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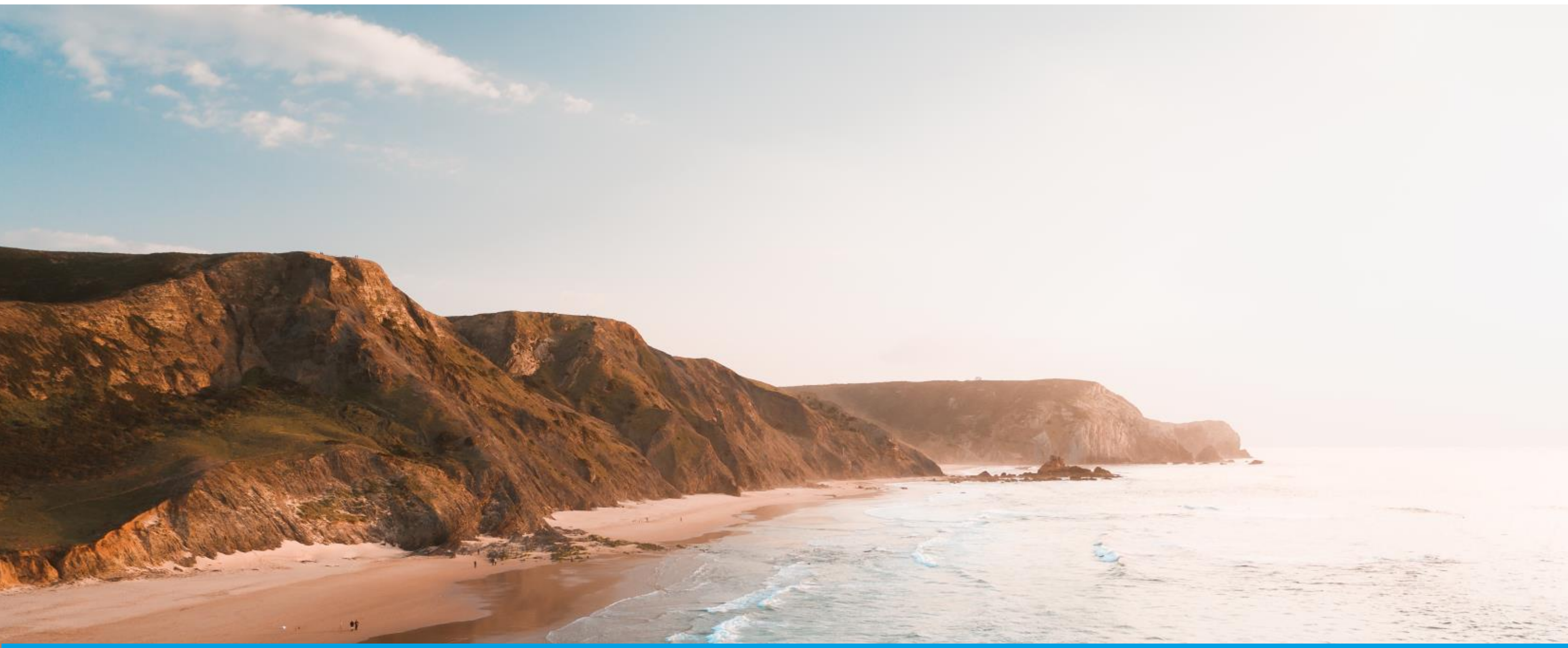
PRO EXTOUR

PROMOTING HERITAGE - AND CULTURE - BASED EXPERIENTIAL TOURISM IN THE BLACK SEA BASIN

Project No BSB-1145



REGIONAL NEEDS ASSESSMENT REPORTS

for the development of experiential tourism in the PRO EXTOUR countries and BSB

COMMON BORDERS. COMMON SOLUTIONS.

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Regional Needs Assessment Reports

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January 2021

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PRO EXTOUR

Black Sea CROSS BORDER COOPERATION

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ACRONYMS

AA	Association Agreement
BSB	Black Sea Basin
BSC	Black Sea Commission/ Commission on the Protection of the Black Sea Against Pollution
BSEC	Black Sea Economic Cooperation
DMO	Destination Management Organization
ENPARD	European Neighbourhood Programme for Agriculture and Rural Development
ET	Experiential Tourism
EU	European Union
FDI	Foreign Direct Investments
GDP	Gross Domestic Product
GNTA	Georgian National Tourism Administration
GVA	Gross Value Added
HCBET	Heritage and Culture-based Experiential Tourism
MEPA	Ministry of Environmental Protection and Agriculture of Georgia
NAR	Need Assessment Report
NGO	Non-government Organizations
PPP	Public-private partnerships
RA	Republic of Armenia
RAP	Regional Action Plan
SME	Small or Medium-sized Enterprise
STE	Small Tourism Enterprise
TA	Tour Agency
TO	Tour Operators
UNESCO	The United Nations Educational, Scientific and Cultural Organization
WTTC	The World Travel & Tourism Council

