of employment and investments, higher standard of living and more proportionate daily wages, which can be followed independently from the project and its timeframe.

Aim(s):

Specific:

- Establishment of a vibrant dialogue of mutual understanding, respect and enhanced culture of constructive cooperation between the cities and its citizens;

- Elaboration of strategic long-term vision of inclusive character for the development of a joint tourism product;

- Creating tools with dual character: for eradication of malpractices and for actual implementation of measures for the achievement of the elaborated strategic long-term perspective for tourism development;

- Emphasised need for systematic investments for the modernization of the transport sector and the tourism infrastructure as a whole;

And taken altogether, leading to:

Substantial improvement of the socio-economic indicators of the cities, respectively the region with benefits for the local citizens and the two countries as well.

Finally, the general aim(s):

Greater attention to the North-western region and more balance in the perspective towards it as a place that hold opportunities for development, as long as efforts are being systematically mobilised – opportunity for better integration within the national and European actuality.

Enhanced visibility of Serbia as a country in accession negotiations, deepened integration processes and better understanding gained towards the reality of the European Union, along with its practices, values, functioning mechanisms.

Quote:
Economic and social cohesion – as defined in the 1986 Single European Act – is about ‘reducing disparities between the various regions and the backwardness of the least-favoured regions’. The EU’s most recent treaty, the Lisbon Treaty, adds another facet to cohesion, referring to ‘economic, social and territorial cohesion’.

Embraced attitudes towards the tourism industry

It can be said, that tourism industry is one of the primary generators for qualitative change of the modern environment; it brings new patterns and models of behaviour – individual and collective and allows on the one hand the visitors to perceive new realities, thus gaining a more inclusive sight of themselves and the otherness around, and on the other: often transforms positively regions and countries as they strive to be more correspondent to the travellers’ expectations and meaningfully present in the global tourism scene.

Cities possess the ability to adapt rapidly to provide their visitors the most valuable experiences. This triggers a constant investment in infrastructure, service excellence, conservation and renovation activities which serves to benefit both tourists and local residents. Tourism needs the diverse and flexible products a city can offer and cities need tourism to achieve their social and economic objectives.\(^6\)

Furthermore, “it is an industry in its own right, which creates added value throughout Europe.”\(^7\)

- Tourism as a vehicle for economic growth;
- Tourism as an instrument for reconverting cities;
- Tourism as a tool for integration and inclusiveness;
- Tourism as a pillar of European identity;

Goal One:

Development of adventure tourism in Montana, Sofia and Nis

The three cities – Montana, Sofia and Nis have serious potential for a more active development of adventure tourism as they are destinations with natural resources and many opportunities for adventure activities such as rafting, kayaking, paragliding, bungee jumping,

\(^6\) UNWTO City Tourism Network Action Plan year 2016/2017
\(^7\) Antonio Tajani, President of the European Parliament
etc. Furthermore, they have the benefit of the affordable prices which is compatible with the profile of the adventure travellers that tend to value the experience in relation to the expenditures – the expectation of a low-priced, but qualitative stay can be met on the territory of the three cities.

However, many efforts should be dedicated firstly towards constructing a more accessible and hospitable environment that is extremely important to the travellers. In addition, a stronger focus on the sustainability factor should be placed in order to respond more tangibly to the demands of the tourists, which are more and more willing to structure their vacation depending on the ecological criteria.

Thirdly, a innovative marketing campaign needs to be elaborated which will address directly the identified target groups - a unified approach would not be that effective as the profile of the adventure travellers is becoming a flexible term, which includes millennials, families, solo travellers and elderly in good health and relatively high standard of living. Therefore, a specific message for each target group should be distributed, able to capture the essence of their demands and to transform them into an affordable experience. There is one benefit that needs to be capitalized in order the set goals to be achieved and that is the “unknown” factor – Bulgaria as a new member state and Serbia as a country in accession are still relatively unrecognizable in its tourism characteristics, unexplored (unlike Croatia for example, one of the main competitors on the market) and possess a certain sense of mystery – an attribute to the unknown, which is a serious resource in necessity for thorough and visionary development.

Goal Two:

Development of speleology tourism in Montana, Sofia and Nis

The advantage here in front of Sofia, Montana and Nis speleological potential is again the fact that they are unknown destinations to the European public which holds the opportunity for generation of strong interest, if presented right and with innovative approach. The resources are many and relevant with the ones of the identified competitors and their exploration can lead to numerous benefits for the local communities. Another positive circumstance is the lack of many analysis and statistics regarding the development of cave tourism in Europe, which presupposes a great chance for early positioning as leading destinations. Before the marketing campaign, however, efforts need to be dedicated towards eradication of the weaknesses regarding the tourism reality in the three cities, namely:

- Low funding, resulting in limited availability;
- Reduced international visibility of the resources in the region due to ineffective marketing campaign;
- Serious insufficiency of information regarding the sites, impeding their positioning in the international speleology map;
- Deficits of analysis, strategies and social consensus, favouring the development of the speleological resources and cave tourism in the region;

**Goal Three:**

**Development of cultural tourism in Montana, Sofia and Nis**

When it comes to cultural tourism in the three cities – Montana, Sofia and Nis, its development is highly fragmented and unproportional; Nis presents the tourists with opportunities for cultural activity and is able to provoke interest of various types – momentous and/or lasting, Montana, although having favourable geographical location in terms of climate and surrounding, is part of the North-Western region, which is characterized with negative socio-economic trends: depopulation, unemployment, lack of investments and opportunities for development, which contributes to its low recognizability among tourists and the fact that it is not usually considered “the typical” cultural destination. Sofia, on its part, has experienced tremendous growth in the recent years and constantly attracts the tourists with its accessibility, low prices and numerous cultural heritage sites.

Having in mind the abovesaid, the best way to “connect” the three cities without having to face too strongly the unproportionality of the development issue, is through common cultural routes which combine not only knowledge on different topics such as literature, poetry, history, etc. but also incorporate the nature elements in order to provide the tourists with multi-layered experience and to establish a certain balance in the perspective as Montana, Sofia and Nis are all cities that can fascinate with environmental sights.

A trend that has to be taken into consideration when making attempts to re-organize the cultural life of a community is the gaining importance of **digital art as a way of overcoming deficiencies** and responding to the desires of the post-modern travellers to “witness everything at once”.

"It's there, it's responding to you, you can see it, but as you try and approach it you can't actually feel it. For me, the idea is to question this distinction between the physical and the virtual."\(^8\)

Digital art is an artistic work or practice that uses digital technology as an essential part of the creative or presentation process. After some initial resistance, the impact of digital technology has transformed activities such as painting, drawing, sculpture and music/sound art, while new forms, such as net art, digital installation art, and virtual reality, have become recognized artistic practices. In an expanded sense, "digital art" is contemporary art that uses the methods of mass production or digital media.

A case example could be the Digital Art Museum in Paris, where through state-of-the-art visuals and audio, artists’ works are transformed as images of their paintings and are being projected (using 140 laser video projectors) on to (and across) 10-metre-high walls over the vast 3,300 square meter surface area of the renovated 19th-century building. These images provide an immersive and panoramic show throughout the space, to a sound track of music by Wagner, Chopin, Beethoven and others, using an innovative “motion design” sound system, with 50 speakers programmed to complement the 3D visual experience.

Digital art spaces are of high importance, especially when trying to unite destinations with their specificities, strengths and deficiencies that is the case of Sofia, Montana and Nis. Such space can be constructed on the territory of the cities, combining their most important cultural contributions to the European art legacy and positioning them as contemporary cultural destinations, able to respond adequately and with long-term vision to the demands of their visitors.

However, before initializing such structures, several issues (which are valid for all three types of tourism, object of this strategy – cultural, adventure and speleology) need to be addressed:

- Need of improvement of the hospitality services: through training courses and more efforts for a better qualification of the staff and developing their ability to deal with different situations of risk;
- Not enough facilities available at the disposal of children, people with limited physical abilities and elderly; low compliance with safety standards in some areas; inclusion on the topic in the social dialogue, direction of funds towards modernization of the existing and construction of new facilities, able to ensure a qualitative stay of the visitors;
- Low utilization of the available resources, ineffective marketing strategy, limitation of the reached people; insufficient rate of digitalization of the tourist offer; through Elaboration of a competitive marketing strategy and promotional activities in

\(^8\) Usman Haque
compliance with the international standards; enhanced digitalization of the tourist offer, implementation of new online services of assistance to the tourists;

Short-term expectations during/after the implementation of the Strategy

- Intensified dynamics of the communal life;
- Enhanced traffic performance of the project online platforms;
- Strengthened interest and knowledge towards the region;
- Increased number of visits to the three cities by 1/4th;
- Increased average spending of visitors to the cities by 10%;

Mid-term expectations during/after the implementation of the Strategy

- Sustainable utilization of natural resources, unspoilt environment managed rationally that is able to provoke a lasting interest in the visitors and to generate incomes in the local economy;
- Improved quality of the sites with facilities at the disposal of children, people with limited physical activities, elderly; enhancing the compliance with the safety standards and educating citizens and tourists on the topic of safety;
- Modernization of the existing transport means and infrastructure; implementation of new services; better compliance with the established rules through more awareness raising campaigns or higher sanctions/new rules;
- Increased general satisfaction of the visitors (measured by digital short-surveys) with the time spent in the 3 cities, including services, accommodation, accessibility of sites, hospitality, etc.
- Increased visibility of the region as a tourism destination with variety of “unique experiences”;

Strategy's rationale:
Elaboration of strategic long-term vision of inclusive character for the construction of a joint tourism identity of the 3 cities

Development of niche tourism: adventure, speleology and cultural

Opportunities for a sustainable growth

Mobilised efforts for services and experiences in the three cities more accessible and attractive

Innovative promotional campaign - differentiation in the methods in correspondence with the target groups

Increased tourism visibility of the three cities and the cross-border region

Strengthened awareness and appeal
Overview of the gathered information from the Analysis of the Situation and Prospects of Speleo, adventure and cultural tourism in Nis, Sofia and Montana area

The conclusions from the analyses determine the necessity to stimulate the partnership between the municipal administrations of Sofia, Montana and Nis which according to the national legislation, geographic location and specificity of the tourist product possess the potential to formulate, develop and manage the joint region as a shared tourism space of value and international significance.

The characteristics of the region, benefiting the establishment of a framework of vibrant cooperation are:

• Territorial proximity - the municipalities have a similar geographic location and because of their neighbourhood relations they share some common issues;

• Intertwinity and complementarity of natural resources and sites: this includes important factors such as relief forms and climate (with minimal intra-regional differences), biodiversity and protected areas;

• Anthropogenic resources - a unique resource for the region is the rich material cultural heritage, belonging to a folklore, common crafts, traditions, lifestyle, traditional livelihoods;

• General infrastructure - the municipalities in the area share common roads on the national road network which, combined with their geographical location, is a suitable territorial basis for the formation of a tourist products of various type;

In addition, from the individual analysis of the resources for the development of cultural, adventure and speleology tourism can be concluded that all three cities are in position to construct themselves as destinations with serious capacity and dynamic presence in the European reality; their differences – existing evidently, for example unproportional levels of development and unbalanced economic indicators, add further value to the partnership as it can contribute for the achievement of the general aim for cohesion profoundly explored by the European community.

Sources for differentiation:

As stated above, the three cities – Montana, Sofia and Nis cannot be characterized by homogeneity when it comes to their positioning in the international tourism market; all
attempts for generalization will fail as the socio-economic realities of the territories differ substantially: for example Sofia as European capital has faced a tendency for growth and has reached a certain stability as a tourism destination in the recent years in contrast to Montana which as part of the North-West region is subject to various negative tendencies such as unemployment, depopulation, serious investments deficiency, etc. and is steadily deteriorating in terms of important economic indicators. Unlike Sofia and Montana - cities of contrariety, Nis can be placed somewhere in the middle as it has an inclination for gradual advancement due to the systematic efforts of the local authorities, as well as existence of external stimulus such as different programmes, funds, etc., but still some malpractices and internal deficiencies need to be addressed for its active and recognisable presence in the international tourism reality.

- **Cooperation as a factor for greater competitiveness**

With the launch of a joint tourism product, each of the municipalities enhances the competitiveness of its tourism sector by:

- Increased visibility and market recognition – the unification of the three municipalities in a common destination is a prerequisite for the general strengthening of their visibility and recognition on the international market; however individual responsibility remains existent as each of the cities needs to address some specific issues in order to be able to participate in a constructive partnership.

- Complementarity of the tourist products - in addition to the general supply, each municipality has a specific feature/resource/advantage that could complement and diversify the regional product – Sofia (suitable for the development of cultural tourism), Nis and Montana (abundant in resources for the development of adventure tourism), Nis as a part of a more exotic (as the unknown has the tendency to provoke specific interest) destination due to the fact that (i) Serbia is not currently part of the European Union therefore objectivity of perception towards the country is more difficult to be achieved, (ii) possess rich and eventful historic past and (iii) is part of a region in Europe, along with Bulgaria that is culturally distinguishable when compared to the cultural reality of other part of the continent; Sofia as capital of one of the newest members of the EU with competitive prices and qualitative, yet insufficiently explored tourism offer.

**SWOT analysis – cultural, adventure and speleology tourism in Nis, Sofia and Montana**

SWOT analysis is a strategic planning tool which summarizes in a concise and succinct way the key aspects of a project, economic sector or a particular area. In planning procedures,
SWOT analysis serves as a sublimation of all analytical findings for the purpose of defining strategic starting points, the vision and major strategies for further development.

In accordance with the meaning of the acronym (SWOT – Strengths, Weaknesses, Opportunities and Threats), the key analytical findings are classified into:

a) Strengths - aspects which essentially give advantage over competitors;

b) Weaknesses - impediments and aggravating circumstances for the development that need to be improved and overcome (if possible) or bypassed in a way that would allow for the adoption of strategic development directions to which these elements bear no relevance;

c) Opportunities – elements and upcoming trends, primarily in the external environment, which can be used for creating competitive advantage;

d) Threats – elements and upcoming trends, primarily in the external environment, which may render difficult or, in the long run, even prevent development.

SWOT analysis of the cultural, adventure and speleology tourism in Sofia, Montana and Nis is made on the basis of:

1) Overview of the general condition of the tourism industry in global and European perspective;

2) Overview of the general condition of the tourism industry in Bulgaria and Serbia;

3) Analysis of the current state of the tourism sector in Sofia, Montana and Nis;

4) Analysis of the specific condition of the cultural, adventure and speleology tourism in Sofia, Montana and Nis;

5) Analysis of development documents and official policies on tourism industry in the Republic of Serbia and the Republic of Bulgaria, as well as in the specific regions of Sofia, Montana and Nis;

6) Comparative analysis of the tourism industry (cultural, adventure, speleology) in Sofia, Montana and Nis;
Strengths:

- Shared historical past, intertwined culture and traditions, high mutual recognizability, viable framework for cooperation and development goals of similar character;
- Favorable geographic location and climate;
- Built transport infrastructure – high levels of connectivity via various transport means;
- Abundance of vibrant natural and cultural resources for the development of cultural, adventure and speleology tourism;
- Language barrier of low functionality;
- Competitive prices;
- Various existing platforms for constructive collaboration in different spheres of interest;
- Similar inclinations for positioning in the political reality: Bulgaria is part of the EU and the Republic of Serbia is country with strong perspective for accession;
- National and regional policies with corresponding general aim, specific objectives and measures to be undertaken;
- Acknowledged importance of the tourism industry for the socio-economic growth of the regions;
- Willingness for the establishment of shared tourism identity able to enhance the position of the cities in the international market;

Weaknesses:

- Different development rates and socio-economic indicators: employment, education, population trends, investments, etc.
- Heterogeneity when it comes to their positioning in the international tourism market;
- Sporadic political tensions and problematic history;
- High levels of malpractices and corruption tendencies, inherent to the very structure of the system of public relations (over-spill, the tourism sector as part of the economy cannot be independent from the processes that define its essence and peculiarity;)
- Similarity of the cultural tradition – simultaneously source of strength and weaknesses as not corresponding to the general demand of international tourists for constant witnessing of the new and the different;
- Deficiencies in the connectivity of the regions: need for modernization of the existing infrastructural network;
- Different currency which can fragmentate the experience of the visitors and to cause some inconveniences;
Existance of negative tendencies in the development of strategic policies: unrecognized importance of critical thinking, short-term thinking, negligence of important indicators/tendencies and/or prioritization of some on the expense of others, inclination for immediate benefit;

Existence of negative trends in the implementation of strategic policies: lack of compliance with the established rules, distorted realization, deficiency in established mechanisms for monitoring and control;

Dysfunctional public-private partnerships in the field of tourism;

Disrupted dialogue and flowed process of communication between the authorities on the one hand and the citizens on the other;

Stability of the region under conditionalities; no predictability of the counties/regions attitudes, defining the low investment rates;

Opportunities:

(Method: a → b → c )

i. Establishment of a vibrant dialogue of mutual understanding, respect and enhanced culture of constructive cooperation;

ii. Formation of a platform for exchange of experience, ideas and good practices;

iii. Systematic efforts for the development of operational capacity for the implementation of programmes, strategies, initiatives, activities, etc.;

iv. Elaboration of strategic long-term vision of inclusive character for the development of a joint tourism product;

v. Eradication of malpractices and actual implementation of measures for the achievement of the elaborated strategic long-term perspective for tourism development;

vi. Strengthened visibility and intensified recognizability of the three cities individually and collectively;

vii. Improved position in the international tourism market;

viii. Dynamic investments in the modernization of the transport infrastructure;

ix. increased accessibility of the three cities;

x. Provoked interest;

xi. Increased tourism flow;

xii. More stimulus for advancement of the tourism offer;

xiii. Constructed joint tourism identity of the region through systematic and continuous efforts;

xiv. Full utilization of the tourism potential of the region;
And as a consequence - renewed dynamics of the cohesion processes and substantial improvement of the socio-economic indicators of the cities, respectively the region leading to benefits for the local citizens and the two countries as well.

Threats:

- Inability to (i) formulate and (ii) follow strategic goals and specific measures for the achievement of the general objective – construction of a viable regional tourism identity, able to attract international visitors and to generate financial and non-financial benefits for the three cities and their citizens;
- Intensified tourist presence in result of the popularization of the region as a tourism destination, which could lead to environmental issues, including pollution, alteration of ecosystems, pressure on the biodiversity, uncontrolled construction, etc.;
- High level of commercialization, degradation of local identity and marginalization of the “essence” at the expense of the short –term intensification of tourist’s presence, resulting in immediate profits; loss of perspective and long-lasting vision;
- Focus on the quantity instead of the quality; malpractices in terms of repair of the existing infrastructure or construction of new routes; unproportional development of the different transportation means on the expense of the others; dissatisfaction and public resentment towards the new rules, further disruption of the public - private dialogue;
- Opening space for malpractices and corruption when dealing with the issue of insufficient accessibility; the urgency of the problem can be interpreted as an opportunity for quick and questionable measures in term of quality;
- Artificial lowering of the prices, which can result negatively for the employees in the tourism sector and all other industries of relevance; improving the quality and the scope of the services, but not increasing the wages of the employees; implementation of short-term strategies and loss of a long-lasting vision for development;
- Spoiling of the environment with view of immediate profits, unregulated construction work, unsystematic development without consideration of the future; marginalization of the concept of sustainable tourism;
- High incorporation of elements of other cultures and traditions, resulting in alteration of the specific characteristics of the cultural calendar of the three cities; loss of recognizability among the citizens of Sofia, Montana and Nis , disruption of the dynamics of the communal life;
- Deteriorated international image of the three cities as a tourism destination - individually and/or collectively as a region with similar characteristics and shared tourism products; negative associations and decreased rates of interest, respectively reduced tourism flow.
Presentation and analysis of European policies in the field of tourism

EU policy aims to maintain Europe's standing as a leading destination while maximizing the industry's contribution to growth and employment and promoting cooperation between EU countries, particularly through the exchange of good practice. The EU's competence in the tourism is one of support and coordination to supplement the actions of member countries.

Europe is currently the most important continent in terms of both outbound and inbound tourism. According to the latest report from the World Tourism Organization – UNWTO (2016), 51% of the international tourist arrivals and 36% of the international tourism receipts were recorded in Europe, 40.3% of the international tourist arrivals and 3.4% of the international tourism receipts being attributed to the EU-28. Although the rest of the EU-28 countries cannot compete with the big key players in the European market, France, Spain, UK, Italy and Germany, according to World Bank statistics (2016), the number of international inbound tourists in the New Member States of the European Union (NMS-13) region increased on average three times. This growth is in many cases attributed to the Community’s accession policy and the market oriented policies in the NMS (Enterprise and Industry Directorate-General of the European Commission, 2007). However, the poorer reputation most of the NMS have continues to affect the tourism industry in this region. As per Nicolescu (2008), tourism is one of the most visible aspects of country branding and unquestionably the greatest beneficiary of a favourable image. Even the citizens of some of the NMS-13 tend to have a rather negative perception of their countries. For example, “when reflecting about themselves, Romanians think first about their main weaknesses as a people and the negative individual traits (dishonesty, cowardice, corruption), exacerbated by the economic difficulties of the last decade” (Nicolescu, Paun, Popescu, Draghici, & Pinzaru, 2007, p. 82).

Even though the importance of tourism for the European integration process was firstly acknowledged on the 10th of April 1984, it is not until recently that the European Institutions have started to focus on the tourism industry. Only broad strategies and norms were designed in 1984, but this is perceived as an important step forward for the tourism industry, on the grounds that it raised Member States’ attention to this particular sector, recognized tourism as a independent action and as a valuable tool meant to ease European integration (Morata, 2002). From 2001 on, the Commission published a series of policy initiatives for tourism at EU level. Most of them focused on sustainable tourism and a stronger Union.
In order to formulate effective tourism policies, a holistic European approach is needed taking into account the multiple impacts of the sector as well as the wide spectrum of stakeholders involved or affected by tourism.

