

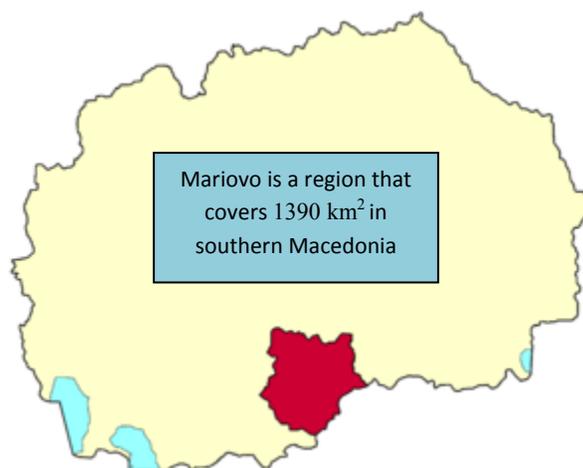
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Developing Mariovo as a Sustainable Tourism Destination

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1. Acknowledgements

This report is the outcome of a study conducted from July to November of 2013. The Center for Economic Analysis (CEA) in Skopje, Macedonia (hereon MK) together with its authors thank all parties who contributed to it.

2. Objectives

The objectives of this study were to: a) Assess Mariovo as a potential tourism destination; b) suggest a mission, positioning, strategy and marketing mix to develop and establish Mariovo as a new, *sustainable* tourism destination; and, c) provide a *realistic* short-term action plan to get the process started.

A sustainable tourism destination is one which preserves environmental and cultural heritages, and because of that, is acceptable to most stakeholders. “Sustainable tourism” is also a factor in choice of destination to an increasing segment of the world tourist population. For example then, turning Mariovo into a preferred destination for off-road motorized sports like motocross or 4x4 trucking would not be sustainable, because it would cause extensive damage to nature, be a nuisance to those who reside in Mariovo, alienate larger segments of current and potential tourists/visitors to Mariovo, and meet resistance from key stakeholders such as environmental groups. That said, researchers acknowledge that Mariovo covers a very large area (1,390 Km²), and thus that there is room for everyone there, including lovers of outdoor motorized sports. Compromises will have to be struck.

A realistic short term plan is one that can make a difference within a relatively short period of time and with limited resources. As such, it would have to be focused on few priority activities which show a high probability of impact on Mariovo tourism, i.e., a substantial increase in number of visitors by the end of Year 2, for a relatively small investment on the part of stakeholders, local, regional or others.

Also, a key feature of the proposed plan is that it carries key performance indicators within a future Monitoring & Evaluation System meant to track implementation and impact of activities. The system will be an important project management and reporting tool to the team in charge of implementing the plan as it keeps a stakeholder group informed on progress. It will also pinpoint to “corrections” if needed.

3. Executive Summary

Taking a *strategic planning approach to the developing, marketing and delivering of sustainable, new tourism destinations*, this study aimed to provide key stakeholders with a realistic, evidence-based path and short term plan framework for the enhancement of tourism in Mariovo.

3.1 Challenges

Current or past strategies and plans for the development of tourism in Mariovo alone were not found. The three municipalities under which Mariovo is administered and who participated in this study confirmed that they did not have one. Not surprisingly then, statistics on flow and profile of past and current tourists to Mariovo were not found either. This meant that extensive research would be needed to find relevant data so that solutions could be backed with solid evidence. It also resulted in an outright recommendation to stakeholders, namely to collect, analyze and use data on tourism in Mariovo as part of a future Monitoring & Evaluation System to track, measure and assess results and impact of a follow on, detailed action plan and to take corrective actions if needed.

3.2 Methodology

Data for this study was collected and analyzed along qualitative research methodology. Sources included facts on Mariovo as well as trends in tourism in the EU and other destinations worldwide, all of which was obtained via extensive desk research, observations as well as testimonials of residents met during four fieldtrips to Mariovo, and transcripts from semi-structured interviews with 15 key stakeholders.

3.3 Overall consistency of findings

A most significant finding from this study was the *consistency* between researchers' observations during fieldtrips, testimonials from residents with whom researchers spoke during those fieldtrips, stakeholders' perceptions and suggestions recorded during interviews, and facts as well as trends emerging from desk research. Hence, we predict that stakeholder buy-in for the proposed mission, positioning, strategy, marketing-mix and action plan framework should be relatively easy. There are, however, areas where differences emerged between what stakeholders thought and suggested and what researchers propose.

First, while stakeholders see competition as limited and from other local or more distant Macedonian destinations primarily, researchers foresee it as fiercer and inclusive of established Balkan, mountain-based adventure destinations as well – like Montenegro and the region of Florina in Greece just across the border. Also, and contrary to stakeholders, researchers don't believe that Mariovo can compete based on its inherent natural/cultural heritage uniqueness alone. Instead, they believe it will have to "sweeten" its offer with a low price strategy for accommodations, leverage technological innovation to the benefit of visitors through e-maps downloadable from smart phones, and promote its accessibility to tourists getting there by road. *Second*, certain solutions suggested by stakeholders, like erecting hotels or renovating a entire village, are rejected by researchers on the grounds that low price of accommodations (to better compete), limited future flows of tourists (even if much more than currently) and higher operating as well as maintenance costs – combined with workforce issues – would make such large investments unjustifiable if weighed against realistic Return-on-Investment (ROI) requirements. *Third*, two features of

the proposed Mariovo product, namely campsites and e-maps of Mariovo downloadable from smart phones, were never mentioned by stakeholders outright, but were branded “good” or “very good” ideas once researchers solicited their reactions to the ideas at the end of meetings. *Fourth and last*, while stakeholders consider access to financing the #1 obstacle to development of tourism in Mariovo, researchers perceive current environmental hazards (e.g., the polluted Black River) and lack of consensus on who should lead the tourism development effort, i.e., public or private sectors, as equally challenging.

That said: The bulk of the findings and recommendations emanating from this study reflect an alignment between facts, trends, perceptions, suggestions, observations and testimonials collected from all available sources, altogether framed into a coherent, evidence-based mission, positioning, strategy, marketing-mix and short term plan framework to develop sustainable tourism in Mariovo.

3.4 Mission, strategy and positioning

Results from our research suggest that the **mission** of Mariovo should be to establish itself as a new Balkan alternative and adventure tourism destination for European travelers, while its **strategy** should be to align the Mariovo offer with EU vacationers’ behavior and preferences, more specifically on longer-stays of seven days or more. Given the distance between Mariovo and more developed countries within the EU, one or two day excursionists to Mariovo will be Macedonian mostly, from Prilep, Bitola and Skopje, with the addition perhaps of Greeks from the region of Florina and other nationals vacationing in Ohid in summer and wanting a respite from crowds and noise there. Main **competitors** to Mariovo would be other destinations in MK like the Pellister national park and Prespa Lake nearby, but established alternative and adventure destinations in the Balkans such as Montenegro and Florina too. To best compete against them, Mariovo should **position** itself along: a) Specific, **inherent features of its product**, like size and richness of its natural and cultural heritages that offer possibilities for many different types of adventure activities plus a unique sense of “space” and “escape”; b) **lower price** of accommodations and other tourism related services; c) **accessibility** to four or two-wheel vehicles given proximity of Mariovo to EU Corridor X; and, d) **technology** in the form of e-maps downloadable from smart phones, supporting field signalization and allowing for a “fuller experience” of Mariovo.

3.5 Marketing-mix: product, price, promotion and place

The **mix** for Mariovo should target the “soft adventure” segment of the EU adventure tourist population. Specifically: a) 1-2 day excursionist coming from the region around Mariovo to hike, mountain bike, hike, rock climb, picnic, visit monasteries during religious holidays or just take a respite from stressful city life; and, b) longer-stay “soft adventurers” from more distant regions of MK and from the EU and coming to Mariovo for similar activities. If coming from the EU, their most probable origin is countries in Northern and Central Europe. Furthermore, they belong to the group of EU tourists that prefers to go on vacation outside their home country (the bulk of which prefer to remain in Europe) and drive to their final destination (the bulk of EU vacationers). Mariovo’s **mix** should then be further refined to the “smaller-budget but extensive-time” sub-segment of the EU soft adventure segment. These tourists arrange their vacations on their own via the internet – while paying much attention to advice from close ones when it comes to choice of destination, are more educated than average tourists – and hence more affluent than the average as well, are in the 25 to 44 age-range, look for value, want to escape from urban settings, are sensible to “sustainable” tourism, want to engage with locals and discover local cultures, and place

natural features, quality of accommodations & service as well as variety of activities offered as the top criteria for returning to a same destination.

3.5a Product

The Mariovo product should accommodate the “average camper” sub-segment of the EU camper segment, with camping being one of the two main accommodation alternatives in Mariovo. It should accommodate also EU soft adventurers who, rather than staying at hotels, prefer to rent private rooms or apartments. This was deemed the most feasible “roofed” alternative to camping in Mariovo. More specifically, rooms would be available across a network of designated villages most accessible to all types of vehicles by asphalt or dirt roads and rented by family-owned and operated B&Bs with capacity for 10 hosts or less. All accommodations in Mariovo (campsites and B&Bs) should meet high quality standards (EU that is) and offer full board as well as sale of basic items as long as restaurants (only one as of today) and retail stores (none today) are not available in the region. Product should also feature a range of soft adventure activities that align Mariovo assets with target tourists’ preferences (like mountain biking). Activities would be supported by thorough signalization of all asphalt and dirt roads – the latter to be used as paths and trails for mountain bikers and hikers, as well as sightseeing points of interest (be they monasteries, Ottoman style bridges or panoramic views for photo shoot). Given Mariovo’s size as well as extensive network of dirt roads and points of interests, signalization in the field should be supported by e-maps downloadable from smart phones, allowing for a fuller experience and discovery of the region.

3.5b Price

To best compete – against established destinations most particularly, Mariovo will have to penetrate the market with an offer that provides significant “value” to its targeted tourists. Established destinations can usually fetch higher prices as they become “popular” and secure an increasing share of the tourism market. New destinations, on the other hand, have to fight to carve market share for themselves. A lower price strategy for all types of accommodations offered in Mariovo, be they open-air or roofed, as well as all other tourism related services, would go in that direction. Moreover, a lower price strategy may counteract competitive disadvantages. For example, while Mariovo could be termed beautiful, clean and untouched, it cannot be described as spectacular or breathtaking – as some of the sights in Montenegro could for example. Also, research shows that the economic crisis since 2008 has made tourists more price-conscious and looking for equivalent quality for less. Hence, a lower price strategy would align Mariovo with that trend. Finally, and as mentioned earlier, a lower price strategy, together with other factors relevant to ROI calculations, supports the type of roofed accommodations (the B&B-type) recommended for Mariovo, while rejecting alternatives like large hotels or entirely renovated villages.

3.5c Promotion & Place (or distribution)

One finding from this study was that Mariovo was poorly communicated and nowhere to be found on the most popular international tourism websites – *unless one considers a long list of hotels in Florina across the border as a desired result of a search on Mariovo accommodations on the internet*. The recommended solution is that Mariovo should be **promoted** through a single e-portal tailored to the profile of its targeted tourists and immediately appearing on the first page of search engines like Google when the two words “Mariovo” and “Adventure” are typed. The e-portal should provide all information needed by

potential tourists. Cost of maintenance could be covered by fees paid by service providers advertising in it (like owners of B&Bs) and registered with it. The portal would be the main channel by which Mariovo would be promoted. **Placing** Mariovo on major international tourism websites like Booking.com and on specialized adventure tour e-operators like Imaginative-traveler.com would be the channels by which to distribute it. While research shows that Mariovo's target segment prefers to choose destinations on the net rather than going through tour operators, it also shows that they tend to organize different elements of their trip separately, hence the usability of a website like Booking.com for accommodations. Also, as Mariovo grows in popularity through positive word-of-mouth from past visitors (the #1 factor influencing choice among its target segment), it could attract adventure tourists belonging to segments that prefer going through tour operators (i.e., the established and affluent 45+ wanting to feel secure in their choices, or the 25-44 with relatively large budgets but less time to travel and make arrangements for it).

3.6 Short-term action plan framework

Armed with findings & recommendations validated by facts and consistent across sources of information, the proposed mission, positioning, strategy and marketing mix were framed within a short term action plan aiming to produce results within a two-year period. This meant limiting areas of intervention to those which would most probably have immediate impact by end of Year 2, i.e., to substantially increase the level of tourism to Mariovo while ensuring high satisfaction among visitors – so that positive word of mouth results in more 1st-timers or returnees thereon. Hence, not only the plan focuses on few activities related to the building of badly needed infrastructure (accommodations and signalization) as well as effective promotion after that (via an e-portal), but it attaches suggested delivery timelines as well as key performance indicators to each activity to make the implementing process *performance* driven. It also attaches accountabilities among different parties part of an essential supervisory and executing structure (see 7 below). The proposed plan, however, is only a “framework” to be turned into a detailed plan (a top priority from the start) that will fully answer the “what”, “how”, “by whom”, “by when” and “for how much” questions of potential providers of external financial assistance. For example then, features of the Mariovo “product” like professional guides and emergency evacuation services will have to be “thought out” much further; this report only mentions them as absolute necessities. Also, cost estimations of recommendations – like e-maps downloadable from smart phones, will have to be backed by tangible price offers before being integrated into a detailed plan aimed at providers of external financial assistance.

3.7 Leadership, supervisory and executive structures

Mariovo tourism will need buy-in, commitment and leadership to take off. Recommendations emanating from this study should neither surprise stakeholders nor meet substantial resistance (we suggest their “endorsement” of them as the first future step). As for the implementation of the plan, it should be inclusive of the interests and contributions of all stakeholders’ (we suggest a supervisory Stakeholder Group led by a “Champion” elected Stakeholder Group Leader) and carried out by an Executive Team. There are issues – like pollution of the Black River and WWI mines, which will need solution-driven thinking on the part of the Stakeholder Group immediately. Tasks, like fetching external financial assistance, will require continuous “ambassadorship” from the Stakeholder Group Leader – to lobby GOM [for example] for the building a regional road that links the Prilep and Novaci sides of Mariovo within Mariovo proper. Finally, activities – like writing well-crafted proposals to obtain financial and

technical assistance from international donor agencies, will require shared resources (people, time and money) regrouped into an Executive Team hired along expertise, experience and knowledge criteria only.

3.8 Conclusion and moving forward

This study does not present or proposes a single finding or recommendation which is not backed by strong evidence obtained through best-practice research along the ethos of independent objectivity. Financial assistance to conduct this study was neither provided nor sought from any of the key stakeholders, and cost estimations in the implementation plan include neither a consulting role nor fees for follow-on activities on the part of the research team. CEA and the authors believed that these ground rules would result into a more credible “vision” by which to attract potential investors to Mariovo.

Once a detailed plan for the development of Mariovo tourism will have been written, i.e., one that goes beyond the framework we propose and which will answer all investors’ questions, it will then be up to key stakeholders and their designated leader to carry it out on behalf of Mariovo as a region and towards success. For that, key stakeholders will first need to come to a concensus and then commit to a “delivery structure” which is both inclusive of their collective interests and individual contributions, while at the same time clearly delineating and assigning leadership, oversight and execution roles as well as accountabilities. We do propose a possible structure in this report, as a starting point for stakeholders to move the process forward.

4. Methodology

Examples of past tourism feasibility studies were initially reviewed¹. Each had specific objectives, scope and challenges to be met. For the study on Mariovo, the challenges were: 1) The starting point for tourism development would be ground zero or close to it given little tourism activity today – an assertion from observations in the field and interviews with key stakeholders; and 2) statistics on flow/profile of tourists was not available. Those two factors combined meant that an extensive amount of research would be needed to collect relevant data and back all findings and recommendations with demonstrated evidence.

Given challenges and objectives (see section 2), researchers decided to conduct the study on Mariovo along a *strategic planning approach to developing, marketing and delivering a sustainable new tourism destination*, starting with a *situational analysis*, then formulating a *mission, positioning* vs. potential competitors and a *strategy*, all supported by a relevant *marketing mix* that would align Mariovo tourism assets (once developed and promoted) with preferences, habits and needs of *targeted tourist profiles*. A main advantage of this approach is that, once the marketing mix (product, price, promotion and place -or distribution) has been developed, it acts as a framework (or roadmap) to stakeholders' development effort.

A drawback of the approach, however, is that one must be cautious when defining the four elements of the marketing mix for a tourism destination². One major difference is that, contrary to mainstream products which match tangible features and benefits, a tourism destination offers an “experience” made up of many contributing and often intangible factors, like providing a sense of “escape” from stressing city life. Some of those factors are highly uncontrollable as well, like good weather, particularly if one considers effects of global warming on weather patterns locally. When it comes to transportation, a destination is not a product displayed somewhere on a shelf for users to purchase; buyers have to come to the product and cost of accessing it are usually theirs to absorb. Also, elements contributing to the experience cannot be stored. Thus, and for example, cost of unrented B&B rooms on a particular day cannot be recouped via a price discount later. On the other hand, the tourism destination marketing mix – similarly to that of most tangible products, can be highly affected by changes in technology. The internet for example has revolutionized the promotion of tourism destinations and how vacationers choose and purchase them.

