Volume II - Destination Development Plans - Plan No. 4

Tourism Development Plan for Destination Tikves area and surroundings

One of ten Tourism Development Plans for fYR Macedonia

February 2018

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1. Introduction

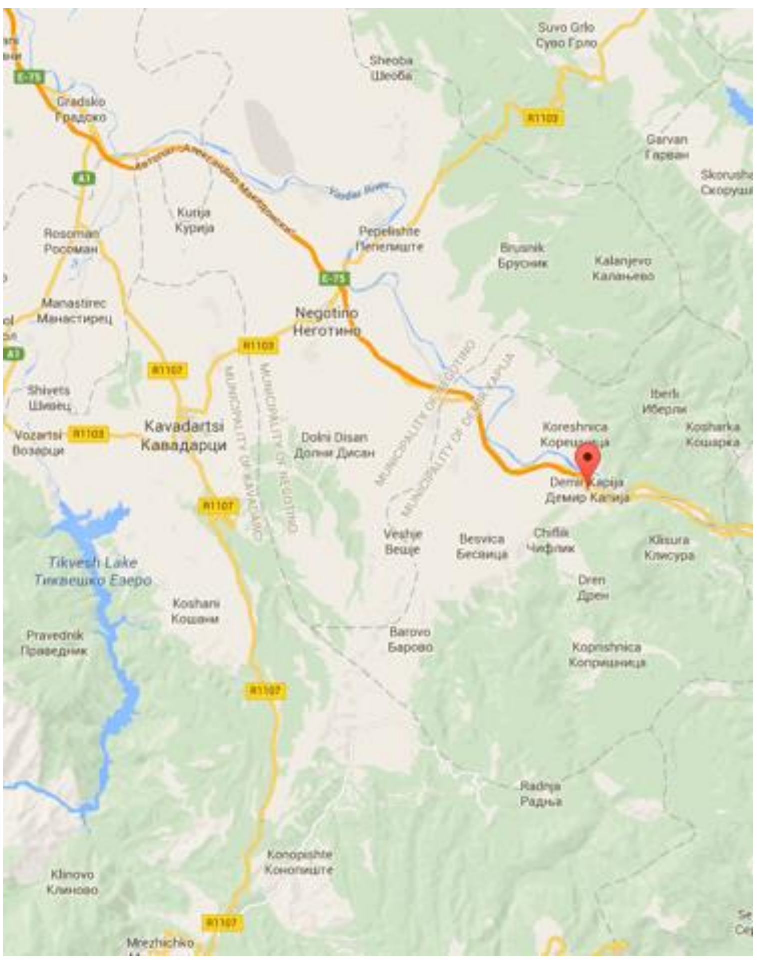
This tourism destination development plan has been created in consultation with and with inputs from stakeholders from the Tikves region. The destination development plan is designed to inform implementation of critical activities that will increase competitiveness and improve the visitor experience.

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

Figure 1 Map of Tikves Region



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 the Tikves region. This destination therefore includes tourism assets in these municipalities but also in municipalities and smaller villages within a one hour driving distance. The attractions in these nearby areas are often visited during the same trip.

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[1].

These words are aspirational and reflect the ambition of stakeholders to develop and build on their core strengths, particularly around ideas of wine making and tasting, food, the rural environment and culture.

The following vison for the destination has therefore been developed:

In 2030, tourism will be a key part of our local economy by offering outstanding experiences in local wine, food, cultural heritage and outdoor activities. We will be offering these experiences to travelers from Macedonia, the Balkans and beyond.

[1] The data used in this section was collected during a destination management workshop on January 12, 2018 in Veles

2.2 Strategic goals for 2030

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

1. To create more and better job opportunities
2. Increase the number of SME opportunities
3. Improved and expanded facilities and infrastructure for residents

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 Tikves region is located in the central part of fYR Macedonia along both sides of the River Vardar. The main towns in this region are Negotino (pop. 20,000), Kavadarci (pop. 40,000) and Demir Kapija (pop. 3,500). It is known as the wine region of Macedonia and 45% of all vineyards are located in this region. The region is located strategically in the center of the country along the E-75 connecting Belgrade with Skopje and Thessaloniki and close to the M5 which connects Prilep to Shtip. Its location makes it possible to create linkages and extended offerings also with complementary attractions and products in Strumica, Dojran and Pelagonija.