This was recognized by the Treaty of Lisbon, which by article 195 of the TFEU gives to the European Union the responsibility to promote the competitiveness of the European tourism sector by creating a favorable environment for its growth and development and by establishing an integrated approach to the travel and tourism sector.

Forecasts predict downturns regarding tourism in Europe by 2030. Hence, EU has to take measures to remain competitive, to adapt its product offerings to ever-changing tourist preferences, but also to the demographic changes EU-28 will face by 2020 (people over 65-year old will count for 20% of the total EU population) or to the ever-changing information and communication technologies (European Commission, 2010, p. 9). To overcome all these challenges, the European Commission came up with a new framework called “Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe”, initiative that focuses on four main points: “to stimulate competitiveness in the European tourism sector, to promote the development of sustainable, responsible, and high-quality tourism, to consolidate Europe's image as a collection of sustainable, high-quality destinations, to maximize the potential of EU financial policies for developing tourism”.

The European Parliament adopted this plan in September 2011, while also asking the other European Institutions to develop and encourage different tourism schemes, especially programmes through which to support the small and medium sized enterprises, emphasizing the significance of high-quality tourism, aiming attention at the regional branding, at working
together on developing areas such as agro-tourism, gastro-tourism, and EU’s cultural, historical or natural heritage.

In this regard, a series of projects and initiatives has been designed, mostly focusing on reducing seasonality’s side effects and attracting tourists from regions such as South America, India and China to emerging countries, most of them the NMS of the EU. According to Debyser (2014, p. 6), “21% of potential tourists from emerging markets (outside of Europe) abandon their plans to travel to Europe due to slow processing of visas”, so the European Institutions took note and eased Schengen Area’s rules and regulation, as to facilitate tourists flows.

Therefore, it can be concluded that EU Institutions and Organizations are increasingly aware of tourism sector’s importance for the whole economy, and for that reason they struggle to improve and maintain EU-28’s allure from a touristic point of view. However, cooperation between parties (not only among Member States, but also between these and the EU bodies) is still to be improved. ⁹

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⁹ Tourism industry in the new Europe: trends, policies and challenges Maria-Irina ANA The Bucharest University of Economic Studies, Bucharest, Romania
Presentation and analysis of EU best practices in the development of niche tourism, specifically Speleo-adventure and cultural tourism

“new niche markets can be revealed which can be valuable for a destination, the experience of visitors/tourists can be improved, costs can be reduced and a favourable attitude from local communities can be obtained”

Up to the Lisbon Treaty that entered into force on the 1st of December 2009, the European Communities did not have specific attributions in the tourism field, and there was rather a set of actions and initiatives developed at European level, but with voluntary implementation. The European bodies were rather helping the tourism stakeholders undertake responsibilities for sustainable tourism development by creating useful instruments, the main aim being the exchange of best practices, information dissemination, co-operation and networking between stakeholders across the Union (Cismaru et al., 2015).

Being classified as a “cross-section issue” (Lehmeier, 2010, p.123), tourism sector is influenced and supported by various sectoral policies, but the EU’s goals in the tourism field seem to be addressed by the Direction General “Enterprise and Industry”.

One of the main initiatives initiated by DG ENTR is the “European Destinations of Excellence” – EDEN – award, which finances distinguished tourist destination in Europe. EDEN was launched in 2007 and ever since, 140 “EDEN” destinations have been elected, based on given themes and aiming at promoting sustainable tourism, “drawing attention to the values, diversity and common features of European tourist destinations” (European Commission, 2010b).


11 TOURISM POLICY AND REGIONAL DEVELOPMENT IN THE EUROPEAN UNION, Holger Lehmeier
The principle of EDEN is simple: every other year a theme is chosen by the European Commission in close cooperation with national tourism authorities. Eligible destinations have to show that an economically viable tourism offer has been developed based on that year’s EDEN theme.

Each theme serves to showcase Europe's diversity, including its natural resources, historical heritage, traditional celebrations and local gastronomy. The topics are always related to sustainable tourism development, whether from a cultural, economic, environmental or local involvement point of view. The destinations have the chance to show off what makes them unique and show tourists that an unforgettable experience awaits them. The winning destinations are the emerging, non-traditional destinations that best reflect the chosen theme of the year and that offer a unique tourism experience, in line with sustainable models.

The EU recognizes the importance of culture as part of the European tourism experience and as an element that can enhance the profile of Europe as a global destination. The European Commission supports the areas of cultural tourism that have the greatest potential for growth.

### Actions in the area of cultural, adventure and speleology tourism

- **European cultural routes**

  ‘European Cultural Routes’ are transnational routes that help tourists discover how Europeans have lived since ancient times. The concept was launched by the Council of Europe in 1987.

  The European Commission actively cooperates with the Council of Europe, the European Travel Commission, the UN World Tourism Organisation, and other international partners to contribute to the development of European Cultural Routes. A joint study, between the Commission and the Council of Europe, ‘European Cultural Routes impact on SMEs' innovation and competitiveness (4 MB)’, found that cultural routes have shown enormous potential for small business generation, clustering, intercultural dialogue, and promoting the image of Europe in general.

  Cultural routes can also strongly contribute to local economies and societies as they work on a sustainable and ethical model, building on local knowledge and skills and often promoting lesser-known destinations. For instance, 90% of cultural routes are through rural areas.

- **Funding for projects**
The European Commission regularly publishes calls for proposals to support the development of physical or virtual ‘routes’ that have a transnational or European dimension and are based on cultural heritage.

The competitiveness of the European tourism industry is closely linked to its sustainability and the European Commission works on a number of initiatives in this area. The competitiveness and sustainability of the tourism industry go hand-in-hand as the quality of tourist destinations is strongly influenced by their natural and cultural environment, and their integration into the local community.

Long-term sustainability requires a balance between economic, socio-cultural, and environmental sustainability. The need to reconcile economic growth and sustainable development also has an ethical dimension.

**Adventure, cultural and speleo tourism are forms of tourism that are becoming increasingly important sectors of the tourism industry worldwide.** The new kinds of lifestyle, the evolving tourist behavior and continuously changing customers’ preferences coupled with the widespread concern about environment, industrial heritage and sustainable development are all factors that led to the expansion of these niche market types of tourism.

- Sustainable tourism actions

**Diversifying the EU tourism offer - sustainable transnational tourism products**

As part of its work in diversifying the tourism experiences on offer in the EU, the Commission co-funds sustainable transnational tourism products that can contribute to tourism growth. These are thematic products and services in areas such as environmentally friendly tourism including cycling routes, sports and wellbeing tourism, nature tourism, and cultural routes crossing Europe.

**The European Tourism Indicators System (ETIS)**

Because tourist destinations are increasingly called upon to measure their performance in relation to sustainability, the Commission has developed a European Tourism Indicators System as a simple method for measuring sustainability performance.

**The EU Ecolabel and EMAS**

The EU Ecolabel is a voluntary tool that is available to tourism accommodation services willing to prove and promote their environmental excellence. Specific EU Ecolabel criteria have been developed for tourist accommodation and campsite services.

EMAS registration allows actors in the tourism sector to improve their environmental performance and promote the quality of their services. EMAS best environmental management practice document can guide them in this process.
Tourism indicators in the EU – short overview for strategic purposes

In 2016, Spain was the most common tourism destination in the EU for non-residents (people travelling outside their country), with 295 million nights spent in tourist accommodation establishments, or 22.2% of the EU-28 total. More than 7 out of 10 from these 295 million nights spent in Spain were concentrated in three regions: Canarias, Balears and Catalonia.

Across the EU, the top four most popular destinations for non-residents were Spain, Italy (199 million nights), France (124 million nights) and the United Kingdom (119 million nights, estimation based on 2016 monthly data), which together accounted for more than half (55.7%) of the total nights spent by non-residents in the EU-28. The least common destinations were Luxembourg and Latvia; the effect of the size of these Member States should be considered when interpreting these values.
Share of nights spent at EU-28 tourist accommodation by tourists travelling outside their own country of residence, 2016 (% of all nights spent in EU-28 tourist accommodation)

Source: Eurostat (tour_occ_ninat)

The number of nights spent (by residents and non-residents) can be put into perspective by making a comparison with the size of each country in population terms, providing an indicator of tourism intensity. In 2016, using this measure, the Mediterranean destinations of Malta, Croatia and Cyprus, as well as the alpine and city destinations of Austria were the most popular tourist destinations in the EU-28 (see Figure 4); Iceland and Montenegro were also popular destinations using this measure of tourism intensity.
It is estimated that **62.1 % of the EU-28’s population aged 15 or over took part in tourism for personal purposes in 2016**, in other words they made at least one tourist trip for personal purposes during the year. Again, large differences can be observed between the EU Member States, as this participation rate ranged from 23.7 % in Romania to 88.9 % in Finland.

Residents (aged 15 and above) from within the EU-28 made an estimated 1.2 billion tourism trips in 2016, for personal or business purposes. The majority (58.0 %) of the total number of trips made were short trips of one to three nights, while three quarters (74.4 %) of all trips made were to domestic destinations, with the remainder abroad.
In some EU Member States, over half of the total number of tourism trips made in 2016 were to destinations abroad; this was the case for Luxembourg, Belgium, Malta and Slovenia (as well as Switzerland). However, less than 10% of the trips taken by residents of Romania and Spain were abroad. These figures appear to be influenced by both the size of the Member States and their geographical location (smaller and more northerly countries tended to report a higher propensity for their residents to travel abroad).

The economic importance of international tourism can be measured by looking at the ratio of international travel receipts relative to GDP; these data are from balance of payments statistics and include business travel, as well as travel for pleasure. In 2016, the ratio of travel receipts to GDP was highest, among the EU Member States, in

- Croatia (18.6%)
- Cyprus (13.7%)
- Malta (13.2%),

In absolute terms, the highest international travel receipts in 2016 were recorded in Spain (EUR 54.7 billion), France (EUR 38.3 billion) and the United Kingdom (37.4 billion), followed by Italy (36.4 billion) and Germany (33.8 billion).
European capital of “smart tourism”

Outstanding achievements by European cities in innovative, sustainable and inclusive tourism will be recognized for the first time this year. The European Commission has launched the European Capital of Smart Tourism to recognize these ‘smart cities’. The initiative, originating from the European Parliament, also aims to showcase inclusive, culturally diverse and sustainable practices for tourism development by European cities.

By rewarding “exemplary practices of smart tourism”, the EU says it wants to encourage innovation at the level of tourism destinations, culturally diverse tourism products and the multifaceted contribution of tourism to sustainable development. Two European cities that demonstrate such innovation, creativity and excellence in four categories – accessibility, sustainability, digitalization, and cultural heritage and creativity – will be awarded the title of European Capital of Smart Tourism 2019.
Presentation and analysis of trends in the development of niche tourism, specifically Speleo-adventure and cultural tourism – competitors on the market, customers’ interests, demand of such services

The concept of niche tourism has emerged in recent years in counter-point to what is commonly referred to as mass tourism. It implies a more sophisticated set of practices that distinguish and differentiate tourists. In a globalizing world of increasing sameness, niche tourism represents diversity and ways of marking difference. It plays on the pejorative connotations that have accompanied the evolution of mass and package tourism and their, often cited, negative impacts in relation to environmental degradation and socio-cultural disturbance. For destination managers and planners seeking to utilize tourism as a mechanism for economic development, the niche tourism approach appears to offer greater opportunities and a tourism that is more sustainable, less damaging and, importantly, more capable of delivering high-spending tourists. For tourists, niche tourism appears to offer a more meaningful set of experiences in the knowledge that their needs and wants are being met.

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The conventional form of tourism setting the paradigm a „passive observer”, witnessing the manifests of beauty and otherness, but without the possession of tools to re-act, is more than less exhausted as the modern individual aspires for the unordinary, perceives the act of travelling as something more, which requires tenacious personal involvement as “the possession of meaning is always an intimate quest”.

In “Postmodern Society and Tourism” Mauro Dujmović and Aljoša Vitasović state:

The abandonment of tourist typologies, the shift of attention towards the existential authenticity, and the admittance that tourism is a multisensory and physical experience bear witness to the recent theoretical shift in the study of the tourist experience which stresses the importance of the individual and his/her role in the tourist industry. New forms of tourism have been emerging, which have the potential to replace or at least change the already existing forms and fundamental tourism structures. A new type of tourism demand has significantly changed the nature of tourism offer. The alterations in the tourism offer and demand and the mere nature of the tourism product are usually associated with the concept of the post-tourist.

The tourism market has been expanding and tourists have become more demanding and lickerish and there has been an increase in the creation of new tourist services that put an
**emphasis on emotions and experience** (Richards, 2001). Therefore, the development of the tourism industry should be regarded in the context of the development of new forms of tourist consumption and the convergence between the patterns of consumption, leisure, and tourism. Such a theoretical shift in late modernity or postmodernity contributes to the greater appreciation of the individualized and subjective nature of the tourist experience, accepting tourism as a source of meaning around which numerous individual lives have been structured (Wearing et al., 2010).

**Quote:**

“It will be argued that tourism has ceased to be a temporary and unusual state of existence in a world otherwise organized by life at home and life at work. More than that, for many people and in many destinations, tourism has become more dominant in the organization of everyday life.”

Niche tourism refers to how a specific tourism product can be tailored to meet the needs of a particular audience/market segment. Locations with specific niche products are able to establish and position themselves, as niche tourism destinations. Niche tourism, through image creation, helps destinations to differentiate their tourism products and compete in an increasingly competitive and cluttered tourism environment.¹³

Novelli (2005) describes how at one level niche tourism can be defined as breaking down tourism into still relatively large homogeneous market sectors – ‘macro niches’ i.e. cultural tourism and event tourism – each then capable of further segmentation – ‘micro niches’ i.e. wine (cultural) tourism and sport (event) tourism.

Examples of the more common niche tourism markets include:

- Adventure and extreme
- Culture and the arts
- Extralegal
- Food and drink
- Historical
- Low-impact
- Medical and dental
- Miscellaneous

Special interest tourism (niche tourism) is the provision of customized tourism activities that caters to the specific interests of groups and individuals. In this case, tourism is undertaken to satisfy a particular interest or need. People engaged with it are seeking to learn more, enrich their awareness, and express themselves. **They expect high standards of service and**

¹³ THE ROLE OF NICHE TOURISM PRODUCTS IN DESTINATION DEVELOPMENT, J. M. Ali-Knight year 2011
individualized focus. Many wish to travel in an environmentally sound manner and to have authentic experiences be they: cultural, social or environmental, in which they have a positive engagement with the host community.

For the purposes of the current Strategy, these three tourism types will be the main object of our interest:

- **Adventure tourism:** Adventure travel is a type of tourism, involving exploration or travel with perceived (and possibly actual) risk, and potentially requiring specialized skills and physical exertion. Adventure tourism is rapidly growing in popularity, as tourists seek different kinds of vacations.

- **Cultural tourism:** This kind of tourism normally occurs in urban areas with particular historical significance or cultural facilities, such as museums and theatres. Cultural tourism also highlights the various traditions of indigenous communities through observing their rituals, customs as well as their values and lifestyle. Tourism therefore serves as the carrier of culture and cultural tourism has become the platform for cultural consumption.

- **Cave tourism (speleology)** is the recreational pastime of exploring wild (generally non-commercial) cave systems. The challenges involved in caving vary according to the cave being visited, but – in addition to the total absence of light beyond the entrance – often include the negotiation of pitches, squeezes, and water hazards.
Adventure tourism – definition, trends, statistics

Adventure tourism is defined as travelling outside a person's regular environment. Adventure travel may involve various adventurous activities such as caving, climbing, cycling, hiking, hunting, rafting, and others. Tourism is one of the most rapidly growing sectors, while adventure tourism is one of its fastest growing segments.

According to recent researches, international adventure tourism is expected to grow by at least 46 percent by 2020. In 2016, adventure tourism grew heavily in Europe, with a focus on paragliding, kite surfing, and mountain trekking.

![Chart: What motivates adventure travel?](image)

Adventure tourists may have the motivation to achieve mental states characterized as rush or flow, resulting from stepping outside their comfort zone. This may be from experiencing culture shock or by performing acts requiring significant effort and involve some degree of risk, real or perceived, or physical danger. This may include activities such as mountaineering, trekking, bungee jumping, mountain biking, cycling, canoeing, scuba diving, rafting, kayaking, zip-lining, paragliding, hiking, exploring, sandboarding, caving and rock
climbing. Some obscure forms of adventure travel include disaster and ghetto tourism. Other rising forms of adventure travel include social and jungle tourism.

Data from the new Expedia study points to the fact that that Gen Z (people aged 22 and younger) has a ton to do with the emerging trends—71 percent of young respondents love adventuring enough to get a part-time job, sell their clothes or furniture to save money for a trip, and say they’d even break up with a significant other to go on a previously planned trip. It’s no surprise that the same set of people say they love being active while scoping out a new spot; with sites like Pinterest, travel-themed blogs and vlogs, there’s endless adventure inspiration to choose from.

Airbnb has exploded in popularity in recent years, helping make adventure travel on off-the-beaten paths more affordable for guests who might not be inclined to really rough it during their entire stay; even more, Airbnb has become a bona fide way to uncover and book trendy, nature-based accommodations in places that were previously tough to access or impossible to find. Based on Airbnb data, more travelers are looking to experience nature firsthand in the new year with bookings for yurts (+155%), ryokans (+600%) and RVs (+133%).”

As adventure travelers become more experienced, they are increasingly seeking to experience destinations as temporary locals. In 2018, more destinations will create proactive strategies to facilitate this, which will mean educating residents and providers, as well as partnering with technology platforms that make these experiences accessible.

Example:

“Visit Copenhagen” has launched a new strategy called Local Hood. The strategy targets the traveler who seeks to be a “temporary local,” that is, one who searches for “a personal connection to an instantly shared experience based on interest, relations and authenticity.” The concept of Local hood may even offer a solution to over tourism as it seeks to create a framework for locals and visitors to interact amicably around shared experiences.

Along with Gen Xers and millennials, those who are 50+ are still keen to pursue the kinds of activities that typically define “adventure travel”: hiking, cycling, rafting, scuba diving, skiing and climbing, among others. And as conventional destinations become overrun, “commoditized McTravel” experiences are becoming less desirable. Sedentary, standardized travel packages, including lie-on-the-beach vacations, are becoming less popular while active adventure travel booms.

The quest for authenticity
Research shows that adventure travelers place a higher premium on exciting and authentic experiences, reflecting a distinct set of values shaping the future of travel. Rather than check off a list of sights, contemporary travelers value doing and engaging over more passive “sightseeing.” In a world where chains and franchises have homogenized so many destinations, and mass tourism keeps travelers at arm’s length from the people who live in the places they visit, travelers crave genuine, meaningful experiences. They want immersive cultural encounters: hands-on cooking lessons, a meal in a local host’s home, an intimate concert, a visit to an artisan’s private studio. They prefer to be guided by someone who’s a native of the place they are visiting. They want to explore nature, culture and history while interacting with a place and its people.

Peace of mind

Adventure travelers are increasingly seeking experiences that allow them to unplug, focus inward, and tap into the mental health benefits of adventure travel. People are increasingly using travel experiences as an opportunity to regain a sense of control among the chaos they encounter in their everyday lives. In fact, the ATTA’s 2017 research with Dr. Paige Viren and Outside magazine showed that physical and mental health are key motivations for travelers when they seek out adventure travel.

Travel brands have recognized that the act of traveling is stressful as well. To combat this, proactive companies are beginning to support customers with wellness services. For example, Air France partnered with the Mind mobile app in June 2017, allowing guests to take advantage of free meditation sessions while flying. Additionally, hotel brand Swissotel recently launched a program encouraging guests to commit to wellness and healthful habits even when they are on the road. This trend has generated powerful marketing campaigns, too.

Another good example:

Estonia is one destination that has tapped into this trend with their Stress Buster Campaign. The campaign deployed face-recognition technology in busy cities to identify stressed people and then offer them a trip to Estonia to relieve their stress. The campaign highlighted all the activities tourists could do in Estonia to minimize their stress, such as birdwatching, canoeing, and visiting national parks.

Winter is coming to stay

Destinations with winter offerings are seeing large increases in arrivals in the colder months— and not just for skiing. According to Iceland Statistics, one-third of Iceland’s tourists visited during the winter months (from January to April). Winter is the peak season for many of Greenland’s regional destinations, and the Yukon, in Canada, found that the largest contingent of tourists all year in 2016 were there to see the aurora borealis. From
AfriSki in Lesotho to the vast winter complex of Kakslauttanen in Finland, destinations are increasingly investing in infrastructure to accommodate winter tourists. Travelers are seeking out winter festivals (such as the Harbin Ice Festival, which received more than a million tourists in 2016), the opportunity to experience the holidays in another country, and what is broadly categorized as “polar activities,” such as watching the northern lights, viewing arctic wildlife, and participating in outdoor snow activities. The main source of winter tourists are the United Kingdom, the United States, and China. In fact, although no Chinese national was recorded traveling to Antarctica in 2007, one decade later, they represent the second-largest group of visitors to the destination, according to the International Association of Antarctica Tour Operators.14

Popular destinations include Iceland, Sweden, Denmark, and Norway. Smoothing out the numbers of tourists over the year can help alleviate overcrowding at destinations and create year-round jobs for the tourism workforce.

Destinations that suffer from undertourism (the case of Montana) may consider building their understanding of the adventure tourist, who is more likely to visit hard-to-get-to places that may not have advanced tourism infrastructure. To combat undertourism, destinations should be offering once-in-a-lifetime experiences (such as balloon rides), improving storytelling to make the place relevant to the visitor, or using technology such as augmented reality to create better experiences.

