Volume II - Destination Development Plans - Plan No. 7

Tourism Development Plan for Dojran, Gevgelija and surroundings

One of ten Tourism Development Plans for fYR Macedonia

February 2018

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1. Introduction

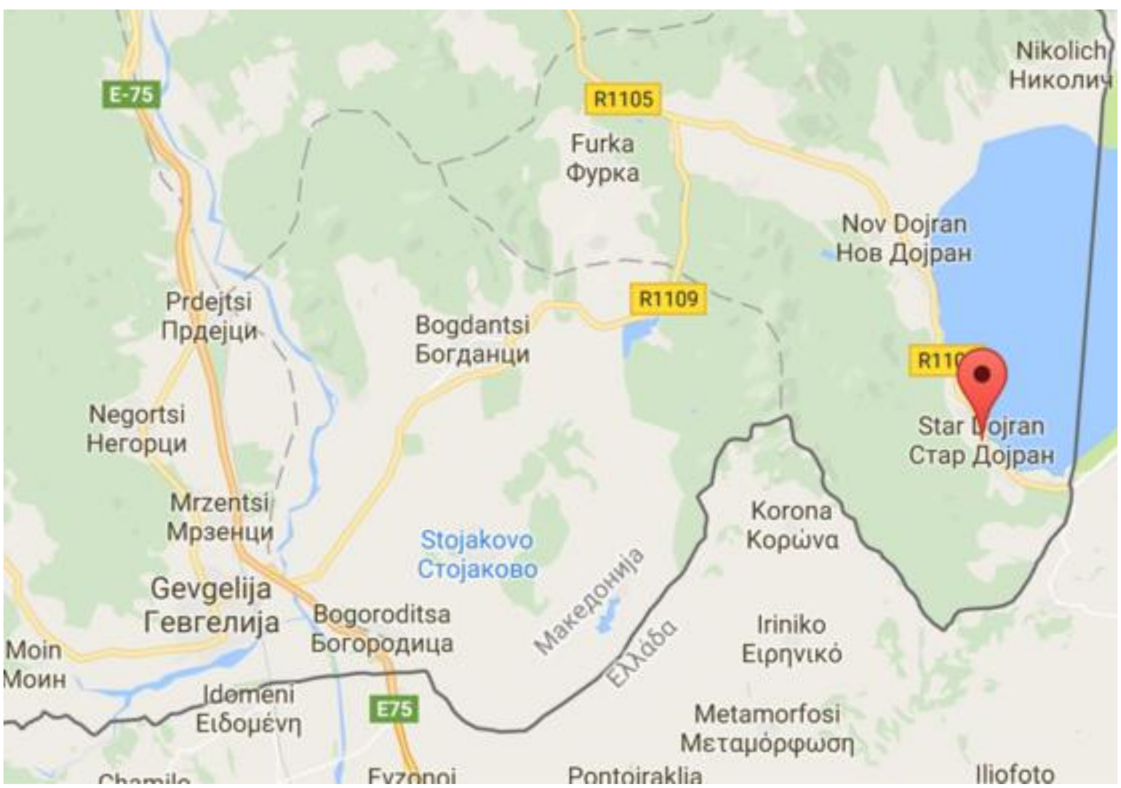
This tourism destination development plan has been created in consultation with and with inputs from stakeholders from the municipalities of Gevgelija and Dojran. The destination development plan is designed to inform implementation of critical activities that will increase competitiveness and improve the visitor experience.

> **Definition: Destination**
> "A tourism destination is a physical space in which a visitor spends ***at least one overnight***. It includes ***tourism products*** such as support services and attractions, and tourism resources within ***one day´s return travel time***. It has boundaries defining its management, and images and perceptions defining its market competitiveness."
>
> \- UNWTO

1. 1. Description of the destination

The 'destination' is not defined by administrative boundaries, but rather by key elements that make up a destination from a visitor perspective. This destination therefore includes the natural, cultural and man-made attractions, facilities, services and resources that make up this particular hub of tourist activity, centered around Dojran and Gevgelija. This destination therefore includes tourism assets in these municipalities but also in smaller villages within a one hour driving distance. The attractions in these nearby areas are often visited during the same trip.

Figure 1: Map of Gevgelija and Dojran



2. Vision and Goals for the Destination

2.1 Vision

The following shows a graphical representation of word frequency of terms that were used by stakeholders to describe tourism in the destination in 2030*.

These words are aspirational and reflect the ambition of stakeholders to develop and build on their core strengths, particularly around ideas of health, clean environment – with an attractive offer.

The following vision for the destination has therefore been developed:

> *In 2030, Gevgelija will have capitalized fully on its central location, and diversifying the portfolio of available experiences with a range of wellness offers based on the use of the special geo-thermal spa waters and the opportunity to engage in a wide range of sports and recreational activities in a clean environment.*
>
> *Dojran will have enhanced its position as an attractive lakeside resort, offering a wide range of resort services, recreational and cultural activities that appeal to travelers from Macedonia and the Balkans well beyond the summer season.*

2.2 Strategic goals for 2030

The primary goals for this destination, as identified by stakeholders, are for tourism to:

1. Provide more and better job opportunities
2. Increase the awareness of the importance of environmental protection
3. Improve the conservation of ecosystems and natural resource management

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* The data used in this section was collected during a destination management workshop on January 16, 2018 in Gevgelija

4. Preserve local traditions and culture including handicrafts and heritage structures
5. Increase the economic benefits for the public sector
6. Attract other sectors by emphasizing the attractiveness of the destination

The targets, together with measurable indicators to accompany these goals will be defined collectively through a destination management process.