The following main attractions[2] in the area are highlighted to outline the main profile of the destination supply, especially in the context of priority segments discussed below:

- Wineries and vineyards
- Ancient city of Stobi
- Tikves Lake

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

- **Hotel and winery Popova Kula** – The hotel has 33 rooms and is located in Demir Kapija. It is built in chateau style and part of a vineyard and winery. Serbs on route to Greece are the largest group (40%) followed by large tour groups (20%) and domestic visitors (15%). The hotel has developed 15 tourist activities

[2] This list is indicative and is not intended to be exhaustive. Extensive supply documentation on attractions in fYR Macedonia has been reviewed as part of Volume I of this plan, and the intention is not to repeat it here. A list of strategies and other literature reviewed can be found in the Annex to Volume I.

ranging from cooking and traditional dances to hiking, biking, and rock climbing. The tours are organized by local guides and operators

- **Hotel Feni in Kavadarci**– This hotel has 48 rooms and received a few large international groups in 2015
- **Villa Bella –** Small 8-room hotel outside of Kavadarci
- **Monastery of St George in Negotino** - Provides accommodation for 60 – 70 people (30 rooms)

3.2 Current supply development pipeline and opportunities

The portfolio of existing attractions and undeveloped assets, as well as existing services in the destination offers a strong supply mix that matches 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.

- There is **increased recognition of Macedonian wines** by regional and international wine experts. This helps to put the destination on the map for niche tourists but also reinforces the image for other market segments.
- The branch organization **'Wines of Macedonia'**–for wine producers in Macedonia has an active tourism cluster. They work together on promoting the different tourism-related products.
- There is **an increased interest in domestic sightseeing.** Its proximity to two large cities (Skopje, Kumanovo and Prilep) combined with increased interest of Macedonians to explore their own country provides opportunities for day as well as overnight domestic tourists
- There is an **increased global interest in rural tourism** and wineries and vineyards in particular.
- There are currently **vineyards and wineries who are already active in tourism.** There are total of 37 wineries of which some are already catering to tourists. These are Stobi winery, Tikves winery, Popova Kula winery and Royal winery Villa Maria.
- UNDP has **established a cluster** for the Vardar region which works with tourism-related development projects

4. Arrival and Demand Trends

Statistics on arrivals and overnight stays are only available for Kavadarci and not for Demir Kapija or Negotino. Kavadarci is one of the few destinations that experienced a drop in foreign arrivals over the last few years. Domestic arrivals however increased between 2012 and 2015. Serbians and Romanians on their way to Greece are currently the main foreign markets. 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 Kavadarci, 2012 and 2015

	Total Number of Overnight Stays			**Total Number of Tourist Arrivals**			**Average length of stay**
	2012*	**2015**	**% change**	**2012***	**2015**	**% change**	**2015**
Foreign	5,580	3,932	-29.5	2 629	1,695	-35.5	2.3
Romania	673	851	26.4	121	273	125.6	3.1
Sweden	116	431	271.6	36	196	444.4	2.2
Serbia	422	367	-13.0	282	195	-30.9	1.9
Bulgaria	215	254	18.1	145	196	35.2	1.3
Germany	572	250	-56.3	159	123	-22.6	2.0
USA	117	221	88.9	42	16	-61.9	13.8
Domestic	1,841	7,031	281.9	1,246	2,864	129.9	2.5

Source: State Statistical Office

5. High Potential Market Segments

The Tikves region is still considered in an ‘emerging’ or development stage. For destinations who have not reached maturity yet, focusing on multiple markets allows for a strategy that creates additional demand. The five priority market segments for Strumica are: domestic short break tourists, regional short break tourists, organized large group explorers and organized as well as independent active tourists. These markets are realistic growth markets given their current presence in the region and their demand specifics. Each of these individual market segments separately are too small to create sufficient demand. However, all the priority market selected are attracted to similar tourism products. The volume created by growing multiple markets will provide increased opportunities and economies of scale for SME’s and accommodation providers to successfully reinvest in existing tourism facilities as well as develop new products and services. While wine tourism is successful in other countries such as France and Italy, the wine tourism segment in fYR Macedonia is currently too small to consider it a specific priority market. However, wine tourism related products such as vineyard tours are compelling attractions for the region and should be the focus.

Feedback from international tour operator:

"We offered the Tikves region as a stand-alone destination but there was no demand. There is too much competition for this niche market with strong products already in France and Italy"

The sections below introduce the five 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 domestic arrivals included in the tourism statistics for Kavadarci include Macedonians traveling for business purposes. Domestic leisure arrivals in other parts of the region are also currently low. Hotel Popova Kula is mostly catering to the domestic MICE market but also marketing to the leisure market through Grouper and other channels. Popova Kula and the restaurant at Tikves winery are also catering to the Macedonian expatriate market as well as diplomats.