In the light of the above, the three cities – Montana, Sofia and Nis have serious potential for a more active development of adventure tourism as they are destinations with natural resources and many opportunities for adventure activities such as rafting, kayaking, paragliding, bungee jumping, etc. Furthermore, they have the benefit of the low prices which is compatible with the profile of the adventure travellers that tend to value the experience in relation to the expenditures – the expectation of a low-priced, but qualitative stay can be met on the territory of the three cities.

However, many efforts should be dedicated firstly towards constructing a more accessible and hospitable environment that is extremely important for the travellers. In addition, a stronger focus on the sustainability factor should be placed in order to respond more tangibly to the demands of the tourists, which are more and more willing to structure their vacation depending on the ecological criteria.

Thirdly, a innovative marketing campaign needs to be elaborated which will address directly the identified target groups - a unified approach would not be that effective as the profile of the adventure travellers is becoming a flexible term, which includes millennials, families, solo travellers and elderly in good health and relatively high standard of living. Therefore, a specific message for each target group should be distributed, able to capture the essence of

14 20 Adventure Travel Trends
their demands and to transform them into an affordable experience. There is one benefit that needs to be capitalized in order the set goals:

- **Increased number of visits to the cities by 1/4th**;
- **Increased average spending of visitors to the cities by 10%;**
- **Increased general satisfaction of the visitors (measured by digital short-surveys) with the time spent in the 3 cities, including services, accommodation, accessibility of sites, hospitality, etc.**
- **Increased visibility of the region as a tourism destination with variety of “unique experiences”**;

To be achieved and that is the “unknown” factor – Bulgaria as a new member state and Serbia as a country in accession are still relatively unrecognizable in its tourism characteristics, unexplored (unlike Croatia for example, one of the main competitors on the market) and possess a certain sense of mystery – an attribute to the unknown, which is a serious resource in necessity for thorough and visionary development.
Cave (Speleo) tourism - definition, trends, statistics

Caving traditionally is a recreational pastime of exploring wild cave systems, today cave tourism is associated with exploring wild cave systems and also caves that have been carved out by men and have historical significance. Caving is also called as ‘spelunking’. Adventure enthusiasts, eco-tourists and fearless curiosity seekers can be found exploring the cramped, lightless corners of the underground world. Exploring wild cave systems has some challenges involved and they can vary. There is a total absence of light beyond the entrance and often include negotiation of pitches, squeezes and water hazards. Some of the most famous caves have become hot tourist spots and these caves offer a complete path with handrails, lights that illuminate the interesting formations and fossils and different caves offer a different level of accessibility. This means that the travellers can choose their cave destination based on their tolerance for adventure and their willingness to crawl through the tight spaces.

Speleological tourism is a particular form of tourism, more precisely an adventure which involves speleological research as well. **This branch of tourism includes unique motives which cannot be repeated**, but which are in most cases accessible to few people. Interiors of speleological sites (caves and pits) has always been a strong motive for research, but was for a long time accessible only to a chosen few who had the courage to tread into the earth’s inner space and engage in the conquest of the unknown. With the advancement of human society there was also a positive trend in this form of tourism, and therefore conditions were secured to acquaint a larger number of people with those natural riches.
As a form of special interest tourism, cave tourism can be found in the tourism offerings of countries in which carbonate relief is widespread and because of some of the features of its offering (labyrinths, narrow passages, high humidity and the lack of natural light), caving has been included in adventure tourism or rural tourism.

**Quote:**

“Geotourism sustains or enhances the geographic character of a place its environment, culture, aesthetics, heritage, and the well being of its residents.”

For enthusiasts, caving carries the lure of the unknown and the thrill of discovery. In a small group -- and usually with a trained guide -- you'll enter a labyrinthine world of narrow pathways and tight crevices, lit only by the yellow glow of your headlamp. Depending on the cave, you may have to wade through waist-high water or scale up rocky walls. If you're lucky, you'll emerge in a large underground chamber filled with dangling stalactites and adorned with colorful, intricate calcite deposits. Half the fun is getting back out.

But not all cavers are in it just for kicks. Speleologists are scientists who study caves and their unique ecosystems. Some scientists research the rare and yet undiscovered creatures that make their homes in the furthest reaches of caves. An example is the emerging field of extremeophiles, microbes that thrive in conditions that would be lethal to humans. It's believed that these creatures could help us understand the earliest life forms on Earth.

**Caves and kids:**

Kids and caves are an excellent combination, particularly on guided trips designed for children. Caves tap into a child's natural curiosity and allow them to show off their crawling, climbing and squeezing-through-small-spaces skills. Caves are also excellent opportunities for science education in an impressive setting. Most major caves support children's education programs for schools and private groups.

Caves as natural resources can be great potential for tourism development and in return increase the growth of the economy of its host residents (Rindam, 2014) as well as help the government to achieve environmental awareness and environmental control education. Itanyi, Okonkwo and Eyisi (2013) opine that caves and rock-shelters have an immense value to both archaeologists and tourism operators. For archaeologists they provide information on habitation pattern of past human occupants including their dietary habits and religious belief system, while tourism operators and tourists perceive caves and rock-shelters as a means of experiencing nature based tourism or ecotourism.

According to Knezevic and Zikovic (2011) caves are endowed with morphological features valuable for tourism development and with special interest to adventure tourists. Caves are important to tourism industry if properly harnessed and developed as it will rapidly increase economic, social and environmental benefits to the host community.
EU and speleology:

The European Cave Protection Commission of the European Speleological Federation (FSE) is an initiative for the preservation of speleological patrimony in whole Europe. The European speleological community includes a vast variety of about 50.000 cavers in all the caving nations from all over Europe. All of them are combined by their common passion to the underground. Since the exploring, the surveying and the scientific work in geology, hydrology, archaeology, paleontology, climatology, biology and other disciplines are taking place in the dark of the underground, caves and speleology are unfortunately still a minor topic for the public.

The advantage here in front of Sofia, Montana and Nis speleological potential is again the fact that they are unknown destinations to the European public which holds the opportunity for generation of strong interest, if presented right and with innovative approach. The resources are many and relevant with the ones of the identified competitors and their exploration can lead to numerous benefits for the local communities. Another positive circumstance is the...
lack of many analysis and statistics regarding the development of cave tourism in Europe, which presupposes a great chance for early positioning as leading destinations. Before the marketing campaign, however, efforts need to be dedicated towards eradication of the weaknesses regarding the tourism reality in the three cities, namely:

- Low funding, resulting in limited availability;
- Reduced international visibility of the resources in the region due to ineffective marketing campaign;
- Serious insufficiency of information regarding the sites, impeding their positioning in the international speleology map;
- Deficits of analysis, strategies and social consensus, favouring the development of the speleological resources and cave tourism in the region;

Cultural tourism: definition, trends, statistics

The cultural heritage of Europe is "one of the oldest and most important generators of tourism" (Thorburn, 1986), and it retains its central role in the European tourism industry to this day. According to the European Union, "tourism, and especially cultural tourism in a broader sense deserve priority attention" as policy area. Cultural tourism has become recognized as an important agent of economic and social change in Europe.

The cultural and tourist industries appear to be advancing in all European nations and regions, occupying the spaces vacated by manufacturing industry, and claiming strategic city center locations. Cultural consumption has grown, and tourism is an increasingly important form of cultural consumption, encouraged and funded by local, national and supranational bodies.

The cultural tourism market in Europe is therefore becoming increasingly competitive. A growing number of cities and regions in the European Union are basing their tourism development strategies on the promotion of cultural heritage, and the number of cultural attractions is growing rapidly. Traditional cultural attractions such as museums and galleries are having to reassess their role as the pressure to generate visitor income intensifies, and the need to compete with a new generation of commercial tourist attractions grows.

15 Bernadini, 1992
16 Corijn and Mommaas, 1995
Quote:

„The origin of the word 'tourism' is usually attributed to the Grand Tour, which originated in Britain in the 17th century (Hibbert, 1969, Feifer, 1985). Towner (1985:301) defined the Grand Tour as: "A tour of certain cities and places in western Europe undertaken primarily, but not exclusively for education and pleasure". Most of the early Grand Tourists were aristocrats for whom a trip to continental Europe was often a coda to a classical education. Usually in the company of a tutor, they would spend two or three years travelling through France, Italy, Germany, Switzerland and the Netherlands, often visiting sites connected with classical culture. The cities of Italy in particular were considered the ‘prize’ to be won by Grand Tourists struggling over the Alps.“

Culture is a more complex concept, as evidenced by the extent of the debate over the term. Tomlinson notes that hundreds of definitions of culture exist, "which would suggest that either there is a considerable amount of confusion ... or that 'culture' is so large an all-embracing a concept that it can accommodate all these definitions". There is a sense of culture as a complex whole, which provides an organizing concept for the widely varied 'ways of life'.

Two basic uses of the term 'culture' can therefore currently be identified in the academic literature: culture as **process** and culture as **product**.

**Culture as process** is an approach derived from anthropology and sociology, which regards culture mainly as codes of conduct embedded in a specific social group. As Clarke (1990:28) puts it, culture "designates the social field of meaning production", or the **processes through which people make sense of themselves and their lives**. The culture as product approach derives particularly from literary criticism. Culture is regarded as the product of individual or group activities to which certain meanings are attached.

When it comes to cultural tourism, it is far from being a completely new phenomenon. What has changed is the extent of cultural tourism consumption, and the forms of culture being consumed by cultural tourists. As Wynne (1992) has suggested, one of the hallmarks of postmodern consumption is the **disintegration of distinctions between 'high' and 'low' or 'popular' culture**. As these distinctions disappear, so the scope of cultural tourism expands to include elements which previously would not have been considered 'cultural' (such as popular music, modern design or match museums). As distinctions between 'culture' and 'tourism' or 'everyday life' also begin to erode, so cultural tourism can also come to include activities such as simply 'soaking up the atmosphere' of a destination, or sampling the local food. In this way, cultural tourism begins to encompass the passive consumption of culture on holiday, as well as actively seeking 'high' culture through a visit to a museum or a classical concert.
Cultural tourism is therefore changing, both in terms of the way in which tourists consume culture, and in the way in which culture is presented for tourist consumption. Culture is now becoming an essential element in tourism policies at all levels, from the European Union down to the individual municipality. Perhaps what is essentially new about this wave of cultural tourism development, however, is the fact that culture is now primarily being promoted for economic, rather than cultural ends.

**Example:**

A prime example of the changing definition and role of cultural tourism in Europe is provided by the European Cultural Capital event. The idea of designating a different city each year as 'Cultural Capital' of Europe was launched in 1983 by Melina Mercouri, Greek Minister of Culture. The idea was adopted by the European Community in 1985, when Athens became the first European Cultural Capital. The origins of the Cultural Capital event were arguably purely cultural. The event was designed to "help bring the peoples of the member states closer together" through the "expression of a culture which, in its historical emergence and contemporary development, is characterized by having both common elements and a richness born of diversity" (European Commission, 1985). The aims of the event were basically twofold: first to make the culture of the cities accessible to a European audience, and second to create a picture of European culture as a whole (Corijn and Van Praet, 1994).

However, as the event has developed, it has been used in different ways by the cities, either to support, extend or challenge the original Cultural Capital Concept.

Corijn and Van Praet (1994), in their review of the history of the Cultural Capitals, highlight the way in which different cities treated the designation. Athens, for example, concentrated on big foreign names, and ignored ancient Greek art. Florence highlighted its own historic importance, while Amsterdam projected itself as a European art city. Berlin was criticized for having an elitist approach, while the event was hardly visible among the normal cultural bustle of Paris. The turning point for the Cultural Capital event came with the designation of Glasgow in 1990. Glasgow, unlike its predecessors, was not a capital city or one of the established 'cultural destinations' of Europe (Van der Borg, 1994). Glasgow won the nomination against competition from other British cities largely on the basis of promised commercial sponsorship and the fact that it planned to use the event to stimulate urban regeneration and to boost the image of Glasgow as a cultural city. This approach apparently fitted the UK government's emphasis on public-private sector partnership, although the role of the public sector was eventually more high-profile than the government cared to admit (Todd, 1988).

The Glasgow event had an impressive range of cultural activities, including big names such as Pavarotti, and an equally impressive budget. The argument for this approach was that the
investment would be repaid directly through tourist expenditure, and indirectly through improvements in the image of the city and increased economic investment. The staging of an event concentrating on international, rather than local, culture aroused opposition from some local groups, who felt either that the money could have been better spent on basic services such as housing, or that the event should have been more culturally representative of Glasgow itself (Boyle and Hughes, 1990). The event was an economic success, however, producing a net economic benefit to the city of between £32 and £37 million (¼40 - 47 million), mainly as a result of tourist expenditure (Myerscough, 1991).

Glasgow highlighted the potential to use the event as a vehicle for economic development and image-building. The number of candidates for the nomination has substantially increased, as cities as the event is now viewed as a tool for economic regeneration rather than a purely cultural manifestation."

One of the first attempts to assess the importance of cultural tourism on a European basis was the research undertaken by the Irish Tourist Board (1988) on behalf of the European Commission. This study estimated that there were almost 35 million international cultural tourists in the European Union in 1986, of whom at least a third came from outside the EU. The study distinguished between ‘general cultural tourists’ (31 million), who visited cultural attractions as part of a general holiday trip, and ‘specific cultural tourists’ (3.5 million) with a specific cultural motive for travelling.

Two perspectives towards the cultural tourists

The consumption patterns of the service class entail a constant search for new experiences and sources of stimulation which help to distinguish the participant from the crowd. As Bourdieu (1984:249) puts it

"the sense of good investment which dictates a withdrawal from outmoded, or simply devalued, objects, places or practices and a move into ever newer objects in an endless drive for novelty, and which operates in every area, sport and cooking, holiday resorts and restaurants, is guided by countless different indices and indications".

Those in search of distinction will automatically steer away from products and places which have become ‘popular’, and seek out novel forms of symbolic distinction.

Because cultural tourists are arguably motivated by local cultures in choosing to visit a particular location, they have been identified as both a blessing and a blight as far as their social and cultural impact is concerned. Some authors have suggested that culturally motivated tourists are desirable, because they tend to be relatively few in number, and they
are also more sympathetic in their approach to the local population and their culture than other tourists (Smith, 1989). Cultural tourists also tend to spend more money than other types of visitor, and can therefore play an important role in providing financial support for local cultural manifestations. Others have suggested that it is precisely this cultural motivation which makes cultural tourists less desirable in some areas. Butler (1990) has suggested that 'alternative' tourists seeking authentic cultural experiences can open up culturally-fragile areas, acting as a 'Trojan Horse', opening the way to potentially more damaging mass tourism. Wheeler (1991) has gone further, arguing that cultural tourists who seek authentic experiences of local culture can inflict severe damage on local communities in spite of (or perhaps because of) their low numbers. Those in search of active contact with the local population are likely to cause far more disturbance by seeking out 'local’ places which may cause the friction between the local population and the tourists to increase rather than diminish.

A further consequence of the integration of high and low culture is the fact that it is now increasingly difficult to determine the boundaries of the cultural sphere of social and economic activity. In the past, high culture was regarded as being synonymous with culture, and this meant that culture could effectively be kept free of commercialism through public sector funding for high culture. As high and low culture become less distinct, however, the aesthetic basis for subsidizing certain cultural forms is eroded, and it becomes increasingly hard for high cultural forms to resist commercialization.
Europe and the cultural tourism: importance, trends, demands

Cultural tourism lets travellers experience the arts, heritage, landscapes, traditions and lifestyles of other cultures and countries. This is a broad market, with many special interests. For example architecture, archaeology, history, (music) festivals, museums, exhibitions and language. European travellers also like to include cultural experiences in other types of holidays, like adventure tourism.

Exploring cultural heritage is the most common form of cultural tourism among European travellers - UNESCO Cultural World Heritage Sites is an important factor influencing the tourists behavior. Nevertheless, the current trend towards unique experiences also offers opportunities for lesser-known cultural attractions.

Europe is a well-established market for cultural tourism. European travelers are increasingly interested in discovering new destinations, especially if these offer authentic activities that teach them about local culture. This makes cultural tourism a promising sector for developing country destinations. It also offers flexible cultural components to appeal to both motivated and incidental cultural tourists. Internet presence is important, as European cultural travelers often book holidays directly.

The cultural tourism, which increases the interaction between different cultures, makes shared values meet on the same platform, develops positive images and relations of the societies is therefore supported by the European Union. In the process of EU integration the importance of cultural tourism and its function as meeting point between citizens and countries becomes evident when the Istanbul metropolis was designated as a European Capital of Culture (ECC) for 2010.

Cultural tourism is also:

- Contributing to the export of the cultures of the member countries while respecting the national and regional variety, also at the same time, emphasizing on the cultural heritage
- Encouraging the formation of the contemporary cultural formations;
- Developing the cooperation and international organizations between member countries and third world countries;

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17 Hughes and Allen, 2005
Based on the level of interest in culture, there are two types of cultural tourists:

- Motivated cultural tourist

This group generally consists of people with a higher education, middle to high income, high interest in culture, high interest in social and environmental issues.

Experiencing and learning about local culture is their main travel purpose. Motivated cultural tourists tend to be prepared before going on holiday; they study the destination thoroughly. They like to see and learn as much of a destination as possible. This group is quite demanding.

- Incidental cultural tourist

This group likes to add cultural components to their holiday. However, they have another primary reason for their trip. They may participate in cultural activities as long as they fit their plans.

Cultural tourists can also be segmented by stage of life. Each age segment has different interests:

- Millennials: 20–39

This segment mainly consists of couples and groups of friends. The majority of this group prefers sun and beach holidays. However, they are increasingly incorporating cultural elements. Women are generally more interested in cultural elements than men. Men prefer more action-oriented activities. Around a third of this segment is interested in holidays with an emphasis on culture.

- Middle-aged: 40–54

This is the largest cultural traveler segment. They are often motivated cultural tourists.

- Older generation

Europe has a relatively large generation of people between 55 and 70 years old. This generation generally has more time and money available than other groups.

Cultural holidays are the most popular holidays among this group. They are often experienced travelers, generally traveling at least once a year. They value their annual long holiday and mostly travel in couples, with a full schedule of cultural activities. They prefer destinations they have wanted to see all their lives (bucket-list travel). Quality is important to them. They look for comfort, more so than the other segments.
Families with children: parents 25-50

Many families combine a relaxing holiday with cultural activities. **Parents want to introduce their children to other cultures.** Both families with young children and families with older children are interesting segments. Health and safety at the destination is important to them. Convenience is a deciding factor.

When it comes to destinations,

The attractiveness of a cultural destination varies greatly from person to person. Most European cultural travelers **focus on the famous cultural attractions of Europe first.** Then they consider travelling to famous sites further away or least explored within the territory of Europe.

Health and safety are important to European cultural travelers. They often inquire about the safety of their destination. Especially safe driving can be a concern. They want to know about drivers and testing of equipment. Lacking cleanliness of rooms and smoke detectors are an annoyance at the destination. This might result in bad reviews after their holiday.

Safety is important to European travelers, especially because some developing countries are politically unstable. Most commercial tour operators don’t offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has led to a drop in tourism arrivals to destinations such as Mali, Egypt and Venezuela, but has opened opportunities for exploration of other which are of discernable closeness however unexplored yet, for example the Balkans.

Cultural holidays are often subject to price changes – to save money, European travelers look for cheap deals and shorter holidays. However, this is not so much the case for cultural holidays to Developing Countries. Travelers understand that these holidays are more expensive and are willing to pay more for a quality experience.

Tourism providers’ eco-friendly activities are increasingly important to European travelers. However, only some actually choose a tourism provider based on its sustainability policy. Cultural tourists value sustainability less than community-based, nature or wellness tourists. However, they do appreciate it when you offer sustainable elements and as they look for flexibility, prefer to compose their own holidays by combining separate components.

When it comes to cultural tourism in the three cities – Montana, Sofia and Nis, its development is highly fragmented and unproportional; Nis presents the tourists with opportunities for cultural activity and is able to provoke interest of various types – momentous and/or lasting, Montana, although having favourable geographical location in terms of climate and surrounding, is part of the North-Western region, which is characterized with negative socio-economic trends: depopulation, unemployment, lack of investments and opportunities for development, which contributes to its low recognizability among tourists.
and the fact that it is not usually considered “the typical” cultural destination. Sofia, on its part, has experienced tremendous growth in the recent years and constantly attracts the tourists with its accessibility, low prices and numerous cultural heritage sites.

Having in mind the abovesaid, the best way to “connect” the three cities without having to face too strongly the unproportionality of the development issue, is through common cultural routes which combine not only knowledge on different topics such as literature, poetry, history, etc. but also incorporate the nature elements in order to provide the tourists with multi-layered experience and to establish a certain balance in the perspective as Montana, Sofia and Nis are all cities that can fascinate with environmental sights.

A trend that has to be taken into consideration when making attempts to re-organize the cultural life of a community is the gaining importance of digital art as a way of overcoming deficiencies and responding to the desires of the post-modern travellers to “witness everything at once”.

"It's there, it's responding to you, you can see it, but as you try and approach it you can't actually feel it. For me, the idea is to question this distinction between the physical and the virtual.”

Digital art is an artistic work or practice that uses digital technology as an essential part of the creative or presentation process. After some initial resistance, the impact of digital technology has transformed activities such as painting, drawing, sculpture and music/sound art, while new forms, such as net art, digital installation art, and virtual reality, have become recognized artistic practices. In an expanded sense, "digital art" is contemporary art that uses the methods of mass production or digital media.