Data for this study was collected and analyzed along qualitative research methodology, including:

- Observations – and residents' testimonials – during four field trips to different parts of Mariovo
- Desk research on Mariovo as well as tourism in the EU and other destinations worldwide
- Person-to-person, semi-structured interviews with key Mariovo stakeholders (see Appendix 1)

¹ Feasibility studies reviewed: 1) Tourism Feasibility Study of Monroe, Lee, Arkansas and Philips Counties of Eastern Arkansas, Kalahara Management, Inc, New World Expeditions, April 2002; 2) Feasibility Study into a tourism venture in the Katherine region based on the “Country Culture Conservation” concept June 2006, Gecko Tours and the Department of Industry, Tourism and Resources (Australian Government), June 2006; 3) Ecotourism Feasibility Study of Wollemi National Park Muswellbrook Shire Council, September 2012; 4) A Feasibility Study for a Yukon Health and Wellness Tourism Industry, K. de la Barre, B.Com, S. de la Barre and M. Taggart, May 2005; and 5) Green Hotelling, a Feasibility Study in the Hellenic Island of Skyros, A. Machaira, T. Lampropoulos and P. Zentelis, May 2012

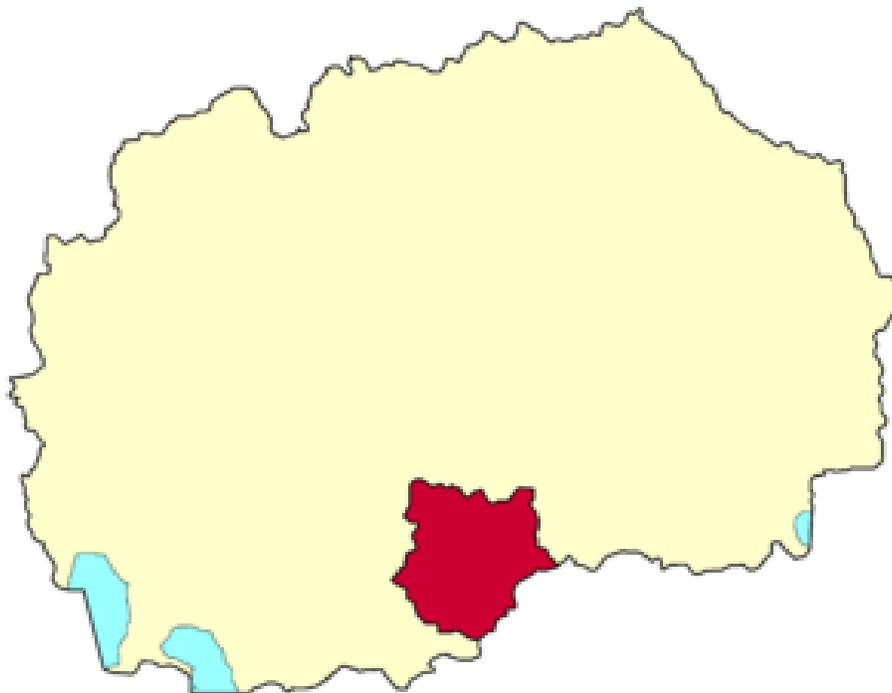
² E. Heath and G. Wall, 1992, Marketing Tourism Destinations – A Strategic Planning Approach, pp 126-128, publisher John Wiley & Son, USA

5. Situational Analysis

5.1. Availability of information

Publically available economic or tourism development strategies or plans focused on Mariovo alone were not found, be it from the central government or the three municipalities administering Mariovo. Some past or current EU-funded IPA projects have been focused on Mariovo, but with very specific aims and not tackling tourism in the region comprehensively³. The region is mentioned as one among others in need of rural tourism development under an MK national strategy for 2012 to 2017⁴ - but not much else, while it was allocated one quarter of a page in an MK tourism book dated of 2001⁵. Going further back in time, one can find a full geographical survey of Mariovo conducted in 1984⁶. Overall, however, information on tourism in Mariovo is sparse, including no statistical data on flow/profile of tourists. Moreover, a potential tourist would have to sift through many websites⁷ to get a full idea of where Mariovo is (see Map 1 below), what it looks like, and what it has to offer. Overall then, *promotion* of Mariovo is deficient today – a key point addressed later in this report in section 7.8.

Map 1: Mariovo in MK



³ Hotel Association of Macedonia, 2007-2013 Rural & Adventure Tourism Projects in Macedonia, www.hotam.org/projects.htm

⁴ НАЦИОНАЛНА СТРАТЕГИЈА ЗА РУРАЛЕН ТУРИЗАМ 2012-2017, TARGETCOMMUNICATIONS, www.targetcomm.com.mk

⁵ Tourism Encyclopedia of the Republic of Macedonia, N. Panov, pp 87, 2001

⁶ Mariovo: kompleksni geografski proučavanja, A. Stojmilov, Univerzitet "Kiril i Metodij", Geografski fakultet, 1984

⁷ In the bibliography, we list Mariovo websites which we visited and grouped them along subjects. It is not an exhaustive list – we visited many more. Rather, it is a sample meant to demonstrate the amount of search a “potential tourist” would have to go through to get an idea of the Mariovo “tourism offer” (if one can say that such as offer actually exists today)

5.2. Topography

Mariovo is a mountainous region *located* in the southern part of MK and covering an area of 1390 km² (see red area on map above). It has an average elevation of 1050 meters and is situated between several mountain chains, i.e., Selechka, Nidze, Kozhuf, Kozjak and Dren, with the highest peak being Mount Kajmakchalan at 2520 meters. Mariovo is currently under the administration of three municipalities: Prilep to the north (pop 76,000), Novaci to the west (pop 3,500) and Kavadarci to the east (pop 38,000).

5.3 Access

We describe this dimension on three levels:

1. *Locally*. The center of Mariovo is easily accessed (mostly) through two asphalt roads from the cities of Prilep and Novaci via Bitola (pop 95,000); both roads are in good condition. Beyond those, however, rugged terrain makes the largest part of the region accessible through dirt roads only. That said, most of those dirt roads do not need 4x4-capability to be used
2. *Regionally*. Mariovo is 90 minutes driving distance from Ohrid, an established destination for tourists from MK, but which is becoming increasingly international. The most direct route from Ohrid to Mariovo is via the cities of Bitola and Novaci. Mariovo borders also with the Greek municipalities of Florina and Pella. It is easily accessible from the municipality of Florina via a border-crossing joining the cities of Florina and Bitola – 30 minutes driving distance. No such border-crossing exists with Pella however. As for the city of Florina specifically, it is 2 hours + driving distance from Thessaloniki – the second largest Greek metropolitan agglomeration
3. *Nationally and internationally*. Mariovo is 2 hours + driving distance from Skopje, the capital of MK, with the most direct route to it being the road connecting Mariovo to Prilep. Skopje has an international airport – but so does Ohrid with charter flights connecting it to major EU capitals in the summer. Most important is that Mariovo is only 90 minutes driving distance from European Corridor X joining Thessaloniki in Greece to Salzburg in Austria via Skopje and Belgrade, then on north to Germany, the Netherlands, Belgium or Slovakia via connections to other Corridors. More precisely, Mariovo is on Branch D of Corridor X (see Map 2 on page 16).

5.4 Population

The region is depopulated (excluding peripheral cities of Prilep, Bitola and Kavadarci which are not within Mariovo proper) and those who still reside there are aging fast. The 2002 census counted 839 Mariovoans spread over 28 settlements. In the village of Gradeshnica, 70 residents – average age 65 – remain today out of a total population of 1019 in 1961. As population decreased, schools in Mariovo were closed, resulting in an overall low education level among those subsisting there now. Thus, while Mariovoans would benefit from more tourism and be part of visitors' Mariovo *experience*, their profile does not exactly align with that of “hospitality entrepreneurs”; those will most probably come from outside Mariovo.

5.5 Environmental and cultural heritages

Mariovo features an “untouched” natural environment. It hosts the largest canyon in MK along the Black River for over 100 km. Beautiful nature all over provides visitors with a unique sense of both space and distance away from urbanization. Its natural habitat includes a large mixture of animal, floral, plant and tree species endemic of the Balkans – but including two species of venomous snakes as well and unfortunately. Mountains, valleys and villages are connected by a large network of paths and dirt roads. Last but not least, Mariovo houses numerous historical, cultural and religious sites – including many monasteries and remnants of the Roman Empire’s Via Egnatia – to name just two. As such, Mariovo could offer an ideal *experience* to lovers of nature, but most particularly those who are looking for tranquility, complete “escape” from the city, outdoor activities – four bicycle trails have been mapped so far⁸, and ample opportunities for diverse sightseeing.

5.6 Habitat

Settlements in Mariovo could be termed “abandoned villages” since they include a very large percentage of unoccupied houses left to decay. This is the result of substantial immigration since the 1960s, given little economic opportunity to retain youth – farming included. Most of the land is of rather poor quality, uncultivated or left for sheep to graze; that which is cultivated is for subsistence agriculture or cash crops like tobacco. That said, abandoned villages are an integral part of Mariovo’s unique atmosphere, providing visitors with a sense of both isolation and escape within an untouched natural environment. As such then, abandoned villages would be part of visitors’ Mariovo *experience* as well.

5.7 Weather

A pre-condition of success for most potential tourism destination is guaranteed good weather during the high tourism season (July and August). Visitors want sunshine and little rain on most days to maximize enjoyment of their natural surroundings, taking good pictures and being able to exercise, eat and drink outdoors. Graphs 1 and 2 on page 17 show average weather patterns in Mariovo over the past 20 years (source: Chinci World Atlas). Maximum temperatures from June to September oscillate between 22 and 25 degrees Celsius and average number of rainy days per month from 3 to 5. Hence, while weather would remain one of the uncontrollable factors within the *product* element of Mariovo’s marketing mix, temperatures would not [a priori] be too hot for a range of activities that comprises the outdoors type primarily – hence somewhat strenuous, like mountain biking or hiking or rock climbing.

An important note here – because weather is such an important factor to tourism, is that Mariovo, like any other tourism destination in the world, will most probably be affected by climate change. Expected temperatures will depend on the atmospheric concentration of greenhouse gases, usually expressed in the form of carbon dioxide equivalent. As shown in Graph 3 on page 18, a rather optimistic scenario with a stabilized concentration of 500 parts per million would most likely result in temperature increases of approximately 2 to 4 degrees Celsius⁹. Thus, maximum average temperatures in July and August in

⁸ www.visitpelagonia.mk/index.php?option=com_content&view=article&id=68&catid=14&Itemid=202&lang=en

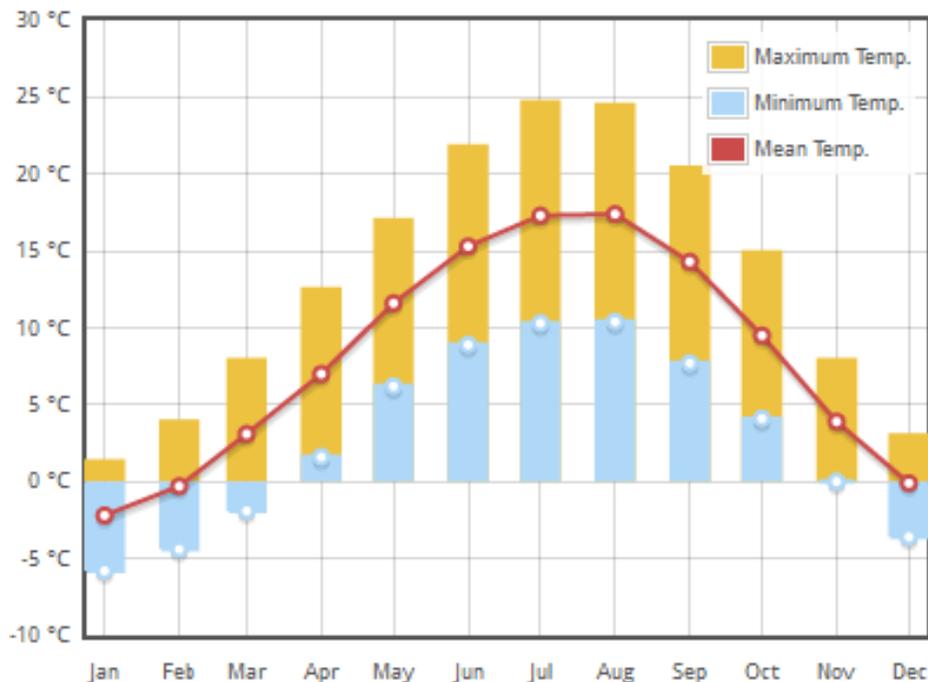
⁹ S. Becken, February 2010, The importance of Climate and Weather for Tourism, LEAP – Land Environment and People, pp 10

Mariovo could go up from 25 to 29 degrees Celsius. Climate change could also affect number of sunny days, frequency as well as intensity of precipitations, and consequently the landscape and ecosystem of Mariovo. As such, this could result in more regular and expensive maintenance of assets related to tourism activities overtime, like keeping fauna growing along hiking trails and mountain-bike paths intact. Overall then, one may assume that the *product* element of the mix will be affected by climate change in the future. Mariovo tourism operators/stakeholders will have to adapt/change accordingly.

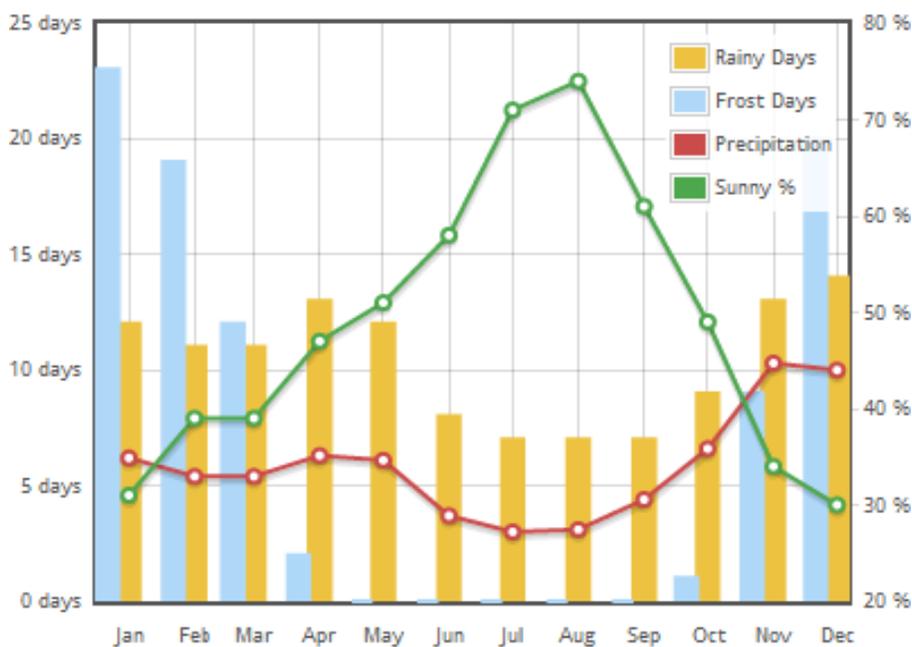
Map 2: Getting to Mariovo



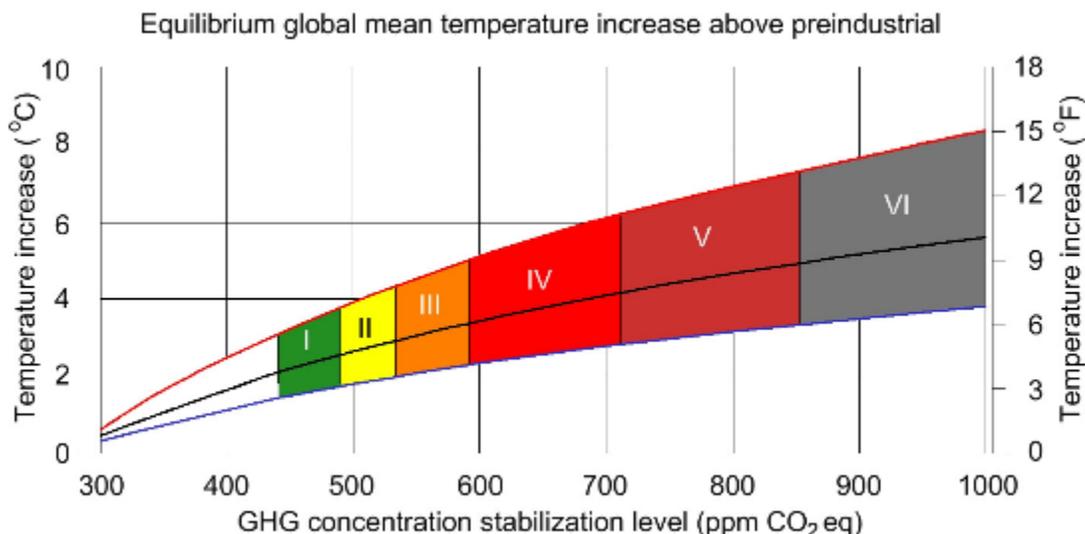
Graph 1: Average Monthly Temperatures in Mariovo



Graph 2: Average Number of Sunny Days/Month in Mariovo



Graph 3: Effects of Climate Change



5.7 Services

In this regard, Mariovo is *absolutely bare*. While some private accommodations may be known to those who are intimately connected with Mariovo, there are no rooms-for-rent, B&Bs, hotels, bars and restaurants readily identifiable in the public domain. Makeshift campsites may be erected for yearly events like the Jeep Tour, Moto Tour and Mountain Bike Marathon, but no permanent campsites equipped to meet standards demanded by comfort/convenience-seeking tourists exist. On one field trip, researcher stumbled upon a new restaurant along the Prilep road leading to Mariovo, but it was not identified on any website searched before or immediately after the encounter. No other such eateries were spotted anywhere else during four fieldtrips. The same applies to support services like professional, certified nature or historical guides. Today, most who visit Mariovo do so during day trips by car, with an overnight stay in Bitola or Prilep. There is no or very little long-stay tourism (one week or more) in Mariovo per se. Some travel agencies in Bitola and Prilep have added Mariovo to their portfolio, but only to arrange short excursions there, including on SUVs. The latter reflects the fact that most of Mariovo today can only be discovered by driving along dirt roads, while hikers and mountain bikers have a very limited number of marked trails and paths to choose from. Also, there is complete lack of retail outlets. Hence, if one visits Mariovo and decides for a picnic or a makeshift stay overnight in her/his own tent in the middle of a field, s/he must bring all food and drinks along and from outside. Plus, if a wild camping trip ends with a snake bite, s/he would have to go to Bitola or Prilep (somehow) for treatment; there are no medical evacuation services. Therefore, many aspects of the *product* element of Mariovo's marketing mix remain to be developed from scratch. Without them, there will be no Mariovo *experience*.