Key segment insights and prioritization rationale: Its central location in combination with the wineries and vineyards make the Tikves region an excellent destination for a short break. There is currently a lack in accommodation as well as activities and attractions catering specifically to this market.

Regional short break tourists are travelers from Bulgaria and Serbia who visit fYR Macedonia for leisure purposes staying for one of more nights. Arrivals from this market are concentrated close to the border with Bulgaria and Serbia. A number of travelers from Bulgaria come in an organized way in groups up to 50 people traveling by coach bus. 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 enjoy good food in the company of friends and family.

Hotels managers mentioned that a large share of the current regional visitors are in transit to Greece. They overnight at the two-star hotels but also at Hotel Popovo Kula where they combine their overnight stay with a dinner and sometimes purchase wines. There are currently a very small number of domestic leisure visitors who visit the Tikves region as a destination. Most of the Bulgarian organized group tours do also not include the Tksvesh region in any of their itineraries.

Key segment insights and prioritization rationale: Growth from this market segment could come from turning transit tourist into short break tourists by increasing the number of activities and thereby stimulating increased length of stay. The destination could also be promoted as a stand-alone destination for visitors from the region looking for activities related to wine and culinary activities. The region's central location near the corridor makes it a convenient destination.

Organized large group explorers are travelers who are part of a tour group (size ranging from 15-30 people) traveling around fYR Macedonia by coach bus. Many of the tour groups are from the Netherlands but Poland, UK and some other European countries are emerging source markets as well. Length of the tour varies between 7-12 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. The majority of these groups consist of travelers who are older than 50 years of age.

There are a number of organized large groups staying overnight in the region. The Dutch Corendon tour groups stay one night at Hotel Feni in Kavadarci and the Dutch TUI groups stay two nights at Hotel Popova Kula. The Corendon tour groups visit Stobi archeological site and Stobi winery. The TUI groups visit the archeological site at Stobi, do a wine tour at Stobi wineries as well as a wine tasting at Popova Kula. The Polish tour groups do not stay overnight but visit Popova Kula for a wine tasting. A large number of Balkan tours stop at Stobi winery for wine tasting and lunch on their way from Heraclea to Skopje but do not stay overnight.

Key segment insights and prioritization rationale: Given the central location and excellent accessibility, there is room for growth for the large organized tour explorers. Tour operators find the limited number of international quality hotel rooms available at one hotel the main obstacle for staying overnight at the Tikves region. The destination would also be more competitive to this market segment through improvements to existing attractions as well as adding similar product offerings.

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. 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

The number of organized active tourists staying in the Tikves region is currently very small. While many of the groups travel through the region, they do not stop nor do they overnight. The current lack of authentic tourism products and accommodation offerings is the main reason for this. The Dutch tour operators SNP for example which offers a 15-day walking vacation across FYR Macedonia travels through the Tikves region from Krusevo to Strumica but does not stop in the Tikves region. The number of international visitors who travel specifically to the region for wine tourism is very low.

Key segment insights and prioritization rationale: As the Tikves region is centrally located and many of the groups travel through the region on their way from the western to the eastern part of the country, there is an excellent opportunity to capture this market. Additional accommodation options and product offerings catered to their need for authentic experiences can stimulate growth from his market segment.

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).

In 2016, there have been initiative from tour operators to promote biking and hiking trips in the Tikves region to the domestic and expat market. The tour operators now planning to expand their offer in 2017. Trips focus on combining biking with culinary experiences at authentic style restaurants. Some of these trips stay overnight at Monastery of St George in Negotino.

Key segment insights and prioritization rationale: This segment is prioritized for the Tikves region because of its spending power and preferred direct spending with local providers Currently, this group is very small but there is good potential for the Tiksvsh region to benefit from this growing market. Nearby Pelegonija is a popular destination for this segment and the Tiksvesh region would be a good add-on destination for foreign independent active tourists who now focus on visiting the western part of the country as well for those who crossover to the eastern part of the country. It is a convenient location to large cities such as Skopje makes it a good destination for the active domestic market. With better infrastructure, more market-relevant product offerings and improved service quality, growth in this segment can generate significant economic benefits.