A case example could be the Digital Art Museum in Paris, where through state-of-the-art visuals and audio, artists’ works are transformed as images of their paintings and are being projected (using 140 laser video projectors) on to (and across) 10-metre-high walls over the vast 3,300 square meter surface area of the renovated 19th-century building. These images provide an immersive and panoramic show throughout the space, to a sound track of music by Wagner, Chopin, Beethoven and others, using an innovative "motion design" sound system, with 50 speakers programmed to complement the 3D visual experience.

Digital art spaces are of high importance, especially when trying to unite destinations with their specificities, strengths and deficiencies that is the case of Sofia, Montana and Nis. Such space can be constructed on the territory of the cities, combining their most important cultural contributions to the European art legacy and positioning them as contemporary cultural destinations, able to respond adequately and with long-term vision to the demands of their visitors.

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However, before initializing such structures, several issues (which are valid for all three types of tourism, object of this strategy – cultural, adventure and speleology) need to be addressed:

- **Need of improvement of the hospitality services**: through training courses and more efforts for a better qualification of the staff and developing their ability to deal with different situations of risk;

- **Not enough facilities available at the disposal of children, people with limited physical abilities and elderly**: low compliance with safety standards in some areas; inclusion on the topic in the social dialogue, direction of funds towards modernization of the existing and construction of new facilities, able to ensure a qualitative stay of the visitors;

- **Low utilization of the available resources, ineffective marketing strategy, limitation of the reached people**: insufficient rate of digitalization of the tourist offer; through Elaboration of a competitive marketing strategy and promotional activities in compliance with the international standards; enhanced digitalization of the tourist offer, implementation of new online services of assistance to the tourists;
Target groups and behavioral trends:

Millennials

Millennials currently account for **approximately 20% of international travel**, spending an estimated USD 203 billion around the world. By 2040, they will range in age from 45 to 60, with the oldest beginning to approach retirement, and having accumulated additional wealth over the next 25 years, their proportion of total spending is expected to increase substantially.

Data indicates that Millennials **take more trips annually compared to other generations** – at four or more per year. However, trips tend to be shorter in duration compared to other demographic groups (Globetrender, 2017). Furthermore, they are more likely to pick **travel experiences that they consider to be “authentic”** – preferring to head off the beaten track and “live like a local” (Future Foundation, 2016). In that sense, the three cities – Sofia, Montana and Nis have to **focus their efforts towards creation of a common place, where the travellers can “feel” most accurately the atmosphere of the places and the lives of the local citizens; they could be presented with the different customs and specific traditions of the regions, such as beekeeping, carpeting, carpentry, etc.**

A study by Airbnb found that **many Millennials consider travel more important than other priorities, including buying a home or a car**. Additionally, Millennials surveyed in the United States, United Kingdom and China **valued experiences more than ownership** (Airbnb, 2016). When combined with a second nature use of digital technologies, this group are more likely to create their own travel itineraries than to rely on the advice of travel agents or participate in package tours.

They also lead in decision making - when planning travel, Millennials are used to having their options conveniently available to them; they want to be able to research and book their trips and tours online, which circumstance requires **high digital presence on the side of Sofia, Montana and Nis**, which is currently lacking and could be a significant issue for the achievement of the aims of the strategies if a change is not pursued systematically.

Adventure seekers

Adventure travelers most commonly present the following characteristics:

1) They consist of three separate subgroups - Adventure enthusiasts (hardcore adventure seekers who want high-impact excursions); Basic adventurers (moderate adventure seeks who
desire medium-grade adventure excursions often with secondary cultural activities attached); and grazers (low-impact adventures tied into more leisurely, beach-based destinations). In accordance with their resources, the three CBC cities should focus on group a) and b).

2) Adventure travelers, though they transcend the traditional classifications of millennial, baby boomer, Generation Xer, and others, usually have higher levels of disposal income though are often time-poor. Because of their time constraints - work, family-life, or other restrictions - they often wait several years between vacations and thus desire experiences that will create lasting memories. – Here the relatively low prices in Sofia, Montana and Nis wouldn’t be a factor of importance and efforts should be dedicated towards the quality of the experience.

3) Much less interested in soft adventures or custom, guided tours, the majority of today’s adventure travelers seek self-guided, cultural-based experiences that are at once curated and at once individualized to their taste. It may sound like a contradiction in terms, but adventure travels want to experience the places they visit with a subtle guiding hand to help them wade through the wealth of information and destinations available to them. This is especially true in the emerging markets in adventure travel, particularly those in northeast Asia, China, the Arctic and the Caribbean.

While so many would-be travelers are eliminating the need for tour operators by utilizing the internet to create custom travel experienced tailored to their specific tastes, adventure travelers are continuing to avail themselves of tour operators for the knowledge, convenience, and expertise necessary to complete complicated travel bookings that often include high-octane activities and excursions.

Adventure travelers crave once-in-a-lifetime experiences often with a heavy physical component to them - mountain climbing, rafting, base jumping, and other thrill-seeking activities - and tour operators who understand this market and leverage the right tools and strategies to capture it can expect to experience robust growth and a stronger play in today’s modern travel industry.

According a 2015 report by the Adventure Travel Trade Association, 4 out of every 10 vacations or trips includes some element of adventure travel - be it ‘hard’ adventure travel activities like mountain climbing, or what the ATTA refers to as ‘soft’ excursions that might include more beach-based activities such as sailboating, kayaking, snorkeling, and other low-impact adventures.

In terms of where adventure travelers ‘live,’ it should come as little shock that they do spend a majority of their time online researching prior to booking a vacation. In fact, more than 60 percent of adventure travelers say they spend a bulk of time - an average of about 40 hours - using the internet to help examine potential destinations before completing a booking.
Solo Travelers

Solo tourism is travel undertaken by a solo person - either single or in a relationship. Solo travel can be in line with someone’s way of life. It can also be something someone does once in a lifetime, at a crossroad in life (divorce, retirement) or to pursue a personal dream (pilgrimage, climbing a mountain). There are no tourism activities that are strictly limited to solo tourism - in fact, most forms of tourism are suitable for solo travellers, including adventure tourism, rural tourism, cave tourism, cultural tourism and cruises, etc. Reasons for people to travel solo vary from enjoying solitude and freedom, meeting new people or obtaining a sense of empowerment while doing something on their bucket list.

Traveller profile:

Some general characteristics of European solo travellers are that they have a:

- higher socio-economic background and middle to high income;
- strong desire to travel;
- strong interest in culture and food;
- digitally educated;

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In addition, solo travellers typically travel for a long time (gap year, backpackers, volunteers), or a relatively short time (self-development, course or relaxation). The most important barriers to solo travel are safety concerns and fear of loneliness. Solo travellers are often fond of their independence, but they rarely really want to be alone. So even if they like to do their own thing, they still want to be able to connect with other travellers or local people at some point in their trip.

Tour operators around the globe have witnessed double-digit growth in solo travel bookings within the past few years. The greatest increase in demand occurred among travellers aged 50 years and older. This segment consists of more women than men. Women solo travellers like to travel to exotic destinations and are looking for cultural experiences. Some are also interested in soft adventure.

**Is solo travel really growing?**

By all accounts, yes.

Solo travel is one of the fastest growing tourism segments in Europe. The number of singles is growing, as is the number of people that travel solo by choice. Self-development and unique experiences are important aspects of solo travel. Personal guided tours are especially popular.

Most importantly, female solo travellers want to embrace new and raw experiences, not the typical 5-star hotel and spa we see in advertisements.
Solo travel trends:

- A study by Booking.com of 20,500 global travelers that was released in May of 2018 found that there "is also a surge in solo travel ... with two fifths (40%) of global Baby Boomers having taken a solo trip in the last year, and a further fifth (21%) planning to take one in the future."

- Solo is a top trip they'd do again. Again from the Booking.com study, 34% or respondents said that solo travel is among the "top five trips that they have already been on and would like to go on again".

- Roughly one in four people say they will travel solo in the next year (2018) — and that’s on the rise, according to a survey of 2,300 people by marketing firm MMGY Global.

- Between January 1 2015 and December 2017, the number of searches on Google for solo travel has risen significantly. The graph indicates approximately a 40% increase in searches for solo travel.

- The popularity of guided tours among solo travelers grew from 21% to 46% between 2013 and 2015.

- Between 2013 and 2015 the percentage of people polled who travel on their own grew from 15% to 24% according to the Visa Global Travel Intentions Study 2015.

Understanding the rationale behind solo travelling:

Almost one third of European households are a single-person household -the number of people who are single (by choice) at various stages in life is increasing. In 2014, 32.7% of European households consisted of a single adult without children. In the past ten years, this number increased at an average annual rate of 2.2%. The number of single-person households is expected to continue to increase for at least another five years. The percentage of single-person households is highest in: Scandinavia, Germany, Austria, Benelux, Baltic countries, France. Even though many solo travellers are not single, single people are more likely to travel alone. Therefore, such a percentage of single-person households indicates promising source markets for solo tourism.

This trend is due to various developments, including the: tendency of women to outlive their partners increase in the rate of divorce and separation affordability of living alone by choice.
gradual shift of populations towards urban centres. As the number of single-person and single-parent households in Europe grows, so does the demand for solo tourism. Ageing population Europe currently has around 90 million senior citizens (people aged 65 or above). This number is rising quickly, due to the ageing population. In 2005, 17% of the population in Europe was above the age of 65. By 2030, this percentage is expected to have increased to 25%. Seniors (predominantly women) are largely represented in the solo-traveller target group. This growing population, which is healthier and wealthier, is fuelling demand for solo-travel products. **Like most European travellers, solo travellers are looking for something unique and authentic.** They are interested in the typical local culture of their destination. **In recent years, authenticity has become a major factor in tourism.** This is not expected to change anytime soon.

![Figure 2: Distribution of single-person households in European countries](source: Eurostat)

**Self-development**

Recent years have seen a **sharp increase in the demand for self-development** and learning holidays. These may involve: meditation, yoga, detox programmes, cookery courses, creative writing. Such self-development activities are highly suitable for solo travellers. Many people who are planning solo holidays consider adding self-development components to their itineraries.

Preferences of solo travellers:

- The search for more
On long-haul holidays, European solo travellers generally seek a variety of experiences. They combine cultural or adventurous activities with, for example, culinary experiences. Solo travellers with a specific lifestyle, like wellness-oriented or food-minded ones, like their holiday to suit this. When it comes to activities during their holiday, solo travellers from Europe are not very different from European travellers in general. However, they are very keen on booking personal guided tours. According to the Visa Global Travel Intentions Study 2015, 24% of solo travellers included this in their last trip.

- Digitally prepared

European solo travellers increasingly research and plan their trip online. To gather information and share experiences they use: peer review sites (TripAdvisor, Lonely Planet), travel forums, social media - Instagram, Facebook, Flickr, Twitter and YouTube. Solo travellers also increasingly use apps to plan or research their trips and meet fellow travellers. Online research is a trend that has increased exponentially over the past five years. Although growth has peaked, the use of internet to research tourism will continue to increase. It is predicted to remain the most important research channel for years to come.

- Safety concerned

Safety is especially important to solo travellers when it comes to selecting a destination. Married solo travellers often prefer domestic trips. Single solo travellers are more likely to choose international destinations. Cities and towns are the preferred locations for solo travellers, followed by beaches and mountains. According to European tour operators, solo travellers are increasingly looking for adventure. Solo travellers are often certain about their destination, but flexible about what they are going to do there. This offers opportunities for tourism companies to attract tourists on the spot.

- Alone, but not lonely

Solo travellers often like to meet people during their travels. They prefer accommodation with shared social spaces, for example communal eating, a (small) bar, lounge, communal garden, etc. Accommodation pricing is generally based on two people. Therefore providers often charge a ‘single supplement’ to solo travellers, of 10–100% on top of the standard rate. Solo travellers may consider this unfair and prefer accommodation that makes them feel welcome travelling alone. With the increasing popularity of solo travel, more and more accommodation providers are waiving the supplement and/or offering single rooms.
Global changes affect us all. More travelers are aware of the impact their experiences have on the planet and as a result, more are opting for sustainable measures in their travel.

*Quote:*

"2017 has been appointed The International Year of Sustainable Tourism by the UN “as a unique opportunity to advance the contribution of the tourism sector to the three pillars of sustainability – economic, social and environmental, while raising awareness of the true dimensions of a sector which is often undervalued”

-UNWTO Secretary-General, Taleb Rifai

Global campaigns have been set in place to promote more sustainable forms of travel and destinations **should expect a shift in the mindset of travelers everywhere.** They will be more interested in the environmental, economic and social impact they're making at the destination they visit and are likely to support companies that embody these values.

There will likely be many mindful changes ahead for the modern traveler, **like staying closer to home to reduce their carbon footprint.** Tour businesses with a strong awareness of the
impact they’re making will benefit greatly from their already established ecotourism practices. Companies and destinations **will need to develop a strong social focus.**

Expectations towards travel behavior in the upcoming years:

- Travelling closer to home to reduce carbon footprint;
- Choosing companies with a strong social focus;
- Growing interest in voluntourism programmes that leave a long-term positive impact;
- Homestays gaining more interest than traditional hotels or bed and breakfasts;

Responsible tourism is any form of tourism that can be consumed in a more responsible way. “Responsible tourism is tourism which: minimizes negative social, economic and environmental impacts, generates greater economic benefits for local people and enhances the well-being of host communities.

There still exists the consideration that responsible and sustainable tourism a niche market—a market separate from mainstream tourism operations, but the industry cannot be so simply demarcated. **Responsible tourism transcends needless delineations** and should be an underlying current embedded in all activities and business decisions within the travel and tourism sector.

**What are most travellers seeking in your destination?**

*Source: Trekksoft*
In the beginning of 2018, an independent Sustainable Travel Report was launched\(^{19}\), indicating that the green travel trend continues to gain momentum with a large majority of global travelers (87%) stating that they want to travel sustainably, and nearly four in 10 (39%) confirming that they often or always manage to do so. However, 48% indicate they never, rarely or only sometimes manage to travel sustainably, suggesting that while promising strides are being made for a greener future, there is still plenty of room to turn intentions into action.

‘Sustainable travel’ is a subjective term that has different connotations for different people. However, for almost half of travelers (46%), ‘sustainable travel’ means staying in eco-friendly or green accommodations, topping the list of what people think of when hearing the term. The top reasons travelers give for choosing these eco-friendly places to rest their heads are to help reduce environmental impact (40%), to have a locally relevant experience (34%) and wanting to feel good about an accommodation choice (33%).

Looking ahead, more than two-thirds (68%) of travelers intend to stay in an eco-accommodation in 2018, reassuringly up from 65% in 2017 and 62% in 2016. Additionally, the percentage of travelers who have not considered eco-friendly stays because they were unaware of their existence continues to decline, resting at 31% this year, compared to 39% and 38% in 2017 and 2016 respectively.

When it comes to what inspires people to travel more sustainably, it seems that travel itself is the biggest motivator. Six in ten (60%) travelers indicated that they found the impressive natural sights visited on past travels as their inspiration to travel more sustainably, while more than half (54%) said seeing the visible impact that tourism can have on destinations serves as their inspiration.

\(^{19}\) Research commissioned by Booking.com and independently conducted among a sample of adults who have taken a trip in the last 12 months/plan to take a trip in the next 12 months. In total 12,134 respondents were surveyed across 12 markets (1000+ from Australia, Brazil, Canada, China, Germany, France, India, Italy, Japan, Spain, the UK and the US). Respondents completed an online survey in February and March 2018.
Sustainable travel was one of the most talked about buzzwords in 2017, but 2018's newest travel term will be “conscious travel.” While sustainable travel mainly focuses on a traveler’s carbon footprint and the local economy, conscious travel includes an added element of community.

Sustainable tourists’ profile:

The complexity of tourist behavior has been frequently stressed in numerous sociological, psychological, and managerial studies, dating back to the 1970s. A wide variety of analytical models and variables have been used (socio-economic, demographic, psychographic) to identify different tourist profiles and their particular choice mechanisms, motivations, and behaviors. They can be synthesised to the following:

- ecotourists
- nature-based tourists
- responsible tourists
- green tourists

A general observation can be made that these travellers are older, better educated, and better off than general travellers and mass tourists. Various studies have produced conflicting data on tourist gender: some show a prevalence of male/female tourists, in others there is no
significant difference between the genders. Regarding motivation and behavior, on the other hand, the main similarity between the segments (ecotourists, nature-based tourists, responsible tourists, green tourists) is **tourist interest in products and holiday experiences consistent with sustainable principles**. What differentiates them is their levels of sensitivity to various aspects of sustainability. In fact, although it differs in intensity, a focus on the environment and natural resources is the main characteristic shared by ecotourists, nature-based tourists, and green tourists. However, the first group also expresses particular interest in the educational and learning aspects of tourism, while the second focuses on the environment, identifying the contemplation of nature as their main motivation. Lastly, green tourists are often identified as being interested in rural destinations. The social dimension of sustainability, on the other hand, is more significant for responsible tourists, who are particularly sensitive to the relations between tourists and host communities and the socio-cultural impact of tourism on a destination.

In recent years, the scientific community has increasingly turned its attention to an examination of one particular segment of tourist demand—*the young as they are considered to be “the new visitors in the tourism market”*. More than 1 in 10 European travellers book sustainable holidays. These sustainable travellers are generally higher-educated, well-travelled people of all ages from higher socioeconomic groups. They mainly come from more mature travel markets in northern and western Europe, which provides opportunities their interest to be captured by “unknown” destinations such as Bulgaria, Serbia, etc.

Furthermore, according to a global survey carried out by TUI Group:

- More than half of all respondents criticize lack of information and choice;
- Around two thirds of holidaymakers are prepared to make lifestyle trade-offs to benefit the environment;

Other important behavioral trends:

- Thinking of others

More than ever, travelers are and will be mindful of their impact on the economy as well as the lives of those living in the destination that they are visiting. In addition to making a conscious effort to go on eco-friendly tours and buy organic produce at local markets, travelers tend to spend their money in ways that benefit the local economy and community, rather than large corporations and foreign investment companies. That includes opting for small boutique hotels over big chain hotels and local shops over international malls.
“The importance of this market segment lies in the fact not only that it is becoming larger but also that it represents the market of the future.”

- Always prepared

Sustainable travellers tend to learn as much as possible about their chosen destination and take time to understand the customs, norms and traditions in order to avoid behavior that could offend the local population.

- Not afraid to share their opinion

Online reviews and feedback have become important sources of information on the sustainability of tourism providers. Travellers frequently share their experiences on social media platforms, travel review sites and travel blogs. This information can alert other travellers and tour operators to outstanding sustainability performances, as well as to businesses that make bogus claims about their sustainability (“greenwashing”).

“Tourism companies need to consciously manage their reputation online – guests can and will find everything.” - Lucy Fuggle, co-author of the 2018 Travel Trends Report and Head of Content at TrekkSoft

9 out of 10 travelers think that reading online reviews is important and 95% of travelers trust reviews on third party sites.

- Out of the box

In light of the growing overtourism problem in major cities around the world, travelers increasingly search for off the beaten path destinations in the coming years. The rapid growth of tourism in cities like Amsterdam, Paris and Venice has caused locals to feel pushed out of their own cities, with visitors taking over their city streets, public spaces and even housing, which naturally decreases the quality of life for residents. The sustainable tourists are not afraid “to think out of the box” and to pursue their travelling goals someplace else, where no additional pressure will be imposed.

Seniors

Over the past decades, leisure travel has become increasingly popular in older segments of the world population, as a consequence of global factors such as a rise in life expectancy, improved health conditions, a higher disposable income, and increased availability of discretionary time in retirement age.

It’s fair to say the perception of seniors is changing; they’re active, working, and more engaged than ever. Today’s seniors are up for anything, and they’re traveling like never before.

Seniors tourism is predicted to be a major force in the 21st century as populations age. While seniors are as diverse as any other demographic sector, and many seniors do not have the resources to travel, the following generalizations can be made about senior travellers:

- They are likely to be more experienced travellers;
- They have more time to spend on travel and leisure;
- Travel is often a lifestyle priority, and many are prepared to pay for travel on a regular basis;
- They generally have more savings and assets and fewer financial commitments, especially in the early years of retirement;
- They are more flexible with regards to travel times, often preferring to travel in off-peak seasons;
- They are generally more discerning, and demand higher quality services;
- Health issues may influence travel choices, especially amongst older tourists;

Figure 3: Share of each age category in tourism of EU residents (smoothed series) and in the EU population aged 15 years or over, EU-28, 2014, (%)

Source: Eurostat
Senior travel as a whole is changing as the cohort gets larger. While cruises are still incredibly popular, unusual destinations, experiences, and objectives are influencing how seniors travel altogether.

Active, adventure-based vacations are one of the fastest-growing segments in the industry. This holds true among seniors, too, particularly among those looking to check off “bucket list” items as they age. Seniors say staying physically active helps them stay young both in body and in spirit.

Common senior adventures include:

- Hiking
- Wildlife watching
- Off-road vehicle or ATV riding
- Fishing and camping

They are also expressing a renewed interest in so-called “educational” vacations. They say that learning and expanding their horizons helps keep them youthful, and also helps them relate better to their families and the world at large. Educational tours can encompass anything from village visits on foreign islands to birdwatching hikes, but the goal is the same: to enlighten and inform while entertaining.

Common senior educational trips include:
• People-centric activities where seniors engage with local residents
• Animal education and/or refuge missions
• Skill-building trips that teach seniors how to do something new

Perhaps the most notable trend in senior travel is the move towards high-end tourism. Seniors, although they report being cost-conscious, aren’t as bound by budgets as their younger counterparts. They’re willing to spend more for a world-class experience whether that means better accommodations, easier transportation, or customized travel itineraries for seniors.