3. Destination Overview and Supply Characteristics

3.1 Destination supply and tourism assets

The town of Dojran is divided into the old part, Star Dojran and the new part Nov Dojran and located in the southeast of the country close to the Greek border. The total population is around 3,500 people. The town is named after Lake Dojran which is the third largest lake in Macedonia. The lake with an ear of 43 sq. km. is shared between Macedonia and Greece. Fishery has traditionally been the mainstay for the people living in and around Dojran. Overuse of Lake Dojran, which is split between fYR Macedonia and Greece, had caused the water levels to drop to one-third of the former size. After some intervention, water levels have now returned to normal. The small border control station nearby is used as an alternative to the busier crossing on the highway near Gevgelija. Dojran is a popular destination for domestic leisure seekers.

The town Gevgelija is located just few kilometers from the border with Greece, the crossing point for the international highway E-75 which links Belgrade and Skopje with Thessaloniki. The town is located on the banks of the Vardar and has a population of about 15,000 people. Tourism is concentrated around the medical spa Negorci, the casinos as well and is also frequented by transit tourists.

Its location makes it possible to create linkages and extended offerings with complimentary attractions and products in Strumica, Berovo as well as the wine region around Tikves.

The following main attractions in the area are highlighted to outline the main profile of the destination supply[†], especially in the context of priority segments discussed below:

- Lake Dojran
- World War I battlefield near Dojran

The following are the main accommodation facilities for tourists in the area:

- **Rental houses and apartments** - The Dojran area has experienced a recent boom in second homes and short-term rental apartments. Overnights stays per accommodation

[†] These attractions are not comprehensive but illustrative of the type of destination. Substantial supply side information has been reviewed as part of this work and a full reference point of documents read can be found in Volume II. The long-list of supply-side attractions has not been repeated here.

type are not available on the municiple level but 61% of all domestic overnight stays in the Southeast region (which includes Dojran) are in ‘houses, vacation apartments and rooms for rent’.

- **Hotel Romantique** in Star Dojran– The hotel opened in 2013 and has 35 rooms. It is one of the few hotels which is open year-round. They cater to the domestic leisure market during the summer months and domestic MICE during low season.
- **Hotel Makedonija** in Star Dojran– The 50-room hotel is only operating during high season
- **Motel Istatov** in Nov Dojran– This hotel offers 44-rooms and offers a sport center.
- **Hotel Ramada Plaza** in Gevgelija – This hotel offers 131 rooms, a casino and a modern spa. They hotel caters mainly to Greek spending time in the casino, transit tourists and some domestic MICE.

3.2 Current supply development pipeline and opportunities

The portfolio of existing attractions is currently limited to leisure tourism around Lake Dojran. There are currently untapped opportunities and destination features that represent particular opportunities matching the demand specifics of the priority segments discussed later in this plan. In addition, there are some recent developments and destination specifics that represent particular opportunities for improving the offerings for priority segments.

- The destination is in **close proximity to both Greece and Bulgaria.** Dojran is located right on the border with Greece and close to Bulgaria. Greeks like to spend time in fYR Macedonia as the prices at restaurants and hotels are relatively more affordable (lower prices in fYR Macedonia than in EU).
- The area is **conveniently located for transit** tourists. Travelers from Serbia and Kosovo use Gevgelija and Dojran to overnight on their way to or from Greece. While they are initially not considered as high potential markets, they could be enticed to spend a few more nights in the destination.
- The **small border control station** near Dojran is a good alternative for the border station on the highway near Gevgelija bringing travelers through the town
- The destination has very **good accessibility** being located near the corridor
- There have been **recent infrastructure improvements near the beach** in Dojran. There is a new walking path around the lake and sun beds, umbrellas and showers at the beach
- Dojran was one of the few places in the world where fisherman use **traditional fishing methods** such as using cormorants, gulls and other birds. While currently not being practiced, the tradition could be reinstated. The fishermen are still using the traditional fishing boats and the stilted fishermen’s huts.
- **The World War I frontline** near Dojran is a well-known battle side. Currently Dojran’s WWI heritage is only accessible and known to a small group of niche travelers
- The **healing characteristics of the water in Lake Dojran** are attractive to all types of visitors. The mud of the lake is believed to heal muscle pain and bone issues. The algae are believed to cure sinus issues.
- The town of Dojran was elected to be the **City of Culture for 2016**

4. Arrival and Demand Trends

Domestic tourists represented 90% of all arrivals in Dojran in 2015 and the number doubled between 2010 and 2015. Foreign arrivals in Dojran also doubled between 2010 and 2015. The average length of stay for foreign guests in 2015 was 1.8 nights. The visitation has increased since the lake has normal water level again.

Star Dojran also attracts a significant number of day visitors (Macedonian and Greek) who enjoy the restaurants and the lake for the day. These visitors are not included in the statistics because they do not overnight. More specific details on the source markets are discussed as part of the section on high potential market segments.

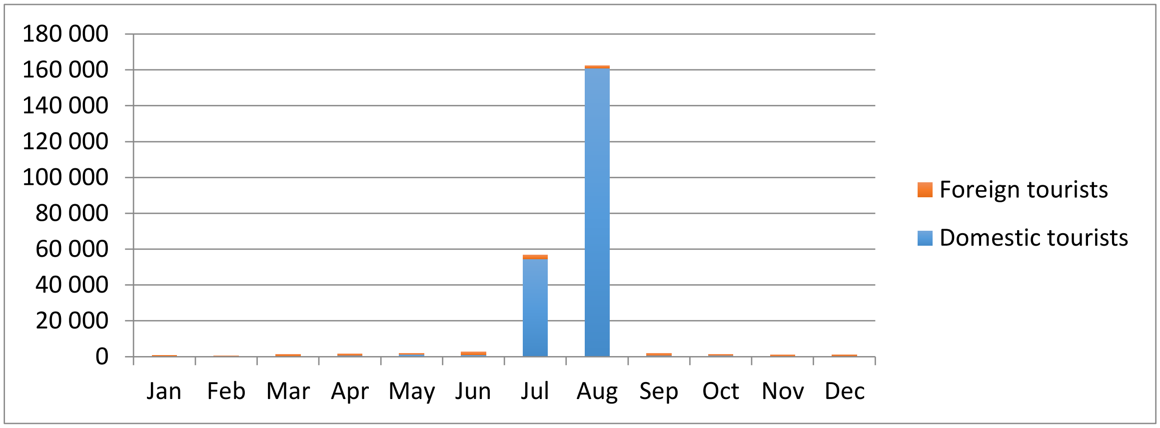
Table 1: Number of Overnight Stays and Tourist Arrivals in Dojran, 2010 and 2015