FOREWORDS

This document unites five Regional Needs Assessment Reports (RNARs) that define the development opportunities for heritage- and culture-based tourism in Armenia, Bulgaria, Georgia and Greece as the countries, represented in the project PRO EXTOUR, and in the whole Black Sea Basin. It profiles the niche for experiential tourism and draws attention to the prospective benefits of the experiential economy for recovery from COVID-19 pandemic and post-pandemic adaptation of tourism and hospitality.

The RNARs identify the countries' potential to offer authentic experience based on their heritage and culture, outlines the environment and resources for development of experiential activities, investigates the specifics of the tourism sector, visitors' profile, tourism offering and tourism enterprises, utilization of heritage and culture for creation of tourist attractions, existing strategies and policies, and evaluates the main problem areas and development challenges for outlining remedy actions at policy-making and business level.

The needs assessment was performed via primary and desk research following a common methodology and covered all program countries that compose the BSB area. A joint research group of experts representing all partner institutions in PRO EXTOUR project discussed together the definition and concept of heritage- and culture-based experiential tourism, the main principles of work, the guiding principles and framework that need to be followed in order to produce comparable and useful documents that are tailored to the needs of the individual countries and the whole area.

The detailed needs assessment analyses and processed research result are published for further reference in English on the web-site of PRO EXTOUR project. This document contains only the main findings and implications for action and is available in English, Armenian, Bulgarian, Georgian and Greek.

Heritage- and Culture-based Experiential Tourism Definition

Heritage- and Culture-based Experiential Tourism (HCBET) is a socially and environmentally responsible set of travel activities and services that offer a memorable experience and interpretation of heritage and cultures that lead travellers to self-discovery, new insights, and inspiration.

HCBET promotes an understanding of history, people and culture among travellers, but also generates appreciation among the local people for their cultural values. Therefore, it contributes to the preservation of heritage and living culture, the sustainable use of resources, has regional added value, and benefits the host community.

The Concept

Heritage- and Culture-based Experiential tourism (HCBET) is a concept of co-creation and co-organization of tourism activities based on one of the main principles of sustainable tourism - " to respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance”.

Experiential tourism is an approach, based on establishing connection on an emotional, physical, spiritual or intellectual level between the visitors and the place they are visiting. It engages tourists in a series of memorable travel activities that are inherently personal, sensual, meaningful and transformative.

All over the world, including Armenia, the last 20 years have been marked by the progressive development of tourism. Such processes have led to an increase in the level of intercultural communication and the desire of tourists to get acquainted with or participate in the cultural heritage of other countries. The latter manifested itself in the form of the emergence of so-called experiential tourism as a new approach to the organization, implementation and development of tourism, which in recent years began to develop in Armenia, becoming an important factor in increasing tourism flows to our country and ensuring sustainable tourism development. It began to develop at a steady pace in our country due to the rich history of Armenia and the tangible and intangible cultural heritage: a heritage that has both local, regional and global significance. The development of HCBET has been facilitated by the programs implemented by a number of international organizations and due to local scientific and educational resources and by the fact that the Armenian nation is very hospitable. Therefore, there is a need of more systematic implementation and development of experiential tourism in Armenia based on the needs analysis and a certain action plan.

1. General overview of the Republic of Armenia (RA)

Today's RA is located in the north-eastern part of the Armenian Highlands (the latter is adjacent to the plateaus of Asia Minor and Iran) [2]. Armenia, being one of the oldest countries in the world, and the Armenian people being one of the oldest peoples in the world (3rd-2nd millennia BC), gained independence in its current territory on September 21, 1991, before that, gaining and losing it in different historical periods [1]. In 2015, the RA became a Parliamentary Republic as a result of constitutional changes and is led by the Prime Minister elected by the Parliament. The current territory of the RA is 29,743 km^2. The RA borders on Georgia in the north, the Islamic Republic of Iran in the south, Turkey in the west, Azerbaijan in the east and southeast, and on the internationally not yet recognized Republic of Artsakh in the east. The RA is a unitary country which is administratively divided into 10 regions, and city of Yerevan as a community [2]. The population of the RA is 2,959,700 of which 63.9% is urban (living in 49 cities) [15]. The capital of the RA is Yerevan with a population of 1,084,000. The RA is considered a monoethnic country, 98.1% of the population are Armenians, there are also Russians, Yezidis, Assyrians, Ukrainians, Georgians, Greeks, and 99% of the population are Christians [15].

