

## **Volume II - Destination Development Plans - Plan No. 9**

# **Tourism Development Plan for Strumica 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 Strumica and its surroundings. 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 Strumica. This destination therefore includes tourism assets in Strumica but also in smaller villages around the city. The attractions in the nearby areas are often visited during the same trip.

*Figure 1 Map of Strumica and Surroundings*



## 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<sup>1</sup>.



These words are aspirational and reflect the ambition of stakeholders to develop and build on their core strengths, particularly around culture, the natural environment, food and local traditions.

**The following vision for the destination has therefore been developed:**

*In 2030, tourism in Strumica and surroundings will be renowned for offering the 'essence of rural Macedonia', with integrated packages that enable visitors to learn about the development of the farming industry, experience traditional hospitality and cuisine, explore our cultural heritage, mountains and nature, and benefit from health giving spa waters. We will be offering these experiences to travelers from Macedonia, the Balkans and beyond.*

### 2.2 Strategic goals and targets 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 linkages with other sectors
3. Improve the conservation of ecosystems and natural resource management

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<sup>1</sup> The data used in this section was collected during a destination management workshop on January 15, 2018 in Strumica

4. Attract other sectors by emphasizing the attractiveness of the destination
5. Preserve local traditions and culture including handicrafts and heritage structures
6. Enhance the image of the area

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**

Strumica is the largest city in southeastern FYR Macedonia and located 45 km from the border with Greece and 15 km from the border with Bulgaria. Strumica has a population of about 35,000 people and the wider area around Strumica has a population of 55,000. The area is known as the main agricultural center of the country and the traditional rural lifestyle is still visible in the region. The relative small destination has a variety of natural and cultural attractions but also intangible cultural heritage assets, some of them unique to the destination.

The area is close to both the border crossings with Bulgaria and Greece. The destination is a popular destination for Bulgarian day trippers who are attracted by the restaurants and the waterfalls. Its location makes it possible to create linkages and extended offerings also with complimentary attractions and products with the destinations Stip, Berovo, Dojran as well as the wine region around Tikves.

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

- Monastery of St Leonthius in Vodoca
- Monastery of the Holy Mother of God in Veljusa
- Bansko (ruins of Roman bathhouse)
- Kolesino waterfall
- Smolari waterfall
- Strumica fortress
- Church of Holy 15 Martyrs in Strumica
- Strumica Carnival

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

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<sup>2</sup> 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.

- **Hotel Sirius** - This 116-room hotel is located outside Strumica and has a modern spa and two very large meeting rooms. The hotel caters mostly to the domestic MICE and wedding market but it also attracts domestic and regional short break tourists offering spa facilities and outdoor pools. They also receive Dutch organized large group explorers through Corendon.
- **Villa Park Hotel** – The 23-room hotel is located just outside Strumica. It receives some of the Dutch organized active tour groups (in 2016, SNP brought four groups of 22 people each them staying for two nights).
- **Hotel Ilinden** – This 27-room in the center of Strumica caters mostly to business and individual leisure travelers
- **Hotel Gligorov** – The 44-room hotel mostly caters to the domestic MICE and wedding market

Out of the 915 properties in Macedonia offered through the online travel agency (OTA) Booking.com, just six are located in Strumica.

### 3.2 Current supply development pipeline and opportunities

The portfolio of existing attractions and undeveloped assets, as well as existing services in the destination offer 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.

- Strumica is **known as the hot spring capital of Macedonia** and this could create opportunities for development of spas attractive for the priority segments for the destination. The current spas are targeting the domestic medical tourist market and are not attractive for the modern-day tourist
- The destination is **near the border crossing** at Novo Selo making it a very convenient destination for Bulgarian tourists
- **Known as the agricultural center of Macedonia** providing the area with the image of rural lifestyle and healthy food offerings
- **Concentration of attractions** in a small geographic area, which makes it convenient for both domestic as well as international travelers to use the area as a hub
- **Authentic rural environment** and home to some well-preserved and authentic living villages where visitors can get a feel for traditional way of living in the area
- The **attractive town center** of Strumica offers a well-preserved and attractive town with shops, cafes and restaurants.
- The **Strumica Carnival** is held annually during the first three days of Orthodox Lent. The carnival is well-known around the country as well as internationally.