5.8 Tourists

Although no statistical data on flow and profile of tourists to the region is available, researchers were able to infer profiles of current Mariovo visitors based on fieldtrip observations as well as interviews with

stakeholders (see section 8). Most come on short 1-2 day trips and are Macedonians, from Bitola and Prilep predominantly; many have family roots in Mariovo. They come to hike, bike, do a picnic, attend yearly events like the Jeep Tour or Mountain Bike Tour, visit monasteries on religious holidays or stay at a weekend house. Occasionally, they are joined by Skopjans during long- weekend holidays, Greeks from the region of Florina (across the border) on a short excursion to MK and summer vacationers from Ohrid (all nationalities combined) looking for a respite from noise and crowd. They seldom come for longer stays, but those who do are mostly Macedonian residents or members of the Diaspora with secondary vacation houses in Mariovo. Other specific groups among long-stay visitors (all nationalities combined) are those who come to “explore” the region during the summer and do wild camping, researchers on scientific trips (e.g., archeology and WWI history), and hunters (of wild boars mostly and in fall/winter specifically). It is difficult to ascertain, however, where the latter two sub-groups sleep/stay.

Text box 1. Findings from Situational Analysis

5.1 There is no written strategy and plan for the development of tourism in Mariovo that is available in the public domain. There are no statistics on flow/profile of past/current tourists to Mariovo either. Collecting such data would be a priority.

5.2 Mariovo is mostly known to locals residing in Prilep or Bitola - some with family ties to Mariovo, or specific groups who gather to participate in yearly events such as the Jeep Tour and the Mountain Bike Marathon. A major reason for Mariovo’s lack of visibility is that it is poorly promoted on the internet.

5.3 Mariovo is accessible (primarily) through two asphalt roads (in good condition) from Prilep and Novaci/Bitola. Once those roads end, however, most of Mariovo is accessible via dirt roads only, but many are practicable by any type of vehicle. From the West, Mariovo is also accessible via Ohrid, a major tourism destination in MK. To the East, Mariovo is accessible via European Corridor X, connecting it to major cities in the EU.

5.4 Mariovo’s assets are its “untouched”, “unspoiled” and “rich/extensive” environmental and cultural heritages isolated from urban settings and blessed with good weather during the warmer season.

5.5 Mariovo is characterized by depopulated or almost abandoned ancient villages with most houses empty or in ruins.

5.6 Mariovo is heavily depopulated, while those which have chosen to remain there are old and of lower education level. This profile does not align with that of the typical entrepreneur or investor in the tourism sector.

5.7 Short excursions to Mariovo are possible only because of the proximity of hotels, B&B and restaurants in Prilep or Bitola nearby. All in all, the region does not have the infrastructure needed to host tourists overnight or longer.

5.8 Overall flow of tourists to Mariovo or along specific profiles is difficult to assess because of lack of data. Hence, only estimates can be made based on field observations and discussions with stakeholders. Most tourists to Mariovo today stay for 1-2 days and are Macedonians from the surrounding region. They come to hike, bike, picnic, attend yearly events like the Jeep Tour or visit monasteries on religious holidays. They are joined by Skopjans during long weekend holidays or Ohrid summer vacationers (Macedonians and foreigners) looking for a respite from noise and crowds there. Those visiting Mariovo for a week or more are suspected to be much fewer and of mixed nationalities. Some come to “explore”, do wild camping and escape urban settings. Others are on scientific trips, while others yet come to hunt during fall and winter. All in all, however, it is safe to assume that tourist flow to Mariovo, for both shorter or longer stays – but the latter most particularly – is small given the lack of tourism infrastructure and services needed to host visitors properly.

6. Mission, Positioning and Strategy

6.1 Mission: Become a new Balkan “alternative and adventure tourism destination”

“Adventure” tourism is a form of alternative tourism and was defined in the 2010 Adventure Tourism Market Report as: “Travel outside a person’s normal environment for more than 24 hours and not more than one consecutive year. A trip may be classified as an “adventure” trip if it involves two of the following three elements: (1) interaction with nature or (2) interaction with culture or (3) a physical activity, while the core of adventure tourism is a trip which involves all three elements at once”¹⁰. When it comes to adventure tourism destinations in Europe specifically, the Balkans has become a focal point. And while Montenegro is already an established destination for adventure tourism, often ranked in the top-10 worldwide¹¹, others are emerging in places few would expect, like “Peaks of the Balkans”, a hiking trail that starts in Kosovo, then trans-borders into Albania and Montenegro; it was one of the winners of the World Travel & Tourism Council 2013 Tourism *for* Tomorrow Award¹². Serbia, for its part, was assessed positively for mountain-based adventure tourism in a study conducted in 2013¹³. As for MK, specialized international adventure travel operators are starting to put it on the world map¹⁴. Mariovo should take advantage of this trend.

6.2 Positioning: Leverage uniqueness, accessibility, price and technology

A tourism mission makes sense only if a destination can successfully compete through it. Within Macedonia proper, Mariovo would compete with destinations like Mavrovo, Vevčani and Galičnik. All are located within mountainous landscapes and could offer a mix of activities similar to that in Mariovo during the warmer season. Plus, both the Vevčani Carnival in January and Galičnik Wedding in May have “brand recognition” already, while Mavrovo is a popular ski resort for Skopjans. That said, larger size and richness of Mariovo’s natural and cultural heritages, if properly developed and promoted for tourism, would put Mariovo ahead of them as an “adventure” destination. To some extent, Ohrid and Prespa Lakes are competitors as well, but mostly because of their geographical proximity to Mariovo. While Ohrid and Prespa Lakes are surrounded by mountains, they do not attract nor are geared for mountain-focused adventure tourism. Visitors go to both Prespa or Ohrid lakes for water sports/activities and sun-bathing; for cultural tourism and urban-type entertainment to the city of Ohrid specifically. Mariovo could in fact attract Ohrid tourists looking for a short respite from the noise and overcrowding of that summer resort.

Adventure tourism destinations in the Balkans may be Mariovo’s prime competitors, Montenegro and the region of Florina in Greece particularly. When comparing the former to Mariovo, some would argue that just a quick look at one of Montenegro’s websites shows a combination of spectacular mountain and seashore sights unmatched in the Balkans¹⁵. On the other hand, others would argue that Mariovo has a

¹⁰ 2010 Adventure Tourism Market Report, a study conducted by the George Washington Business School, the Adventure Tourism Travel Association and XOLA Consulting

¹¹ www.adventuretravelnews.com/montenegro-again-hits-the-list-of-top-10-tourist-destinations-in-the-world

¹² www.wttc.org/tourismfortomorrow/winners-finalists/2013-winners-finalists/peaks-balkans-kosovo

¹³ Possibilities for mountain-based adventure tourism: the case of Serbia, S. Vujadinovic et Al, *Bulleting of Geography, Socio-Economic Series* #19, 2013

¹⁴ www.tucantravel.com/country/overview/macedonia; www.adventurefinder.com/adventure-travel/macedonia

¹⁵ <http://www.adventuremontenegro.com/page11.html>

richer cultural heritage – it was the epicenter of the WWI Balkan Front for example. Comparisons on such grounds are very subjective and part of creative packaging. Along more tangible grounds like *location*, Montenegro is equally reachable by road than Mariovo, through the highway joining Trieste to Ljubljana to Zagreb to Dubrovnik and then continuing as a two-way road to Podgorica. This is the shortest path to French and Italian travelers who want to reach the Balkans and the Adriatic riviera. Corridor X, however – that which leads to Mariovo, is the most used by Northern and Central Europeans because of the Greek sea resorts at the end of it. Also, and along *price* range of accommodations and tourism-related services, an established destination like Montenegro will be more expensive than one like Mariovo which tries to penetrate the market (see survey on accommodations in subsection 7.7). Thus, once properly developed and promoted, Mariovo would have to differentiate itself from Montenegro along competitive advantages such as: Extensive, untouched natural and cultural heritages that provide a complete sense of “escape” from urban settings; lower prices; and, availability of new technology facilitating exploration of a vast region (i.e., e-maps downloadable from smart phones). All these are discussed in detail in later sections.

As for the region of Florina, it is just across the border with Mariovo and minutes driving distance from the city of Bitola in MK. Florina and Mariovo share common cultural heritages, plus “adventure” features like beautiful nature all around and ample opportunities for physical and sightseeing activities. That said, tourism in Florina is *significantly* more developed than that in Mariovo. Proof is that Florina was one of the 10 winners of the 2007 "Best Emerging European Rural Destinations of Excellence" Award (EU project: European Destinations of Excellence - EDEN)¹⁶. Some of its hiking trails are already connected to the European Long Distance Walking Path E4¹⁷. Plus, its tourism assets are inherently more diverse: Florina includes a wine region producing wines with their own denominations and part of the wine roads of Northern Greece¹⁸ – Mariovo has none; it has the smaller Prespes lake connecting with the larger Prespa lake in MK – Mariovo does not border with neither; it includes the town of Kastoria known for its fur industry and traditional Balkan architecture, plus well-preserved or rehabilitated typical villages like Psarades on the south shore of Prespes and Nymphéo perched at 1,364 m – Mariovo is patched with abandoned villages; and, it has the Vigla Pissoderi ski centre – the MK Kozuf ski center near the Greek border is accessible from the city of Gevgelija, which is outside Mariovo proper¹⁹. On the other hand, getting to the region of Florina is more difficult and takes longer than getting to that of Mariovo, be it through the cross-border passage between the cities of Bitola and Florina or through Edessa in Greece, off Corridor X ending in Thessaloniki. And, Florina is expensive – see survey in subsection 7.7 again. Thus, once properly developed and promoted, Mariovo will have to differentiate itself from Florina through competitive advantages similar to those it could leverage vis-à-vis Montenegro, plus better accessibility to European travelers. Table 1 below summarizes competitive advantages based on which Mariovo could position itself vis-à-vis competitors in MK and Balkans. Each is further discussed in section 7 on the *marketing mix*.

¹⁶ <http://ec.europa.eu/enterprise/sectors/tourism/eden/themesdestinations/countries/greece/florina>

¹⁷ www.visitgreece.gr/en/activities/land_sports/mountaineering-hiking

¹⁸ Networking of Wine-Tourism Small and Medium Sized Enterprises and their Contribution to Local Development: The Case of the Wine Roads of Northern Greece, E. Pitoska, ICOAE 2008

¹⁹ Geographic Positioning as a Determination of Tourism Development of Gevgelija Region, M. Gjorgievski, S. Gramatnikovski, D. Nakovski, September 2012

Table 1. Mariovo’s Positioning vs. Competitors along Promotion, Product, Price & Place

	Mavrovo, Vevčani and Galičnik – established Macedonian alternative destinations for Macedonians tourists, two hours from Mariovo	Prespa/Ohrid – an established Macedonian alternative destination for Macedonian and EU tourists, one hour or less to Mariovo	Montenegro – an established, Balkan adventure destination for EU tourists, and distant from Mariovo	Florina (Greece) – an established, Balkan adventure destination for Greek tourists mostly – and some EU, and close to Mariovo
Promotion – see details in section 7.8	A single, attractive “Mariovo adventure” portal in Macedonian and English featuring all needed info and instantly accessible on Google and Facebook	A single, attractive “Mariovo adventure” portal in Macedonian and English featuring all needed info and instantly accessible on Google and Facebook	A single, attractive “Mariovo adventure” portal in English and Macedonian featuring all needed info and instantly accessible on Google and Facebook	A single, attractive “Mariovo adventure” portal in English and Macedonian featuring all needed info and instantly accessible on Google and Facebook
Product – see details in sections 7.3 to 7.6	Large region w/extensive natural/cultural heritage unparalleled in MK and to be explored at the touch of a button (e-maps)	Large region w/extensive natural/cultural heritage without noise & crowd, to be explored at the touch of a button (e-maps)	Large region w/extensive natural/cultural heritage untouched and to escape within, at the touch of a button (e-maps)	Large region w/extensive natural/cultural heritage untouched and to escape within, at the touch of a button (e-maps)
Price – see details in section 7.7	Accommodations/other services at lower or equal to their lowest price	Accommodations/other services at lower or equal to their lowest price	Accommodations/other services at lower than their lowest price	Accommodations/other services at lower than their lowest price
Place (or distribution) – see details in section 7.9	Placed in/with major international tourism websites and tour operators in Ohrid, Skopje, Bitola & Prilep	Placed in/with major international tourism websites and tour operators in Ohrid, Skopje, Bitola & Prilep	Placed in/with major international tourism websites and tour e-operators specialized in soft adventure tourism	Placed in/with major international tourism websites and tour e-operators specialized in soft adventure tourism

6.3 Strategy: Align with EU tourists’ preferences

When it comes to “alternative” destinations, Europeans are no longer searching the usual spots only. In one website²⁰, three out of 10 top suggestions in Europe were in Eastern Europe; in another website, six out of 10 suggestions in Eastern Europe were in the Balkans²¹. And while Croatia is an established destination for Europeans already, Bulgaria [for example] is emerging as a new one in the region, with its own alternative-tourism association to support its national aims²². Mariovo should follow that path.

The 2012 Eurobarometer Survey provides many key insights into preferences of European travelers²³:

- *Going on vacation has not been affected by the economic crisis: 72% travelled in 2011 and 73% intended to do so in 2012 despite the crisis; 41% planed longer rather than shorter trips (27%)*
- *They stay in their home country or travel within the EU, but nationality is a big factor in either or: Destination preference is one’s own country (52%) or others in EU (37%). In terms of nationality, figures show that a large proportion of Dutch (48%), Slovenes (44 %) and Belgians (26%) spent less than half of their holidays in their own country, while Romanians (93 %),*

²⁰ www.talktoeu.ie/?p=3581

²¹ www.wearetraveller.com/2013/04/10-alternative-tourist-attractions-in.html

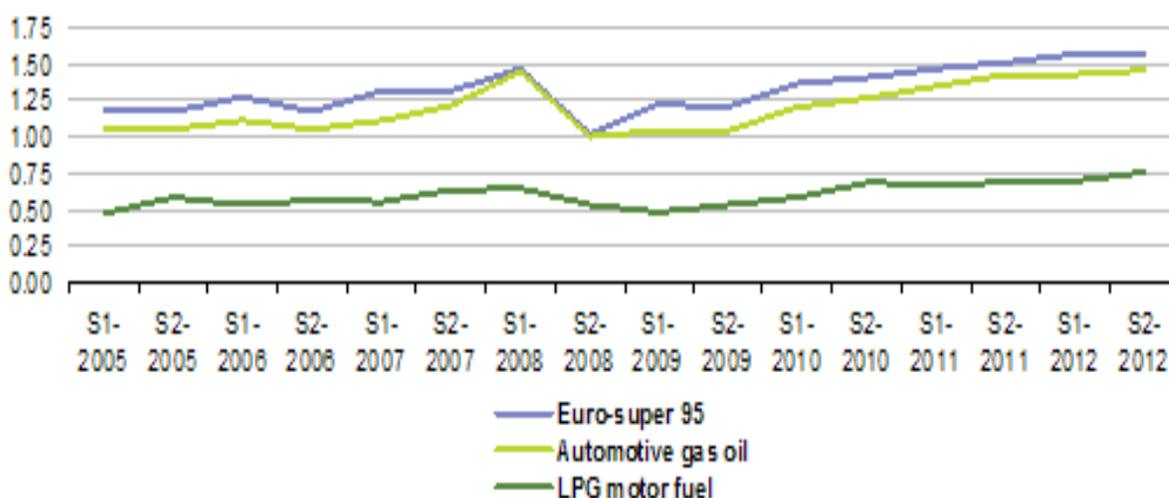
²² www.baatbg.org

²³ Eurobarometer Survey, 05.03.2012

Spaniards (92%) and Portuguese (91%) stayed “at home” for more than nine out of 10 holiday trips in 2011²⁴

- *They travel to vacation destinations mostly by car and motorbike:* Among those who travelled in 2011, most preferred to travel by these means of transport (78%), much more than in 2010 (44%). This preference holds across age and education groups as well. Most of those aged 25-54 (83-84%), those who finished their education aged 20 or over (81%) or aged 16-19 (79%) as well as those who left education at 15 or under (68%) travelled to vacation destinations by car or motorcycle. Interestingly, this preference has been consistent over the years while price of gasoline has increased over the years consistently as well, as depicted in Graph 4 below²⁵

Graph 4: Increase in Price of Gasoline from 2005 to 2012 in Europe



(1) Weighted average; inclusive of taxes and duties ; reference periods refer to the end of each semester.