2. The economic profile of the RA

According to the Human Development Index expressed by the main socio-economic macro indicators, in 2019 the RA ranked 81st out of 189 countries with a score of 0.776 [6], which is considered a high score. The RA's GDP was about 13 billion US dollars in 2019, which is about 4, 400 US dollars per capita. The poverty rate of the RA was 26.4% in 2019 and the economically active population was 41.7% of the total population, of which the number of employed was 48.3%. The unemployment rate in the country was about 18%. Currently, the average monthly nominal salary is 182,673 AMD (about $ 350) and the minimum salary is 68,000 AMD (about $

120) [15]. The RA economy, according to the key types[1] of economic activity, is divided into the following groups: agriculture, industry, construction, trade and services [15].

As shown in Figures 1 and 2, the sector of trade and services is the leader in the RA economy both in terms of GDP and employment, which accounts for the importance of the latter for the economy, but it should be noted that such a structure is due to the relatively low development of other sectors and not due to the fact that trade and services sector is highly developed.

Figure 1 . The share of the main types of economic activies in the GDP of the RA (2019) [15]

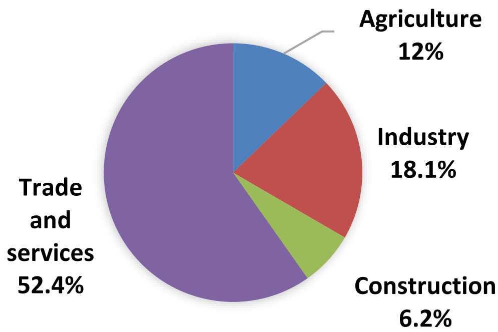
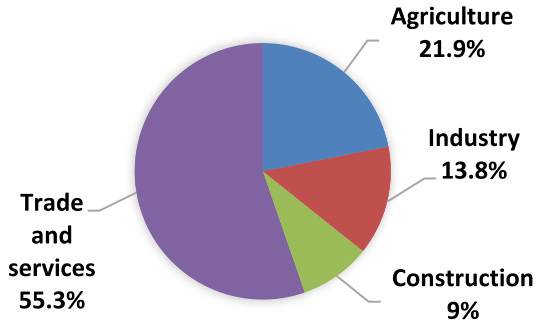
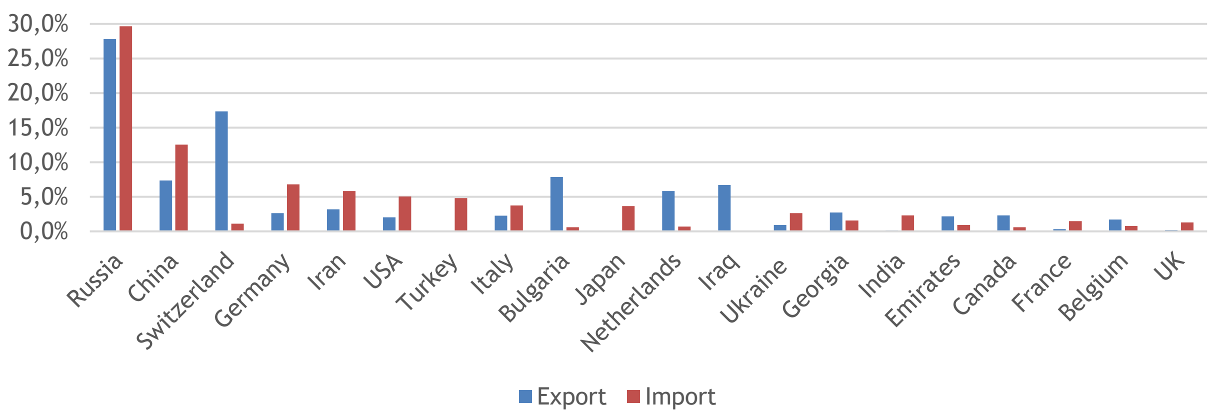


Figure 2 . Employment of the population of the RA by the main types of economic activities (2019) [15]



In 2019, the trade turnover in the RA economy was: export – 2,636,616,000 USD, import – 5,553, 269,000 USD, that is, it has a negative balance: import exceeds export.