Common ways seniors are traveling “better”:

- High-end accommodations with resort-style amenities
- Spa visits and amenities like massages, hot springs, or skin treatments
- First-class food, particularly that which is “local” in nature
- Personalized service through a concierge travel service

Nevertheless, that is not the case for the seniors living on the territory of Eastern Europe, more specifically Bulgaria, Serbia and their neighbors, where the standard of living and life expectancy is lower, less seniors are economically active and engaged in a travel activity (11 % in Bulgaria), as becoming evident from graphic 2. In that sense, the seniors from these countries tend to distinguish themselves from the abovementioned categorization – when deciding to travel, important factors are: affordable prices as their budget is often tight, relatively close destinations due to health issues, more “traditional” activities such as going to the beach, walks in the nature, food tourism, etc. on the expense of the pure adventure ones. In that sense, when targeting the seniors from the parts of Europe where the indicators – standard of living, health, incomes are higher, the profile of the region (Montana, Sofia, Nis) should be focused on the quality of the experience and when the target group are seniors from counties with lower standard of living, the marketing campaign should be centered around the affordable prices, the close distance and the meaningful experience.

Graphic 1: European seniors who are engaged in travel activities
Source: Eurostat
Seniors say that travel accomplishes three things for them. One is to get away from everyday life, particularly important when the doldrums of retirement have begun to set in. The second is to reconnect with friends and family, leading to a marked increase in the number of multigenerational trips each year. The third is to relax, a term that means different things to different people.

Self-drive holidays suit the younger end of the senior market, who seek freedom, adventure and independence. Some stay in motels and B&Bs, but many are ‘grey nomads’, retirees on extended camping/driving holidays. For the most part, however, older tourists are more likely to choose guided package tours than those in their 50s and 60s. Coach tours are especially popular, as they are relatively inexpensive and provide security and companionship for those travelling alone. Also, because of the numbers involved, tours are often discounted, especially
in low season, and older travellers seem more willing to travel off-season to take advantage of the reduced costs.

Another reason that older tourists tend to prefer guided tours is health. Health concerns can stimulate travel in those who fear that they may not be well enough to travel later or who want to enjoy the experiences despite poor health. On the other hand, poor health can be a deterrent, though the risk of being unable to get care is reduced when older tourists travel in organised groups.

Destinations can be chosen that offer both active attractions that require a lot of walking and also, restful attractions such as good cafes, parks, pleasant views, or local museums and shops for those who wish to spend the day strolling or relaxing.

Table 2: Share of population not participating in tourism, by age group, 2014 (%)  

Source: Eurostat
It can be said that **senior tourism is a segment that has not held great importance in the tourism industry**, although this trend is changing. The importance of the senior citizen segment in markets, in general, is determined by the process of aging (Norman et al., 2001:115; Szmigin and Carrigan, 2001:1092), which is linked to improvements in the economic status and the health conditions of this group (Gunter, 1998:6). In this sense, some authors suggest that the unprecedented change in the demographic structure of the population will entail a shift in markets (Nedelea and State, 2008).

With the increasing ageing of the world’s population, **seniors are pointed out to become the most valuable consumer segment**. These have increasing available time to travel and they have the disposable income to spend in travel experiences as a primary motivation.

| Non-tourist share of respective age groups within the respective age groups | 15 years or over | 15 to 24 years | 25 to 34 years | 35 to 44 years | 45 to 54 years | 55 to 64 years | 65 years or over |
|---------------------------------------------------------------|-----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| **EU-28(*)**                                                  | 40.0            | 37.2           | 37.1           | 33.0           | 37.7           | 39.0           | 51.8           |
| Belgium                                                      | 43.4            | 46.6           | 45.0           | 25.8           | 30.1           | 39.2           | 64.0           |
| Bulgaria                                                    | 74.2            | 70.4           | 66.3           | 66.0           | 72.2           | 78.5           | 89.0           |
| Czech Republic                                              | 16.0            | 10.8           | 12.5           | 7.5            | 14.5           | 16.2           | 31.1           |
| Denmark                                                     | 17.1            | 8.2            | 12.5           | 12.0           | 12.4           | 17.4           | 32.9           |
| Germany                                                     | 24.0            | 17.2           | 19.2           | 12.2           | 22.5           | 24.1           | 38.4           |
| Estonia                                                     | 28.9            | 15.3           | 9.4            | 14.0           | 29.3           | 39.1           | 56.2           |
| Ireland                                                     | 25.9            | 27.1           | 27.5           | 18.3           | 24.0           | 24.5           | 35.3           |
| Greece                                                      | 61.7            | 58.6           | 56.1           | 50.9           | 57.1           | 63.5           | 76.7           |
| Spain                                                       | 47.1            | 47.0           | 48.2           | 39.8           | 41.7           | 43.4           | 60.0           |
| France                                                      | 28.8            | 36.5           | 25.4           | 18.2           | 35.7           | 21.2           | 34.0           |
| Croatia                                                     | 50.9            | 14.9           | 63.0           | 40.9           | 46.7           | 59.5           | 68.4           |
| Italy                                                       | 62.3            | 56.8           | 60.5           | 54.3           | 56.3           | 60.5           | 75.4           |
| Cyprus                                                      | 36.2            | 22.4           | 26.6           | 31.0           | 41.0           | 47.7           | 62.1           |
| Latvia                                                      | 48.0            | 30.8           | 30.5           | 34.2           | 44.2           | 58.1           | 75.7           |
| Lithuania                                                   | 42.3            | 27.0           | 27.7           | 23.5           | 32.5           | 56.1           | 74.9           |
| Luxembourg                                                  | 17.4            | 15.4           | 13.3           | 11.9           | 13.7           | 18.4           | 33.3           |
| Hungary                                                     | 47.0            | 47.8           | 38.4           | 42.0           | 41.5           | 45.4           | 62.5           |
| Malta                                                       | 47.3            | 31.5           | 24.4           | 54.5           | 28.9           | 66.8           | 70.3           |
| Netherlands                                                 | 17.8            | 12.1           | 15.1           | 14.7           | 16.2           | 14.5           | 29.8           |
| Austria                                                     | 24.4            | 17.5           | 20.3           | 10.6           | 10.0           | 22.5           | 40.7           |
| Poland                                                      | 46.9            | 34.2           | 43.8           | 42.1           | 41.7           | 54.0           | 62.5           |
| Portugal                                                    | 61.6            | 57.4           | 62.6           | 52.4           | 63.5           | 59.3           | 69.9           |
| Romania                                                     | 75.2            | 69.1           | 62.8           | 70.1           | 78.4           | 80.3           | 87.4           |
| Slovenia                                                    | 37.1            | 17.5           | 22.0           | 24.2           | 31.5           | 45.2           | 69.2           |
| Slovak Republic                                             | 46.3            | 41.1           | 47.1           | 27.3           | 42.4           | 54.1           | 68.5           |
| Finland                                                     | 9.2             | 4.1            | 3.7            | 3.7            | 5.3            | 9.1            | 21.4           |
| Sweden                                                      | 23.5            | 45.5           | 37.1           | 15.9           | 4.5            | 29.3           | 14.5           |
| United Kingdom(*)                                           | 35.5            | 43.3           | 26.9           | 31.4           | 38.4           | 26.0           | 41.8           |
| Switzerland                                                 | 16.9            | 24.9           | 14.6           | 4.5            | 13.2           | 17.3           | 26.7           |

(*1) EU-28 aggregate estimated for the purpose of this publication, using available data.  
(*2) 2012 data.
**Figure 4: Specificity of touristic activities according to age group**

<table>
<thead>
<tr>
<th>62-89 group more specific activities</th>
<th>75-81 group more specific activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>DIY, gardening</td>
<td>Shopping</td>
</tr>
<tr>
<td>Natural heritage sites</td>
<td>Sports</td>
</tr>
<tr>
<td>Fishing</td>
<td>Beach</td>
</tr>
<tr>
<td>Gastronomy, oenology</td>
<td>Zoos and amusement parks</td>
</tr>
<tr>
<td>Cultural activities</td>
<td></td>
</tr>
<tr>
<td>Thalasotherapy, health</td>
<td></td>
</tr>
<tr>
<td>Fauna and flora observing</td>
<td></td>
</tr>
<tr>
<td>Walks</td>
<td></td>
</tr>
</tbody>
</table>

**Source:** Silver Tourism project
Competitors on the market – Slovenia, Romania, Croatia

Slovenia

- Adventure tourism: richness of natural resources, precise focus and systematical governmental efforts;
- Speleo tourism: 23 explorable caves, one of world’s longest karst cave systems, “the underground Grand Canyon”;
- Cultural tourism: A well-preserved cultural heritage, some of the oldest archaeological findings in the world, architectural masterpieces of Plečnik and his successors;

From the start of 2017 and up to the end of August, 8.8 million overnight stays were recorded in tourist accommodations in Slovenia, which is **12% more than in the same period last year**. An increase in overnight stays can be seen for foreign as well as domestic tourists.

Foreign tourists generated almost 6 million overnight stays (or 68%), 17% more than last year, and almost 2.5 million arrivals (18% more). Domestic tourists generated more than 2.8 million overnight stays, 5% more than last year, and more than 925,000 arrivals (6% more).

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21 Source: Lonely Planet
In August 2017 tourists from the following key markets generated more overnight stays than in August 2016: the Netherlands (36% more), Germany (31% more), France (13% more), the United Kingdom (6% more), Austria (5% more) and Italy (3% more).

**Quote:**

“Many authors have analyzed the socio-demographic characteristics of different types of tourists or rather, tourists with different motives for traveling. Ryan (2003) even affirmed that there is a link between income and motivation for traveling; when material needs are satisfied, experiential needs become important.”
• Slovenia is the first country in the world to be, as a whole, declared a Green Destination. It earned this title based on the criteria that show the high level of its commitment to sustainable tourism. In 2016, Slovenia Green Destinations and Ljubljana, European Green Capital, were ranked among the 100 most sustainable tourist destinations.

• It’s one of the world’s most environmentally-friendly nations. The Environmental Performance Index (EPI), produced by the Yale Center for Environmental Law & Policy, is based on an assessment of the policies of 180 nations, reflecting whether they are meeting internationally established environmental targets or, in the absence of agreed targets, how they compare to one another. Slovenia performed admirably, with a rating of 88.98. Only four nations (Finland, Iceland, Sweden and Denmark) can better it.

• A remarkable 53.6 per cent of Slovenia is protected land, a higher percentage than any nation on Earth except Venezuela. Steve Fallon adds: “With more than half of its total area covered in forest, Slovenia really is one of the greenest countries in the world.”

A factor that shouldn’t be neglected when analyzing the considerable growth in the interest towards Slovenia as a tourism destination is the strong marketing campaign, which
combined innovation and conventional methods in a way that sensibly reached the travellers and to engage them in the Slovenian project.

The key objectives of the **2017–2021 Strategy for the Sustainable Growth of Slovenian Tourism** are to increase recognizability and promote Slovenia as a green, active and healthy destination for 5-star boutique experiences, increase an added value of tourism and income from the export of travels, focus on demanding visitors seeking high-quality diverse and active experiences, tranquility and personal benefits, form innovative products of higher added value based on sustainable development, depersonalization, geographical dispersion of tourist flows, provision of suitable and motivated staff, improvement of flight connections and accessibility, enhanced investments and modernization of the infrastructure.

The global digital campaign, “**Slovenia. Make New Memories.**” reached over 117 million people in 21 countries. Furthermore, the first broadcast of the Tour of Slovenia cycling race on Eurosport reached 113 million viewers. Also the number of followers on social networks of the STB increased: on FB by 32%, **on Instagram by 183%** and on Twitter by 26%. In 2017, the STB implemented another campaign, i.e. “**Discover SLOVENIA, Europe's best-kept secret.**” Together with Expedia, the world’s largest online travel company for reservations, the STB held a campaign in order to boost the possibility of selecting Slovenia as a tourist destination for 5-star experiences and to also promote reservations in the low season. In addition to increased digital activity, the STB prepared various activities with the ambassadors of Slovenian tourism, such as the best female chef in the world, Ana Roš, and many athletes. It issued digital catalogues and publications in 17 languages in 850,000 copies.

Awards received in 2017 also contributed to Slovenia’s recognizability as a green, active and healthy destination. The STB received the prestigious award, **National Geographic World Legacy Destination Leadership for sustainable management of a destination** and **The Golden City Gate 2017** for the promotional video “Slovenia. Make New Memories.”

The Association of Travel Journalists of Slovenia also recognized the significant contribution of the STB in increasing Slovenia’s recognizability and awarded it the Crystal Triglav 2017, the award for supreme achievements in Slovenian tourism.

Furthermore, Slovenia is actively exploring the cooperation method as a supplementary source for more international attention - the Slovenian Tourist Board has cooperated with the Croatian National Tourist Board since 2010. This cooperation includes **joint presentations on distant markets such as China, Japan, South Korea, Brazil, etc.** Croatia and Slovenia work together on fairs and workshops, which is one of the main promotional tools for long distance markets of these two countries.
Speleology in Slovenia

“an encouraging example of how exceptional nature conservation values and longstanding and ongoing human presence are not necessarily mutually exclusive”

Slovenia currently has 12148 registered caves (August 2017) at the Cave Registry of the Karst Research Institute at ZRC SAZU and the Speleological Association of Slovenia and every year there are around 100 new caves found. As to where the caves are, well, almost everywhere, because carbonate rocks cover over 40% of the territory of Slovenia.

Out of those 12148 caves only 22 are open to tourists, unless you are a speleologist. Most famous one and the longest is Postojna cave (the cave system is more than 24 km long).

The deepest caves in Slovenia are the Kanin massif caves; Škocjan Caves are also a special phenomenon with its underground canyon.

The Postojna cave system is the longest with 20,570km, followed by the Kačna cave with 13,250km and the Predjamski system with 13,092km. The deepest caves in Slovenia are the Kanin massif caves, of which the Čehi II cave with 1,502m is the deepest, next is Mala Boka with 1,319m and the Renejevo brezno cave, with 1,242m.d heritage site since 1986 and the cave system is a bit more than 6 km long.

- Postojna cave

The most visited tourist cave in Europe is a place where the proteus or olm offspring are once again hatching. The cave railway has been operating at the cave for 140 years. Predjama Castle is located close to Postojna Cave and is the largest cave castle in the world.

Thus far, more than 38 million visitors from all over the world have seen Postojna Cave. They began their visit at the departure platform of the unique cave railway. A 5-kilometre subterranean trail is available for tourist visits. The train has also been adapted for disabled access. More than 150 animal species live in the karst caves of Slovenia, the olm or the human fish (Proteus anguinus) being the largest. Postojna Cave is the most biologically diverse cave in the world. One of its corridors features a vivarium, where you can learn about incredible cave animals and their stories. Standing out among them is the historic event
in 2016, when people could witness "dragon" hatchlings coming out of olm eggs for the first time in the 200 years the cave has been open to tourists.

- Škocjan Caves

Škocjan Caves Regional Park is situated in the Kras Plateau of South-West Slovenia. The protected area of 413 ha conserves an exceptional limestone cave system which comprises one of the world's largest known underground river canyons, that was cut into the limestone bedrock by the Reka River. Along its course, the river suddenly disappears into the karst underground, before passing through a vast and picturesque channel of up to 150 meters in height and more than 120 meters in width, often in the form of dramatically roaring rapids and waterfalls. The canyon's most spectacular physical expression is the enormous Martel Chamber, which exceeds two million cubic meters in volume. Like the canyon, the vast underground halls and chambers of the cave system expose stunning variations of limestone bedrock and secondary cave formations.

Beyond its almost supernatural visual appeal, its scale and scientific importance, the regional park is also home to noteworthy species and species assemblages, which thrive in the distinct world of the underground environment and in the so-called collapsed dolines, a form of karst sinkholes. The caves support many endemic and endangered species, including the Cave Salamander along with many invertebrates and crustaceans. The very particular environmental conditions of the collapsed dolines provide a habitat for rare and threatened flora and fauna.

The Škocjan cave system and its surroundings are eminent and well-conserved manifestations of Karst topography. It reveals a broad range of karst features with its exceptional scale and aesthetic quality.

Adventure tourism and Slovenia

“two sides of the same coin”

Slovenia is one of the countries, which not only possess natural resources for the development of adventure activities, but also focus systematically and with long-term vision their efforts towards this specific tourism niche.

Some of the opportunities for adventure are: rafting, paragliding, canyoning, kayaking ziplining, hiking and others.
The 2864m limestone peak called Triglav (Three Heads) has been a source of inspiration and an object of devotion for Slovenes for more than a millennium – it even appears on the country's flag. The early Slavs believed the mountain to be the home of a three-headed deity who ruled the sky, the earth and the underworld.

- **Triglav National Park**

Located in the north-west of Slovenia, in the Julian Alps, Triglav National Park is the only National Park in Slovenia. The park was named after the highest mountain in Slovenia, Triglav, the summit of this mountain reaches 2864 m. The park offers many **beginner day hikes** and guided tours for those who would rather not venture off on their own. **For the more advanced hikers, there are three possible ascent routes to the summit of Triglav:** The Prag Route is the most popular but requires climbing experience as the use of equipment and an alpine axe are compulsory. Adventure companies offer day trips (and multiday trips) into the park; **canyoning, hiking and kayaking are just some of the activities this National Park provides.**

The landscapes and natural sights in this park are unique and beautiful, and there are information centers and signs all over for your information and exploration.

No one managed to reach the summit until 1778, when an Austrian mountaineer and his three Slovenian guides climbed it from Bohinj. For Slovenes under the Habsburgs in the 19th century, the 'pilgrimage' to Triglav became, in effect, a confirmation of one's ethnic identity, and this tradition continues to this day; **a Slovene is expected to climb Triglav at least once in his or her life:**

"**Being an alpinist and being Slovenian are two sides of the same coin. Undoubtedly, this propensity for fitness and nature has played a role in the country’s high standards of living. (Slovenia regularly ranks toward the top of the Global Peace Index.) It certainly explains why Slovenia claims 759 registered professional climbers—the highest number per capita on the global competitive circuit—and 13 of the coveted Piolet d’Ors awarded in the last 26 years.**"  

- **The river Soča**

The River Soča, which has a distinct emerald green colour, is considered to be **one of the most beautiful rivers in Europe.** Its water flows across waterfalls, small waterfalls, and cascades as well as through narrow rocky gorges, and along the way it has carved surprising
canyons and pools. The river and its tributaries excite the lovers of natural beauty and seekers of adventurous water sports, such as **wildwater kayaking, rafting, canyoning etc.** A renowned fish lives in the River Soča – the Soča Trout, which attracts fishermen from all over the world. The mountainous landscape above the River Soča was the scene of the largest mountain battle in history during World War I.

The Soča Valley was the first destination in Slovenia to earn the title European Destination of Excellence (EDEN) due to its sustainable development of tourism. Part of the reason for this is due to its stories of peace along the Path of Peace.

The first town of some size is next to the river is Bovec. Nearby, there is the Boka Waterfall, the waterfall that has the most abundant flow of water in Slovenia - 144 m high. The Bovec area is very suitable for hiking, biking, paragliding and others.

- **The Kamnik, Savinja and Karavanke Alps**

The Kamnik and Savinja Alps are very popular among mountaineers. Velika Planina is considered to be the most beautiful mountain pasture in Slovenia due to exceptional views and the preserved shepherding heritage. In the middle of the mountainous landscape, there are two of the most alluring valleys in Slovenia – the Logar Valley, with the Rinka Waterfall, and the Kamniška Bistrica Valley.

The Karavanke Alps – the longest mountain range in Slovenia – are full of natural wonders. Steep hillsides, panoramic peaks, mountain pastures, valleys, gorges, waterfalls, diverse plant and animal species, rich nature, and preserved cultural heritage. Tourists observe the natural wonder of daffodils on Mt. Golica, which are so lush and dense when they bloom in the spring that they almost seem like a covering of snow.

Slovenia is a destination, regularly included in adventure articles/lists along with which indicates gradually rising visibility among Europeans and visitors from other continents – a aim followed systematically through the years by the relevant authorities and interested agents. Furthermore, factors such as general safety, developed tourism infrastructure, hospitality and standard of living, relatively high compared to neighboring countries are of assistance for the positive affirmation of Slovenia as a must – experience adventure destination.
Slovenia of culture

“The fifth season”

In Slovenia, culture has a special historical and social significance. It was primarily thanks to their culture and common language – the Slovenian – that the Slovenians were able to forge themselves and survive as a nation. To Slovenians, the language and culture have for centuries represented a substitute for the lack of their own state and political institutions. Slovenia is one of the rare countries, if not actually the only country in the world, where a day of culture is a national holiday.

In Slovenia, literature is still the most prestigious and revered form of art. The first texts in the Slovenian language date back to the turn of the first millennium A.D., i.e. the Freising Manuscripts, which are also the oldest texts in any Slavic language written in Latin alphabet. Today, they are kept in the Bavarian State Archives in Munich.

A special place in the Slovenian literature is occupied by Primož Trubar, who published the first book in the Slovenian language, and the poet France Prešeren, whose poem Zdravljica (A Toast) is the Slovenian anthem. In 2010, Ljubljana was the world book capital as selected by the UNESCO and in 2012, Maribor was the European Capital of Culture.

Slovenia has a very well-spread network of cultural institutions, organizations and associations, comparable to the culturally most developed European countries. In Slovenia, there are professional opera and ballet companies in Ljubljana and Maribor, and numerous professional theatres. The cultural life is very variegated and rich at the museums, galleries and cultural centres. The offer of cultural events in Slovenia is exceptionally diverse, pleasing even the most demanding visitors. Particularly in the summer, a series of world-class festivals are held in Slovenia, featuring appearances of world-renowned artists.

State secretary for economy Eva Štravs Podlogar explains that the Slovenian Tourist Organization has already prepared an operative plan for tourism marketing and promotional activities, including digitalisation. A strategy for the growth of Slovenian cultural tourism is close to being finished, too, and is being written by experts from different fields, since the aim is to help "Slovenia become a five-star destination for new experience".