## 4. Arrival and Demand Trends

While the domestic market showed a decline between 2010 and 2015, overnight stays generated by the international market increased by 38% during the same period. Bulgaria is the main international source market followed by Serbia and Turkey. Arrivals from the Netherlands doubled and from Germany quadrupled. Especially in low and shoulder season hotels in Strumica benefit from the domestic MICE market. 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 Strumica, 2010 and 2015*

	Number of Overnight Stays			Number of Tourist Arrivals			Average length of stay
	2010	2015	% change	2010	2015	% change	2015
<i>Foreign</i>	9,361	12,877	37.6	4,086	7,773	90.2	1.7
Bulgaria	1,650	3,715	125.2	903	2,746	204.1	1.4
Serbia	1,228	1,341	9.2	623	721	15.7	1.9
Turkey	288	930	222.9	215	481	123.7	1.9
Netherlands	332	719	116.6	182	402	120.9	2.7
Germany	211	717	239.8	65	264	306.2	2.7
Greece	1,463	572	-60.9	696	330	-52.6	1.7
<i>Domestic</i>	56,161	41,173	-26.7	22,782	16,833	-26.1	2.4

Source: State Statistical Office

## 5. High Potential Market Segments

Strumica and most other destinations in the east are 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.

The sections below introduce the five segments with more details on how they use and relate to Strumica. Their description is followed by a discussion of the rationale behind



their appropriateness as targets for Strumica, 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.

In 2015, 68% of all tourist arrivals as well as overnight stays in paid accommodation in Strumica were generated by domestic tourists. However, the number of domestic overnight stays dropped by 27% between 2010 and 2015. The domestic MICE and the wedding market currently drive much of domestic tourism as does those staying at Tsar Samuil Hotel and Spa for medical treatments. The average length of stay for domestic tourists remained the same between 2010 and 2015 at 2.5 nights (the relative long length of stay can be contributed to the medical spa). The area is a popular destination for a day trip to enjoy lunch at one of the restaurants or visiting the water falls.

*Key segment insights and prioritization rationale:* The Strumica area offers a variety of sites and attractions which are popular among day visitors. There is an opportunity to grow this visitor market into overnight stays. Domestic leisure tourists are interested in staying in hotels offering services related to relaxation as well as in self-catering houses. This segment often travels as a family or in small groups. They are interested in local and authentic offerings, have interest in buying from local providers and eating at local restaurants. With more destination awareness and more market-relevant product offerings, this segment can generate significant economic benefits.

**Regional short break tourists** are travelers from Bulgaria 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 Bulgaria and Serbia. Many 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.





Bulgaria drives much of the international tourism demand in Strumica and the number of overnight stays increased by 125% between 2010 and 2015. At the same time, their average length of stay dropped from 1.8 nights 1.4. Strumica is the closest largest town from the Bulgarian border and Bulgarians come for business or leisure. Since one of the main hotels in Strumica added spa facilities, they have noticed an increased number of Bulgarians who come to stay and enjoy the spa. Bulgarian tour operators also offer packaged tours to Strumica advertised as “*Spa weekend in Strumica*”. The package includes transportation by coach bus, use of spa services, lunch and a festive dinner at Hotel Sirius, a visit to downtown Strumica and a stop in Dojran on the return trip. The restaurants near the waterfalls Kolesino and

Smolari are mainly catering to Bulgarian day visitors, many of them traveling by charter bus.

*Key segment insights and prioritization rationale:* Strumica is catering towards both the individual as well as the group markets from Bulgaria. Its proximity to the border crossing and the recently modernized spa hotel are one of the main drivers for growth. Among the opportunities for improving existing supply to drive growth from this segment are improvements to existing attractions as well as adding similar product offerings.