Figure 3. The RA foreign trade partners with the highest rate (2019) [16]

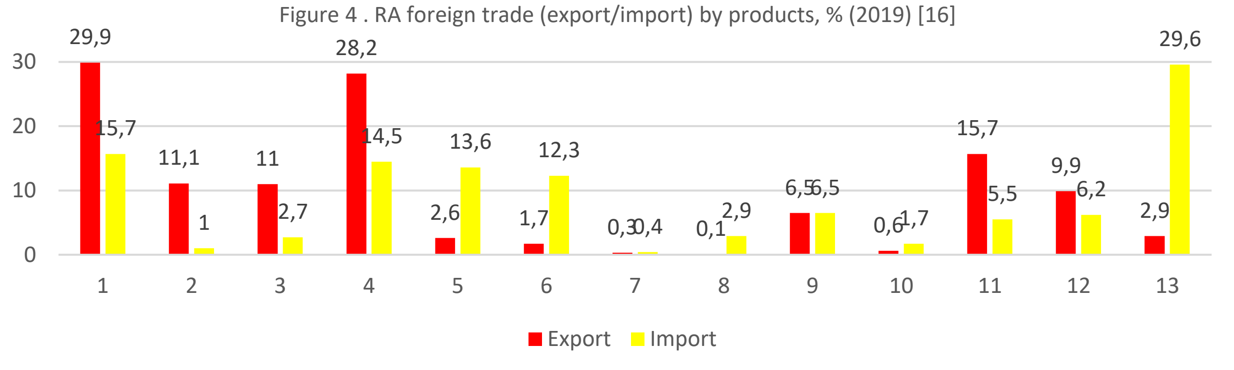


[1] Economic activity is divided into three main sectors: *primary* (agriculture, forestry and fisheries, mining and open pit mining), *secondary* (manufacturing, electricity, gas, steam and air conditioning supply, water supply, sewerage, waste management and recycling, construction), *tertiary* (wholesale and retail trade, repair of motor vehicles and motorcycles, transportation and storage, accommodation and catering, information and communication, financial and insurance activities, real estate activities, professional, scientific and technical activities, administrative and auxiliary activities, public administration and defense, compulsory social security, education, health and social services, culture, recreation and leisure, other services, household activities as an employer, the production of goods and services in households that are not differentiated for own consumption). The listed types are grouped according to the main branches of the economy: agriculture, industry, construction, trade and services.

As shown in Figure 3, the RA has the largest trade turnover with Russia, followed by China and Switzerland (2019). The list of countries with the largest trade turnover with the RA includes countries of the Black Sea Economic Cooperation (BSEC) as well: Turkey, Bulgaria, Ukraine, Georgia. Armenia also has trade turnover (with the exception of Azerbaijan) with other BSEC member states, but to a lesser extent.

As shown in Figure 4[2], the RA mainly exports food, agricultural raw materials, minerals and precious stones and metals, and imports machinery, equipment and vehicles, food, agricultural raw materials, minerals, fuel and energy products, chemical products and rubber. In other words, the RA economy is rather a raw material economy based mainly on the extractive branches, and not on the branches of the processing-producing economy.

Figure 4 . RA foreign trade (export/import) by products, % (2019) [16]



In the last decade, tourism, which has a special place in foreign trade, has been declared a priority for economic development. It will be presented in more detail in the next chapters. In recent years, the share of tourism in the RA GDP has begun to grow in large volumes. According to the WTTC, the share of GDP in 2019 reached 11.8%, which created 124,600 jobs (12.5% of total employment), provided 23.9% of total exports, or $ 1,253.7 million, of which 85% was spent on leisure and 15% on business [5]. In the field of services, the elements directly related to tourism and being part of its structures are accommodation, catering services, which make up 2.2% of GDP, and culture, entertainment and leisure services, which make up 6% of GDP. They employ 3.1% and 1.8% of the working population, respectively [15]. According to the WTTC Competitiveness Index (2019), the RA ranks 79th out of 110 countries with a score of 3.7.

3. General overview of the RA tourism sector

The progressive development of tourism all over the world and in RA is evidenced by the growth of both international and domestic tourism flows, the number of people employed in the tourism sector, the increase in the share of tourism in GDP. Such growth was due to a number of factors, some of which were the most important: increasing people's free time, increasing