Source: Oil bulletin, Directorate-General for Energy, European Commission

- *They prefer arranging holidays by themselves:* 53% booked their holidays via internet while 49% organized various elements of their trips separately, rather than booking them in one package
- *They still rely most on recommendations from family and friends about where to go:* "Word-of-mouth" was relevant to 52% of EU travelers, more than internet websites (40%)
- *They use the internet to make vacation arrangements extensively, although differences across age groups exist:* Those in the 25-39 age group are most likely to make arrangements online (65%), compared with the 40-54 group (59%), the 15-24 group (56%) and the 55+ group (36%).
- *Likelihood that holiday arrangements are made via the internet is correlated to education level:* 60% of people who left education aged 20 or over did this, compared with 50% who left aged 16-19, and just 27% who left aged 15 or under. Those who left school aged 15 or under are the most likely to use a travel agency (29% vs. 23% for the other two groups).
- *They value natural features, quality of accommodations, price, customer service and range of activities most:* When asked what would make them visit the same destination again, half (50%) said they would go back to a place for its natural features, such as the weather or the landscape, a

²⁴ Tourism in Europe: Results for 2011, Eurostat, Statistics in Focus, 28/2012

²⁵ Eurostat 2013, Consumer prices for petroleum products

third (32%) said that the quality of the accommodation would persuade them to return, about a quarter (27%) said that the general level of prices would make them to go back while 24% said the way tourists are welcomed, in terms of child friendliness, customer care and so on would be returning factors. In 13 countries, the range of activities offered was particularly important, with at least one respondent in five saying that the activities would make them go back

- *Rest and recreation are the main reasons for going on vacation for most, while other reasons are specific to age groups:* Those were the reasons cited by most respondents in all but seven of the 34 countries included in the survey. Rest, recreation and spending time with family are most popular to those aged 25-54 (49%-51%). Sun/beach (32%), visiting friends/relatives (36%), city trips (20%) and sport activities (12%) are most important to those aged 15-24. Nature (22%) and culture/religion (18%) are important for those aged 55+.

Text box 2. A strategy than aligns the Mariovo offer with EU vacationers' preferences

Facts/trends show that vacationing is a habit Europeans are not willing to forgo regardless of the economic/financial crisis – and the EU is the largest and closest target market to Mariovo. Moreover, they show that some inherent aspects of the Mariovo product fit European tourists' preferences already, such as landscape and weather, accessibility by road and a peaceful environment where visitors can rest. At the same time, they provide very important directions on how to develop a marketing mix that would properly support a Mariovo strategy targeting EU tourists. Specifically, to attract EU tourists, satisfy them and make them return to Mariovo, the region must: 1) Promote itself on the internet effectively; 2) tailor its promotional message to specific EU nationalities as well as age and education-level segments; and, 3) develop its product so that it can offer good but reasonably priced accommodations, friendly client service and a range of activities that allow visitors to experience Mariovo's environmental and cultural heritages both fully and conveniently.

7. Marketing Mix

7.1 Mix: Tailor it to the EU “adventure tourist” segment

Back in 2006, the European Travel Commission was already forecasting an increase in the emerging adventure tourism segment, saying: “The youth/young (defined as 18 to 40) market will seek more active holidays, particularly in various types of adventure tourism”.²⁶ In 2010, the Adventure Tourism Market Report unveiled results from a survey conducted in 2009 on a representative sample of residents from 6 countries in the European, Latin American and North American “world regions”, i.e., in the UK, Spain, Germany, Argentina, Brazil and the US. Those three regions all together represent 73% of world expenditures in adventure tourism worldwide. Some of its findings are very relevant to the strategic planning of Mariovo as a new destination to be developed, and confirm conclusions from other research:

- 26% of all respondents indicated that they participated in adventure travel activities
- 16% of all international departures from these three regions were for adventure travel
- The choice of activities influence whether travelers term their trip “adventure”. Over time, “adventure tourism” has been expanding into a broader range of activities

²⁶ Tourism Trends for Europe, European Travel Commission, September 2006

- On average, *regional* adventure travel represents 55% of adventure travel in regions surveyed
- Adventure travel is resilient to difficult economic times. Around 43% of European respondents indicated that, for their next vacation, they would take a “soft adventure” trip
- “Soft” adventurers spend the most per trip (excluding airfare). On average, each European soft and hard adventure traveler spent \$525 and \$500 per trip (excluding airfare if applicable)
- Adventure travelers spend significant amounts of money on equipment, gear and apparel
- Adventure travelers are equally single or married, male or female. They average between 35-37 years old, are more educated and have higher levels of income than other types of travelers
- Compared to “other travelers,” adventure travelers place importance on exploring new places and meeting and engaging with local cultures while on vacation
- Compared to other forms of pre-trip research, adventure travelers conduct research online, but they also consult friends and family. Their #1 social networking site is Facebook
- When preparing their trips on line, 82.2% said that they typed the destination or activity into “Google” or another search engine or visited the destination’s official website
- Adventure travelers indicated that their average trip was between 7 and 8 days, but most indicated also that their next trip would be longer – 1.5 days longer for soft adventurers

Text box 3. Targeting the “adventurer” segment of the EU tourist population

Data suggests that, within the European tourism market, the adventure segment is both significant and resilient, one which Mariovo could tap into, given assets which would allow visitors to explore and immerse in Mariovo’s natural and cultural heritages for 7 days or more. Moreover, adventure tourism is mostly regional and EU vacationers prefer out-of-home destinations within Europe. Data confirms that promoting on the internet would be the best channel by which to “sell” Mariovo, preferably via a single website that identifies Mariovo clearly and makes search on Google or Facebook easy. But it also confirms that quality of the Mariovo “product” will have to be high, consistently, for adventure tourists make decisions based on word-of-mouth from close ones most. It also suggests that the target visitor for Mariovo will be younger/middle aged, more educated than the average traveler, single or married (hence some young families as well). Among them, the “soft adventurer” sub-segment spends most on vacation – it should be Mariovo’s target/priority group.

7.2 Mix: Tailor it further to the “younger/mid-aged 25-44, limited budget, but extensive time” sub-segment

From a psycho-demographic perspective, the 2010 Adventure Tourism Market Report distinguishes two main categories of adventure travelers, with the first one broken down into two distinct sub-segments:

- *The younger generation* – Gen Y (people aged between 18 and 30) and Gen X (people aged between 31 and 44). This segment can further be broken down into two sub-segments:
 - *High disposable income, time poor:* This group is already in the workforce and has a limited amount of vacation time each year. They will seek to fill as much as possible into their vacation time, often splurging on what they view as once in-a-lifetime opportunity, such as hiking Mt. Kilimanjaro. This group is more likely to book through a tour operator. They are most likely reached through social media
 - *Smaller budget, extensive time:* Older and younger engage with the communities and places they go. Budget and value will be the key selling points across this group, but

sustainability and responsibility in tourism plays a high role in choice of destination. The youngest among them takes opportunities to travel for extensive periods of time (for 6 to 12 months sometimes) after two/three years in the workforce. They feel comfortable with long train journeys because of low budgets and big dreams, travel deeply in the communities they visit seeking authentic experiences, and are more likely to go trekking

- *The “baby boomer”* – people aged between 45 and 64. This adventure traveler is awakening (or re-awakening) to the adventure travel experience later in life. Many find themselves with extra time and money as children have moved from the house and they enter retirement with good health and a curiosity to do things they couldn’t do before. They have large budgets and value adventures combined with a cultural experience. They also book through tour operators and may take two/three international trips a year. “Experience” and “authenticity” are key to them

Text box 4. Targeting the “mid-age, smaller-budget but extensive-time” EU adventurer sub-segment

The younger/mid-age (25-44) tier among the “smaller-budget but extensive-time” EU adventurer sub-segment will look for “value”. Given Mariovo’s distance to Western/Northern/Central Europe, they will drive there to spend one week or more vacationing, expecting quality accommodations and other services at a reasonable *price*, and a complete *experience within a reasonable budget* in an environment void of all the pitfalls of “*mass tourism*”. Thus, if strategic planning for Mariovo’s aims to develop adequate *product* infrastructure, but at the same time maintain natural and cultural heritages “*unspoiled*”, and guarantee very competitive *prices vis-à-vis* other destinations in MK and the Balkans, then this is the sub-segment which best matches Mariovo’s current and future assets.

7.3 Product: Campsites for the “average camper” sub-segment of the EU camper segment

Research shows that accommodation is a key factor towards satisfaction or dissatisfaction with a tourism experience. Camping is one form of accommodation and much data points to its economic value within the EU tourism sector, while identifying nationalities which practice it most/least and describing different segments as well as common motivators among campers. Very important is that past research on camping has clearly pointed to common motivators that campers and adventure tourists share. Also important is that some data lumps tent and caravan/motor-home campers together while other makes the distinction between them. If Mariovo develops “collective” accommodations, it should choose which type of camper and camping to target, for size of investments varies substantially for one or the other.

According to Eurostat statistics on camping published in 2010²⁷ and 2012²⁸:

- Over 15 % of all tourist nights spent in 2008 were at collective accommodations like campsites, a figure that had remained stable since 2001. In 2011, the overall figure was down to 10%, but at 14% still when considering outbound trips outside a traveler’s home country. In fact, 30.4 % of all nights spent on campsites in the EU-27 in 2008 were by tourists from outside the country
- A total of 20.8 % of holiday trips by Dutch residents in 2008 were camping trips, almost four times the EU-27 average share (5.8 %) and twice the value of the next Member States in the ranking — Slovenia (11.1 %) and Denmark (9.1 %). With a share of 7.5 %, 6.5 % and 6.0 %

²⁷ Eurostat, Statistics in Profile, 25/2010

²⁸ Eurostat, Tourism in Europe, Results for 2011, issue #28/2012

respectively, the number of camping trips by Czech, French and German tourists was also higher than the EU-27 average. At 15.6 %, the Netherlands also recorded the highest share of camping trips in the total number of outbound trips, followed by Slovenia (12.4 %) where the high share can partly be explained by the proximity of campsites in Croatia – Slovenes' main destination

One factor which plays in favor of development of camping sites at alternative tourism destinations in Eastern and Southeastern Europe is *price*. Results from a 2008 study by DWIF consulting²⁹ on camping in Eastern European countries members of EU showed the following for caravan or motor-home owners:

- Costs at a medium category campsite for an overnight stay, for 2 adults and 1 child, charges for pitch/other (e.g. electricity, shower, visitor's tax) included, varied widely between Western and Eastern member states. Highest was 39.7 Euros in Italy. Lowest was 21.9 Euros in Poland

Price has indeed become a major factor in tourism since 2008, when the financial crisis started. A website dedicated to adventure tourism families says the following about how they can save money on their camping trips in Europe³⁰: “Italy isn't the only place you can see a ruined Roman amphitheatre. Turkey and Bulgaria have amazing Roman ruins too. The Greek Islands aren't the only place to spend time on a stunning beach. Croatia and Montenegro also have lovely beaches. The UK and France aren't the only place to see castles. Eastern Europe has gorgeous castles too. Take a look at the things you want to see and experience during your trip. Perhaps you can see some of those in countries where the cost of living is cheaper. Entrance fees are probably also cheaper, and there's a good chance that when you get there you'll have that castle or ruin all to yourself rather than sharing it with hundreds of others”.

But price is not the only factor explaining the perception that camping in Eastern and Southeastern Europe has a bright future. Resent geopolitical developments contribute to it as well. Research by DWIF Consulting for a German association looked at trends in caravanning [specifically] and concluded³¹:

- Since the European Union was expanded to include a large number of countries in Eastern Europe, *caravanning* tourism has grown enormously in the accession countries over past years

Other studies published by trade associations/clubs provide important trends on the camping sector in Europe. One by the Camping & Caravanning Club (CCC) in the UK in 2008 indicated that³²:

- The camping and caravanning market continues to enjoy significant growth. The UK CCC alone has seen its membership grow from 14,000 to 22,000 from 1997 to 2007
- In 2007 in Europe, there were 4.32 million caravan owners and 1.16 million motor-home owners. Sales in caravans has been stable, while motor-home ownership grew significantly
- Tent camping is enjoying a renaissance as well. Because manufacturing of the majority of tents now takes place in the Far East, the combination of low cost production and new lightweight materials has made tents more accessible, affordable, portable and of higher quality at meeting

²⁹ Economic impact of touristic camping in selected states of Eastern Europe, DWIF Consulting – GmbH, B. Harrer, 2008

³⁰ www.vagabondfamily.org/blog/finance/how-to-save-money-on-a-camping-adventure-in-europe

³¹ www.civd.de/en/caravanning/marktzahlen/touristik/soziodemografische-daten

³² www.insights.org.uk/articleitem.aspx?title=The%20value%20of%20camping%20and%20caravanning%20to%20-local%20communities

demands. All these factors have driven the availability of tents in distribution channels, be it supermarkets, mail order, online stores and traditional high-street outdoor retailers

- The growth in camping as a leisure pursuit is the result of a growing population, improvements in equipment quality and availability, but also an increasing desire to “escape” stress of everyday life

And when the same study further examines the *motivational drivers* behind “why” more people camp in Europe, common drivers among campers and adventure tourists become clear – which could lead to the conclusion that steady increase in the adventure segment of tourism has indirectly created and increase (or for some groups a rebirth) in the practice of camping:

- For the majority of campers, being involved in outdoor pursuits has a positive impact on how they feel. Campers are twice as likely to actively engage in an outdoor pursuit over non-campers. This could be as simple as walking and cycling but it could also mean more active pursuits like mountain climbing. There is a growing consensus that it is highly beneficial to “escape” and enjoy nature, take exercise, experience local cultures and visit places of interest. It is important to take 'uncomplicated' time together with family/friends. The number of young families joining CCC is now approaching 50% of new memberships, representing an all-time high

Still in terms of trends in the Camping sector in Europe, a 2009 market survey on the sports and camping goods market in the EU³³ points to trends in sales and provides very interesting explanations for them:

- While there are growing trends towards more outdoor activities and consumers getting more in tune with the environment, economic realities have forced many consumers to defer purchases of sporting equipment, and engage in sporting activities that require little or no investment in equipment. Some segments are benefiting from the economic downturn. For example, camping goods sales are growing strongly; sales of expensive golf and fishing equipment have fallen
- Faced with an increasingly complicated and sometimes stressful lifestyle, many are choosing a simpler way of life. This is also driven by the economic recession, where many consumers are forced to adapt spending to reduced budgets. This will also encourage people to go back to nature. They will enjoy simple outdoor pleasures like walking, hiking and camping. Consumers will revert to habits from the past, as they associate this with a more simple way of life
- Within the camping goods segment, tents in particular have had increased sales. This can be explained by the increase in the number of family-sized tents being purchased, rather than the sale of single and two-man tents. The reported growing interest in camping has seen increasing activity in short-break holidays, especially for families

The importance of the findings above is that they squarely support the fact that convergence of 1) constraining economic conditions leading to increased price sensitivity among European tourists, with 2) European tourists’ increased preference for nature and outdoor activities as a way to escape from stressful urban life and stay physically and mentally healthy, 3) has led to both growth of adventure tourism and resurgence of camping. Many of Mariovo’s existing assets fit into this trend perfectly. They now need to be developed adequately and promoted effectively to take advantage of that dual trend.

³³ CBI Market Survey: The Sports and Camping Goods Market in the EU, July 2009

Ranking proneness to outdoor activities – camping included (see Table 2 below), the study shows that:

- Outdoor activities rank almost equal to individual sports (ranked #1 and #2 out of all activities with 24% and 23%) among all EU countries combined
- The Dutch are most prone to outdoor activities (32%) and prefer them by a large margin to their second choice (individual sports 22%). Britons are second (29%) and rank them equally to team sports. Belgians/Germans are third (23% both) but rank individual sports higher (26%/28%)

Table 2. Preferred Sports/Outdoor Activities among Europeans

	Individual sports	Team sports	Fitness/gym	Snow Sports	Water sports	Outdoor pursuits
Total EU	24%	19%	15%	14%	5%	23%
Germany	26%	20%	14%	13%	4%	23%
France	21%	16%	17%	22%	4%	20%
United Kingdom	20%	29%	16%	2%	3%	29%
Italy	25%	14%	14%	21%	7%	19%
Spain	32%	11%	15%	18%	6%	18%
Netherlands	22%	19%	16%	5%	6%	32%
Belgium	28%	21%	15%	6%	7%	23%

Results shown in Table 2 above further confirm that, Macedonia aside, *continental* Europe is the most promising market for Mariovo, both geographically and from the point of view of destination-choice motivators. We exclude the UK from our conclusion, because driving distance (including crossing the Channel) and super-highways along North-South Corridors lead most Britons to the sunny South of France and Spain. It also confirms specific nationalities as best targets for Mariovo because of their proneness to outdoor activities (camping included), such as the Dutch, Germans, Belgians, French to a lesser extent, but excluding Spaniards and Italians perhaps. This choice would be only a starting point, however. As indicated in 5.1 of Box1, statistical data on flow and profile of tourists to Mariovo should be collected immediately, through a single promotional portal, but also in the field, so that Mariovo’s strategy and plan can be corrected or redirected based on recorded facts.