	Number of Overnight Stays			**Number of Tourist Arrivals**			**Average length of stay**
	2010	**2015**	**% change**	**2010**	**2015**	**% change**	**2015**
Foreign	*4,605*	*10,514*	*128.3*	*2,169*	*5,748*	*165.0*	*1.8*
Serbia	1,549	3,807	145.8	561	2,071	269.2	1.8
Bulgaria	1,344	2,593	92.9	498	1,259	152.8	2.1
Greece	373	849	127.6	290	764	163.4	1.1
Kosovo	443	799	80.4	273	394	44.3	2.0
USA	13	415	3,092.3	11	123	1018.2	3.4
UK	62	292	371.0	37	130	251.4	2.2
Domestic	*114,017*	*222,688*	*95.3*	*25,286*	*49,590*	*96.1*	*4.5*

Source: State Statistical Office

Domestic tourism is heavily seasonal with 96% of all domestic overnight stays taking place during the months of July and August. The hotels are full during the summer months but many of them close during the rest of the year.

Figure 2: Number of overnight stays in Dojran by month, 2015



Source: State Statistical Office

Foreign arrivals in Gevgelija showed strong growth between 2010 and 2015. In 2015, 84% of all foreign tourists originated from Greece. Their average length of stay was 1.7 nights in 2015 and arrivals increased by 65% between 2010 and 2015. Many of the overnight stays can be attributed to Greeks coming to play at one of the casinos in the town. There are two major casino hotels in Gevgelija; the Flamingo Hotel and Casino opened in 2003 and the Ramada Hotel (Princess Casino), which opened in 2010. People from Serbia, Turkey and Bulgaria are mostly transit passengers who use the hotels in Gevgelija for an overnight stay when traveling on Corridor 10.

Domestic tourists represent approximately 50% of all overnight arrivals in Gevgeljia. Senior citizen staying at medical spa Negorci represent much of this market segment. This is also evident from the long average length of stay of 4.3 nights.

Nearby restaurants in villages such as Mrzenci benefit from transit passengers (mostly Serbs and Greeks) who stop for lunch or dinner when traveling on Corridor 10.

Table 2: Number of Overnight Stays and Tourist Arrivals in Gevgelija, 2010 and 2015

	Number of Overnight Stays			**Number of Tourist Arrivals**			**Average length of stay**
	2010	**2015**	**% change**	**2010**	**2015**	**% change**	**2015**
Foreign	37,445	62,465	66.8	18,845	27,759	47.3	2.3
Greece	20,790	39,224	88.7	14,192	23,414	65.0	1.7
Serbia	1,208	4,812	298.3	1,167	3,307	188.3	1.5
Turkey	366	4,244	1,059.6	205	2,033	891.7	2.1
Bulgaria	474	2,183	360.5	318	1,196	276.1	1.8

Kosovo	1,373	1,269	-7.6	609	926	52.1	1.4
Romania	121	1,092	802.5	108	799	639.8	1.4
Domestic	*49,423*	*60,624*	*22.7*	*10,459*	*14,216*	*35.9*	*4.3*

Source: State Statistical Office

5. High Potential Market Segments

While located in fairly close proximity, Dojran and Gevgelija are very different destinations. Dojran is catering mostly to domestic leisure tourists while Gevgelija's main segments are gaming tourists, medical service tourists and transit tourists. The priority market segments for the destination are: domestic short break tourists, regional short break tourists and organized as well as independent active tourists. These segments are characterized by demand specifics that align with the existing and potential tourism supply. The priority segments are attracted to the nature, culture and history, as well as to the local and authentic rural experience that can be found in the area. These segments are characterized with consumption behavior that provide particular opportunities for increased economic performance of tourism in this destination through diversification flows and increase of average daily spending.

The sections below introduce the four segments with more details on how they use and relate to the destination. Their description is followed by a discussion of the rationale behind their appropriateness as targets for the destination and the opportunities for desired tourism development they can generate.

Domestic short break tourists are travelers who live in fYR Macedonia and who visit different resorts or holiday places for weekends, for short breaks during the week or around official holidays. This group includes Macedonians but also expatriates residing in the country. They stay in a variety of different accommodation types ranging from vacation homes to higher-end hotels, and travel by car. They are motivated by change of scenery from their regular place of living, need for relaxation and spending time with friends and family. Frequently they travel with family, and very often with groups of friends.

The average length of stay for domestic tourists in Dojran is 4.5 days, the town hereby achieves one of the highest lengths of stay in the country. Most of the domestic tourists stay in a rented home or apartment during the summer and come to the lake to relax, spend time with family and friends and undertake very little activity. The area is known for its local restaurants serving regional (fish) dishes. The mud in the lake is believed to have healing powers for the bones and muscles and the algae to cure colds. One of the hotels caters to the domestic MICE market during low season. For domestic short break tourists, Dojran is in most cases a single destination trip.

Key segment insights and prioritization rationale: While Dojran is very busy during the months of July and August, the remainder of the year is quiet. There is an opportunity to attract the domestic market outside of high season. This can be done by developing more market-relevant product offerings including family oriented activities as well as special events and festivals during low season.