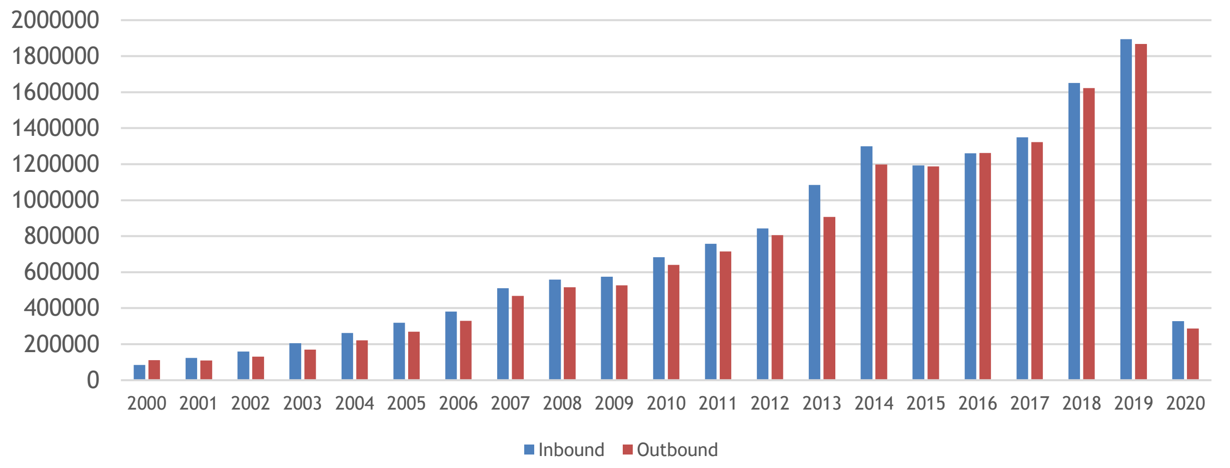
[2] **1**- Food, agricultural raw materials, **2**-Alcoholic, non-alcoholic beverages, **3**-Cigarettes and raw materials, **4**-Minerals, **5**- Fuel and energy products, **6**-Chemical products, rubber, **7**- Fur, leather products, **8**-Wood and paper products, **9**-Textiles, footwear, **10**-Stone, gypsum products, ceramics, glass, **11**-Precious stones, metals, **12**-Metals and products, **13**-Machines, equipment, vehicles

solvency, establishing stable international relations, abolishing or facilitating visa regimes, the development of the latest information and communication technologies, etc.

International tourism in the RA

International tourist flows (inbound and outbound) in the RA have grown steadily over the last two decades, which has increased the importance of tourism in the economy, the country's development and the international image[3]. Taking into account the growth rates of previous years, it was predicted that in 2020 the number of inbound tourists would exceed 2 million, but due to the situation caused by COVID-19, as shown in Figure 5, the number of both inbound and outbound tourists sharply decreased in 2020. Moreover, 70% of the visits registered in 2020 were before March, before declaring a state of emergency and closing the country's borders. The picture is the same in the case of outbound tourism. Figure 5 shows that in 2019 compared to 2000 inbound tourist flows increased more than 22 times, from 84,461 to 1,894,377 tourists. The picture is similar for outbound tourism, which increased 17 times in the same period, from 111,250 to 1, 867,888 tourists. At the same time, the number of inbound tourist visits without tour operators/agencies increased, in particular, in 2019, and only 18% of inbound tourists used the services of these companies, while in the case of outbound ones, this figure did not exceed 1% [15].

Figure 5. Number of inbound and outbound tourists of the RA by years (2001-2020) [15]

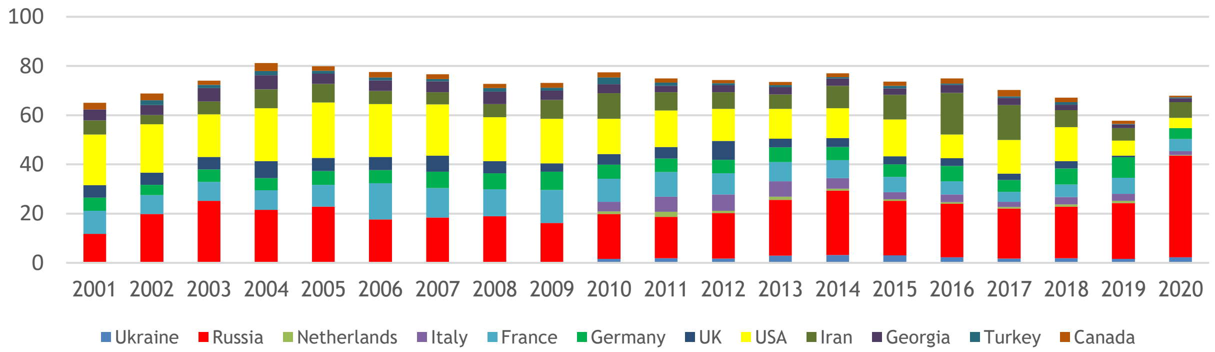


As shown in Figure 6, the RA has leaders of inbound tourism countries, of which Russia is the first in the number of visits since 2000. The other leading country was the United States, but the share of visits from the United States has decreased over time. Visits from France and Germany remained relatively stable, and from 2010 Ukraine, the Netherlands and Italy became emerging markets for Armenia. Moreover, according to the visits, the three leading countries - Russia, the USA and France - also coincide with the three leading countries most populated by Armenians in the Armenian Diaspora (in the same order). It should be noted that in the last few years there has been a dynamic increase in visits from the Middle East, South and Southeast

[3] The data for 2020 are given according to the first three quarters.