**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 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.

While many Dutch tour groups visit the area around Strumica, just few of the tours stay overnight in Strumica (2-5 groups per year). The other tour groups travel on to overnight in Berovo. The monasteries in Vodoca and Veljusa and the waterfalls are also incorporated in the itinerary of Dutch international tour groups who do not overnight. The number of visitors traveling in large organized groups from Poland has increased significantly over the last few years (from 32 in 2010 to 459 in 2015). The Polish groups combine four days touring Bulgaria with eight days touring Macedonia. They come from

Kratovo and continue to Ohrid after visiting Strumica. There are also a small number of Balkan tours catering to the Italian market, which stay overnight in Strumica. One of the restaurants in Novo Selo near the waterfalls works with tour operators and received 22 large international tour groups (15-20 people each) in 2015. These tour groups are mainly from the Netherlands. The Monastery of St Leonthius in Vodoca receives approximately 20 large tour groups with Dutch tourists per season.

*Key segment insights and prioritization rationale:* This segment is prioritized for Strumica because there are currently several tour groups visiting attractions in and around Strumica who do not stay overnight. There is an opportunity to grow this market in an overnight stay segment. There is also an opportunity to attract international organized groups currently not visiting Strumica to start including it in their itinerary. The lack of suitable hotels is the main reason for tour operators not to overnight in Strumica. 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.



**Organized active tourists** are part of an organized tour group (size ranging from 5-25 people) traveling with a specialty operator around 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 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. Most these groups consist of travelers who are older than 50 years

of age.

The Strumica area is an overnight stop for some smaller niche markets such as bike tours. Dutch tour operator SNP brings four large groups for walking tours each season. They overnight at Villa Park Hotel for two nights and go on longer (14km) hikes around the waterfalls. One of the evenings they enjoy a dinner cooked by a local family in Gabrovo while enjoying live Roma music. There are also small groups with bikers who overnight in Strumica on their way to Bulgaria.

*Key segment insights and prioritization rationale:* This segment is prioritized for Strumica because of its higher spending power, its interest in local and authentic offerings, interest in buying from local providers, and conscious attitude towards natural and cultural assets. The concentration of attractions combined with an interesting landscape offers a varied product for international travelers interested in unique and

authentic experiences. 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. Success for Strumica attracting these groups is partly dependent on the overall competitiveness of the country and the eastern region to further grow this market.



**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 Macedonia and are usually in small groups (up to 4-5 people).

While still in small numbers, there are independent travelers who travel around Strumica. Hotels have reported individual bikers and hikers staying overnight. While most 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 Strumica because of its spending power and its interest in local and authentic offerings. 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 Strumica to their itinerary.

## 6. Challenges and Gaps

### 6.1. Destination Development Challenges

The main tourism development challenge in Strumica is the low economic impact of tourism. This is caused by a combination of low arrivals, short length of stay and low average expenditure. While foreign arrivals have increased over the last few years, the number of overnights stays by domestic tourists has dropped. There is also a missed opportunity arising from the many day visitors who are not staying overnight. The challenge of low demand 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, improves linkages with other sectors as well as increase the image of the area.

## **6.2 Gaps in the experience of the priority market segments**

The rural lifestyle in combination with natural and cultural assets makes Strumica and surrounding areas 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 that the destination currently offers across the five priority segments.

### **6.2.1. Accommodation and Hospitality**

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

#### **Detail and explanation**

- Several the larger hotels around Strumica who cater to groups receive negative feedback via Booking.com and Tripadvisor. The most common complaints concern overdue maintenance, poor quality of food, poor customer service, noise pollution and smoking.
- The style of many existing accommodation facilities in and around Strumica do not align with the expectations of the independent and organized active tourists in terms of interior design and ambiance, furniture, quality of mattresses, etc. There is very little availability for homestays or other authentic type of accommodation.

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 most 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 tour operator

*“There are no accommodation offerings available where I feel comfortable bringing one of my groups”.*

Feedback from domestic travelers

*“The hotel is a total disappointment, the food is very bad, the rooms and the bathrooms too. I would never stay again”*

*“I will give this hotel two stars, not four stars. They need to improve many things, the most important thing is the customer service, I didn’t feel the service for a hotel with four stars at all, the front desk people were very cold and not welcoming, not even a smile or thank you for staying at the hotel, just the bill when we checked out”.*

### **Filling the gap**

#### 1a. Ensure the quality and style of accommodation facilities meets the expectations of target market segments

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 esthetics of some of the accommodation facilities such as interior design and ambiance reflecting the authentic rural environment of the area. This is particularly important for the smaller active groups 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 Booking.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**

- 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. One of the Dutch tour operators offers his groups a dinner in a small village near Strumica. This home-cooked traditional village meal is very well received by the travelers but it is not possible for independent travelers to book this experience
- 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.