Regional short break tourists are travelers from Bulgaria, Greece and Serbia who visit fYR Macedonia for leisure purposes staying for one or more nights. Arrivals from this market are concentrated close to the border with Greece, Bulgaria and Serbia. A number of travelers from Bulgaria come in organized groups of up to 50 people. They book a package for one or two nights and usually stay in one single destination. These groups are very interested in culture and local foods. There is also a significant market of regional travelers who travel independently and book their hotel or rental home directly from the provider or through an OTA. The latter group seeks relaxation and enjoys good food in the company of friends and family. Some of their attraction to destinations in fYR Macedonia is fueled by the competitive pricing of the tourism products.

In Dojran and Gevgelija, the regional leisure market is small compared to the domestic market but is less seasonal. More than half or foreign arrivals originate from Serbia or Bulgaria. Many of the Serbian tourists are transit tourists traveling between Serbia and Greece on Corridor 10 and stay in the destination for just one night. There are a few tour groups from Bulgaria who stop for lunch in Dojran on their way back home after overnighting in Strumica. Visitors from Bulgaria come mostly for leisure purposes. The high number of Greeks showing up in the visitor statistics are mostly gambling tourists but a small group can be considered short break tourists. There are also large numbers of Greek day visitors who like to take advantage of the lower prices.

Key segment insights and prioritization rationale: Its geographic location makes the destination a convenient travel destination for short break leisure tourists from within the region. A more attractive lake tourism product expanded with additional activities and attractions could appeal to this market. This segment is prioritized for the destination for its opportunities to reduce seasonality in the destination. Additional activities could increase the length of stay.

Organized active tourists are part of an organized tour group (size ranging from 5-25 people) traveling with a specialty operator around fYR Macedonia. Some of the tours combine fYR Macedonia with neighboring countries such as Greece and Bulgaria. These tours usually involve traveling by mini bus or bus, and may combine road transportation with hiking and/ or biking. The length of the tour varies between 7-14 days, shorter tours focus on the western region and longer tours also cover parts of Eastern Macedonia. The main focus of the tours is Macedonian culture and nature through authentic experiences in off-the-beaten-track locations. Some of the tours are standard and others are tailor-made for specific interest. The majority of these groups consist of travelers who are older than 50 years of age.

Currently only very few organized active group tours include this destination in their itinerary. The World War I battlefield near Star Dojran is attracting special interest groups from the UK. In 2016 it was 100 years since the main battles and events along the Greek-Macedonia Line. For summer 2016, hotels in Dojran had bookings for three groups of 50 people each from the UK. The groups visited battlefields in Greece for four days and then spend two days in Dojran. There are currently no other organized active groups including the destination in their itinerary. Tour operators are concerned about the quality of the hotel rooms and the limited variety of activities.

Key segment insights and prioritization rationale: Dojran would be a good addition to itineraries of small organized tour groups who are already traveling around the region. These groups usually start in the western part of the country and travel through the Vardar region on to Strumica and Berovo. This type of organized tours travel from May until October and could offset some of the current seasonality. Among the opportunities for improving existing supply to drive growth in this segment are better quality tourism infrastructure, more market-relevant product offerings and improved service quality.

Independent active tourists (including domestic) are travelers from a variety of source markets (Europe, US/ Canada, region and domestic from fYR Macedonia itself) who travel to and within fYR Macedonia engaging in active outdoor exploration (hiking, biking) combined with cultural and culinary experiences. The age bracket for this group of travelers is quite wide (could be between mid 20s and 30s to mid 50s). They tend to be independent in the planning of their stay (using online channels such as booking.com) in fYR Macedonia and are usually in small groups (up to 4-5 people).

While still in small numbers, there are independent travelers who travel around the destination. Hotels have reported individual bikers and hikers staying overnight. While most the travelers within this segment originate from Western Europe they are also coming from North America. They are adventurous and attracted to new and less-conventional experiences. They are a leading market for many rural offerings.

Key segment insights and prioritization rationale: The segment is prioritized for the destination because of its spending power and its interest in local and authentic offerings. They would also be more likely to travel outside the high season than the current markets. This market requires better infrastructure, more market-relevant product offerings and improved service quality. There is growth potential for this market but the destination will be dependent on the rest of the country to further expand this market as active foreign tourists will initially be attracted to explore destinations in the western region and then later add destinations such as Dojran and surroundings to their itinerary. Its proximity to the border with Greece makes this destination convenient for independent travelers combining multiple countries.

6. Challenges and Gaps

6.1. Destination development challenges

Currently, Dojran's main issues are high seasonality and suboptimal tourist expenditures. While during the months of July and August hotels and other accommodation facilities are fully booked, there are few overnight visitors during the remainder of the year. Due to its proximity to the Aegean Sea, Dojran's competiveness for the regional sun and sand product is low and Dojran is considered a low budget destination. These challenges can be addressed through extending the tourism season for domestic short break tourists through offering additional activities and attractions geared towards the needs of this market. Expenditures can also be increased by improving the destination's competitiveness through offering a higher quality lake tourism experience for the domestic and regional short break tourists. Addressing these challenges will contribute to the destination's goals of increasing tourism sector job opportunities, protect the natural environment as well as preserve traditions

6.2 Gaps in the experience of the priority market segments

The natural assets in combination with its cultural assets makes Dojran, Gevgelija and surroundings an attractive destination for the four priority market segments. While existing tourism assets could hold strong potential for appeal to the priority segments, the experience value chain analysis revealed gaps in current supply and delivery, as well as underutilized opportunities.

The following section summarizes the gaps and opportunities for improvements in the traveler experience currently offered across the four priority segments at this destination.