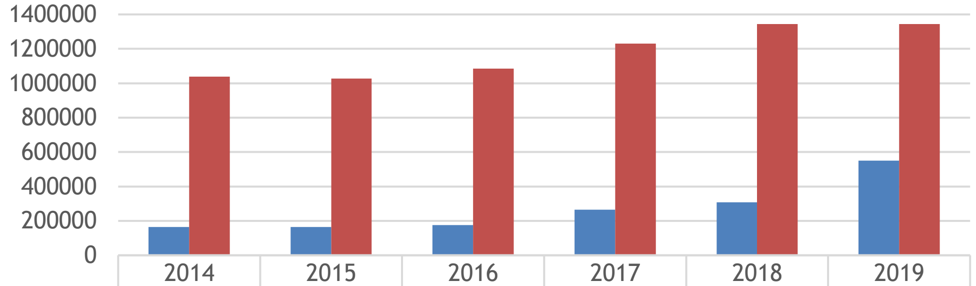
Asia, but the number of visits from these countries was significantly lower than the leading countries [15]. These tendencies, the existing dynamics and the current situation show which countries should be considered as existing and perspective markets for the development of tourism in the RA. As we can see, Russia, Ukraine, Georgia and Turkey are considered to be members of the BSEC member states. Incoming visits, according to the rate of overnight stays in accommodation facilities, are dominated by overnight stays in relatives' houses or rented apartments, compared to overnight stays in hotel facilities (hotels, hostels, resorts, rest houses etc.).

Figure 6. Number of inbound tourists of the RA by countries (2001-2020) [15]



However, the number of overnight stays in hotel facilities has grown steadily in recent years, reaching about 41% in 2019 (Figure 7).

Figure 7. Number of inbound tourists by overnight facilities (2014-2019) [15]



	2014	2015	2016	2017	2018	2019
Accommodation facilities	164663	164732	174724	264702	307473	550289
Relatives' houses or rented apartments	1039083	1027388	1084933	1230077	1344309	1344088

There is also a significant difference in the overnight geography of inbound tourists. About 87% of them spend the night in Yerevan (Figure 8).

Figure 8. Share of inbound tourists staying in RA hotel facilities by in Regions and in Yerevan (2019) [15]

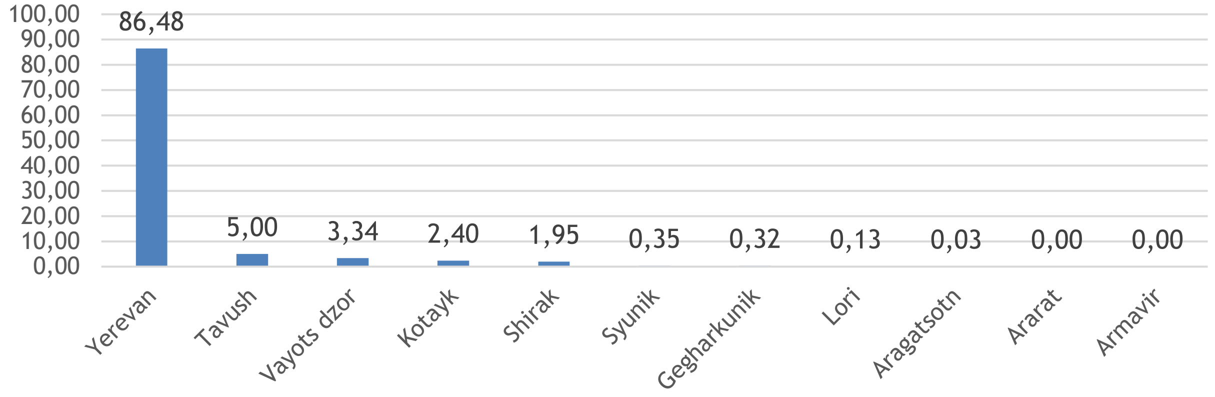


Figure 9. The proportion of inbound tourists of the RA according to the purpose of the visit (2001-2020) [15]