According to experts, one of Slovenia's key advantages lies in its dispersion of cultural tourism from Goričko in the north-east to Piran in the south-west, from the Alps in the north-west to White Carniola in the south-east. Even a few entries on UNESCO's list of the world
heritage can make a great difference, since "every new listing on the trial list can help design the product and raise awareness about Slovenia's tourist offer".  

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23 Štravs Podlogar
Adventure tourism: richness of natural resources, troublesome implementation of strategies, lack of an effective marketing policy;

Speleo tourism: 12,500 caves discovered and explored, one of the world’s ice blocks and important traces of human activities;

Cultural tourism: A well-preserved cultural heritage, identity dilemma, weak infrastructure;

In 2017, the number of foreign visitors arrivals to Romania amounted to 12706 thousand persons (an increase of 24.3% compared to 2016) and the number of Romanian visitors departures abroad amounted to 19940 thousand persons (an increase of 23.6% compared to 2016).
Quote:

“Nowadays, Romanian tourism, just like the global tourism, is characterized by a strong competition among tourist destinations. Therefore, travel destinations (resorts or countries) need more and more a new model of tourism policy able to influence their competitiveness position under the current competitiveness conditions. Tourism represents a key domain in which our country could excel. **Romania is one of the most diversified countries when it comes to the tourist products that it offers** (natural and anthropic resources, unique flora and fauna European biodiversity).”

The number of tourists staying in Romania in 2017 rose with 10.4% reaching 12 million in 2017 according to the country’s statistical board; INS. Tourists spent 26.9 million overnights in Romania in 2017, up 6.5% year-on-year.

**In 2018,** over 5.2 million arrivals were recorded in touristic structures in Romania for the first six months– a 4.1 percent increase year-on-year. Of the total, 75.8 percent were Romanian tourists, according to the data published by the National Institute of Statistics (INS).

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24 ROMANIA’S ADVANTAGES IN THE COMPETITION OF THE EUROPEAN TOURISM, Andreea Băltărețu
Most foreign tourists came from European countries (92.5 percent), and 50.9 percent of them were from the EU. Among EU states, the most arrivals were registered in Bulgaria (28 percent), Hungary (27.3 percent) and Italy (8.1 percent). The average length of a stay was two days for Romanian tourists and 1.9 days for foreign tourists.

Source: Travel & Tourism Economic Impact 2018, Romania

This year has brought a significant increase in the quality of services in the HORECA\textsuperscript{25} (an abbreviation for the food service industry) industry. More 4-5 star hotels, all-inclusive offers,
speciality restaurants, pubs with unique identities – from a logistical point of view, the Romanian hospitality sector is at its best since a long time ago.

But there are still many grey areas in which authorities need to intervene:

“In Mamaia, for example, hotels are built on green spaces of other hotels without any visual identity; the beaches are full of stalls and other temporary buildings. The kitsch on the Romanian seaside is becoming increasingly obvious, and authorities are due to intervene in this segment, to enforce compliance with urban planning rules. Without a strategy in this area, it will be quite hard to attract more foreign tourists or to convince Romanians to spend their holiday in the country and not in Greece or Turkey”26

It can be said that Romania has certain deficits regarding its international presentation as a tourism destination which leads to a relatively weak performance which does not correspond to its potential and wide variety of natural and cultural resources on its territory; the marketing approach has been object of criticism as it fails to capture the “good side” of the tourism reality and is considered a practical demonstration of different, however recognizable shortcomings in management and administration such as: undefined long-term vision with concrete target and tools for control, lack of unified structure, responsible for the coordination of the tourism activity and for the timely addressing of tourism-related complications, implementation weaknesses of different strategies, etc.

“Tourism can not be regarded as an independent industry but only in connection with an amalgamation of other industry sectors: hospitality, transport, labor, etc”27

Apart from the above, there are also problems regarding the road infrastructure, the labor force: in need of qualified staff, investment deficits, uneven distribution of accommodation capacity, which is concentrated in Bucharest and the big cities.

In addition, the troublesome capitalization of all areas with tourism potential is a matter of wide discussion that has to be practically addressed. Example of the case is the Danube area, which possesses tremendous unexplored potential – the construction of a larger accommodation capacity is a necessity, along with improved access to the sites and a following marketing campaign, flexible in its ways to attract the different target groups.

Speleology in Romania – “The other world”

Romania sets a veritable European record when it comes to its number of caves, over 12,000. Apuseni Mountains, the lowest-altitude part of the Carpathians, are especially famous for an

26 Frames analysts
27 Anamaria Liana LĂZURAN, Mihaela UNGUREANU, University of Oradea, Department of Geography, Tourism and Territorial Planning,
impressive landscape of 1,500 caves that attracts many visitors even if only a few of them are open to the public. The others remain mysterious places explored only by scientists.

In Romania, more than 12,500 caves have been discovered and explored. The first cave that opened its gates for tourism was Meziad Cave in 1903. Today, Romania has seventeen show caves, all included into a national protected area network. Apuseni Mountains and South Carpathians host most of the show caves of Romania, seven and eight, respectively. In these caves, the visitor has the opportunity to explore the ancient history of Europe and the today’s beautiful subterranean landscapes. Some show caves (i.e., Muierii, Ungurului, Meziad) are emblematic for the distant past, with traces of human activities or skeletal remains ranging in age from the Paleolithic to the Neolithic. Scărișoara Ice Cave allows the visitors to discover one of the world’s largest and oldest ice blocks, whereas Urșilor Cave is known for its important fossil assemblages, among which a cave bear skeleton in anatomic connection that is ca. 40,000 years old. All show caves of Romania host peculiar fauna and unique landscapes, and discovering their natural and cultural heritage while enjoying the beauty of the natural protected areas that host them is an experience worth taking.

❖ Scarisoara Cave

Scarisoara Ice Cave houses the second biggest underground glacier in south-eastern Europe. This makes it one of the most important caves in Romania. In some cases, the glacier is formed in caves due to the subsidence of snow on the bottom of potholes caves. The ice stays there during summers due to the high altitude. But the caves in Apuseni that house underground glaciers do not fall into this category. The presence of ice is not because of rough weather conditions, but due to a special ventilation system that determines an underground glacier topoclimate.

The Scarisoara Glacier, a site of extraordinary beauty at the heart of the Apuseni Mountains, is important not only for tourism as it generates international interest and appeal, but also for science, especially due to the complex of ice-induced phenomena it displays and to the general structure of the cave: morphogenesis and evolution of the ice formations, the layering of the ice massif etc.

❖ Bolii cave

Cave Bolii is a natural breakthrough accessible along its entire length, one of the few this types caves in country. It was recently modernised - several footbridges and modern lights have been mounted in order to highlight the scale of this cave. The caverns are huge and the limestone formations are impressive.

The name of the cave most probably comes from Bolia family which owned land in the area in the 15th century. The cave was formed by the Jupâneasa creek which dug in the limestone found here. The entrance in the cave is huge: 20 meters wide and 10 meters high. The
uniqueness of this cave is given by the fact that it’s entirely accessible by riding a horse. It’s high enough for this to be possible and that’s pretty impressive.

Bolii Cave belongs to the protected area of the Natural Park Gradistea Muncelului-Cioclovina comprising eight reserves and natural monuments, but also historical monuments such as Bănița Dacian Citadel or Crivadia medieval tower. Reserves and natural monuments which are important to be mentioned: Cioclovina Ponorici- karst complex (Stâna Valley cave), Cheia and Sura Mare cave and Tecuri cave, Pui hayfields, fosolifer place Ohaba Ponor, Crivadia Gorge and Bolii cave and hill.

- Poarta lui Ionele Cave

Another important cave from Apuseni Mountains is Poarta lui Ionele, 810 meters long, with an imposing 15 meters tall entrance. The name of the cave is linked to a local legend according to which a girl from a nearby village found a boy named Ionele hiding there. The cave has also a temporary lake that is spectacular to see in winter, and shelters a protected species of bats.

**Adventure tourism in Romania – “A waiting game”**

Due to its geographical position and to the three natural elements defining its landscape structure and territory: the Carpathians, the Danube and the Black Sea, the country has a rich potential for adventure tourism, offering a wide range of proposals of general and specific interest such as hiking, climbing, cycling, mountain biking, skiing, kayaking and canoeing on the rivers and lakes, surfing, water skiing and diving.

Romania ranks at 10th place as part of the most attractive developing countries for adventure tourism in 2016, according to the Adventure Tourism Development Index (ATDI) study published by George Washington University, the Adventure Travel Trade Association (ATTA) and Vital Wave Consulting. Several factors were taken into account when conducting the study, such as safety and security, health, natural and cultural resources, adventure activity resources, tourism infrastructure, image. However the country’s presence in the previous years is rather unsteady – in 2010 it is on 9th place, but in 2011 and 2015 it is missing from the list. According to the data from Eurostat 2015, Romania is one of the least visited countries in the EU, beating only much smaller countries in the Baltic. The country has issues preventing it from becoming more dominant on the travel market, which are thought to be addressed by the Master Plan for Tourism Development in Romania, developed by a group of experts from the World Tourism Organization, in collaboration with Romanian experts, for the period 2007-2026, which combined with the high potential of the country, makes the development of its tourism sector, of which the adventure segment is most significant and promising, a particular “waiting game”.
Some of the places, which are suitable for adventure activities and have attracted many visitors during the years, are:

- The Carpathians Mountains

The Carpathians Mountains stretch in the shape of an arch in the center of Romania for more than 900 km. This means there are hundreds of trails that tourists can choose from to hike, depending on their preparedness and experience.

- The Carpathian Mountains are home to one of the largest undisturbed forests in Europe;
- 400 unique species of mammals, including the Carpathian chamois, call the Carpathian Mountains home;
- 60% of European brown bear population lives in the Carpathian Mountains;
- The Carpathian Mountains are forming a semi-circle around Transylvania, which one of Romania's nine historical provinces;
- The Western Carpathian Mountains are also called the Mountains of the Sunset (Muntii Apuseni);

The Carpathians are home of several nature reserves and other tourist attractions that attract thousands of mountain enthusiasts each year:

**Retezat National Park**

Retezat National Park is the largest nature reserve in the country, a natural monument included in the list of natural reserves of the Biosphere by UNESCO in 1979. Located in the western Carpathians (in Hunedoara County), in the imposing Retezat Mountains, it offers some of the best views in Southeast Europe. The size of the mountains, where the altitude varies between 794 and 2509 m (Peleaga Peak), the geological landscapes of an authentic wild richness of flora and fauna, especially the large evidence of quaternary glaciation (circles and mountain lakes) make this part of the Carpathians a natural monument of great scientific importance.

The main attractions of the Retezat National Park are the authentic wild landscapes, shaped by forests, glacial lakes, alpine meadows and high peaks, the flora and fauna of this place. The largest lake in the Romanian Alpine area, Bucura, can also be found in the Retezat National Park. The Retezat Mountains are crossed by many marked trails for hiking enthusiasts, but there are also some climbing routes.

**Seven Ladders Canyon**

The Seven Ladders Canyon is a gorge carved in limestone, located in Piatra Mare massif. The length of the canyon is 160 meters with a difference of 58 meters at an altitude of 948 meters. The gorge consists of seven steps with heights between 2.5 and 15 meters, giving its name
and which turn into waterfalls when the volume of water of the river Seven Ladders increases. The scenery is gorgeous; the waterfalls are a true spectacle both in summer and winter, when the frozen water creates a fairytale-like landscape.

**The Bicaz Gorges**

They are famous for their 1000 ft. limestone rocks towering over narrow roads and passes. The road that slices through the Bicaz Gorges (Cheile Bicazului) is among Romania's most stunning and spectacular. For kayakers and fly-fishing enthusiasts the park's main attraction is the Red Lake (Lacul Rosu), created in 1837 after a major natural landslide. Short and long walks provide access to the lake's spectacular scenery and many fishing spots. The Bicaz Gorges offer a unique view of the Ceahlau Mountains.

- **Caraş-Severin County**

The Caraş-Severin County is geographically placed in Romania on the left bank of the Danube, at the border with Serbia, respectively on the contact area between the Meridional Carpathians with the southern part of the Occidental Carpathians, respectively the Banatian Mountains. It has an excellent natural touristic potential, tourists having the possibility to admire special landscapes, to visit caves, natural reservations, springs, falls, to go fishing, swimming and canoeing on natural lakes and due to the climatic conditions they can benefit from treatment such as air therapy. Regarding the anthropic touristic potential in Caraş-Severin County, this is diversified, tourists can study the habits and traditions of the region and they can visit: the railway Anina-Oraviţa, Mihai Eminescu Theatre in Oraviţa, the artesian fountain and the steam locomotives park in Reşiţa, Decebal’s Statue and Tabula Traian on the Clisura Dunării, barrier lakes, the ruins of some boroughs, historical and architectural monuments, monasteries, churches and museums.

In the county, the Bigar Waterfall can be also seen – photos of it circulated all over the internet since it was included in a top of the most beautiful waterfalls in the world.

The waterfall is formed by a spring of groundwater that drains to limestone wall, shaped like a cone, about 7-8 meters high, fully covered by moss. Bigar spring, whose water has a rare purity, is supplied with water by an underground stream coming out from under a rock high above 50 meters. It runs through the cave of the same name in Anina Mountains, after a distance of about 200 meters and it flows into the river Minis forming the Bigar Waterfall.

- **Transylvania**

Transylvania is a historical region which today is located in central Romania. Bound on the east and south by its natural borders, the Carpathian mountain range, historical Transylvania
extended westward to the Apuseni Mountains. The region of Transylvania is known for the scenery of its Carpathian landscape and its rich history. It also contains major cities such as Cluj-Napoca, Brașov, Sibiu, Târgu Mureș and Bistrița.

The Western world commonly associates Transylvania with vampires, due to the influence of Bram Stoker's novel Dracula and its many film adaptations.

Asides from castles and the relaxing countryside, Transylvania is a perfect region for cycling tours during the warm season. Many bikers like to choose a cycling trail that passes near the fortified churches of Transylvania. Built by Saxons, these churches are part of UNESCO's World Heritage List and are considered worth visiting.

Cultural tourism – “the dilemma”

Romania has a history and folk cultural heritage of great value and attractiveness. There are over 680 cultural heritage values of national and international interest, among which stands out: church and monastery complexes, monuments and architectural ensembles and art, urban ensembles, historical and archaeological sites, some of which have been the values under the aegis of UNESCO World Heritage (fortified churches, churches with exterior frescoes, Dacian fortresses, the fortress of Sighisoara, etc.). Romanian ethnography and folklore treasure is also of great originality, being represented by: the specific architecture of villages in the Romanian historical provinces, wooden churches of Maramures and Salaj, woodworking, costumes, art decoration, traditional religious and ethno-cultural events, fairs and ethnographic museum exhibitions outdoor or exhibition pavilions etc.

Quote:

“For many in the West, Romania is synonymous with Count Dracula. Since the publication of Bram Stoker's famous novel in 1897 Transylvania (and by extension, Romania) has become inseparable in the Western imagination with Dracula, vampires and the supernatural. Moreover, since the late 1960s Western tourists have travelled to Transylvania on their own searches for the literary and supernatural roots of the Dracula myth. Such 'Dracula tourism' presents Romania with a dilemma. On one hand, Dracula is Romania's unique selling point and has considerable potential to be exploited for economic gain. On the other hand, the
whole notion of vampires and the supernatural is starkly at odds with Romania's self-image as a modern, developed, European state."28

This form of tourism is supported by the accommodation capacity which is 12.9% of all existing places in whole country, in recent years recording a decrease of it due to change of accommodation destinations. The challenges facing cultural tourism are related to infrastructure for access to archaeological sites, architectural monuments outdated and inadequate, lack of parking spaces provided with information points and promote cultural objective, lack of belvedere points for fortifications, fortresses medieval, churches, historic monuments and monasteries, the lack of special facilities for camping for pilgrimage tourism.

Romania's unique cultural heritage is reflected in the UNESCO World Heritage Sites, throughout the whole territory. Starting from Dacia and Roman influences from antiquity, Byzantine and Slavic influences to the Middle Ages - Romania is an exceptional amalgam of fascinating ingredients. Extraordinary scenic testimonies of its cultural reality are, for example, the painted monasteries that can only be found in Romania.

Peles and Bran Castles are the most visited castles in Romania for their medieval atmosphere but also because they hold an amazing history. Resorts such as Mangalia, Saturn, Venus, Neptun, Olimp and Mamaia (sometimes called the Romanian Riviera) are among the main attractions during the summer. During the winter, the ski resorts of Poiana Brasov and Prahova Valley are the favorite destinations of foreign tourists.

The George Enescu Festival is an important classical music festival and international competition held in Romania. It is a widely acclaimed music festival and is attended by numerous world renowned musicians and orchestras. The festival is held in honor of the celebrated Romanian composer, George Enescu.

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28 The Dracula Dilemma: Tourism, Identity and the State in Romania (New Directions in Tourism Analysis) 1st Edition by Duncan Light
Croatia has a rich historical and cultural heritage; its greatest advantage in terms of tourism is its Adriatic Sea coast which, according to the 2010 European Environment Agency's survey, **had the second cleanest water in all of Europe.** A mild Mediterranean climate with a warm summer and moderately cold winter favor tourism. The tourist offer of Croatia is very diverse and consists of nautical, excursion, diving, congress, cultural, ecological, rural, religious, adventure, hunting or fishing and health tourism.

![Number of arrivals in tourist accommodation in Croatia from 2006 to 2017 (in millions)](image_url)

**Number of arrivals in tourist accommodation in Croatia from 2006 to 2017 (in millions)**

*Source: Statista 2018*

On 1 July 2013, Croatia became the 28th Member State of the European Union and has turned into one of the most attractive tourist destinations in the EU, outperforming its competitors from the Northern Mediterranean (Cyprus, Greece, Italy, Malta and Spain) in attracting international tourists. According to the Croatian ministry of tourism, 2017 was another year in a row that broke tourist records. From January to December, 18.5 million arrivals were registered, which is a 13% growth. Overnights were 102 million, or 12% growth. Duration of stays in Croatia was on average 5.3 days in 2016, whereas in Cyprus it was 6.3, in Malta 5.9, in Spain 4.8 and in Italy 3.6.
And according to the European Commission economic directorate, in 2016, foreign tourists spent in Croatia 45.5 billion euros which is 19% of the country's gross domestic product and is more than 35% of its export revenues. International demand for Croatian tourism is the most elastic in terms of income compared to the other destinations in the Northern Mediterranean. European Commission analyses show that with every point increase of EU GDP the number of arrivals increases by 4.3% in Croatia, 4.0% in Greece, 3.8% in Spain, and only 2.8% in Italy.

The tourists arriving from Central and Eastern Europe spend roughly 55% less per night per person in comparison to tourists from the 15 richest EU members. In other words, Central and Eastern Europeans spend around 62 euros per day per person whereas the Western Europeans spend more than twice more - 140 euros.

During the twelve months most of the overnight stays were made by tourists from Germany (20.7 million overnights), Slovenia (10.1 million overnights), Austria (7.6 million overnights), Poland (6.3 million overnights) and the Czech Republic (5.4 million nights). Outside European countries, most of the overnight stays were made by guests from the United States (1.4 million overnight stays), Australia (667 thousand nights), South Korea (533 thousand nights), Canada (415 thousand nights) and China (237 thousand overnight stays).

Top destinations for overnight stays are Dubrovnik, Rovinj, Poreč, Medulin and Umag. Of the total number of overnight stays, most were realized in households (35 million nights), hotels (25 million overnight stays) and camps (19 million overnights), while 3.2 million overnight stays were made during the nautical charter for twelve months.
When presenting the data for tourism in 2017 in the beginning of the year, Minister of Tourism Gari Cappelli said that his ministry's intentions are this year to continue working on expanding season in Croatia, and positioning the country as an all-year tourist destination.

"Tourism is the most important sector in our country and every year has a significant increase of more than 10%. Additional increases are expected this year, especially due to large investments in Zagreb, Split and Dubrovnik airports which doubled their capacities and new terminals can receive a total of 11.5 million passengers a year."  

In order to cope with increasing demand in the sector, the Croatian government has recently increased the quota of foreign workers allowed to work in the country. Tourism Minister Gari Cappelli has recently warned the number of vacant jobs in the tourism sector has significantly increased this year and is set to grow as the country expects another successful tourism season.

Croatia's tourist attractiveness, however, has downsides described in detail in a document about the Croatian tourist industry by the Commission's economic directorate, published in March. The document concludes that tourism is a strategic sector for Croatia and that the country's economy is strongly dependent on it, although it cannot fully take advantage of it. There are several problems:

   o  **Seasonality**

Croatian tourism is highly seasonal. In 2016, **75% of the overnights were concentrated in only three months - July, August and September.** This is due to Croatia's geographic position compared to the other southern Mediterranean destinations. Greece, for example, also has a highly seasonal tourism but the season is much longer - it starts in April and lasts until the end of October.

The high seasonality and the season's short life are a major challenge for the local business which works for the tourist sector because it restricts possibilities success in tourism to spill over other sectors in the economy. In addition, high seasonality has consequences for employment as 45% of those employed by the tourist industry are temporary workers. This is the highest rate in the EU.

   o  **Environmental matters**

Increasing the number of tourists also has an impact on waste generation and energy consumption. Data show that **a tourist consumes 3-4 times more water per day than a permanent resident.** The agency points out that the most critical sector which requires urgent

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29 Helena Budisa from UHY HB EKONOM in Croatia
actions is waste management. In the past years, a lot of low-cost flights opened to distant European countries in Western and Northern Europe. Expectations are that air transport will continue to expand. In the same time, arrivals by train and bus are decreasing. The reason is that the Croatian rail-way network continues to be underdeveloped and is generally very inefficient.