In terms of camper segmentation, a recent study on trends worldwide divides the short-duration segment of campers (i.e., weekends or vacations vs. a lifestyle) into three *psycho-demographic sub-segments*³⁴:

- The “soft rugged” are mature campers who overcome camping irritations by using recreational vehicles, caravans or rental cabins which act as home away from home (Counts & Counts, 2004)

³⁴ Trends in Outdoor & Camping Hospitality – An International Overview, E. Brooker & M. Joppe, Journal of Outdoor Recreation and Tourism 3-4, 4.2013

- “Extreme campers” (Bultena &Klessig,1969) are male hard-adventurers (Beedie &Hudson,2003) who seek primitive, intense/challenging wilderness experiences (Fazio & Gilbert, 1974)
- The “average” segment regards camping as an outdoor activity that includes a campfire, a tent and socializing (Lillywhite,Simonsen,&Fowler,2013). Even so, this *mainstream* group still seeks out comfort (Carter,2011), illustrating the contradiction underlying modern camping – the desire to “recreate” oneself in the outdoors, but with modern conveniences
- The common main motivational driver for all sub-segments above is the possibility to “escape” [in an outdoor/nature setting] from an urban setting and the hustle and bustle of everyday life

Finally, some general negative perceptions of camping will need to be addressed. For example, Western Europeans may have a dire image of camping in Eastern Europe. One website says: “In the West, camping entails certain available amenities - tents, ovens, all-weather gear, etc. Eastern Europeans love nature, and most don't mind *roughing it*. If you go camping with Eastern Europeans, you'll likely find yourself in the middle of nowhere with the barest of essentials ³⁵”. Negative perceptions can exist regionally as well. In the Balkans, camping may be viewed as something of the past associated today with decaying caravan parks built during socialist times for the working class. Therefore, while feasibility of campsites in Mariovo has been validated by ample studies presented in this subsection, the Mariovo product will have to feature other types of accommodations for those who want a real roof overhead.

Text box 5. Targeting the “average camper” sub-segment of the EU camper segment

Feasibility of campsites in Mariovo has been validated by many studies presented in this subsection. A key fact is that European adventure tourists and campers share many common motivators. Of all European campers, the “average camper” sub-segment – a mainstream group, has psycho-demographic features that would best align with Mariovo’s inherent *product* features (e.g., its untouched natural & cultural heritages), lower *price* and higher *accessibility* by road (i.e., compared with some of the most established adventure destinations in the Balkans like the mountainous areas of Montenegro and Florina in Greece). Important is that European campers, like other European tourists, want amenities that ensure both comfort and convenience, meaning that Mariovo campsites would have to be operated along EU standards, whether for tent campers or those coming with caravans and motor-homes. Dutch, German, Belgian and French campers would be top targets to Mariovo’ *promotion* and *distribution* – until data on origin and profile of tourists to Mariovo is consistently collected and shows otherwise.

7.4 Product: Offer rooms-for-rent within a network of most-accessible villages

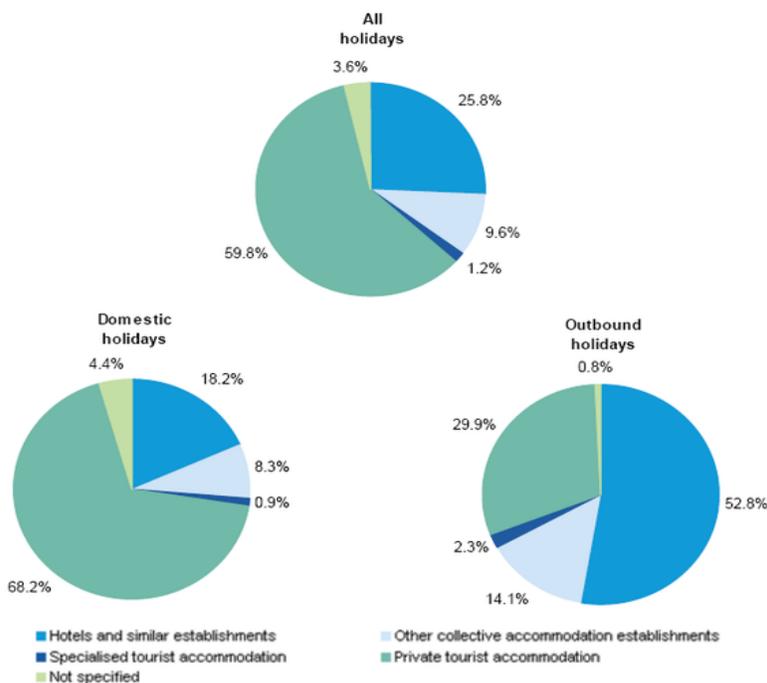
While campers and adventure tourists have much in common, and while camping is inexpensive compared to all other types of accommodations, it is not [by far] the first choice of accommodations for most European tourists. Hence, “roofed” alternatives to camping need to be evaluated so that the Mariovo offer in that regard is complete.

³⁵ <http://goeasteurope.about.com/od/introtoeasteuropetravel/p/camping.htm>

Recapping findings from the 2012 Eurobarometer Survey and Eurostat Statistics on accommodations:

- *Quality of accommodations is the top factor to most EU tourists' satisfaction*
- *Quality of accommodations is the second most important factor leading to a return*
- *Quality of accommodations matters most to the more educated - assumed rather well-to-do*
- *The economic crisis has not affected departures but has affected behavior, with a large segment changing vacationing patters amounting to spending less, in accommodations included*
- *Most Europeans stay at private accommodations rather than hotels while on vacation: As shown in Graph 5 below, 60% of respondents who went on holiday (domestic or outbound) said they stayed in private accommodations (in green), about 26% stayed in hotels and about 10% in collective accommodations such as camping. Private accommodations include: Rented rooms in family homes, dwellings rented from private individuals or professional agencies, but also second homes and accommodation provided for free by friends or relatives*
- *However, on outbound trips specifically, the trend between private accommodations and hotels is reversed: About 53% staid in hotels, 30% in private accommodations and 14% in collective accommodations (significantly more than on domestic holidays). But, considering that most vacationers have friends or 2nd homes in their home country primarily, it is safe to assume that most of the 30% who stayed in private accommodations rented them (regardless from whom); this is a very large segment still, one that presents significant business opportunities.*

Graph 5. Types of Accommodations Used by EU Vacationers



(1) EU-27 estimate made for the purpose of this publication, not including CY and UK.
(2) 2011 estimate based on quarterly data. When 2011 data was not available, 2010 or 2009 data was used instead.

From previous findings listed above, one can infer that accommodation alternatives to camping in Mariovo would have to be of high quality to ensure satisfaction, positive word-of-mouth and return to Mariovo from educated EU tourists who search, compare and choose destinations on their own. Accommodations will also have to remain within a price range that is both reasonable and competitive.

Renovating an entire village and offering a cluster of rooms-for-rent there is one alternative to consider for Mariovo. An example of that in MK already exists in Brajcino³⁶ near Prespa Lake. However, while Brajcino has managed to gain international recognition by now³⁷, getting the recognition was first the result of a fortunate combination of several positive factors within one very small place, namely:

1. Being part of a national park - Pellister
2. Offering lake and mountain activities at once within a very close distance from/to the village
3. Accessibility to a main road and sizable town nearby – i.e., a recently rebuilt road that circles along the western side of Prespa Lake and connects to the north with the Bitola-Ohrid main axis road, which itself goes through the town of Resen, 20 minutes driving distance from Brajcino

If we were to compare Mariovo and Brajcino: #1 above would not apply to Mariovo; #2 could [perhaps] if the GOM project to build dams on the Black River (and the resulting artificial lakes) was to materialize - but prospects are dim after many failed consecutive calls for bids; only #3 does (see 5.3 on page 14). Further with the comparison, development of tourism in Brajcino concerned one village alone; Mariovo is a region 1390 km² wide and housing 28 villages – and then the question: which to renovate? Size, however, combined with much more extensive natural and cultural heritages, makes feasibility of keeping long-stay visitors in Mariovo “occupied” more of a reality than in Brajcino, *if tourists are able to explore and discover the entire region of course*. Finally, given the significant cost of restoring a village (each house plus supporting infrastructure around them), one could question the wisdom of such a project. It would most probably require extensive financial support from GOM and municipalities, while private accommodations spread across several villages is an alternative that entrepreneurs could undertake alone.

Another important factor about the renovation of Brajcino is that it involved concerted assistance from many stakeholders together. The Pilot Eco-Tourism Project in Brajcino was one component of the Pellister Mountain Conservation Project (PMCP), which additionally consisted of a Management Plan for the Pellister National Park and a Nature Education Program. Brajcino benefitted from the assistance of the Swiss Agency for Development and Cooperation, the Swiss NGO Pro Natura and two local NGOs – DEM (Ecological Movement of Macedonia) and BSPM (Bird Society Protection of Macedonia) all at once, plus that of two minor partners, i.e., the Mountaineering Club Pellister and Natura Nova Ltd. Under the project, villagers agreed to open their pristine natural environment and traditional lifestyle to visitors under the condition that they would keep it that way. Three walking trails were developed, i.e., “village”, “monastery” and “nature”. Families interested in offering private accommodation were supported with small scale direct investments so that they could improve and adapt their homes to hospitality services. Other accommodations were offered as well at the Monastery of St. Petka. A group of mountain and village guides was developed. “Village meal” events were organized at local houses and the Monastery. And an information point and info-coffee-shop were placed in the center of the village. All was

³⁶ <http://ertr.tamu.edu/files/2013/04/Notarianni.pdf>

³⁷ <http://ireport.cnn.com/docs/DOC-441940>

implemented under a marketing strategy and follow-on action plan supported and coordinated by “external” stakeholders mostly, providing Brajcino with both financial and technical assistance at once.

Today, however, main challenges remain³⁸. Villagers believe that they have been further isolated since the bus route joining Brajcino to Resen was discontinued recently – resulting in further immigration of the younger, more entrepreneurial population, a trend which the project had meant to reverse. Also, it seems like the village needs to broaden its offer to a larger population of “adventure” tourists through the development and maintenance of hiking and biking trails – in addition to its walking trails. During a recent visit to Brajcino – on a summer national holiday, one of the researchers observed that the village was empty. The only restaurant there had reduced its menu and working hours compared to previous years. He and his guests were the only patrons at lunch hour. He also noted that the area around the information point was littered with garbage and needed much landscaping. Important also is that accommodations are fairly expensive in Brajcino, compared to what can be fetched at the nearby village of Dolno Dupeni on the road down to Lake Prespa. Rooms in Brajcino edge close to 15 Euros; in Dolno Dupeni it is 10. If anything then, Brajcino has demonstrated what locals can achieve when provided well coordinated external assistance. But it also shows that, once external assistance stops, leadership wanes and complacency settles in. Success requires sustained commitment from stakeholders within, together.

A more feasible alternative for Mariovo, one which would meet low price, reasonable investment and low operational/maintenance costs prerogatives, is a network of rooms-to-rent at renovated or adapted private houses across a network of Mariovo villages most accessible to regular vehicles by asphalt or dirt roads. Several villages would qualify. Preferably, owners would offer full board until more restaurants open. They would sell basic food, drink and personal hygiene products as long as retail outlets are unavailable. If several houses were to be grouped in a designated village, a small retail store could eventually emerge there and serve both residents and tourists. Advantages of this *preferred* proposed alternative are:

1. It would offer choice to tourists, depending on whether they prefer to stay at a village unique for its natural features (e.g., next to a canyon), opportunities for physical activities (e.g., a starting point to several hiking trails and mountain bike paths), architectural sites (e.g., housing a monastery or Ottoman style bridge) or other features still (e.g., it is the stage for a yearly cultural/sport event)
2. Several accommodations in each village would act as a catalyst to more houses being renovated in each village – for R&R or commercial purposes, particularly if a retail outlet opens, hence creating development and inciting the young to return to the *region* - rather than to one village alone
3. The range of investments to renovate or adapt a village house into a tourist accommodation is wide, but would still remain reasonable; it can be small for a house which is already occupied and in good condition and within which only one floor is to be offered/equipped for rent; it can be larger for an abandoned house which has a good standing structure and roof but needs to be gutted out and rebuilt inside to make it suitable to tourists while meeting minimum quality/equipment standards
4. Because financial outlays would be reasonable, they would encourage private investment, supported by commercial financing perhaps, but not necessarily dependent on subsidies from either international donors or government. Usually also, cost of workmanship is cheaper when negotiated between small contractors and locals than when outsourced by government or international donors

³⁸ <http://tourismrural.com/macedonia/topicdetails-6.41.html>

5. If aid was provided by government or international donors, spreading it among several locations would decrease jealousies while increasing the community's good will towards a common action

But the alternative above would also have to overcome challenges inherent to Mariovo. For example, given that no road connects the Prilep and Novaci sides of Mariovo, getting all stakeholders in one place at once – to turn common interests/objectives into concerted action across the region, will be difficult. Lack of this connecting road will also be a problem for both short and long-stay tourists, since it limits their ability to access all villages within the region conveniently. Building such a road should be a priority. Finally, split municipal authority over the region will complicate agreement on regional incentive programs, standards of quality and the monitoring of them across all participating villages.

7.5 Product: Offer “soft adventure” activities preferred by targeted sub-segment

The study featured in the 2010 Adventure Tourism Market Report made it clear: *Destinations must offer activities which their targeted tourists prefer*. Table 3 on page 35 lists those which respondents had practiced on past trips. Researchers then categorized them as “Soft Adventure”, “Hard Adventure” or “Other Tourism” activities – based on criteria validated by past research. Most were “Soft Adventure” – the bulk of the adventure market, and many match what the Mariovo *product* could offer best (cells colored in yellow).

7.6. Product: Provide technology supporting targeted sub-segment's full experience

Table 3 shows that, once developed and promoted properly, Mariovo's rich environmental and cultural heritages could be turned into an *experience* that suits what its targeted tourists want most. But to be able to experience Mariovo fully, its extensive network of asphalt/dirt roads, current and future trails as well as sightseeing points of interest must be thoroughly signaled in the field, directing tourists along “theme roads” that combine physical and sightseeing activities, i.e., hiking or mountain biking together with stops at monasteries, architectural landmarks and panoramic views. Given size of the network again – and Mariovo overall, ground signalization should be supported by e-signalization, i.e., e-maps downloadable from smart phones. A quick search into websites of adventure destinations worldwide proves that the technology already exists³⁹. It would give Mariovo an additional competitive advantage over competitors.

7.7 Price: Offer lower price of accommodations and other services to better compete

Researchers conducted a survey on accommodation in six locations on October 26 of 2013: Prilep, Bitola and Ohrid in MK; Florina and Kastoria in Greece; and the Durmitor National Park in Montenegro. Prilep and Bitola were considered competitors to Mariovo for overnight visitors. Ohrid was included because vacationers there could consider a short excursion to Mariovo and hence would compare price of accommodations with what they are paying on the lake. Florina, Kastoria and Durmitor are Mariovo competitors because they are established, mountain-based “adventure” destinations in the Balkans.

³⁹ <http://www.heritageportal.co.za/organisation/gps-smart-tours;>
<http://www.viewranger.com/en-gb/partners/trail-authors-publishers/cumbria-tourism;>
<http://www.floridakeysapps.com>

Table 3. Activities Practiced on Past Vacation Trips

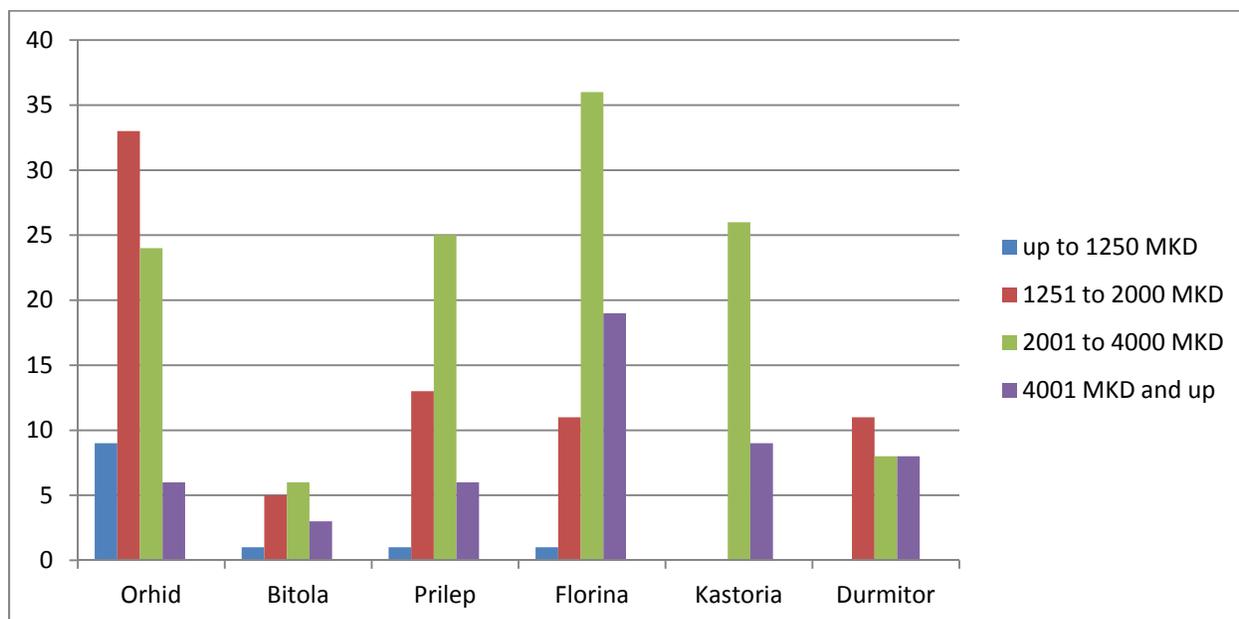
Activities practiced	Hard Adventure Tourism	Soft Adventure Tourism	Other Activities
Archeological expeditions		X	
Attending local festivals/fairs			X
Backpacking		X	
Bird watching		X	
Camping		X	
Canoeing		X	
Caving	X		
Climbing (mountain/rock/ice)	X		
Cruise			X
Cultural activities		X	X
Cycling		X	
Eco tourism		X	
Education programs		X	
Environmental sustainable activities		X	
Fishing/fly-fishing		X	
Getting to know the locals		X	
Hiking		X	
Horseback riding		X	
Hunting			X
Kayaking/sea/whitewater		X	
Learning a new language			X
Orienteering		X	
Rafting		X	
Research expeditions			X
Safaris		X	
Sailing		X	
Scuba diving		X	
Snorkeling		X	
Skiing/snowboarding		X	
Surfing		X	
Trekking	X		
Walking tours		X	
Visiting friends/family			X
Visiting historical sites			X
Volunteer tourism		X	

Using the **Booking.com** reservation portal, researchers recorded availability of properties as well as lowest price for a single room for two people on the night of Saturday August 9 to Sunday August 10 of 2014. Results are presented in Table 4 and Graph 6 on the following page. They show that Mariovo would gain a price advantage over competing locations if accommodations stayed at 20 Euros per night or less, for this is the price range with least number of offerings across destinations surveyed. Some could be priced within the 20 to 33 Euro range to accommodate upper-scale visitors during overnight stays, but preferably not above that. The 20 to 33 Euro range was found to be the 2nd least common among 4 out of 6 locations surveyed, but the most common in Ohrid and Durmitor – by far in the former (33/72), much less in the latter (11/27) where all other rooms (16/27) were priced in the two price ranges above.