6.2.1. Accommodation and hospitality

<u>Gap 1: There is a gap between the type of offered accommodation and the expectation of priority markets</u>

Detail and explanation

- While over the last few years the inventory of international quality hotel rooms has increased slightly, many of the hotels are not reaching the expectation level of the international and domestic travelers. Overdue maintenance and low levels of hygiene are the main complaints. This issue is more striking in Dojran than most other destinations in the country.
- The number of rooms in smaller and more authentic accommodation offerings is limited. This type of accommodation would be most attractive to the smaller organized active groups. Small international tour groups require accommodation which can be basic but provides a good bed and a private modern bathroom. Tour operators also require the accommodation provider to offer breakfast and meet the needs of the travelers in regards to customer service.

These problems arise because;

- There is an insufficient number of hotels offering rooms that meet the quality standards of the organized large group explorers, organized active tourists as well as large proportion of domestic and regional short break tourists. There is evidence, however, that the majority of travelers from these priority segments would be willing to pay higher prices for a better product
- Service providers lack understanding of the needs and requirements of targeted tourists, and are not accustomed to directly addressing or modifying the product according the traveler expectations or feedback

Feedback from international traveler:

"Whilst outwardly looking acceptable, this hotel has delusions of acceptability. The rooms are filthy and most basics don't work. Toilets don't flush properly and less than half of the lights are functional. Carpets are stained and dirty"

Filling the gap

<u>1a.Ensure the quality and style of accommodation facilities meets the expectations of target market segments</u>

There is need to align the quality and style of existing accommodations with the expectations of the priority segments. This includes improving availability of specific elements that are very important for the traveler experience of all the priority segments: quality bed and mattress, well-functioning bathroom with a simple but well working shower, consistent and well working heating/ cooling systems, water and electricity, etc. Several the priority target markets require quality hotels with at least 20 rooms in order to cater to tour groups. There is also a need to improve the esthetics of some of the accommodation facilities such as interior design and ambiance reflecting the authentic rural environment of the area. This is important for the smaller active group tours as well as the independent active tourists.

Indicative activities to fill this gap

a. Improvements and maintenance of existing accommodation offerings. Improvements need to be towards bringing existing small properties (up to 20 rooms) to current market standards such as ensuring quality of bathrooms, improvement of bed quality and mattresses and adding amenities.
b. Improvements can also support the development of additional installations that are needed to meet the needs of active tourist markets. These may include: bike parking or storage areas, laundry rooms, kitchen improvement to enable additional or extended service, etc.

c. Support for market access to existing small properties, which are in operation but are not registered or listed anywhere and have limited access to the market. This can include assistance with development of online marketing channels (website, social media presence) and distribution channels (presence on Booking.com and others).

d. Setting up a feedback mechanism for accommodation providers to analyze and respond to customer feedback received through channels such as TripAdvisor and Boooking.com. The feedback should be analyzed on a regular basis and actions should be undertaken to address negative feedback.

1b. Activity and experience providers need capacity building that secures alignment with the expectations and needs of targeted segments.

This is discussed in more detail in the cross-destination gaps chapter, but there are opportunities for implementation and some innovation to address this gap at the local level.

6.2.2. Activities and experiences

Gap 2: There are not sufficient tourism offerings that are specifically geared towards the priority segments

Detail and explanation

- The outdoor activities such as hiking, biking, mountaineering and others are underdeveloped
- The new path around the lake is a good addition and attractive for all priority market segments but is periodically flooded
- The festivals and cultural events all take place during high season
- There are very limited activities geared towards domestic and regional family travel
- There is very limited availability of experiences based on local culture and history, local celebrations, culinary traditions, etc.
- There are currently limited activities and attractions that take advantage of the unique culture around rural environment, food and agriculture. Existing offers need to be improved and new ones added. These activities need to be authentic and build upon existing resources (e.g. cooking classes or traditional handicrafts).
- There are limited opportunities for visitors to purchase locally grown or prepared foods as well as handicrafts.

These problems arise because;

- Many local tourism business operators have limited understanding of the needs and wants of priority segments, and expectations of international tour operators.
- There is limited access to market knowledge that can guide tourism businesses in their decisions to invest in new experiences and offerings.
- There is limited public investment in infrastructure that gears towards the targeted segments due to the lack of priority on outdoor forms of tourism.

Feedback from international traveler:

"Lots of history in this small town, but not a whole bunch to do other than lay out and/or swim"

Filling the gap

2a. Ensure visitors have access to visitor infrastructure to enable outdoor activities.

There are several historic attractions in the area which are located in a natural environment such as the World War historical sites There are currently very limited opportunities for all five priority segments to combine a cultural visit with light outdoor activity such as a short self-guided walk. While the new walking path around the lake has proven to be very successful, it is not always passable. Offering soft outdoor activities would be attractive for travelers interested in nature-based experiences such as hiking, biking, horseback riding, etc. The practicing of these activities requires paths and supporting infrastructure, which is currently limited in the destination. These activities will encourage visitors to stay longer.

Indicative activities to fill this gap

Investment in the designing and installation of infrastructure that enables hiking and biking around existing attractions in the destination as well as enhance current trails. Providing short hiking trails around cultural sites such as World War I sites or walking routs along the historic attractions in Star Dojran would make the destination more attractive for the priority segments.

2b. Ensure there are activities geared towards families with children

There are currently very few activities that are attractive for families with children. Both the regional and domestic short break tourists often travel with families including young children and teenagers. Offering activities geared towards these markets would increase their length of stay and also improve the attractiveness of the area outside the summer months.

Figure 2: Examples of natural style play areas

2c. Ensure visitors have access to more and better quality products and experiences around local culture, farming and culinary traditions

There are almost no visitor experiences in the area that are based on local culture, culinary tradition, farming practices or other distinctive elements of the heritage of the region and its people. The development of these is possible and relatively easy as there is an abundance of assets that are in place. Dojran is for example known for its food specialties and its traditional style of fishing. There is currently no opportunity for visitors to learn more about this or other traditions or assets (mud and algae). Dojran is known for. Tourism could be a means to reintroduce cormorant fishing and protect this unique type of intangible cultural heritage.