Another problem is that thanks to its convenient geographic location Croatia is the closest destination for Central and Eastern European tourists. According to statistics, the bulk of tourists (90%) come from Europe as those from neighbouring or close countries, like Austria, Germany, Italy, Slovenia, the Czech Republic, Slovakia and Hungary, make two thirds of arrivals and a bit more of overnights. The problem with European tourists is that more than 90% of them arrive by car which leads to congestions at the borders (and highways), and has negative impact on the environment. Croatia is about to reach its full capacity which means that new investments will be made and that may lead to overexploitation of natural resources and could have social consequences. Last year, for instance, the government increased the toll fees for highways during the summer on the back of local citizens who travel for work and because of tourism their costs increase.

- Currency confusion

One of the issues that many tourists find to be frustrating is that Croatia has not adopted the Euro as their main form of currency. They still continue to use the Croatian Kuna, which is about 7.52 HRK to 1 Euro.

Quote:

"The introduction of a Single European Currency (the euro) and the creation of a 'euro-zone' has facilitated travel throughout Europe by doing away with currency exchange" (Boniface and Cooper 119).

Croatian tourism is highly seasonal (Croatia Tourism Report 7). The peak seasons run from May-September while shoulder seasons operate from October until April. Most of the economic contributions from tourism occur during peak season. During this peak season, tourists flock to the islands and coastal towns, searching for a paradise or getaway adventure. The problem with seasonality is that it limits the amount of opportunities for tourists who travel during shoulder season. During peak season in Dubrovnik, the weather is hotter, around 100 degrees Fahrenheit, and there are several outdoor activities to undertake. There is a large variety of restaurants and shops as well. However, when shoulder season occurs, all outdoor activities cease and most of the restaurants and shops close down. This limits economic prosperity of Dubrovnik, even though the climate is still mild and warm, about 70-75 degrees Fahrenheit. By eliminating this concept of seasonality, Dubrovnik, as well as the other regions of Croatia, can continue to employ people, improving the consumer markets.
More economic prosperity can occur by allowing tourists the full experience of the city once seasonality is eliminated.

“With UNESCO threatening to take away its World Heritage status due to extreme overcrowding, Dubrovnik has decided to take drastic measures in order to cut tourist numbers. The city is capping the number of people who can scale its 15th century ramparts at 4,000 a day -- 10,388 did so in one day alone in August 2016, many drawn by the city’s starring role in "Game of Thrones." The mayor is also planning on cutting the number of cruise ships entering the ancient port. Nearly 800,000 people disembarked from cruise liners in 2016, most staying for just three hours.”

‘City for all seasons’ motto demonstrates Dubrovnik’s primary focus on prolonging the tourist season, while the new ‘Respect the City’ project will undoubtedly contribute to the sustainable tourism development. But reports of over tourism suffocating popular destinations such as Dubrovnik and Split on the Adriatic Coast have caused some concern to the authorities - and even to rethink their strategies in some cases.

“We are planning and developing selective forms of tourism based on full quality and destination management involving all stakeholders,” Cappelli said to Total Croatia News. This will focus on gastronomic tourism, cycling tourism, health tourism and nautical tourism - ideal for a country which has over 2,500 miles of coastline. For example, one of the world’s largest cycling tourism routes which runs through 11 countries, including coastal parts of Croatia is expected to open in 2020, which would attract further investment and tourism to the country.

Statistics

The first edition of the Global Tourism Locations of the Future 2017/2018 report, of the leading British publication of the Financial Times for business, the fDi Magazine, has ranked Croatia the seventh country among destinations with the highest potential for tourism investment. Among 43 world tourist destinations, Croatia also received the special award “Editor's Choice Awards”, as one of the countries with the greatest progress in the area of improving tourist infrastructure, accommodation, initiatives for the development of tourism, and for investment in hotels and the cruise segment of the nautical tourism. In addition, when it comes to special forms of tourism, Croatia is particularly famous as a filming destination

According to the EU statistic's agency, Eurostat, Croatia had 86.1 million overnight stays in 2017, as tourism grew by 10.6 per cent in comparison to 2016.

This was the third biggest leap in numbers in the EU, behind Latvia, with a 12-per-cent rise, and Slovenia, with 11.3 per cent growth, and well ahead of the EU average growth of 5.1 per cent.
Speleology tourism in Croatia

“the light in the stone”\(^{30}\)

Croatian mountains are located in the centre of the karstified Dinaric region. A key geomorphologic feature of the area is the formation of speleological objects: 10,000 caves and pits have been discovered. These passages connect surface waters to groundwater aquifers, so their preservation is particularly important for freshwater supply. As home to hundreds of unique species, the underground of the country is also a globally recognized biodiversity hotspot.

This list of caves in Croatia includes 49 which are deeper than 250 m (820 ft), 14 deeper than 500 m (1,640 ft) and three deeper than 1,000 m (3,281 ft). The karst geology harbours a total of approximately 7,000 caves and pits. However, out of the total number of caves, only forty are open to visitors. All caves in Croatia are protected by law, and the visit is allowed only if tourists are granted a permit for research or for tourist purposes, so individual visits without official accompaniment are not recommended.

*Speleo Film Festival – Croatia*

By being one of a very few speleo thematic festivals in the world, the festival has already been given national and international recognition for its quality and consistency. Throughout the years the festival has been supported by the city of Karlovac, the Speleological Commettee of the Croatian Mountaineering Association, Croatian Speleological Federation and Cinema club Karlovac. It introduced authors and films from Croatia, Bosnia and Herzegovina, Montenegro, Slovenia, Italy, Slovakia, Great Britain, etc.

Speleological film holds a significant role in speleological exploration because of its ability to present authentic underground environment in all its beauty, previously accessable only to a small number of specially trained people – speleologists. The value of recorded scenes beyond the surface is even greater if observed from non-specialized viewer's perspective. Films displayed in recent festivals showed viewers all the beauty of speleological decorations and hidden touristic possibilities the underground holds. They presented the various life beyond the surface, acknowledged as one of the bearers of biodiversity in Croatia. They exhibited the results and valuable scientific information from many speleological explorations and expeditions to different, exotic parts of the world and a lot more.”

\(^{30}\) The book "The light in the stone" - Blue cave Croatia description ("U kamenu svjetlo") by Joško Bužanić
Some of the caves that are an object of continuous tourist interest include:

- **Odysseus cave**

  It is close to village Babino Polje on the island of Mljet, a ten minute walk through the fields because it can not be reached by car. This cave is located among the rocks and in the sea level. It is very effective and gives a fantastic impression.

  Odysseus cave is a cave egg-shaped with a few tens of meters in diameter. It has collapsed vault; therefore named Jama, because watching from the air, looks like a big hole in the ground. The bottom is filled with water. Through layers of limestone, which is separated from the open sea, there is a breakthrough in the form of a tunnel and a cave can be entered by swimming or small boat. Odysseus is a cave used as a shelter for fishing boats and fishing tools: network, (now banned) Mljet traps, longlines and oars, and is the most unusual port at Adriatic sea, and beyond.

  In the summer months, around noon, when sunlight is strongest impact on the area of the cave, the sea provides a spectrum of colors, particularly interesting for tourists and lovers of true natural phenomena and photos. In the Pit itself, mostly because of the high rocks, light never comes.

  The access to the cave from the sea is possible with a smaller boat or by swimming. The entrance is only five meters wide and the height is one meter and a half, while access from the mainland is facilitated by improvised stairs.

- **The Blue Cave**

  The Blue Grotto or Blue Cave is a water-logged sea cave located in a small bay called Balun on the east side of the island of Biševo and about 4.5 nautical miles (8.3 km) from Komiža, in the Croatian Adriatic. It is situated in the central Dalmatian archipelago, 5 km south-west of the island of Vis. The grotto is one of the best known natural beauty spots on the Adriatic and a popular show cave because of the glowing blue light that appears at certain times of day.

  The cave is famous for the mesmerizing blue light filling the space at a certain time of the day, when the sunlight hits the sea surface through an opening on the vault. The light reflects off the water and the white seabed, wrapping the whole interior into a layer of iridescent blue.

  The cave attracts approximately 100,000 visitors annually to the low inhabited island (Biševo has 8 villages and 7 permanent residents).
Cerovac caves

Declared as a geo-morphological natural monument, the Cerovac Caves are one of the most famous caves in Croatia. The entire complex consists of three caves (Upper, Lower and Central) which run approx. 7km in length. Also, they are one of the largest cave bear findings in Croatia which explains the given names such as the Bear Trench and Bear Hall.

The richness of cave ornaments found in this caves by far excel those of all other speleological structures in Croatia. For their unique natural beauty and numerous findings that belong to the ancient times, Cerovac Caves received legal protection from the government in 1961 as geomorphological natural monument. Ever since 1981, the Caves have been part of the Velebit Nature Park.

Adventure tourism and Croatia

“a transparent sea”

Croatia led its regional peers because of its strong scores in the Adventure Activity Resources category. In Croatia, Iva Puđak Mihajlović, of the Croatian National Tourist Board, says the most popular adventure activities are cycling, hiking, river rafting and sea kayaking. With Croatia’s more than 1200 islands, islets, rocks and reefs sailing is another favored way to discover the country. Visitors who kayak are able to travel to some of the nearest islands discovering hidden beaches and bays, many of which are inaccessible from inland. River rafting allows visitors to float down waterfalls surrounded by deep canyons. Ms. Mihajlovic observes, “People are becoming more active and the demand of diverse activities is rapidly increasing.” She further points out that the Croatia National Tourist Board is investing in the development of infrastructure and facilities for new or less popular adventure activities, making an effort to “consider nature and environment protection at the same time.” One significant project is called Greenways. Greenways are paths, which run along two rivers in Croatia – the Sava River and the Danube. Both of the Greenways projects are very important for local communities and adventure tourists as the routes connect several countries, showcasing different cultures, local cuisines, and traditions.

In addition to this, the Croatian National Tourist Board provides subsidies every year to projects, which have the aim of improving active tourism in specific areas of the country. Projects include segregation and signage for bike trails, signage and additional facilities along hiking/walking trails and equipping routes on natural rocks for climbing. The Board perceives active tourism as one of the key products in the country’s tourism strategy and emphasizes it as an important element of all promotional campaigns and activities.
Adriatic Sea

The Croatian Adriatic coast is one of the most indented in the world, with over 1200 islands and islets. It offers many opportunities for adventure activities, such as:

- **Kayaking**

Sea kayaking has gained instant popularity in the Adriatic due to its warm water and transparent sea. The climate is predictable, with strong currents and big tides. Some highlight locations include the islet of Mrkanjac near Cavtat in the Southern Adriatic, the waters around the cape of Lenga on Mljet, the underwater cliffs of the islet of Bijelac near Lastovo and the area around Vis where the wrecks of numerous boats and several dozen aircrafts from World War Two rest. A highlight would be the wreck of the Austro-Hungarian passenger liner the Baron Gautsch, which hit a mine and sank not far from Rovinj in 1914 and is at a depth of 40 metres.

- **Snorkeling**

The sea in Croatia is very clear, and clean. The sea bed, especially in the shallow waters, is pebble. Thus the underwater visibility is excellent. The Adriatic Sea is very safe to swim and snorkel. You won’t find any sharks, whales or other dangerous species live in these waters. You can encounter lots of dolphins in the Adriatic - the most famous sites are the island of Losinj, and Rovinj.

Also, snorkeling is not popular as an organized tour, but rather as an individual activity anybody with a snorkeling gear can partake in. It’s also often an optional activity on many kayaking or boat tours.

**Zrmanja River - rafting**

Zrmanja River has penetrated its way towards the sea for many centuries and by breaking carbonate based grounds, created one of the most impressive canyons in Croatia. Therefore, it was protected as a significant landscape attracting a great number of nature lovers every year. After the last ice age period, the sea level rose for more over than 120 meters and created current Zrmanja river flow into an estuary. Right in that part of the canyon, near the bottom of the riverbed there is a layer of the seawater which provides a rich and diverse habitat for various aquatic plants and animal species making it an important and sensitive ecosystem.

**Dalmatia – cycling**
The Croatian National Tourist Board has launched a new concept called Croatia 365, with the aim of extending the tourist season. There are six main areas of focus with the new initiative, one of which is biking. As one of the premier outdoor destinations in the country, Central Dalmatia – known to have the clearest waters in the Mediterranean and undoubtedly packed with historical and cultural interest, is featured in the biking section.

The scenery alternates between seaside villages, tiny mediaeval towns and pretty pebble bays; there are 12 themed bike trails which take adventurers through rocky landscape and historically rich expanses of Split’s Hinterland.

Cultural tourism – beyond the sun and sea

Because of Croatia's long history of living under different empires and powers, there are several different cultures within the national Croatian culture. Croatia's Istrian peninsula has architecture from Ancient Rome, including one of the best well-preserved Roman amphitheaters in all of Europe dating back to 80AD. Dubrovnik offers a look into the medieval times in which Croatia was ruled under the Venetians. It’s enormous and extremely well-preserved city walls are one of the main tourist attractions in all of Croatia. In the capital of Zagreb, there are several different influences, but one of the most noticeable is from Austria, not only with architecture, but with food as well.

The tourist potential of Croatia’s cultural assets has been recognized and there is evidence of strong demand for such products amongst both domestic and international tourists. Croatia from the standpoint of offer, with picturesque settlements, rich and various history, historic urban and rural areas, and with tourism developed in the coastal area has good prerequisites for the development of cultural tourism and cultural-tourism products, and a Strategy of development of cultural tourism has been created in order to identify strategic measures (priorities and plan of activities), which should encourage the development of cultural-tourism products of Croatian tourist destinations in the entire country.

Richness of tangible and intangible Croatian cultural heritage is a resource for the development of cultural tourism in all its forms: heritage tourism and UNESCO sites,
museums, archaeological, rural and eco-ethno tourism. Croatian cultural and tourist offer as a destination makes: autochthonous atmosphere of Mediterranean coastal cities and the uniqueness of undiscovered coastal ones, as well as the attractiveness of continental urban centers and traditional rural areas. The variety of natural and cultural heritage and impressive monuments under UNESCO protection (Plitvice Lakes, Šibenik Cathedral, Euphrasian Basilica in Poreč, the old towns of Trogir, Dubrovnik and Split with its Diocletian palace) are examples of the rich cultural heritage of the Croatian origin. In Croatia, there are 175 museums and collections with an impressive inventory of domestic and world heritage with 2.1 million visitors per year (Statistical Yearbook of the Republic of Croatia, 2011, 500).

Croatian cultural heritage is exceptionally valuable resource in the Croatian tourism offer, as evidenced by the fact that 69% of tourists during their stay participate in one of cultural events, although the main motivation for their coming in Croatia is the sea and sun. It should also keep in mind that the existence of heritage and cultural resources does not mean that they are cultural and tourism products.

In recent years, Croatia has outperformed its competitors in attracting foreign tourists. Tourist destinations compete among themselves in attracting international tourism. Over the past decade, Croatia outperformed the average of the other EU countries in the Northern Mediterranean region (Cyprus, Greece, Italy, Malta and Spain) in increasing its international tourism revenues, non-resident tourists' overnight stays and arrivals from abroad, however High seasonality, limited range of services, and low average spending are frequently mentioned weaknesses of the Croatian tourist model (Ministry of Tourism, 2013).

Croatia's features a typical "sun and sea" tourism model, with relatively long stays, concentrated in the coastal areas and over the summer months. Even though Mediterranean countries have a lot to offer in terms of historical and cultural heritage, most tourists visit them to enjoy a warm climate and the coastal natural attractions and this is an issue that has been taken into serious consideration by the Croatian authorities, which have set up the goal to alter the situation by placing a stronger focus on the cultural heritage and on its basis - development of a more sustainable and deprived of seasonality tourism reality.
Adventure tourism: richness of natural resources, troublesome implementation of strategies, lack of an effective marketing policy;

Speleo tourism: 12,500 caves discovered and explored, one of the world’s ice blocks and important traces of human activities;

Cultural tourism: A well-preserved cultural heritage, identity dilemma, weak infrastructure;

In 2017, the number of foreign visitors arrivals to Romania amounted to 12706 thousand persons (an increase of 24.3% compared to 2016) and the number of Romanian visitors departures abroad amounted to 19940 thousand persons (an increase of 23.6% compared to 2016).

Quote:

“Nowadays, Romanian tourism, just like the global tourism, is characterized by a strong competition among tourist destinations. Therefore, travel destinations (resorts or countries) need more and more a new model of tourism policy able to influence their competitiveness position under the current competitiveness conditions. Tourism represents a key domain in which our country could excel. Romania is one of the most diversified countries when it comes to the tourist products that it offers (natural and anthropic resources, unique flora and fauna European biodiversity).”

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31 ROMANIA’S ADVANTAGES IN THE COMPETITION OF THE EUROPEAN TOURISM, Andreea Băltărețu
The number of tourists staying in Romania in 2017 rose with 10.4% reaching 12 million in 2017 according to the country's statistical board; INS. Tourists spent 26.9 million overnights in Romania in 2017, up 6.5% year-on-year.

In 2018, over 5.2 million arrivals were recorded in touristic structures in Romania for the first six months— a 4.1 percent increase year-on-year. Of the total, 75.8 percent were Romanian tourists, according to the data published by the National Institute of Statistics (INS).

Most foreign tourists came from European countries (92.5 percent), and 50.9 percent of them were from the EU. Among EU states, the most arrivals were registered in Bulgaria (28 percent), Hungary (27.3 percent) and Italy (8.1 percent). The average length of a stay was two days for Romanian tourists and 1.9 days for foreign tourists.
This year has brought a significant increase in the quality of services in the HORECA\(^{32}\) (an abbreviation for the food service industry) industry. More 4-5 star hotels, all-inclusive offers, speciality restaurants, pubs with unique identities – from a logistical point of view, the Romanian hospitality sector is at its best since a long time ago.

But there are still many grey areas in which authorities need to intervene:

“In Mamaia, for example, hotels are built on green spaces of other hotels without any visual identity; the beaches are full of stalls and other temporary buildings. The kitsch on the

\(^{32}\); The term is a syllabic abbreviation of the words Hotel/Restaurant/Café.
Romanian seaside is becoming increasingly obvious, and authorities are due to intervene in this segment, to enforce compliance with urban planning rules. Without a strategy in this area, it will be quite hard to attract more foreign tourists or to convince Romanians to spend their holiday in the country and not in Greece or Turkey.”

It can be said that Romania has certain deficits regarding its international presentation as a tourism destination which leads to a relatively weak performance which does not correspond to its potential and wide variety of natural and cultural resources on its territory; the marketing approach has been object of criticism as it fails to capture the “good side” of the tourism reality and is considered a practical demonstration of different, however recognizable shortcomings in management and administration such as: undefined long-term vision with concrete target and tools for control, lack of unified structure, responsible for the coordination of the tourism activity and for the timely addressing of tourism-related complications, implementation weaknesses of different strategies, etc.

“Tourism can not be regarded as an independent industry but only in connection with an amalgamation of other industry sectors: hospitality, transport, labor, etc.”

Apart from the above, there are also problems regarding the road infrastructure, the labor force: in need of qualified staff, investment deficits, uneven distribution of accommodation capacity, which is concentrated in Bucharest and the big cities.

In addition, the troublesome capitalization of all areas with tourism potential is a matter of wide discussion that has to be practically addressed. Example of the case is the Danube area, which possesses tremendous unexplored potential – the construction of a larger accommodation capacity is a necessity, along with improved access to the sites and a following marketing campaign, flexible in its ways to attract the different target groups.

Speleology in Romania –

“The other world”

Romania sets a veritable European record when it comes to its number of caves, over 12,000. Apuseni Mountains, the lowest-altitude part of the Carpathians, are especially famous for an impressive landscape of 1,500 caves that attracts many visitors even if only a few of them are open to the public. The others remain mysterious places explored only by scientists.

33 Frames analysts
34 Anamaria Liana LĂZURAN, Mihaela UNGUREANU, University of Oradea, Department of Geography, Tourism and Territorial Planning,
In Romania, more than 12,500 caves have been discovered and explored. The first cave that opened its gates for tourism was Meziad Cave in 1903. Today, Romania has seventeen show caves, all included into a national protected area network. Apuseni Mountains and South Carpathians host most of the show caves of Romania, seven and eight, respectively. In these caves, the visitor has the opportunity to explore the ancient history of Europe and the today’s beautiful subterranean landscapes. Some show caves (i.e., Muierii, Ungurului, Meziad) are emblematic for the distant past, with traces of human activities or skeletal remains ranging in age from the Paleolithic to the Neolithic. Scărișoara Ice Cave allows the visitors to discover one of the world’s largest and oldest ice blocks, whereas Urșilor Cave is known for its important fossil assemblages, among which a cave bear skeleton in anatomic connection that is ca. 40,000 years old. All show caves of Romania host peculiar fauna and unique landscapes, and discovering their natural and cultural heritage while enjoying the beauty of the natural protected areas that host them is an experience worth taking.

❖ Scarisoara Cave

Scarisoara Ice Cave houses the second biggest underground glacier in south-eastern Europe. This makes it one of the most important caves in Romania. In some cases, the glacier is formed in caves due to the subsidence of snow on the bottom of potholes caves. The ice stays there during summers due to the high altitude. But the caves in Apuseni that house underground glaciers do not fall into this category. The presence of ice is not because of rough weather conditions, but due to a special ventilation system that determines an underground glacier topoclimate.

The Scarisoara Glacier, a site of extraordinary beauty at the heart of the Apuseni Mountains, is important not only for tourism as it generates international interest and appeal, but also for science, especially due to the complex of ice-induced phenomena it displays and to the general structure of the cave: morphogenesis and evolution of the ice formations, the layering of the ice massif etc.