6. Challenges and Gaps

6.1. Destination development challenges

Tourism in this region, despite its potential, is underdeveloped. Until recently, the Tikves region did not have a four-star hotel with a sufficient number of rooms to handle large tour groups. There are currently two main hotels catering to international tourists, a two-star hotel and a four-star hotel. Despite its central location, it is not receiving a substantial number of overnight leisure visitors. The continued lack of accommodation and tourism products is the main reason for this. The challenge of low overnight stays can be addressed by improving the accommodation options, increasing the attractiveness of current tourism products and by designing tourism product offerings that specifically cater to the needs of the priority markets. Besides increasing the volume of visitors, there should also be strong emphasis on increasing the spend per stay through offering more opportunities for expenditures outside accommodation and meals as well as a focus on extending the length of stay. Addressing these challenges will contribute to the destination's goals of increasing tourism sector job and SME opportunities as well as improve and expand the facilities and infrastructure opportunities for the residents.

6.2 Gaps in the experience of the priority market segments

The vineyards and wineries in combination with the rural lifestyle, cultural and natural assets make the Tikves region an attractive destination for the five 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 across the five priority segments.

6.2.1. Accommodation and Hospitality

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

Detail and explanation

- While over the last few years the inventory of international quality hotel rooms has increased, there is still an untapped market demand
- The two and three-star hotels do not meet some of the tourist's need for service and standards
- The number of room in smaller and more authentic accommodation offerings (e.g. restored farmhouses or other rural buildings) is limited. This type of accommodation would be most attractive to the smaller organized active groups.
- Small active tour groups require accommodation, which can be basic but provides the tourist with a good bed and a private bathroom. Tour operators also require the accommodation provider to offer breakfast and good customer service
- Currently only one winery offers accommodation facilities

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 tourist:

"Overpriced for what you got, paid half the price for better hotels in Bulgaria. Breakfast buffet wasn't great, went there at 7am (served 7-10 am) and the fried eggs in the 'hot plate' were already cold. Shower leaked and you had to hold showerhead in your hand and wall bracket was broken. Light in bathroom constantly flickered on and off".

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. A number of 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 aesthetics 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 and capacity building for owners and managers on understanding and responding to markets.
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 new accommodation should be focused on small-scale type of accommodation such as bed & breakfast or homestays. Also, provide 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.

<u>1b. 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 non-destination specific gaps chapter (chapter 2), but there are opportunities for implementation and some innovation to address this gap at the local level.

6.2.2. Activities and Experiences

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

Detail and explanation

- Outdoor activities such as hiking, biking, mountaineering and others are underdeveloped
- 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. Only Stobi Wineries and Popova Kula have restaurants with scheduled opening hours. The other wineries only offer food services with a prior-notice requirement.
- 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 linkages between wine and traditional cuisine
- 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 very 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.

Filling the gap

<u>2a. Ensure visitors have awareness and access to visitor infrastructure to enable outdoor activities.</u>

There are currently very limited opportunities for all five priority segments to combine a visit to a winery or vineyard with an outdoor activity. Offering stand-alone soft outdoor activities would be attractive for active 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 wine routes (for cars, bike or hiking) or scenic walks would make the attraction more attractive for the priority segments.

<u>2b. Ensure there are activities geared towards families with children</u>

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

Indicative activities to fill this gap

Play areas made of natural materials such as the example in Figure 2 allow for these attractions to blend into their natural surroundings. Families would also enjoy light activities such as horseback riding or short hikes.

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

There is room for additional visitor experiences in the area that are based on local culture, culinary tradition, wine making or other distinctive elements of the heritage of the region and its people. Only few wineries offer activities such as winery tours and wine testing. Most of the wineries are also located in industrial areas. While international tourists are interested in the modern-day wine making process, they would also like to visit traditional wineries and vineyards. Currently, there are few tourism products catering to this demand. 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. 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. The priority should be to create experiences that highlight the local traditions around wine and food.

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

There is limited availability of products and souvenirs that are typical of the area or of the country. In addition to specially 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, or 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.

6.2.3. Attractions

Gaps

Currently no urgent gaps identified

6.2.4 Capacity building

Gap 3: There is a gap between the level of service offered and the expectation of priority markets

Detail and explanation

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

3a. 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.

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.

3b. 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.

6.2.5 Marketing, branding and access to information

Gap 4: There is limited online content for promotion and/or information at the destination level. This affects the visitor experience in accessing timely information.

Detail and explanation

- There is very limited (online) information available about the different events, attractions, activities and sites in and around the Tikves region. 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.

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.

4a. Ensure that independent travelers have easy access to information in order to book accommodation as well as information on local restaurants and activities such as hiking and biking.

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.

These have been explored in more detail in Chapter 2.

For details see chapter 2 on non-destination specific gaps

6.2.6. Accessibility and infrastructure

Gap 5: 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). For example, there no clear signposting to the Tikves region from the corridor
- The region has limited and inconsistent visitor signage within towns and settlements, as well as recreational areas facilitating easy navigation by independent travelers.