#### **Filling the gap**

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

There are several hiking trails starting near Veljusa monastery and there is an information board near the start of the trails providing details on the different hikes. However, there is no information available prior to arriving at the location. In other areas such as around the waterfalls there is very limited opportunities for hiking besides from and to the falls.

*Indicative activities to fill this gap*

The area has several attractions which are in close proximity (e.g. the two waterfalls, the baths at Bansko and the nearby rural villages). Hiking or bike trails would allow visitors to safely visit these sights while actively engaged. Besides putting the necessary infrastructure in place, it would also require creating awareness of these hiking and biking routes and trails to 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. Visiting and picnicking near the waterfalls is currently one of the few activities. 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 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, 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. 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 the gap*

Invest in development (private sector-led) of traveler experiences that are based on enjoying outdoors, nature, culture and local traditions. Use more effectively Strumica'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.

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

Strumica and surroundings is the main agricultural region of the country. There is limited availability of products and souvenirs that are typical for Strumica or of the country. In addition to the especially designed souvenir booths installed around tourist areas, there is need to make local souvenirs, crafts and easy-to-take-home food items (bottles of wine or rakija, jars with ajvar 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 the 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.

2e. 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.

### **6.2.3. Attractions**



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

**Detail and explanation**

- **Roman bath Bansko** – There is very good signage from the main road to the site. The archeological site and the remains of the roman bathhouse have been partly renovated but work has been halted. The nearby Hotel Tsar Samuel uses the thermal waters for medicinal baths and the hot springs can currently only be accessed with a doctor’s prescription. The attraction could be more attractive for the priority market segments if there is more interpretation and the infrastructure is more tourist-friendly.
- **Monospitovo wetlands** - Supported by a Bulgaria organization the municipality of Bosilovo received a grant from the European Union in 2007 to develop the wetland area as an ecotourism site. There is no signage to the site at all and it is located at the end of 2.5 km dirt road. The structure consists of a wooden boardwalk, which splits into seven extensions with a wooden structure at the end of each for obscured bird watching. Some railing has recently been renovated, parts of the boardwalk are falling apart and is not safe to use. This site could be interesting for active tourists as well as domestic and regional short break tourist. It combines a nature walk with opportunities and bird watching. The infrastructure needs to be renovated and the signage and interpretation improved.
- **Kolesino waterfall** – There is signage from the main road but after that the site is difficult to find. They are currently putting in a new asphalt road which will make it much easier for visitors to get to the waterfall. From the end of the road it is an easy hike along a path to the waterfall (10 minutes). There are many places to rest and picnic but the infrastructure needs maintenance. During high season this site is very popular with domestic and regional day visitors as it is one of the most impressive waterfalls in FYR Macedonia and it is relatively easy accessible. The site is also included in many of the organized tour groups who visit the destination. The current infrastructure around the waterfall diminishes the quality of the experience.

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.

Figure 2: Examples of lack of maintenance of visitor infrastructure around Strumica



### **Filling the gap**

#### **3a. Ensure that attractions and sites are rehabilitated to a condition that meets visitor expectations:**

There is 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 market segments. A good example for a site that needs improvement in maintenance is the waterfall at Kolesino. The infrastructure is in bad shape creating an unsafe environment and reducing the attractiveness of the area. Taken into should also that the attractions should be accessible for elderly people who have specific needs towards for example railings and pathways.

#### *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.

#### **3b. Attraction 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.

## 6.2.4 Capacity building

Gap 4: There is a gap between the level of service offered and the expectation of priority markets (also national)

### **Detail and explanation:**

- Service providers across the region show inconsistent service culture in the delivery of visitor services. This especially visible in the larger hotels
- 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.

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.

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 of *Volume II – Destination Development Plans*.

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 the ability to communicate leads to misunderstandings, limited ability to exchange knowledge regarding the destination and an overall lack of providing service.

- The larger hotels, currently already catering to international groups, have a limited number of front-of-house staff who speaks 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.

#### **Detail and explanation**

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

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.