There is need to address the lack of skills and capacity in identifying these assets and packaging them in a market-relevant format. Collaboration with specialized tour operators can help address some of the missing capacity as well. Existing offers need to be improved and new ones added. These activities need to be authentic and build upon existing resources (e.g. cooking classes or traditional handicrafts).

Indicative activities to fill this gap

Invest in development (private sector-led) of traveler experiences that are based on enjoying nature, culture and local traditions. Use more effectively the destination's natural and cultural assets such as natural and cultural traditions to offer experiences that allow travelers to learn about and "taste" local culture, traditional ways in which Macedonian people interact with nature, their cultural and culinary traditions.

<u>2d. Ensure visitors have access to locally-produced crafts, souvenirs and supplementary products linked to local traditions</u>

There is limited availability of products and souvenirs that are typical of the area or of the country. In addition to the especially designed souvenir booths installed around tourist areas, there is a need to make local souvenirs, crafts and easy-to-take-home food items (bottles of wine or rakia, jars with aivar or fruit jams, traditional herbs and spices, etc.) available at more places visited by tourists. These can be tourist sites but also hotels and other accommodation facilities, restaurants, different attractions, resting points, etc. The purchase of locally produced crafts, souvenirs, food items can generate more economic benefits than visitor fees so this is an important opportunity to multiple the impact of tourism. The improved availability should be combined with actions stimulating the development of such products, including improving skills as to the design, packaging, branding, pricing, etc.

Indicative activities to fill this gap

Invest in private-sector led initiatives of producing and selling locally produced goods. This includes support on food safety training, producing competitive products, packaging and promotion.

<u>2e. Activity and experience providers need capacity building that secures alignment with the expectations and needs of targeted segments.</u>

This is discussed in more detail in the cross-destination gaps chapter, but there are opportunities for implementation and some innovation to address this gap at the local level.

6.2.3. Attractions

<u>Gap 3: There is inconsistent maintenance of sites and attractions, which negatively impacts the visitor experience</u>

Detail and explanation

- The **beaches around the lake** are not sufficiently clean and domestic as well as international tourists are dissatisfied with this. The water is also not attractive for swimming. The beach and the lake are the main attraction in this destination. A clean beach will increase the visitor satisfaction during their visit and thereby make the destination more competitive.
- There is insufficient signage from the town to the **restored clock tower and the roman baths**. Both attractions are restored but receive currently very little visitors because of lack of signage and interpretation. The lack of signage and interpretation is causing the visitors to miss out on an opportunity to learn more about the history of the destination and thereby making the destination more of a rounded, rich experience.
- The signage to, the accessibility to and around the **World War I battlefields** outside of Dojran is limited making it difficult to visit for domestic and international travelers. The site is unique to fYR Macedonia and can offer a compelling story but is currently only known and visited by a minority of niche groups. Making the attraction more accessible and providing the necessary signage and interpretation makes it attractive to more market segments. This will make the destination more appealing and competitive.

These problems arise because:

  - There is limited understanding on the importance of good maintenance of attractions and the fact that they are the main reason travelers visit.
  - There are limited resources for maintenance and refurbishment activities.

Feedback from international travelers:

"The only thing I didn't like is trash on the lake beach. I really don't understand why people can't collect their own trash and put it later in trash can"

"Only complaint is that there's lots of trash on the beach, and lots of smokers"

Filling the gap

<u>3a. Ensure that attractions and sites are rehabilitated to a condition that meets visitor expectations:</u>

Figure 3: The Old Clocktower

There is a need to improve some of the natural and cultural heritage sites in the area in order to attract existing and new visitors. In addition to improving their overall physical condition (fix broken or missing infrastructure, install safety infrastructure where needed, install interpretation signs) there is need to improve the interpretation and the overall visitor experience. This is important for all four market segments. A good example for a site that needs improvement in maintenance is the World War battlefield.

Indicative activities to fill this gap

The infrastructure, interpretation and signage to and within most attractions in the destination need be improved and updated to match contemporary expectations when visiting an attraction. There is also a need to understand the significance of the different sites to contribution of the overall attractiveness of the destination for the different market segments.

<u>3b. Attraction providers need capacity building that secures alignment with the expectations and needs of targeted segments.</u>

This is discussed in more detail in the cross-destination gaps chapter, but there are opportunities for implementation and some innovation to address this gap at the local level.

6.2.4 Capacity building

<u>Gap 4: There is a gap between the level of service offered and the expectation of priority markets</u>

Detail and explanation

- Service providers across the region show inconsistent service culture in the delivery of visitor services
- Lack of sensitiveness towards expectations and needs of different traveler groups, as well as lack of ability to explore and capture traveler expectations and needs

Filling the gap

This problem is complex and will need to be addressed at a variety of levels both at the destination, but also at the regional or national level.

<u>4a. Ensure that accommodation and other tourism providers in the destination have a good understanding of the needs and wants of tour operators and the priority market segments.</u>

There is a need by new entrants as well more established tourism service providers to receive guidance on the expectations of tour operators as well as individual travelers.

<u>4b. Beyond the destination level there are a number of additional ways to address this gap, some requiring support and cooperation from the national or central level.</u>

These have been explored in more detail in Chapter 2.

Gap 5: There is a limited number of tourism service providers who have foreign language skills

Detail and explanation

- Foreign language skills are lacking and need to be improved in order to cater to the international priority market segments. Lack of ability to communicate leads to misunderstandings, limited ability to exchange knowledge regarding the destination and an overall weakened service quality.
- The larger hotels, currently already catering to international groups, have a limited number of front-of-house staff who speak English. Owner-operators and staff of smaller tourism enterprises have very limited foreign language skills.