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>5a. Ensure visitors are better guided to destination attractions</u>
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>5b. Ensure visitors are able to better navigate within towns, settlements and recreational areas:</u>
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>5c. 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 6: There is limited roadside visitor infrastructure</u>

Detail 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.

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 visitors have access to roadside visitor infrastructure:
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

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.

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

Gap 7: There are limited roads and utilities infrastructure to support the development of the market segments

Details and explanation

- Developing new activities and accommodation at chateau-type wineries in rural locations requires infrastructure for improved access roads, electricity and potable water

Filling the gap

7a. Ensure that the relevant infrastructure of the destination is supportive of tourism development.

The priority markets are interested in learning about the traditional wine making culture in a setting where they can visit the vineyards and observe the winemaking in the same vicinity. There a number of these traditional wineries but they are located in relatively remote areas. Offering these tourism experiences would require improved access roads as well as improvement of basic utilities.

Indicative activities to fill this gap

Infrastructure improvements should be limited to the support of tourism products and experiences specifically targeting the five priority market segments.

Table 2: 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 new and 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.	Improve waste collection and waste management culture
Capacity Building	
8	Advance service culture and service quality (also national)
9	Advance foreign language skills
Marketing, Branding an Access to Information	
10	Create and maintain contemporary online presence for the region
11	Increase digital communications and social media skills of tourism operators (also national)
12	Develop contemporary digital services for independent travelers and other priority segments (also national)
Accessibility and Infrastructure	
13	Improve signage and information on roads (also national)
14	Improve signage and information in towns, settlements and recreational areas (also national)
15	Develop roadside visitor infrastructure (also national)
16.	Ensure that the relevant infrastructure of the destination is supportive of tourism development.

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. To create more and better job opportunities
2. Increase the number of SME opportunities
3. Improved and expanded facilities and infrastructure for residents

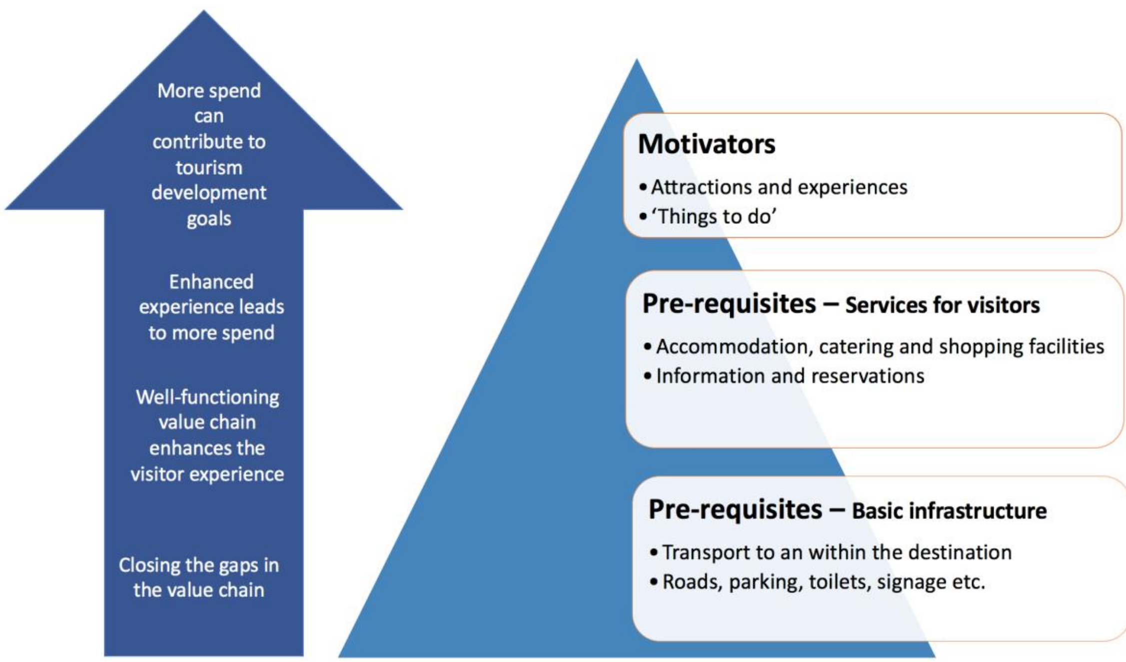
These goals will need clear targets and an action plan with strategies to achieve these targets. The action plan will provide a road map to achieve the strategic objectives during a specific time. It gives an indication of the activities that are to be carried out, the timeframe in which they should be achieved, who should carry them out and how much this will cost.

Figure 2: 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 3: 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.