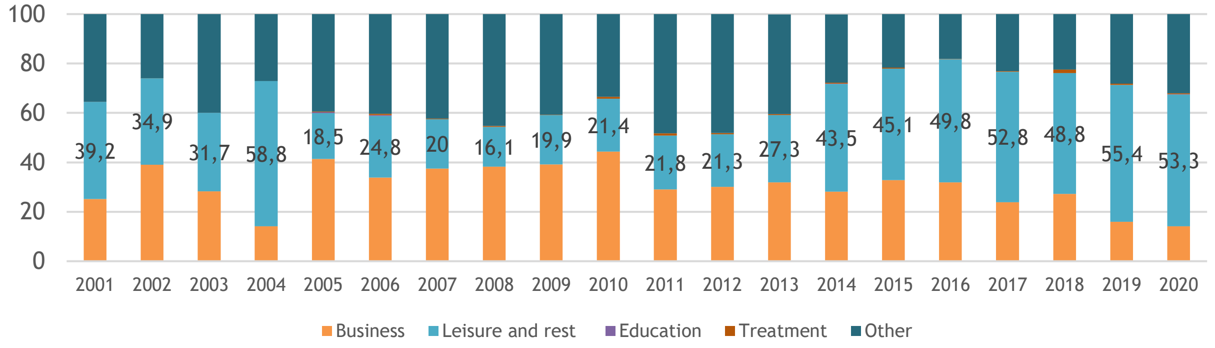
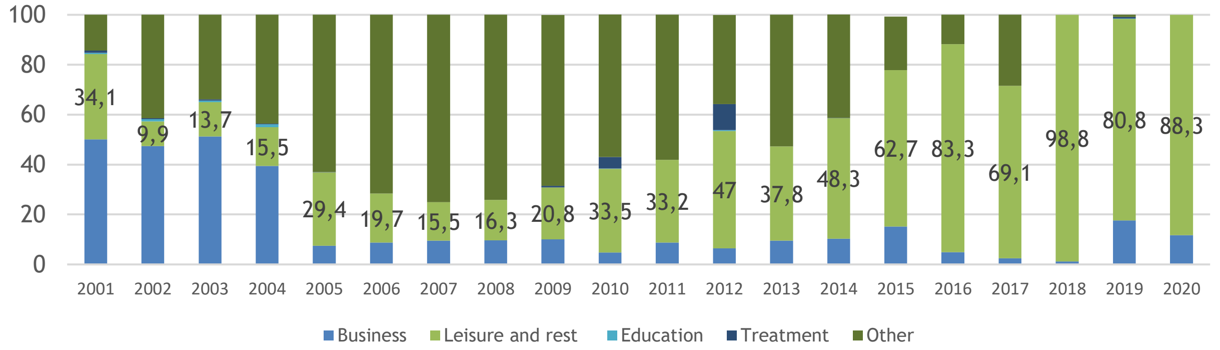


Figure 10. The proportion of outbound tourists of the RA by purpose of visit (2001-2020)[15]



Figures 9 and 10 show that in both inbound and outbound tourist flows, leisure and rest and business visits were leading according to the visitors' goals. Over the years, the specific weights of these goals have changed, but since 2014, especially in incoming tourist visits, leisure and rest visits have prevailed, which have been primarily motivated by Armenian cultural heritage and food, hospitality, nature, quality of services.

Domestic tourism in the RA

Domestic tourism in the RA, expressed in the form of domestic tourism flows, has also developed during the last two decades (Figure 11). That is, in 2019, in the RA every second citizen travelled within the country. However, it should be noted that only about 50% of these trips were organized by travel companies (which is decreasing) and only about 20% were with overnight.

Figure 12 shows that leisure and rest visits also predominate in the domestic tourist flows of the RA but unlike the incoming one, nature is considered as the motivation for the visits, followed by the cultural heritage.

Figure 11. Number of domestic tourists of the RA by years (2001-2020) [15]