Feedback from international tour operator:

"I would like to bring tourists to the east and I tried but people there don't speak English and they don't understand service"

Filling the gap

5a. Ensure the visitor experience is not negatively affected by lack of foreign language skills
Deeper analysis may be required to determine how best to address this issue. Constraints may be in the form of funding, lack of training programs, lack of qualified teachers, poor incentives to learn, or insufficient demand.

Indicative Activities to fill this gap

Investment in the design and execution of activities to improve the ability of tourism service providers to communicate effectively with foreign tourists.

6.2.5 Marketing, branding and access to information

Gap 6: There is limited online content for promotion and/or information at the destination level. This affects the visitor experience in accessing timely information.

- There is very limited (online) information available about the different events, attractions, activities and sights in the destination. Visitors have a need for information on how to get to specific attractions as well as opening hours and or possible entrance fees. This is especially relevant when attracting independent domestic, regional and international travelers.
- The website www.dojran-info.com does not provide information in English, only in Macedonian
- There is not one web site, brochure or catalogue of Dojran tourist offer (all type of accommodations and restaurants with basic description and contacts, outdoor activities, places which should be visited etc.)
- There is a lack of branding of Dojran as a destination

Filling the gap

This problem is complex and will need to be addressed at a variety of levels both at the destination, but also at the regional or national level.

6a. Ensure that independent travelers have easy access to information they need in order to book accommodation as well as information on local restaurants and activities such as hiking and biking.

6b. Beyond the destination level there are a number of additional ways to address this gap, some requiring support and cooperation from the national or central level.

These have been explored in more detail in Chapter 2 of *Volume II – Destination Development Plans.*

6.2.6. Accessibility and infrastructure

Gap 7: There is a lack of signage and roadside information necessary to guide priority market segments

Detail and explanation

- The region lacks roadside information and signage in English that enables independent travelers to navigate throughout the region on their own with motor vehicles or bike (also national)
- The region has limited and inconsistent visitor signage within towns and settlements, as well as recreational areas facilitating easy navigation by independent travelers. There Signage to the historic sites in Star Dojran are insufficient. Signage to and around the historic WWI battleside near Star Dojran is insufficient.

Filling the gap

This problem is complex and will need to be addressed at a variety of levels both at the destination, but also at the regional or national level.

7a. Ensure visitors are better guided to destination attractions
At the local or destination level, once responsibility for key signage is determined, a plan should be put in place to address this problem, covering where to put signs, the type of signs, consistency of design, maintenance of signage etc. A first step may be to undertake a rapid assessment and to prepare a prioritized list of currently missing signage as well as signage that is in need of replacement

7b. Ensure visitors are able to better navigate within towns, settlements and recreational areas:

At the local or destination level, once responsibility for key signage is determined, a plan should be put in place to address this problem, covering where to put signs, the type of signs, consistency of design, maintenance of signage etc. A first step may be to undertake a rapid assessment and to prepare a prioritized list of currently missing signage as well as signage that is in need of replacement

<u>7c. Beyond the destination level there are a number of additional ways to address this gap, some requiring support and cooperation from the national or central level.</u>

For more details on these non-destination specific gaps, see chapter 2 of *Volume II – Destination Development Plans*

<u>Gap 8: There is limited roadside visitor infrastructure</u>

Details and explanation

- The region offers limited visitor/ recreational infrastructure alongside roads, which provides opportunities for stopovers for travelers in motorized vehicles as well as bikers. This is a general recommendation for across the entire region. For example, basic infrastructure (info tables, places to rest etc.) around places related with WWI are missing

Filling the gap

This problem is complex and will need to be addressed at a variety of levels both at the destination, but also at the regional or national level.

<u>8a. Ensure visitors have access to roadside visitor infrastructure</u>

At the local or destination level, once responsibility for roadside infrastructure is determined, a plan should be put in place to address this problem, deciding where to place roadside infrastructure, the type of roadside infrastructure, consistency of design, maintenance etc. First step may be to undertake a rapid assessment and to prepare a prioritized list of currently missing roadside infrastructure, roadside infrastructure that need to be repaired or that is in need of replacement

<u>8b. Beyond the destination level there are a number of additional ways to address this gap, some requiring support and cooperation from the national or central level.</u>

For more details on these non-destination specific gaps, see chapter 2 of *Volume II – Destination Development Plans*

<u>Gap 9: There is limited road and utilities infrastructure to support growth of products that would enhance the experience of the priority market segments</u>

Details and explanation

- There is no access road to the historic sites related to battles during WWI. This makes it very difficult for potential visitors to gain entrance to the attraction. Improving the road would open the site up to more market segments and thereby increasing the competiveness of the destination for these markets
- There is limited parking in Star Dojran. During high season there are not sufficient parking spots available to accommodate all visitors. This does not only create dangerous situations but also make the destinations less attractive to the priority segments.
- Dojran's wastewater treatment plan is not consistently functioning, which influences the quality of the water in the lake. This has a negative impact on the attractiveness of the lake and hereby the destination.

Filling the gap

<u>9a. Ensure that the relevant infrastructure of the destination is supportive of tourism development.</u>

Tourism in Dojran is highly seasonal and this causes it to stretch the infrastructure in the destination to maximum capacity levels. This has a negative impact of both the local population as well visitors. The infrastructure needs to be able to support the number of available beds in the destination as well as the local community and day visitors. The destination also needs to provide adequate access roads to visit the main attractions.

Indicative activities to fill this gap

First step should be to undertake an assessment of the current infrastructure and specify the current and future constraints. Then, those constraints which are considered most binding should be addressed first.