❖ Bolii cave

Cave Bolii is a natural breakthrough accessible along its entire length, one of the few this types caves in country. It was recently modernised - several footbridges and modern lights have been mounted in order to highlight the scale of this cave. The caverns are huge and the limestone formations are impressive.

The name of the cave most probably comes from Bolia family which owned land in the area in the 15th century. The cave was formed by the Jupâneasa creek which dug in the limestone found here. The entrance in the cave is huge: 20 meters wide and 10 meters high. The uniqueness of this cave is given by the fact that it’s entirely accessible by riding a horse. It’s high enough for this to be possible and that’s pretty impressive.
Bolii Cave belongs to the protected area of the Natural Park Gradisiea Muncelului-Cioclovina comprising eight reserves and natural monuments, but also historical monuments such as Bânița Dacian Citadel or Crivadia medieval tower. Reserves and natural monuments which are important to be mentioned: Cioclovina Ponorici-karst complex (Stâna Valley cave), Cheia and Sura Mare cave and Tecuri cave, Pui hayfields, fosolifer place Ohaba Ponor, Crivadia Gorge and Bolii cave and hill.

❖ Poarta lui Ionele Cave

Another important cave from Apuseni Mountains is Poarta lui Ionele, 810 meters long, with an imposing 15 meters tall entrance. The name of the cave is linked to a local legend according to which a girl from a nearby village found a boy named Ionele hiding there. The cave has also a temporary lake that is spectacular to see in winter, and shelters a protected species of bats.

Adventure tourism in Romania –

“A waiting game”

Due to its geographical position and to the three natural elements defining its landscape structure and territory: the Carpathians, the Danube and the Black Sea, the country has a rich potential for adventure tourism, offering a wide range of proposals of general and specific interest such as hiking, climbing, cycling, mountain biking, skiing, kayaking and canoeing on the rivers and lakes, surfing, water skiing and diving.

Romania ranks at 10th place as part of the most attractive developing countries for adventure tourism in 2016, according to the Adventure Tourism Development Index (ATDI) study published by George Washington University, the Adventure Travel Trade Association (ATTA) and Vital Wave Consulting. Several factors were taken into account when conducting the study, such as safety and security, health, natural and cultural resources, adventure activity resources, tourism infrastructure, image. However the country’s presence in the previous years is rather unsteady – in 2010 it is on 9th place, but in 2011 and 2015 it is missing from the list. According to the data from Eurostat 2015, Romania is one of the least visited countries in the EU, beating only much smaller countries in the Baltic. The country has issues preventing it from becoming more dominant on the travel market, which are thought to be addressed by the Master Plan for Tourism Development in Romania, developed by a group of experts from the World Tourism Organization, in collaboration with Romanian experts, for the period 2007-2026, which combined with the high potential of the country, makes the development of its tourism sector, of which the adventure segment is most significant and promising, a particular “waiting game”. 
Some of the places, which are suitable for adventure activities and have attracted many visitors during the years, are:

- The Carpathians Mountains

The Carpathians Mountains stretch in the shape of an arch in the center of Romania for more than 900 km. This means there are hundreds of trails that tourists can choose from to hike, depending on their preparedness and experience.

- The Carpathian Mountains are home to one of the largest undisturbed forests in Europe;
- 400 unique species of mammals, including the Carpathian chamois, call the Carpathian Mountains home;
- 60% of European brown bear population lives in the Carpathian Mountains;
- The Carpathian Mountains are forming a semi-circle around Transylvania, which one of Romania's nine historical provinces;
- The Western Carpathian Mountains are also called the Mountains of the Sunset (Muntii Apuseni);

The Carpathians are home of several nature reserves and other tourist attractions that attract thousands of mountain enthusiasts each year:

**Retezat National Park**

Retezat National Park is the largest nature reserve in the country, a natural monument included in the list of natural reserves of the Biosphere by UNESCO in 1979. Located in the western Carpathians (in Hunedoara County), in the imposing Retezat Mountains, it offers some of the best views in Southeast Europe. The size of the mountains, where the altitude varies between 794 and 2509 m (Peleaga Peak), the geological landscapes of an authentic wild richness of flora and fauna, especially the large evidence of quaternary glaciation (circles and mountain lakes) make this part of the Carpathians a natural monument of great scientific importance.

The main attractions of the Retezat National Park are the authentic wild landscapes, shaped by forests, glacial lakes, alpine meadows and high peaks, the flora and fauna of this place. The largest lake in the Romanian Alpine area, Bucura, can also be found in the Retezat National Park. The Retezat Mountains are crossed by many marked trails for hiking enthusiasts, but there are also some climbing routes.

**Seven Ladders Canyon**

The Seven Ladders Canyon is a gorge carved in limestone, located in Piatra Mare massif. The length of the canyon is 160 meters with a difference of 58 meters at an altitude of 948 meters. The gorge consists of seven steps with heights between 2.5 and 15 meters, giving its name
and which turn into waterfalls when the volume of water of the river Seven Ladders increases. The scenery is gorgeous; the waterfalls are a true spectacle both in summer and winter, when the frozen water creates a fairytale-like landscape.

*The Bicaz Gorges*

They are famous for their 1000 ft. limestone rocks towering over narrow roads and passes. The road that slices through the Bicaz Gorges (Cheile Bicazului) is among Romania's most stunning and spectacular. For kayakers and fly-fishing enthusiasts the park's main attraction is the Red Lake (Lacul Rosu), created in 1837 after a major natural landslide. Short and long walks provide access to the lake's spectacular scenery and many fishing spots. The Bicaz Gorges offer a unique view of the Ceahlau Mountains.

**Caraş-Severin County**

The Caraş-Severin County is geographically placed in Romania on the left bank of the Danube, at the border with Serbia, respectively on the contact area between the Meridional Carpathians with the southern part of the Occidental Carpathians, respectively the Banatian Mountains. It has an excellent natural touristic potential, tourists having the possibility to admire special landscapes, to visit caves, natural reservations, springs, falls, to go fishing, swimming and canoeing on natural lakes and due to the climatic conditions they can benefit from treatment such as air therapy. Regarding the anthropic touristic potential in Caraş-Severin County, this is diversified, tourists can study the habits and traditions of the region and they can visit: the railway Anina-Oraviţa, Mihai Eminescu Theatre in Oraviţa, the artesian fountain and the steam locomotives park in Reşiţa, Decebal’s Statue and Tabula Traian on the Clisura Dunării, barrier lakes, the ruins of some boroughs, historical and architectural monuments, monasteries, churches and museums.

In the county, the Bigar Waterfall can be also seen – photos of it circulated all over the internet since it was included in a top of the most beautiful waterfalls in the world.

The waterfall is formed by a spring of groundwater that drains to limestone wall, shaped like a cone, about 7-8 meters high, fully covered by moss. Bigar spring, whose water has a rare purity, is supplied with water by an underground stream coming out from under a rock high above 50 meters. It runs through the cave of the same name in Anina Mountains, after a distance of about 200 meters and it flows into the river Minis forming the Bigar Waterfall.

**Transylvania**

Transylvania is a historical region which today is located in central Romania. Bound on the east and south by its natural borders, the Carpathian mountain range, historical Transylvania
extended westward to the Apuseni Mountains. The region of Transylvania is known for the scenery of its Carpathian landscape and its rich history. It also contains major cities such as Cluj-Napoca, Brașov, Sibiu, Târgu Mureș and Bistrița.

The Western world commonly associates Transylvania with vampires, due to the influence of Bram Stoker's novel Dracula and its many film adaptations.

Asides from castles and the relaxing countryside, Transylvania is a perfect region for cycling tours during the warm season. Many bikers like to choose a cycling trail that passes near the fortified churches of Transylvania. Built by Saxons, these churches are part of UNESCO’s World Heritage List and are considered worth visiting.

Cultural tourism –

“the dilemma”

Romania has a history and folk cultural heritage of great value and attractiveness. There are over 680 cultural heritage values of national and international interest, among which stands out: church and monastery complexes, monuments and architectural ensembles and art, urban ensembles, historical and archaeological sites, some of which have been the values under the aegis of UNESCO World Heritage (fortified churches, churches with exterior frescoes, Dacian fortresses, the fortress of Sighisoara, etc.). Romanian ethnography and folklore treasure is also of great originality, being represented by: the specific architecture of villages in the Romanian historical provinces, wooden churches of Maramures and Salaj, woodworking, costumes, art decoration, traditional religious and ethno-cultural events, fairs and ethnographic museum exhibitions outdoor or exhibition pavilions etc.

Quote:

“For many in the West, Romania is synonymous with Count Dracula. Since the publication of Bram Stoker’s famous novel in 1897 Transylvania (and by extension, Romania) has become inseparable in the Western imagination with Dracula, vampires and the supernatural. Moreover, since the late 1960s Western tourists have travelled to Transylvania on their own searches for the literary and supernatural roots of the Dracula myth. Such ‘Dracula tourism’ presents Romania with a dilemma. On one hand, Dracula is Romania’s unique selling point and has considerable potential to be exploited for economic gain. On the other hand, the
whole notion of vampires and the supernatural is starkly at odds with Romania's self-image as a modern, developed, European state."\textsuperscript{35}

This form of tourism is supported by the accommodation capacity which is 12.9\% of all existing places in whole country, in recent years recording a decrease of it due to change of accommodation destinations. The challenges facing cultural tourism are related to infrastructure for access to archaeological sites, architectural monuments outdated and inadequate, lack of parking spaces provided with information points and promote cultural objective, lack of belvedere points for fortifications, fortresses medieval, churches, historic monuments and monasteries, the lack of special facilities for camping for pilgrimage tourism.

Romania's unique cultural heritage is reflected in the UNESCO World Heritage Sites, throughout the whole territory. Starting from Dacia and Roman influences from antiquity, Byzantine and Slavic influences to the Middle Ages - Romania is an exceptional amalgam of fascinating ingredients. Extraordinary scenic testimonies of its cultural reality are, for example, the painted monasteries that can only be found in Romania.

Peles and Bran Castles are the most visited castles in Romania for their medieval atmosphere but also because they hold an amazing history. Resorts such as Mangalia, Saturn, Venus, Neptun, Olimp and Mamaia (sometimes called the Romanian Riviera) are among the main attractions during the summer. During the winter, the ski resorts of Poiana Brasov and Prahova Valley are the favorite destinations of foreign tourists.

The George Enescu Festival is an important classical music festival and international competition held in Romania. It is a widely acclaimed music festival and is attended by numerous world renowned musicians and orchestras. The festival is held in honor of the celebrated Romanian composer, George Enescu.

\textsuperscript{35} The Dracula Dilemma: Tourism, Identity and the State in Romania (New Directions in Tourism Analysis) 1st Edition by Duncan Light
Marketing and communication short and mid-term plan for the promotion of the speleo, adventure and cultural tourism in the region of Nis, Montana and Sofia

The target of the Strategy is to adopt a non-standardised approach to convey the Nis-Montana-Sofia brand and all its distinguishing values. The Plan prioritises the use of online tools to attract demand, while encouraging dynamic management of target markets, products and strategies. The marketing the region adopts must be differentiated and specialised, based on a portfolio of products and their respective targets, as well as an innovative collection and analysis of tourism data.

**Brand**

*To construct and affirm the Nis-Montana-Sofia brand internationally and locally*

To achieve the effective and innovative marketing set out under the Strategy, it is essential to operate with robust international coordination, using actions and tools that will improve the brand's market penetration. Promotional activity will have a multimedia approach, differentiated by market and geographical area, with a strong international presence. At the same time, it will be firmly committed towards development and differentiation with regard to the domestic market.

**Markets**

*To penetrate neighbouring and European markets*

Destination marketing will focus on markets and products with high potential for development in the medium to long term, and on those that can reduce seasonality and geographic concentration most effectively. The most suitable markets for the affirmation of the Nis-Montana-Sofia brand are:

i) Bulgaria – Serbia  
ii) Neighbouring countries such as Greece, Turkey, Romania, Hungary, Macedonia  
iii) European countries – Western, Northern and Central Europe

A different message has to be elaborated regarding each target group as the first can be focused on similarity, proximity and closeness such as: *“The things we don’t know. About us”*; the second consist of countries of more heterogenous character and different levels of
development so that the message should be a form of invitation to explore what differentiates one from another and what makes each place special, furthermore it has to be able to capture their immediate attention and to engage them in research activity on a later stage, example of a message might be: “Three cities – hundreds of stories”.

Regarding the third group, these are countries with different standards and way of living, the most citizens of which are not well acquainted with the reality of Bulgaria and Serbia, however follow a general perspective of underdeveloped territories with a strong element of unpredictability. In order to attract this specific type of tourists, the message should be a mixture of surprise and expectations and indirectly challenge their already established view patterns of the region, such as: “Dare to hear the #whole story?”. The idea here is not to “escape” from the stereotype as it is more truthful than false, but to show that there is something more, which is worth exploring.

**Web marketing**

*To boost the digitisation of promotion and marketing services*

Destinations needs to have a strong presence online to engage with new and returning travellers across all channels and devices; it’s essential to find a way to influence travellers positively and to assist them in a better and more meaningful experience. Therefore, an innovative website and mobile app should be developed with intuitive, simple design, which has been planned with the user front of mind in the development process.

The website should be offering various site navigation opportunities, including Breadcrumb, Horizontal and Vertical Navigation, Sub-Page content menus, and in text hyperlinks – which allows the user to confidently peruse the content on the site without getting lost, which helps enhance user engagement (eg. encourages increase time on site through lowering bounce rates, and increasing the number of pages per session). It should also

- feature an interactive map on the homepage, so the user can search for experiences from a geographic mindset, or they can use the main navigation structure;
- display relevant content (articles, product etc) throughout the website in relevant subsections;
- feature loads of inspiring images of genuine experiences – with the use of full width images below the main navigation;
- display time sensitive, actionable information (eg. Top 10 experiences, partner deals) and local insight on the homepage to give clout to typically factual content;
- offer social recommendations and content on their home page and Social Hub page;
Promotional video(s)

In an age where the digital has become norm, people live surrounded by information that they can access instantaneously, at any time, through a click or the flick of a finger. The Internet is a source of information that allows everybody to easily get information and read users’ opinions, especially in the universe of tourism. Before travelling, people search for what they might see at a given destination and what experiences they can look forward to having there. They rely on users’ experiences at that location and the information supplied by local tourism institutions and one thing they always do is watching promotional videos of the places intending to visit, giving them a better visual “insight” towards the chosen destination.36

When defining the content of a tourism video of Sofia, Montana and Nis, several things have to be taken into consideration:

- Videos must have information that may help future tourists to imagine how their future experience might be (Gonçalves, 2010; Hassan, 2011; Lee & Gretzel, 2012; Pham, 2013). This information can be about bookings, gastronomy, landscapes and entertainment (Hou et al., 2011);
- Information must be precise and realistic (Laine, 2013) even though it must make the user dream, travelling through the mind; Marujo (2008) and Lee & Gretzel (2012) state that this mental trip is fundamental to create visit intent;
- The main goals should be diversity and authenticity. When people search about a destination they want to understand its culture and what is authentic about it (Laine, 2013; Reino & Hay, 2014). Besides, people believe more in what they see than in what they read, according to Lee & Gretzel (2012). Reino & Hay (2014) confirm the idea, stating that YouTube is an useful tool to provide reliable content;
- The senses must be stimulated, because Rajaguru (2014) found that it helps to create decision processes. Visual stimulation in particular is important for tourism, images and landscapes stay longer in our memory (Aiello & Thurlow, 2006; N. Marujo & Santos, 2012);
- People react positively to narratives (Valls et al., 2013). They like stories and it’s an effective way to get attention from the target audiences;

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36 THE ROLE OF PROMOTIONAL TOURISTIC VIDEOS IN THE CREATION OF VISIT INTENT TO BARCELONA Joana Eulália, Marques Teixeira
• Self-congruity theory defends that a very effective way of getting attention from the target audiences is to use someone they trust and similar to the audience. This theory was created thanks to advertisement, the authors found that when there’s big congruity between the advertisement and the individual watching it, it’s more probable that the individual will buy the product (Beerli, Meneses, & Gil, 2007). In the case of tourism, the best option is to show tourists having a good time (Rajaguru, 2014).

The idea is to be elaborated a video that presents the Sofia-Montana-Nis region in its multispectivity, contains a meaningful story and is able to capture the viewers attention and to transform it into a consecutive actions.

Development of methodology for control and follow up of the implementation of the strategy

Regarding the short-term expectations during and after the implementation of the Strategy:

• *Intensified dynamics of the communal life* – the indicators for the execution of this criterion will be the events, fairs, tournaments, contest, etc. which will be held for the promotion of the identity of the region, as well as the number of participants involved. The general aim is for all happenings to be dispersed through all seasons, to be of different character – cultural, adventure, speleological, etc. and to be minimum 3 per month. The data from the events will be gathered, analysed and presented to the wider public through the website of the municipalities or the project online platforms.

• *Enhanced traffic performance of the project online platforms* – the performance of the online platforms can be easily measured through regular monitoring; the posts on the Facebook and Instagram pages will provide the relevant bodies with an insight regarding the success rate of the used publishing methods and the chosen general approach;

• *Strengthened interest and knowledge towards the region, Increased number of visits to the three cities by 1/4th, Increased average spending of visitors to the cities by 10%*: The first indicator could be measured through the visits to the online platforms of the project and the region, the photos posted, the recommendations/complaints expressed publicly; the second and third through the official data and registers on a yearly basis,

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37 THE ROLE OF PROMOTIONAL TOURISTIC VIDEOS IN THE CREATION OF VISIT INTENT TO BARCELONA, Joana Eulália Marques Teixeira
in casa underachieving is becoming evident, measures should be taken in order the situation to be corrected.

Regarding the mid-term expectations during and after the implementation of the Strategy:

- Sustainable utilization of natural resources, unspoilt environment managed rationally that is able to provoke a lasting interest in the visitors and to generate incomes in the local economy – This indicator will be measured through the regular statistical data, accessible to all interested agents and also through online interactive surveys, which will give opportunity for the visitors “to be heard”. After analysis of the obtained information, several documents with conclusions and recommendations towards the course of the strategy will be elaborated.

- Improved quality of the sites with facilities at the disposal of children, people with limited physical activities, elderly; enhancing the compliance with the safety standards and educating citizens and tourists on the topic of safety – This criterion will be measured objectively, through number of modernised and/or newly created facilities, their quality and effectiveness, the funds allocated and subjectively: again through the perspective of the visitors and their specific and general satisfaction with the quality of the stay and the existence/deficits of relevant facilities.

- Modernization of the existing transport means and infrastructure; implementation of new services; better compliance with the established rules through more awareness raising campaigns or higher sanctions/new rules – The indicator will be measured quantitively through the number of modernised transport means and implemented new services and by the number of awareness campaigns conducted on the territories of Sofia, Montana and Nis.

- Increased general satisfaction of the visitors (measured by digital short-surveys) with the time spent in the 3 cities, including services, accommodation, accessibility of sites, hospitality, etc. – After obtaining the necessary information, an analysis will be elaborated and published on the online platforms with the idea for everyone – from tourists through tourists to business owners to be acquainted with the results and the expressed satisfaction/dissatisfaction.

- Increased visibility of the region as a tourism destination with variety of “unique experiences” – The indicator will be measured cumulatively through the number of overnight stays, number of tourists, spending, opinions towards their stay and the
quality of the services, as well as through monitoring of important tourism internet platforms and the regularity of mentioning the three cities – Montana, Nis and Sofia taken independently or collectively as a joint destination.

Financial plan for the implementation of the strategy

<table>
<thead>
<tr>
<th>Strategic goal/indicator</th>
<th>Time resources</th>
<th>Financial resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elaboration and implementation of a competitive marketing strategy and promotional activities in compliance with the international standards; enhanced digitalization of the tourist offer, implementation of new online services of assistance to the tourist, including website, mobile application, promotional videos, digital surveys and results processing.</td>
<td>6 months</td>
<td>75 000 euro, distributed equally between Sofia, Montana and Nis</td>
</tr>
<tr>
<td>Intensified dynamics of the communal life – the indicators for the execution of this criterion will be the events, fairs, tournaments, contest, etc. which will be held for the promotion of the identity of the region, as well as the number of participants involved. The general aim is for all happenings to be dispersed through all seasons, to be of different character – cultural, adventure, speleological, etc. and to be minimum 3 per month. The data from the events will be gathered, analysed and presented to the wider public through the website of the</td>
<td>For the whole period of the Strategy (5 years);</td>
<td>450 000 euro, distributed equally between Sofia, Montana and Nis</td>
</tr>
<tr>
<td>Improved quality of the sites with facilities at the disposal of children, people with limited physical activities, elderly; enhancing the compliance with the safety standards and educating citizens and tourists on the topic of safety – This criterion will be measured objectively, through number of modernised and/or newly created facilities, their quality and effectivity, the funds allocated and subjectively: again through the perspective of the visitors and their specific and general satisfaction with the quality of the stay and the existence/deficits of relevant facilities.</td>
<td>For the whole period of the Strategy (5 years);</td>
<td>650 000 euro distributed between Sofia, Montana and Nis</td>
</tr>
<tr>
<td>Modernization of the existing transport means and infrastructure; implementation of new services; better compliance with the established rules through more awareness raising campaigns or higher sanctions/new rules – The indicator will be measured quantitatively through the number of modernised transport means and implemented new services and by the number of awareness campaigns conducted on the territories of Sofia, Montana and Nis.</td>
<td>For the whole period of the Strategy (5 years);</td>
<td>525 000 euro distributed between Sofia, Montana and Nis</td>
</tr>
</tbody>
</table>
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