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

### **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
- Monastery of Sv Leonthius in Vodoca and Monastery of the Holy Mother of God in Veljusa - Signage to the monasteries from Strumica is insufficient
- Kolesino waterfall – There is signage from the main road but after that the site is difficult to find
- Monospitovo wetlands - There is no signage to the site at all

#### **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

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.

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

Gap 8: There is limited roadside visitor infrastructure

**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.

8a. 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

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.

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

*Table 2: Summary of opportunities for improvement*

#	<i>Intervention</i>
<i>Accommodation and Hospitality</i>	
1	Improve quality of design and services at existing accommodations
2	Support for market access and improve quality and design of existing small properties
<i>Activities and Experiences</i>	

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
<b><i>Attractions</i></b>	
7	Refurbish and restore attractions and sites
8	Improve waste collection and waste management culture
<b><i>Capacity Building</i></b>	
9	Advance service culture and service quality*
10	Advance foreign language skills
11	Create and maintain contemporary online presence for the region
<b><i>Marketing, Branding and Access to Information</i></b>	
12	Increase digital communications and social media skills of tourism operators
13	Develop contemporary digital services for independent travelers and other priority segments
<b><i>Accessibility and Infrastructure</i></b>	
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)

\* 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 linkages with other sectors
3. Improve the conservation of ecosystems and natural resource management
4. Attract other sectors by emphasizing the attractiveness of the destination
5. Preserve local traditions and culture including handicrafts and heritage structures
6. Enhance the image of the area

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 3: Tourism development plan cycle*



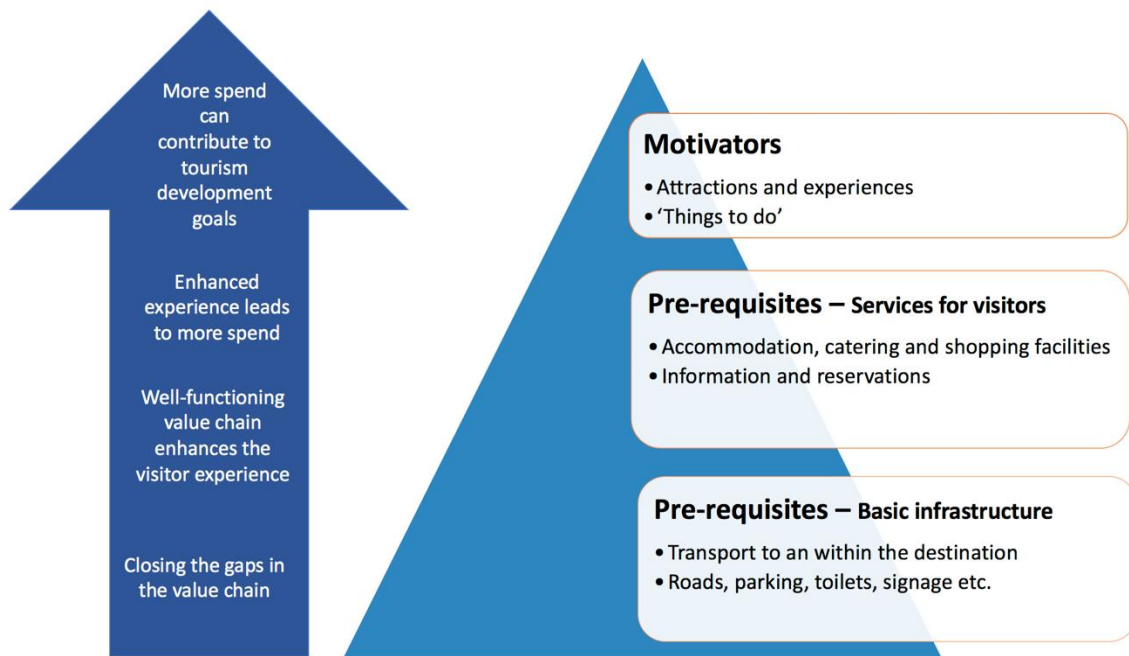
The sequencing of actions to fill the gaps depends on the goals, the level of priority and urgency for filling the gap and the cost. During and after implementation of the actions, the results will be measured and evaluated. The destination management partnership is responsible for the development plan 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 4: 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.