Table 3: Summary of opportunities for improvement

#	***Intervention***
	Accommodation and Hospitality
1	Improve quality of design and services at existing accommodations
2	Support for market access and improve quality and design of existing small properties
	Activities and Experiences
3	Develop a system of visitor infrastructure in natural areas in the region to enable outdoor activities
4	Develop new products and experiences targeted towards families
5	Develop new products and experiences around local culture, farming and culinary traditions
6	Develop and improve access to locally-produced crafts, food and supplementary products linked to local traditions

Attractions	
7	Refurbish and restore attractions and sites
8	Improve waste collection and waste management culture
Capacity Building	
9	Advance service culture and service quality*
10	Advance foreign language skills
11	Create and maintain contemporary online presence for the region
Marketing, Branding and Access to Information	
12	Increase digital communications and social media skills of tourism operators
13	Develop contemporary digital services for independent travelers and other priority segments
Accessibility and Infrastructure	
14	Improve signage and information on roads* (national)
15	Improve signage and information in towns, settlements and recreational areas* (national)
16	Develop roadside visitor infrastructure*(national)
17	Ensure that the relevant infrastructure of the destination is supportive of tourism development.

* activities that need to be addressed on national level or coordinated with other destination

7. Next Steps

This development plan is a working document and will need to be adapted at regular periods (1-3 years). This will need to be done through a destination management process that involves the main tourism sector stakeholders. The primary goals for this destination are for tourism to:

1. Provide more and better job opportunities
2. Increase the awareness of the importance of environmental protection
3. Improve the conservation of ecosystems and natural resource management
4. Preserve local traditions and culture including handicrafts and heritage structures
5. Increase the economic benefits for the public sector
6. Attract other sectors by emphasizing the attractiveness of the destination

These goals will need clear targets and an action plan with strategies to achieve these targets. The action plan will provide a road map to achieve the strategic objectives during a specific time.

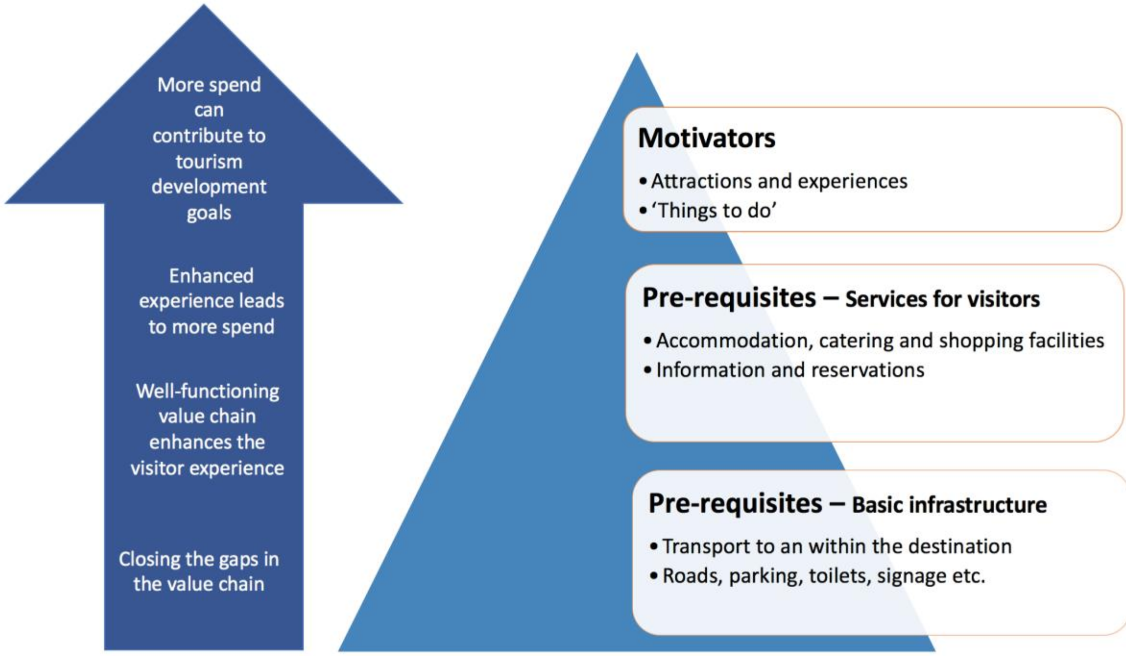
It gives an indication of the activities that are to be carried out, the timeframe in which they should be achieved, who should carry them out and how much this will cost.

Figure 4: Tourism development plan cycle

The sequencing of actions to fill the gaps depends on the goals, the level of priority and urgency for filling the gap and the cost. During and after implementation of the actions, the results will be measured and evaluated. The destination management partnership is responsible for the development plan and should update it on a regular basis.

When determining the sequencing of action to fill the gaps it is important to distinguish between those that are 'pre-requisites' that any destination must have to satisfy visitors and the 'motivators' to attract them. Pre-requisites refer to the basic facilities and services that any destination should have if it is to compete effectively in the tourism marketplace. These are not the factors that will motivate people to come to the destination, but rather the fundamentals that people expect when they are in the destination – food and drink, accommodation, shops, public transport, etc, Different market segments have different basic requirements and provisions should be made according to the needs of the priority target markets. The motivators are those aspects of a destination that will attract people to go there, rather than to any of the (many) other destinations available to them. These could be large, well known attractions and events, unique authentic cultural experiences, outstanding landscapes and natural features, towns and cities with great ambience, exceptional food and drink, activity/adventure opportunities, health giving spa waters, etc.

Figure 5: The relationship between quality of the value chain and goals for the destination



Some gaps are more critical than others and will need to be addressed first. However, all the identified gaps will need to be filled to improve the visitor experience and thereby achieve the goals the destination has set for tourism.

Destination management is an ongoing process where stakeholders plan and manage the destination towards common goals. Evaluation and monitoring is therefore a key component of the development plan and can be used to demonstrate value, i.e. how well the activities contributed to achieving the goals. During each new cycle of the development plan, it will be important to reassess the competitive scenario and reevaluate the goals and targets for the destination.