Table 4. Number of Properties & Price of Rooms in 6 Locations

	Ohrid Hotels/B&Bs	Bitola Hotels/B&Bs	Prilep Hotels/B&Bs	Florina Region Hotels/B&Bs	Kastoria Region Hotels/B&Bs	Durmitor Region Hotels/B&Bs
	72 available	15 available	45 available	66 available	35 available	27 Available
Less than 1250 MKD – or less than 20 Euros	9	1	1	1	0	
1250 to 2000 MKD – or between 20 to 33 Euros	33	5	13	11	0	11
2000 to 4000 MKD – or between 33 to 66 Euros	24	6	25	36	26	8
Above 4000 MKD – or above 66 Euros	6	3	6	19	9	8
Findings in terms of most common first and second price ranges	-The highest number of rooms is in the 20 to 33 Euros price range -A distant second is in the 33 to 66 Euros price range -Few are in the less than 20 Euros price range	-The highest number of rooms is in the 33 to 66 Euros price range -A close second is in the 20 to 33 Euros price range -Only one is in the less than 20 Euros price range	-The highest number of rooms is in the 33 to 66 Euro price range -A distant second is in the 20 to 33 Euro price range -Only one is in the less than 20 Euro price range	-The highest number of rooms is in the 33 to 66 Euro price range -A significant second is in the above 66 Euro price range -Only one is in the less than 20 Euro price range	-The highest number of rooms is in the 33 to 66 Euro price range -A significant second is in the above 66 Euro price range -None are in the less than 20 Euro price range	-The highest number of rooms is in the 20 to 33 Euros price range -But the bulk is in the 33 to 66 Euro or 66+ ranges -None are in the less than 20 Euro price range

Graph 6. Number of Properties & Price of Rooms in 6 Locations



Return-on-Investment (ROI) prerogatives point to the *recommended lower price ranges* for Mariovo above as further support to another recommendation made previously, i.e., that development of Mariovo's roofed accommodations remain a *reasonable* investment. Another ROI-related factor to consider is that, even if inflow of tourists to Mariovo was to increase dramatically, it would still be small, since the base-figure today is assumed to be low. Related to ROI still, calculations should factor-in operating and maintenance costs also, for they significantly increase as room capacity increases. Hence, erecting large hotels accommodating 50 or more tourists at once may not be a wise option, while B&Bs accommodating 10 or less would be. At last, there is the issue of personnel. Given the socio-demographic characteristics of Mariovo residents (i.e., few, old, uneducated, untraveled and scattered across a relatively large region), it would be difficult for large hotel operators to hire the necessary number and profile of employees they need locally – they would have to import most from Prilep or Bitola, while B&Bs could remain family-owned and operated businesses supported by one or two locals employees each.

7.8 Promotion: Through a single, logically identifiable “Mariovo Adventure” e-portal

Evidence presented earlier in this report demonstrated that:

1. *On the one hand:* A potential tourist would have to sift through many websites to get a full idea of where Mariovo is, what it looks like, and what it has to offer. Overall, *promotion* of Mariovo today is deficient because it is scattered, or lumped together with that of other MK destinations
2. *On the other hand:* Profile of the targeted tourist to Mariovo is one that prefers to arrange its vacations independently rather than through tour operators, using the internet, using search engines like Google – to arrange different elements of the trip separately, and when doing so, typing in the name of the destination and/or type of preferred touristic activity

Researchers conducted a small experiment on November 21 of 2013, typing the words “Montenegro Adventure” then “Mariovo Adventure” on Google. It led to the following websites listed at the top of page 1 of Google's results:

- For Montenegro, first sites to appear were www.montenegro-adventures.com and www.adventuremontenegro.com, a sign that these are the two most visited sites by potential tourists, and which confirms finding #2 above. Going further down the Google list of sites, Montenegro appeared under www.tripadvisor.com, www.tucantravel.com and www.imaginative-traveller.com. Those are three major, international tourism websites
- For Mariovo, the first site to appear was www.exploringmacedonia.com. This is an official GOM site that provides tourism information for all regions in Macedonia. When clicking “Mariovo”, however, researchers got very little information about what someone can do there. Instead, and anyway researchers browsed the site, they usually were referred to activities in other MK regions. Going further down the list of sites – an in order of appearance, Mariovo appeared in the form of a portfolio of pictures, videos, then a Mountain Bike NGO and the race it organized in Mariovo in 2013. This confirms finding #1 above. No listings of Mariovo on www.tripadvisor.com, www.tucantravel.com and www.imaginative-traveller.com appeared thereon.

From this short experiment, it is clear that Mariovo could benefit much from a single e-portal that would appear first on major internet search engines like Google when the words “Mariovo Adventure” or “Adventure Mariovo” are typed in – as most of Mariovo’s target tourists would do. Once accessed, the portal should provide potential tourists with all the information they need to make a decision, including descriptions of: Natural/cultural heritages; range of adventure activities; “theme roads” joining points of interest like panoramas, Ottoman bridges and monasteries through hiking or biking trails; support technology available to tourists (e-maps downloadable on smart phones), where to get it and terms of purchase/usage; and, contact details of all tourism service providers as well as a general info center. Updating/maintenance of the e-portal could be financed by fees paid by providers promoting their services in it – but with placement conditional on consistency in quality of their services over time.

7.9 Place (distribution): In/through major international tourism websites

Mentioned in the previous section were three major, international tourism websites:

- Tripadvisor.com: A distributor of services (e.g., accommodation booking) or packaged tours by providers registered with them. Adventure tours are one type among many others offered
- Imaginative-traveler.com and Tucantravel.com: Specialized adventure tour operators. They package/deliver their own at destinations of their choice; or, select then distribute that of others

While previous findings indicate that Mariovo’s target tourists (i.e., *the 25-44 smaller budget but extensive time*) would most probably not use tour operators, they show also that they would most probably arrange different elements of their vacation separately and via the internet. For example then, they may use Tripadvisor.com or Booking.com websites to choose accommodations at their final destination. Such e-distribution channels should be used by Mariovo service providers, but only once product infrastructure has been developed up to EU quality standards, to avoid negative word-of-mouth⁴⁰.

Previous findings indicate also that MK is now being featured by international tour e-operators. A search through their websites, however, shows a limited choice, often lumping MK with other countries into “Balkan” tours and leaving little room for longer stays in more specific in-country destinations. Hence, Mariovo will have to create its own “niche” separately from MK. While this is not a priority in the short term, being listed by such e-operators would have two main advantages for Mariovo ultimately: First, it could be a *long-term* strategic goal that would harness the efforts of all stakeholders collectively towards a common aim. If successful, it would then show that Mariovo has reached a level of infrastructure development and quality of service delivery high enough to meet the standards of top players in the industry. Second, and provided that elements of the Mariovo marketing mix diversify to meet the needs of upscale tourists as well, it would open the region to segments other than that initially targeted. The upper tier *baby boomer* segment for example (see description on pages 25-26) would prefer the luxury of “boutique” hotels – or at minimum very well equipped B&Bs – and hire the services of internationally certified tour guides. In the mean time, and in the short term, Mariovo should expand its presence within local tour operators’ product portfolios to increase flow of its short-stay, 1-2 day excursionist market.

⁴⁰ Note: An additional Tripadvisor.com feature is that it can advertise “official tourism information” for a fee and provide clients (i.e., the destinations) with valuable tracking data on who access their sites, when and how often.

Text box 6. Summary of Findings & Recommendations from Sections 6 & 7

6.1 Mariovo's *mission* should be to become a new alternative & adventure tourism destination in the Balkans while its *strategy* should be to align with EU vacationers' preferences. Main competitors to Mariovo could be other destinations in MK, but most probably established alternative adventure destinations in the Balkans like Montenegro and Florina as well. To best compete, Mariovo should *position* and differentiate itself from competitors along *price*, inherent features of its *product* like size and variety of its natural/cultural heritages and the sense of "escape" they provide, *technology* in the form of e-maps downloadable from smart phones and supporting thorough field signalization, and high *accessibility* via Corridor X.

6.2 The *marketing mix* should be tailored to the European "adventure tourism" market, but more particularly the "soft adventure" segment" and more specifically still the "25-44 age group with smaller budget but more extensive time to vacation" sub-segment. These target tourists will stay in Mariovo for one week or more. Some will be Macedonians from cities like Skopje while more will be Northern and Central Europeans who prefer vacationing outside their home country but remain within Europe. They usually drive or ride a motorcycle to their final destination, arrange their vacations on their own via the internet and pay much attention to advice/opinions from close ones. They are more educated than the average tourist, look for value, wish to escape from urban settings and place natural features, quality of accommodations and service as well as variety of activities offered as the top criteria for returning to a same destination.

6.3 *Product* should feature a range of soft adventure activities that align Mariovo assets with its longer stay target tourists' preferences particularly; most align already with preferences of current short stay 1-2 day excursionist to Mariovo.

6.4 *Product* should accommodate the "average camper" sub-segment of the EU camper segment, with camping being one of the two main accommodation alternatives in Mariovo

6.5 *Product* should also accommodate EU soft adventures who prefer to rent rooms or apartments rather than staying in a hotel. This is the most feasible "roofed" alternative to camping in Mariovo, but more specifically: 1) Rooms-for-rent across a network of designated villages most accessible to all vehicles by asphalt or dirt roads; and 2) family-owned/operated B&Bs. All accommodations in Mariovo (campsites and rooms-for-rent at B&Bs) should meet high quality standards (EU that is) and offer full board as well as sale of basic items as long as restaurants and retail stores are not available in the region.

6.6 *Product* should feature thorough signalization of all roads, paths, hikes and sites on the ground supported by e-maps downloadable from smart phones at the touch of a button and allowing for a fuller experience and discovery of Mariovo.

6.7 *Price* of all accommodations in Mariovo should give the region a competitive advantage over competitor destinations, particularly those outside MK. The same should apply to other tourism-related services.

6.8 *Promotion* should be through a single "Mariovo Adventure" e-portal tailored to the profile of targeted tourist and immediately downloadable on search engines like Google. The portal should provide all information needed by potential tourists. Cost of maintenance could be covered by fees paid by service providers advertising in it and registered with it.

6.9 *Placing* (distributing) Mariovo should include listings of its service providers in international tourism websites used for services like booking accommodations, but only once infrastructure has been developed up to EU standards, to avoid negative word-of-mouth. Short term, increased usage of local tour operators should increase flow of 1-2 day excursionists. Longer term, listing by international operators specialized in adventure tours should expand flow of longer-stay tourists.

8. Findings from Stakeholder Interviews and Fieldtrip Observations

Transcripts from interviews with stakeholders (see list in Appendix 1), observations from fieldtrips and discussions with Mariovo residents during fieldtrips were coded along themes derived from the guideline used for semi-structured interview (see Appendix 2). They were then clustered into overarching themes. For example then, Communications and Assessment of Communications were condensed into one theme. Most common answers/observations (based on frequency once coded/clustered) became “main findings”. Other comments made by one/few participants were retained if they enriched discussion of main findings.

8.1 Top-of-Mind descriptions of Mariovo

When asked top-of-mind words/sentences to describe Mariovo, participants mentioned “clean air & clean environment”, “tradition & culture”, “untouched & peaceful”, “abandoned & depopulated” most often (in order of frequency). Some other qualifiers were “monasteries”, “religion”, “WWI”, “famous Macedonian movies” and “Macedonian literature”. This was in line with researcher’s overall impression from fieldtrips. While the region did not strike them as “spectacular”, its many winding and practicable asphalt/dirt roads took them through sparsely populated plateaus, valleys, canyons and low mountains, with natural beauty all-around, giving them a sense of space as well as peaceful “escape” from the city.

8.2 Communications & assessment of communications

Participants’ assessment of Mariovo was based on many sources of information, be it from trips they had taken there, websites, travel agencies, literature or films. Overall, however, participants described communication of Mariovo [as a tourism destination] along the following qualifiers: “Scattered”, “poor” and “unprofessional”, all in all leading to lack of a single and comprehensive Mariovo offer.

8.3 Geographic position and access

Participants rated roads from Prilep and Novaci to Mariovo as in good condition but in need of development. Most particularly, they suggested that they reach further/deeper into Mariovo and be connected within Mariovo proper. Signalization, on the other hand, was rated as poor, particularly vis-à-vis tourists. These views were confirmed by researchers’ observations during fieldtrips. Asphalt roads leading to the center of Mariovo were not in perfect condition, but were in “very practicable” condition. They crossed some villages, connected to adjacent villages through tributary asphalt or dirt roads, or led to more settlements still through follow-on dirt roads. On the other hand, practicability of dirt roads was uneven, depending on degree of inclines and hence exposure to water erosion. Those winding along plateaus and valleys were in very good condition; those in and out of canyons required 4x4 tractability. Overall, however, width of dirt roads and extent of their network seemed excellent for low-effort hiking and perfect for mountain biking. One major issue was that researchers could not explore Mariovo fully and at once given no connection between Prilep and Novaci roads. This was inconvenient and would be disliked by future tourists. As for signalization, researchers never got lost in Mariovo given that their destinations were villages clearly indicated by signs on both roads and their maps. A note here: The map of the Novaci side of Mariovo provided to researchers by the municipality was excellent, but an

equivalent could not be found on the market. Beyond villages, however, dirt roads lead to unspecified destinations. The only other type of signs on asphalt/dirt roads (besides names of villages) were those directing researchers to monasteries. Signs to historical sites, like the cobbler road outside of Vitoliste, were not spotted.

8.4 Environmental heritage

Participants rated Mariovo's environmental heritage as "clean" and "untouched" mostly. They pointed to its rich biodiversity as well. This is a general description that researchers share from their fieldtrips. All along roadsides – asphalt or dirt, very little man-made pollution was observed (i.e., trash or "mini dumps"). And on one trip, up to 20 turtles were seen trying to cross roads. However, a couple of participants pointed to potential challenges to the general branding of Mariovo as "clean" and "untouched", namely: A highly polluted Black River, the Uranium mines on the Prilep side (radiation!?) and WWI landmines on the Novaci side (explosions!?). Those were acknowledged by other participants, but only once put forth to them by researchers at the end of meetings. Pollution of the Black River was also confirmed during a fieldtrip, when upon crossing it at a bridge past the village of Rapes, researchers could not fail to notice the foul smell coming from it. As for the other two issues, they need clarification.

8.5 Cultural heritage

Participants pointed to cultural, historical and religious heritages as being very important to Mariovo. They mentioned the traditional architecture of houses, the many monasteries, the remnants of WWI, Ottoman bridges, etc. But they also reiterated that signalization to best leverage those assets towards tourism was lacking. Besides signs leading to monasteries, fieldtrips taken by researchers confirm (again) the need for making visitors aware of those sites as they hike, bike or drive across Mariovo.

8.6 Habitat and people

Participants described villages as highly depopulated and residents remaining there as poor, uneducated and not the type which would show the entrepreneurial spirit needed to make Mariovo take off as a tourism destination. They described the land as poor and good for not much but sheep herding. However, they also said that abandoned villages and depopulation contributed to the "uniqueness" of Mariovo... its "mystique". Fieldtrips confirmed those views – except for the fact that the only restaurant in Mariovo today is one which was opened by an entrepreneur-farmer born in Mariovo and residing there. Researchers noticed that most villages had electricity, but no evidence of running water was spotted. However, according to one resident researchers spoke with, water was plentiful and very clean out of wells and rivers nearby her village. As for sewage, the assumption (given the level of poverty and number of inhabitants left) is that septic tanks are as far as sewage goes in Mariovo. Finally, and worth noticing, one participant (who has worked in Mariovo extensively) described Mariovo residents as fiercely independent and looking after their own interest primarily, a mentality born out of history (i.e., the region's past, negotiated independence from the Ottoman empire), current isolation – and marginalization by local authorities perhaps. The same participant ascertained that buy-in from village leaders would be key to any tourism initiative in Mariovo, something to remember for the future.

8.7 Tourism activities

Participants spoke of the variety of physical/nature-based as well as sightseeing activities Mariovo could offer. They mentioned biking, mountain biking, hiking, rock-climbing, fishing and sightseeing (of monasteries particularly) most. They described it as a great place for “adventure”, back-packers and religious tourism. They also mentioned yearly events like the Jeep Tour and insisted that there is no conflict between motorized outdoor sports and other nature/culture-based tourism activities. One added that excursions on 4x4 SUVs were available already and that Mariovo was “big” enough for all. On the other hand, participants practitioners of paragliding, kayaking or white water rafting rated Mariovo as “not good” for those activities, while simultaneously praising it for others – like mountain biking again.

8.8 Current tourist profile

According to participants, current tourists to Mariovo are mostly Macedonians from Prilep and Bitola, middle or upper class, many of whom have family ties to Mariovo. Second are foreigners, mostly from the EU. Macedonian tourists were described as bikers, mountain bikers, hikers, practitioners of 4X4 motorized sports activities or attendees to 4x4 events – the latter again qualified as not a nuisance, picnickers and religious tourists, usually on short 1-2 day excursions. Foreigners were described as coming to Mariovo for the same motives than Macedonians, but on longer stays, and more of the “adventurist” type, enjoying “wild camping” for example. Both Macedonians and foreigners were described by many as “nature lovers” coming to “experience” Mariovo life, outdoors and tradition. Most participants deplored lack of accommodations in Mariovo, which forces tourists/visitors to sleep in Prilep or Bitola. This may be one reason explaining the “wild camping” by foreigners – although one participant recollected a family of Swedes spotted camping near a river and, when asked why (?), answering: “Escape!” Fieldtrip observations confirm many aspects of this profiling. On the first trip for example, researchers noted a great number of mountain bikes attached to the back or roof of SUVs. On a follow up trip, a resident told them that foreigners were wildcamping on the outskirts of her village – she then listed the various origins of foreign plates. She said that her village was visited by tourists at the rate of one or two cars/day during summer. Another resident pointed to foreigners coming for hunting in fall and winter.

8.9 Potential tourist profile

When describing future tourists, participants said “more” of the same *assuming proper infrastructure development and promotion of course*. But they were also more explicit in some of their descriptions. Some foresaw groups of Macedonian students on short excursions or longer stays – sent there to learn about their country. Others made the difference between a “younger-mid” group, perhaps families with kids, with lower budget, and coming for physical activities (like hiking and mountain biking) within a nature setting and ready to “rough it a little”, vs. another “older” group, with higher budget, looking for a less risky and physical experience, coming for sightseeing mostly, but within a natural environment the same. Both groups were described as having common features such as a love for nature, “adventurism”, wanting to explore and discover Mariovo, and coming to Mariovo after having heard about it from friends. Another group mentioned by one participant was foreigners staying in Ohrid but wanting a break

from it. When describing accommodations to develop in Mariovo, participants mentioned hotels (but inexpensive), an entirely renovated village like that of Brajcino near Pellister, and rooms-for-rent as part of village tourism. Interestingly, while they often mentioned wildcamping as an activity they had observed among foreigners in Mariovo, they never mentioned campsites as an alternative, collective accommodation for Mariovo tourists. Instead, they branded campsites as a “good” or “very good” idea only once researchers had mentioned it to them at the end of a meeting.

8.10 Positioning & competition

Participants pointed to a strategy aiming to make Mariovo an “alternative destination” to foreign tourists from the EU, one focused on the “uniqueness” of some aspects of Mariovo’s heritage, such as its untouched nature and the sense of escape it provides visitors. To them, the uniqueness of Mariovo and the variety of attractions/activities it could offer seems to protect it from competitors, and if competition there will be, it would come from other local or Macedonia destinations primarily. While nothing from fieldtrip observations allows researchers to agree or disagree with those perceptions, they do believe that competition will be fiercer in general and would come from established, Balkan mountain-based “adventure” destinations (like Florina and Montenegro) as well. They also believe that Mariovo will not be able to compete based on its inherent “uniqueness” alone, but that it will have to offer *low price* of accommodations and other services, and enhance the Mariovo experience with technology (i.e., e-maps).

8.11 Needed improvements & challenges

The list of improvements needed to make Mariovo a new, sustainable alternative and adventure destination in the Balkans is long, but participants mentioned three aspects most, which align with researchers’ findings and recommendations up to section 7 of this report:

- An infrastructure of accommodations and other support services (like professional guides and retailing), to allow short excursions or longer-stay tourists to remain in Mariovo instead of having to sleep in Prilep or Bitola, and which (moreover) will allow them to enjoy Mariovo fully
- New or better or extended existing roads, to support tourism traffic and increase tourists’ access to more locations *across* Mariovo, coupled with more/better signalization to open all points of interest to sightseers, be they drivers, bikers or hikers. The latter would include clearly signalized “theme roads” directing tourists along various sights regardless of mode of transportation used
- Better promotion of Mariovo, to leverage its assets within one offer and communicate it effectively via one main source of information (such as an e-portal) to targeted tourist segments

On the other hand, redressing environmental hazards – like pollution of the Black River – were not priority improvements in the minds of most participants, while researchers believe they should be addressed. In terms of challenges, participants saw access to financing as the most important barrier to the development of tourism in Mariovo. Researchers agree, but would argue that lack of clear “leadership” would be an equally important barrier.

8.12 Leadership

While participants agree that all stakeholders have a role to play in the development of Mariovo as a tourism destination – some alluded to a stakeholder group or association of tourism service providers, they pointed to different parties when it came to designating “who” should lead the effort. Preferences

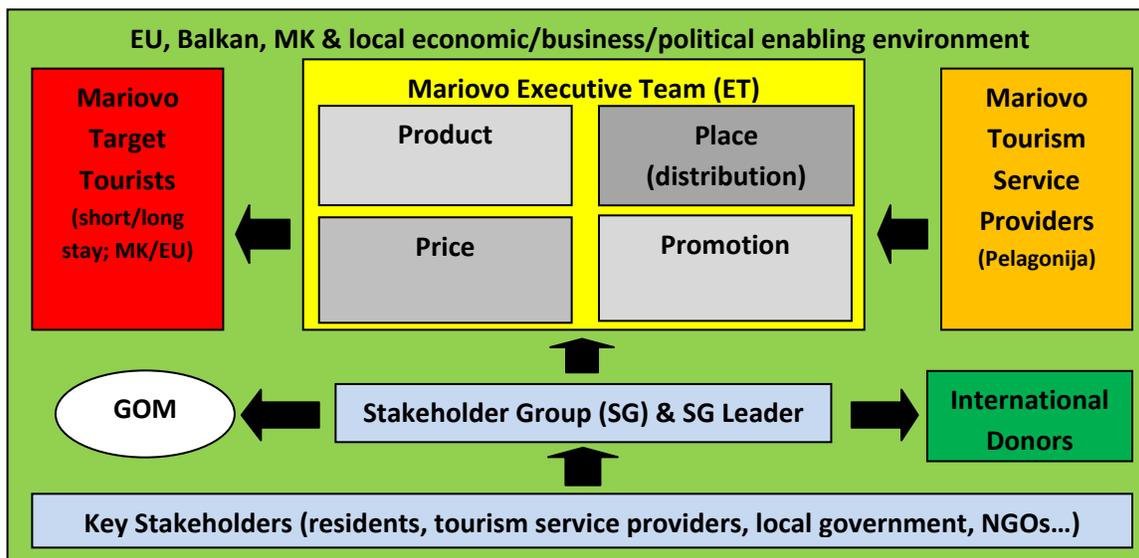
were often in line with each participant’s occupation or employer: Entrepreneurs as well as business owners and managers would prefer the private sector to lead, while public officials pointed to local or central government. A third option – mentioned by a Major – was a public/private partnership, where:

- The private sector (entrepreneurs, firms, business associations in the hospitality/tourism sectors and commercial banks) take the risk of financing or investing in tourism in Mariovo, provided an environment where government fosters rather than stumps private enterprise – unclear from GOM
- The public sector (municipalities primarily) supports the development of tourism in Mariovo via proper infrastructure (i.e., roads, signalization, water, electricity, urban plan), incentives to investments (e.g., free life-long leases on municipality-owned buildings), lobbying of GOM (e.g., to build a regional road connecting Prilep and Novaci roads in Mariovo) and seeking of external financial assistance (e.g., from GOM and international donors alike)

Researchers’ believe that the third path is the appropriate one to follow. But this does not address the issue of “who” should lead the tourism development effort for Mariovo still. Given that tourism development is part of economic development, researchers would point to the three municipalities [under which Mariovo is administered] for leadership first, since fostering local economic development is part of their mandate to constituencies – even when they represent a small number of votes, like Mariovo does.

Graph 8 below depicts a suggested “delivery structure” within which all relevant parties could contribute to the Mariovo tourism development effort. Having answered key questions pertinent to Mariovo’s enabling environment (e.g., is adventure tourism a growth sector in the EU? If yes, how can Mariovo take advantage of it and best compete?), it proposes at its center a Stakeholder Group (SG) that would represent the interests of all key stakeholders. Headed by a designated SG Leader – a mayor or president of a tourism association for example, the group would reach out to International Donors and GOM for external technical and financial assistance. It would hire and supervise an Executive Team charged to implement a short-term action plan focused on the four elements of the marketing mix (see next section 10), during a 2-year timeline (see then section 11), monitored along a series of key performance indicators (section 12), and for an estimated cost X (section 13 finally). Service providers would contribute to the delivery of each of the elements of the mix, which would be aligned with needs and preferences of Mariovo’s target tourists (see their profile in section 9).

Graph 7. The Mariovo Tourism Delivery Structure



Text box 7. Conclusions from Interviews, Observations and Testimonials

7.1 Findings from interviews with stakeholders were supported by observations and testimonials during fieldtrips. For the most part, stakeholders' intuitive views – and those they hold from visiting, promoting, working in, residing in or advocating for Mariovo – are consistent with researchers' findings and recommendations up to Section 7 of this report.

7.2 Not surprisingly, there were “contrarian” views expressed by some participants, and although they were few, they need to be acknowledged. For example, one key stakeholder did not see tourism as a feasible development path for Mariovo, and suggested others instead. Another saw Mariovo's potential for longer-stay tourism as minimal, but good for 1-2 day excursions.

7.3 There are also *some* differences between what stakeholders and researchers think, suggest or propose:

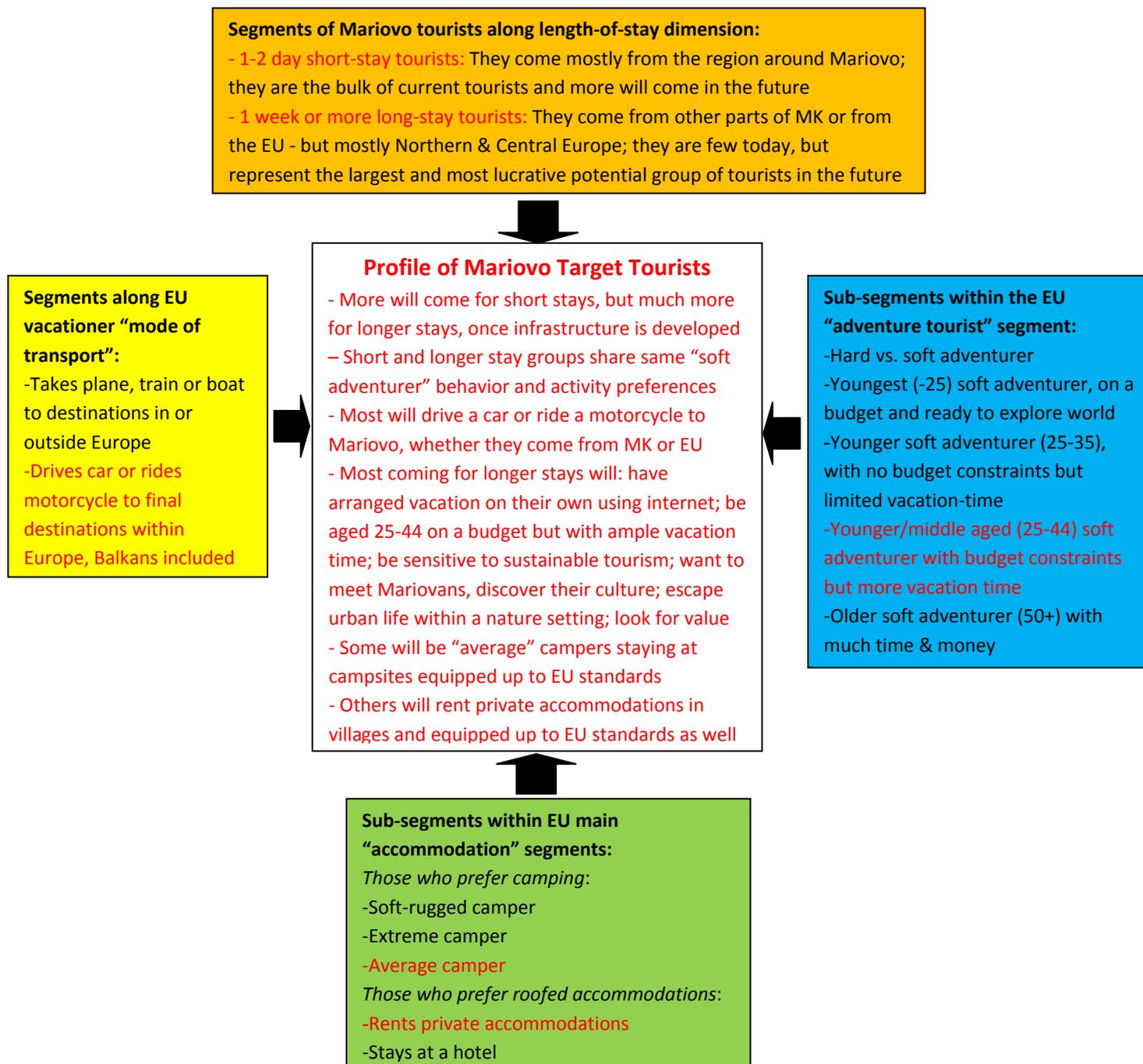
- First, while stakeholders see competition as limited and from other local or Macedonian destinations mostly, researchers foresee it as fiercer and inclusive of established, Balkan mountain-based adventure destinations as well. Also, and contrary to stakeholders, researchers don't believe that Mariovo can compete based on its inherent natural and cultural heritage uniqueness alone, but that it will have to augment its offer with a low price strategy as well as technological innovations like e-maps downloadable from smart phones and giving tourists autonomy and fuller access to the Mariovo experience
- Second, while stakeholders consider access to financing the major obstacle to development of tourism in Mariovo, researchers perceive current environmental hazards – such as pollution of the Black River – and lack of consensus on who should lead the tourism development effort, i.e., public or private sectors, as equally important challenges
- Third and last, certain “solutions” suggested by stakeholders, like erecting large hotels or renovating villages entirely, are rejected by researchers on the grounds that low price of accommodations (to compete and penetrate the market), small future flows of tourists (even if much higher than currently) and higher operating as well as maintenance costs – combined with workforce issues – would make such large investments unjustifiable against realistic ROI requirements

7.4. Given challenges like access to financing and leadership, there is a need for consensus among all parties on a “delivery structure” that would clearly delineate and assign leadership, oversight and execution roles as well as accountabilities. An example of such structure is suggested and depicted in Graph 7 at page 44. It assigns a central role to a Stakeholder Group which would guarantee inclusion of key stakeholders' interests, views and concerns in the decision-making process, reaching out to external technical and financial assistance from GOM and International Donor Agencies, and supervision/tracking of the implementation of an initial short-term action plan delegated to an Executive Team hired along experience/skills criteria.

9. Mariovo Target Tourists Profile

Findings in sections 6 and 7 led to recommendations on a mission, positioning, strategy and marketing mix for Mariovo. All elements of the mix are meant to align with the profile of Mariovo's *target tourists*, which was derived through segmentation. Profile is described in the box at the center of Graph 8 below.

Graph 8. Profile of Mariovo Target Tourists



10. Short-term Action Plan Framework*

Mission: Become a new alternative “adventure tourism” destination in the Balkans		
Strategy: Align the Mariovo offer with EU vacationers’ preferences		
Positioning: Along inherent/unique features of Mariovo’s natural and cultural heritage, price, accessibility and technology		
Marketing mix: Tailored to the “mid-aged, smaller-budget but extensive-time” sub-segment of the EU soft adventure segment		
Promotion: Single “Mariovo Adventure” e-portal appearing first on search engines like Google and providing all needed info		
Place (distribution): International tourism websites; local tour operators; international e-operators specialized in adventure tours		
Product: Infrastructure/services developed for a healthy, complete “escape” from the city in unique natural and cultural heritages		
Price: Lower or comparable to lowest offer by competitors resulting in superior value-for-money		
Needs & weaknesses	Solutions	Implementing actions & activities
1. Development of tourism in Mariovo will require “leadership”	1. Mariovo stakeholders build a structure to both lead and implement the ST action plan	<p>1a. During a stakeholder conference, strategy is endorsed, a Stakeholder Group (SG) formed and a “Mariovo champion” nominated SG Leader (SGL)</p> <p>1b. SG forms an Executive Team (ET) to activate, manage & track ST plan; it uses MNGT, human & financial resources provided by stakeholders to operate</p> <p>1c. ET develops “detailed” ST plan (what, when, whom & how much) and Key Performance Indicators (KPIs) within a Monitoring & Evaluation System (M&ES) to track implementation & impact; SG endorses ST plan & M&ES</p> <p>1d. SGL seeks external financial assistance from GOM & international donors while maintaining SG commitment to ST plan and overseeing ET activities</p> <p>1e. ET implements the ST plan – including project proposals to secure external financing – and keeps SG aware of progress via monthly M&E reports and meetings to/with SG</p>
2. Mariovo’s natural, cultural and historical heritage is substantial but it does not offer accommodations that would allow visitors to discover it for longer than one day	2. Develop Mariovo’s capacity to accommodate short and long-stay visitors via renovation/adaptation of village houses into B&B-type operations across a network of selected villages as well as erecting of two campsites – one on either side of Mariovo, all meeting EU quality standards	<p>2a. SG members (i.e., municipalities) award (or facilitate with GOM) on a competitive basis life-long leases on municipality-owned buildings and land to entrepreneurs aiming to operate B&Bs or campsites; speed permits to those aiming to do the same but on their own property</p> <p>2b. SG members (i.e., municipalities) oversee proper renovation/adaptation of buildings or land into B&Bs or campsites along style/quality/equipment criteria which are standard across Mariovo</p> <p>2c. SG members (i.e., municipalities) do QC of B&B/campsite operations along lease contracts & regulations; revoke leases or permit to operate if applicable</p>
3. Mariovo’s natural, cultural and historical heritage is substantial but cannot be enjoyed and discovered by visitors thoroughly	3. Leverage Mariovo’s various heritages by making them 100% accessible to tourists via thorough signalization of all asphalt/dirt roads, paths, trails and sites in the field, supported by e-maps downloaded on smart phones and available across a network of distribution points	<p>3a. ET enlists NGO volunteers for field signalization, negotiates/creates a network of e-map distribution points and hires an e-map app provider</p> <p>3b. ET supervises field signalization and e-mapping of all asphalt and dirt roads, mountain-bike paths and hiking trails</p> <p>3c. ET supervises field signalization and e-mapping of all sightseeing points, including historical, architectural, religious sites and natural panoramas</p> <p>3d. ET supervises integration of 3b/3c into field/electronic “theme roads” that attach sites to excursion itineraries for hikers, bikers or drivers</p> <p>3e. Members of SG maintain quality and signalization of all roads, paths, trains and sites; ET maintains/updates/expands portfolio of e-maps</p>
4. Mariovo’s natural, cultural and historical heritage is substantial but it is unknown and not promoted properly	4. Promote Mariovo to its target tourist segment, but from specific countries particularly (Belgium, Netherlands, Germany), via a single “Mariovo Adventure” e-portal as well as specialized international websites, focusing the offer on Mariovo’s competitive advantages	<p>4a. ET hires portal designer</p> <p>4b. ET supervises design of portal along profile/needs of targeted tourist segment while verifying all information imported into the portal, including all collected at 3b/3c plus that which concerns services and service providers</p> <p>4c. ET launches portal (in Jan – March before summer season)</p> <p>4d. ET does regular QC of services/providers and maintains portal updated</p> <p>4e. ET collects “quantitative” and “qualitative” data through the portal, analyzes it, enters results in M&ES and takes corrective action if needed</p>

(*) The short-term action plan assumes limited financial, organization and human resources as well as expected impact within a given period (see 2-year timetable at #10 below). Hence, it focuses on needs and weaknesses that must be addressed most and first to make a difference (#1 to 4) and proposed solutions (middle column). It also reflects what potential external sources of financial assistance would expect on the part of beneficiaries before committing funds, starting with a supervisory and executive structure (SG, SGL and ET at #1), plus a clear description of the activities to which funds will be allocated (1a to 4e).

11. Suggested Timetable for ST Plan Activities**

Activities under the 24-month ST Plan	M 1-3	M 4-6	M 7-9	M 10-12 Ja-Mar	M 13-15	M 16-18	M 19-21	M 22-24 Ja-Mar
1a. Strategy endorsed, SG formed and “Mariovo champion” nominated SGL								
1b. SG forms ET which uses MNGT, HR and financing provided by stakeholders to operate								
1c. ET develops “detailed” ST plan (what, when, whom & how much), KPIs and M&ES; SG endorses detailed ST plan & M&ES								
1d. SGL seeks external financing, maintains SG commitment and oversees ET								
1e. ET implements ST plan – including proposals to fetch external financing, and keeps SG informed monthly								
2a. Members of SG award leases of municipal buildings/land for B&B and campsite operators								
2b. Members of SG they approve permits for B&B and campsite operators, including those on own property								
2c. Members of SG check compliance of new B&B and campsites with style/quality/equipment standards								
2d. Members of SG check B&B and campsites for compliance with operating regulations								
3a. ET enlists NGO volunteers for field signalization								
3b. ET hires a smart phone app provider for e-maps								
3c. ET develops a network of e-map app distributors								
3d. ET supervises field signalization and e-mapping of all asphalt and dirt roads, mountain-bike paths, hiking trails and sightseeing points								
3e. ET supervises integration of 3b/3c into field and electronic “theme roads”								
3f. ET conducts quality and compliance control of e-map app distributor network								
3g. Members of SG maintain quality and signalization of all roads, paths, trains and sites								
4a. ET hires portal designer								
4b. ET supervises portal design, verifies all information imported into the portal, then gets portal vetted by SG								
4c. ET launches portal (in Jan – March before summer season)								
4d. ET does regular QC of services/providers and maintains portal updated								
4e. ET collects data through portal, analyzes it, enters results in M&ES and takes corrective action if needed								

(**) The timetable for delivery of activities reflects another requirement from potential providers of external financial support, namely a clear idea of who does what by when. Thus, accountability and a timeline are attached to each activity (ET, SGL & SG members; M1-24). Some are specific and continuous, like 1d. Others reflect a sequence of activities towards a main deliverable, like 3a-e for field/electronic signalization.

12. Suggested Key Performance Indicators ***

Activities	KPIs	Units measured
1a. Approve strategy, elect SG, nominate SGL and form ET	-Strategy approved -SG elected and SGL nominated -ET formed/hired	-Yes/No by M1; criteria for 100% completion (Yes) should be added -Yes/No by M1; criteria for 100% completion (Yes) should be added -Yes/no by M1; criteria for 100% completion (Yes) should be added
1b. Develop a detailed ST plan, KPIs and M&ES then get plan and M&ES endorsed by SG	-ST plan developed -KPIs and M&ES developed -ST plan endorsed	-Yes/No by M2; criteria for 100% completion (Yes) should be added -Yes/No by M3; criteria for 100% completion (Yes) should be added -Yes/No by M3; criteria for 100% completion (Yes) should be added
1c. Seek and obtain external financial assistance	-# of external donors signed-up - \$ external financing fetched	-Actual vs. Targeted # at M6, 12, 18 and 24 -Actual vs. Targeted amount at M6, 12, 18 and 24
1d. Implement ST plan	-ST plan implemented	-Actual vs. Targeted results for all KPIs within the M&ES
1e. Keep SG informed	-SG/ET hold monthly meetings	-Yes/No monthly M4-24; criteria for 100% completion (Yes) added
2a. Award municipal building and land leases/concessions	-Leases/concessions awarded	-Actual vs. Targeted # at M3, 9, 15 and 21
2b. Approve permits for B&B and campsite operators	-Permits approved	-Actual vs. Targeted # at M3, 9, 15 and 21
2c. Check compliance w/style, quality & equipment standards	-Compliance w/style, quality & equipment standards checked	-Actual vs. Targeted # at M6, 12, 18 and 24
2d. Check compliance with operating regulations	-Compliance with operating regulations checked	-Actual vs. Targeted # at M9, 15 and 21
3a. Recruit NGO volunteers for field signalization	-NGO volunteers recruited	-Yes/No by M3; criteria for 100% completion (Yes) should be added
3b. Hire smart phone app provider for e-mapping	-Smart phone app provider hired	-Yes/No by M3; criteria for 100% completion (Yes) should be added
3c. Develop network of e-map app distributors	-Network of e-map app distributors developed	-Yes/No by M9; criteria for 100% completion (Yes) should be added
3d. Do field signalization and electronic mapping of all roads, paths, trails & sightseeing points	-All roads, paths, trails and sightseeing points signaled in the field and e-maps	-Actual vs. Targeted % completion by M9
3e. Integrate 2d into field and e-map "theme roads"	-Theme roads signaled on field and e-maps	-Actual vs. Targeted % completion by M9
3f. Conduct quality and compliance control of e-map app distributor network	-Quality and compliance control of distributor network completed	-Actual vs. Targeted # at M12, M18 and M24
3g. Maintain quality & proper signalization of all roads, paths, trails and sites	-Quality & proper signalization of all roads, paths, trails and sites maintained	-Actual vs. Targeted # at M12 and M24
4a. Hire service provider	-Provider hired	-Yes/No by M3; criteria for 100% completion (Yes) should be added
4b. Design portal and get SG vetting	-Portal designed & vetted by SG	-Yes/No by M6; criteria for 100% completion (Yes) should be added
4c. Verify all information imported into portal	-Information verified	-Yes/No by M9 (Dec); criteria for 100% completion (Yes) should be added
4d. Sign promotional contracts with service providers	-Promotional contracts signed	-Yes/No by M9; criteria for 100% completion (Yes) should be added
4e. Launch portal	-Portal launched	-Yes/No by M12 (Mar); criteria for 100% completion (Yes) should be added
4f. Check quality of services promoted in portal	-QC of services conducted -Status of providers reviewed	-Yes/No at M13, 16, 19 & 22; criteria for 100% completion (Yes) should be added -Yes/No at M14, 17, 20 & 23; criteria for 100% completion (Yes) should be added
4g. Maintain portal updated	-Portal updated	-Yes/No at M15, 18, 21 & 24; criteria for 100% completion (Yes) should be added
4h. Collect, analyze & interpret data from portal, then enter into M&ES for management	-Data from portal collected, analyzed and interpreted for management	-Actual vs. Targeted monthly hits, registrations, questions, etc. M13-24

(***) Many KPIs are Yes/No type. External financiers will want criteria demonstrating 100% completion (Yes). Ex: 100% complete 4e depends on 100% complete 4a to 4d, plus steps like successful "testing" and integration into the M&ES. Adding criteria is better than more KPIs to the M&E

13. Cost Estimations ****

Item	Calculation	Estimate
Costs to local municipalities with or w/out external financial support		
Stakeholder conference	Housed at municipality; 10 Euros/person x 100	10 x 100 = 1,000 Euros
Exec Team (ET), including: -Hire portal designer -Supervise portal design -Recruit promoters for Portal & negotiate promotional contracts -Lead portal launch -Build KPIS and M&E System -Operate M&E System -Hire & supervise field signalization teams -Hire and supervise electronic signalization provider and output -Hire and supervise provider and output for smart phone application -Recruit apps distributors and negotiate distribution contracts -Supervise erecting of camping site and recruiting of camping MNGT & maintenance team -Conduct QC visits at portal promoters, apps distributors and camping site; renegotiate relationships -Report to SG	Project Manager, Project Coordinator & QC/M&E Coordinator: -Manager : 900 Euros x 24 M -Project Coord: 600 Euros x 24 M -QC/M&E Coord: 600 Euros x 24 M Add operating costs : -Office & equip rent -Office supplies -Transportation (fee/KM) -Total: 1000 Euros x 24 M	3,100 x 24 = 74,400 Euros
SG meetings	21 meetings M4-24, housed at municipality; beverages and small foods	21 x 15 Euros = 315 Euros
Portal design	Interactive portal with modern design	1 x 5,000 = 5,000 Euros
Field & electronic signalization	Mark 10 theme roads = 500 Euros x 10 Develop 10 GPS maps = 2,000 Euros x 10	5,000+20,000 = 25,000 Euros
Application to smart phones	ANDROID & iOS apps = 5,000 Euros each	2 x 2,500 = 5,000 Euros
Field & electronic signalization maintenance	Field signalization = 1,000 per year Electronic maps = 2,000 per year	1,000 + 2,000 = 3,000 Euros per year
Trails and hikes maintenance	Twice per year = 2 x 4,000 Euros	2 x 4,000 = 8,000 Euros per year
Update smart phone application	Upgrading applications = 2 x 1,000 Euros	2 x 1,000 = 2,000 Euros
Costs to private entrepreneurs with or w/out external financial assistance – and assuming life-long leases on LG buildings/land for 0 Euros		
2 fully equipped camping sites – building & equipment costs	Building 1 site Between 20,000 and 50,000 each	40,000 to 100,000 Euros
Camping site yearly maintenance costs	5% of start-up investement/year	2,000 to 5,000 Euros
10 fully equipped B&Bs of =<20-people capacity each - building and equipment costs	Renovating or adapting village houses Between 20,000 and 50,000 Euros each	200,000 to 500,000 Euros
B&Bs yearly maintenance cost	5% of start-up investement/year	10,000 to 25,000 Euros

(****) The table above shows both a list of possible costs and gross estimations of those costs. Taking campsites for example, one or two could be erected, and the investment will very much vary depending on whether campsites host tents only, or tents as well as caravans and motor-homes, plus how many of either each campsite is equipped to host. The same high variances can be assumed for the building of any B&B, depending on the state in which each municipal building is when it is leased to entrepreneurs (in need of adaptation or complete renovation). Hence, the value of this document is mostly as a starting point to more accurate and realistic calculations when the ET is to submit a detailed ST plan for SG's endorsement. This will also be an important task when seeking external financial assistance. Note also that this document tries to attribute costs to each partner in a public/private partnership between municipalities and entrepreneurs, while leaving out potential costs to GOR, like building a regional connecting roach within Mariovo. Hence, a third category – attributed to central government – should be added to this list.

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Mariovo - Mountain Bike Marathon: www.youtube.com/watch?v=dJMtk1cQq0
Mariovo - Biking Map: www.bikemap.net/en/route/1652498-sliva-mariovo
Mariovo - Biking Trails: www.visitpelagonia.mk
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Appendix 1: List of Participating Stakeholders*

Organization Type/Sector	Organization/person
1. Business: E-portal providing information and services to Mariovo tourists	Mariovo.MK
2. Business: Represents interest of food and hospitality industry in Bitola; part of a larger association	Hotel Molika; Catering Industry and Tourism Association;
3. Business: Same as above but in Priliep	Tourism Agency Bran; Catering Industry and Tourism Association
4. Other tourism-related Services: Restaurant in Mariovo	Ethno Restaurant Mariovo
5. Natural & Environmental Heritage: Preserves Mariovo natural/environmental heritage via projects	Biosfera NGO – Bitola
6. Natural & Environmental Heritage: Preserves Mariovo environmental heritage in Mariovo via written works	Trenco Dimitrioski – Journalist & Author
7. Cultural & Historical Heritage: Preserves Mariovo cultural and historical heritage via IPA project	Center for Civic Initiative, in coop with Municipality of Novaci
8. Cultural & Historical Heritage: Rep of Orthodox Church; preserves religious heritage in Mariovo	Father Nikola – head of monastery in village of Manastir, Mariovo
9. Sport Activities: Mountain Bikathon participant	Slobodan Trajkovski – NGO Dir.
10. Sport Activities: A group practicing water sports on the main river crossing Mariovo	Kayak Canoe Club Arka Reps
11. Local governments: Municipality of Novaci and its involvement in Mariovo tourism development.	Econ Devel Department Reps at Novaci; plus interview w/Major
12. Local governments: Municipality of Prilep and its involvement in Mariovo tourism development	Econ Devel Department Reps at Prilep
13. Local governments: Municipality of Kavadarci and its involvement in Mariovo tourism development	Econ Devel Departments Reps at Kavadarci
14. Regional Development: Organization involved in development of Palagonia region – inclusive of Mariovo	Center for Development of the Pelagonija Planning Region (CRPPR)
15. Mariovo residents: Individuals residing in Mariovo and willing to speak about their contacts with tourists	One individual residing in one the villages visited; plus the owner of the Ethno Restaurant

(* Efforts were made to contact the mountain bike NGO “Oxygen” which is in charge or organizing the yearly Mountain Bikathon as well as the organizer of the yearly Mariovo Jeep Tour, but were unsuccessful.

Appendix 2: Guideline for Semi-structured Interviews

Contrary to structured interviews which have a rigorous set of questions and order that do not allow for diverting, **semi-structured interviews** are open to new ideas or follow-on questions brought up by the interviewee or interviewer during the interview. Usually, the interviewer has a logical framework of themes or “information sought” s/he wants covered during the interview and which s/he has put in the form of a written **interview guide**. The guide helps the interviewer focus the interview on the themes, but without constraining them to the particular format or sequence or exact wording. Instead, the interviewer tailors usage of the guide according to the interview context/situation and the interviewee.

1. Top-of-Mind: <i>Mariovo described in 3 words or short sentences, positive or negative</i>
2. Relationship to Mariovo: <i>Work, tourism, friends, family, public information</i>
3. Communications: <i>Sources of information on Mariovo</i>
4. Assessment of Communications: <i>Good, bad, thorough, piecemeal, scattered</i>
5. Geographic position and access: <i>Easy, difficult, roads, signalization, access to markets</i>
6. Natural & environmental heritage: <i>Strengths and weaknesses</i>
7. Cultural, historical and religious heritage: <i>Strengths and weaknesses</i>
8. Human and habitat heritage: <i>Strengths and weaknesses</i>
9. Tourism activities: <i>Which tourism activities would match Mariovo’s strengths best?</i>
10. Current Tourist profile: <i>Who goes to Mariovo, for what, how long, where do they stay?</i>
11. Potential Tourist potential: <i>Who else could be drawn to Mariovo? More of same? Other?</i>
12. Needed improvements: <i>What to do/improve to draw the biggest market to Mariovo?</i>
13. Competition: <i>Envisioned competitors</i>
14. Positioning: <i>Valuing and differentiating Mariovo vis-à-vis competitors</i>
15. Leadership: <i>Who needs to take the lead in Mariovo tourism development? what would be the main barriers to developing a tourism strategy and plan for Mariovo?</i>