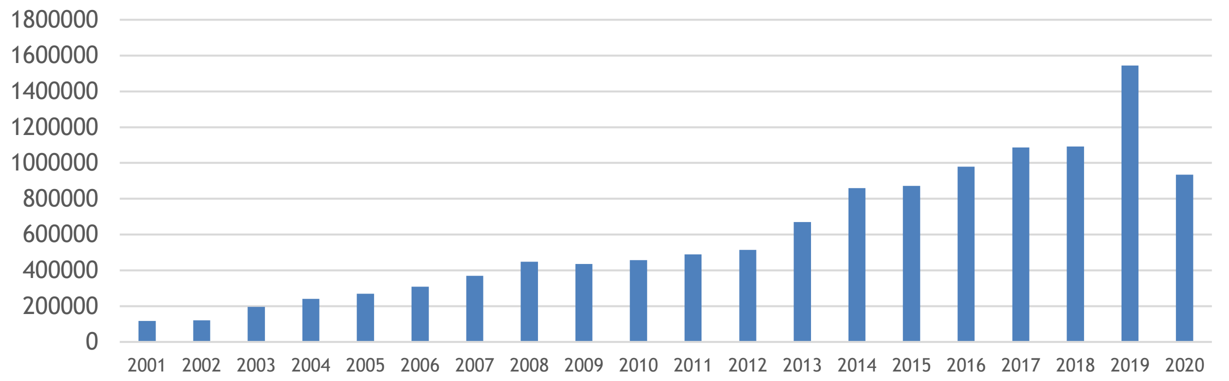
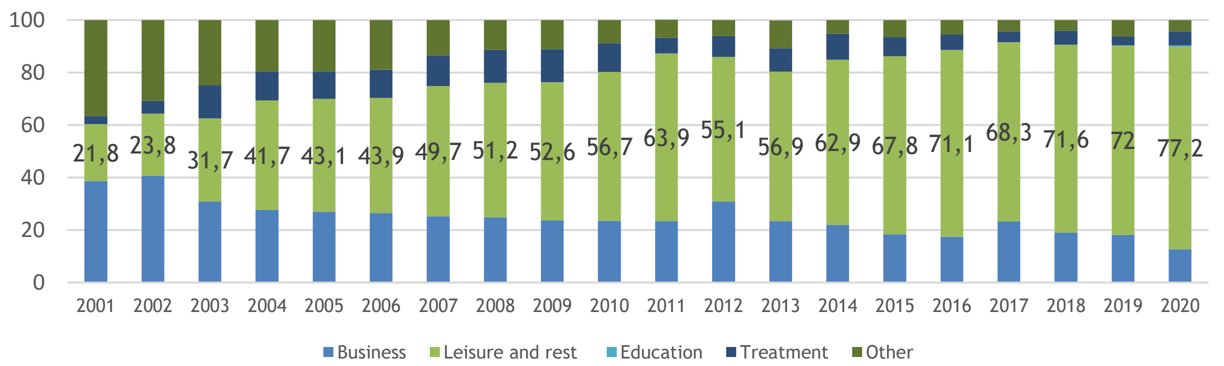


Figure 12. Domestic tourists flows of the RA according to the purpose of the visit (2001-2020) [15]



RA key tourism resources, products, competitive advantages

Due to its unique geographical location, diverse natural-climatic conditions, millennia-old history and culture, the RA stands out with its high tourist attractiveness.

As it is known, Armenia is considered one of the countries with the oldest culture and history of the world. Particularly, significant is the fact that Armenia is the first country in the world to adopt Christianity as a state religion (301 AD), after which the country's culture has been enriched with Christian heritage and values, becoming a precondition for the development of religious tourism. Currently, there are about 24 231 historical and cultural monuments (Figure 13) in the RA (most of them khachkars (cross-stones), churches and monasteries, castles and fortresses), which are also complemented by national traditions, customs, rituals, music, dances, writing and literature, cuisine, Armenian hospitality, Armenian family and family relations.

The preservation of the mentioned cultural values and heritage and the importance of tourism also increase the special attitude of UNESCO towards them (Table 1).

Figure 13. Number of historical and cultural monuments in the RA [9]

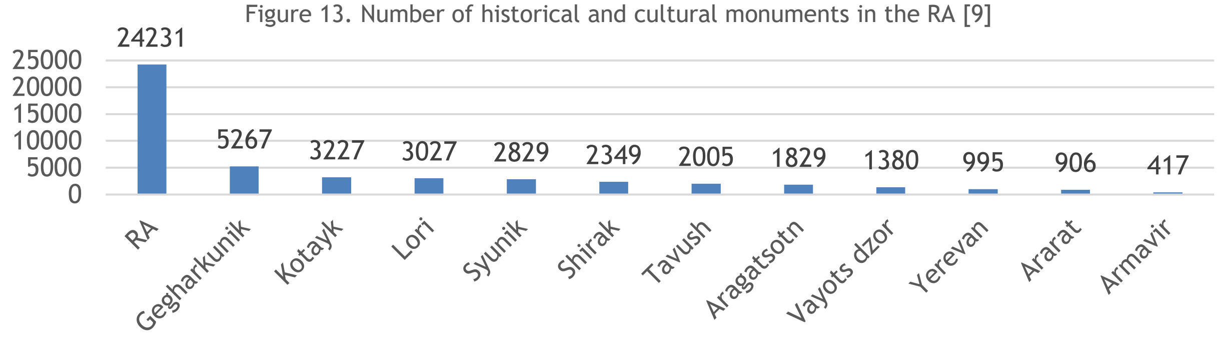


Table 1. The cultural heritage of the RA included in the UNESCO World Heritage List [11,13]

No	Tangible cultural heritage values	Intangible cultural heritage values
1.	Cathedral and Churches of Echmiatsin and Archaeological Site of Zvartnots	Duduk and its music
2.	Monasteries of Haghpat and Sanahin	Armenian cross-stones art. Symbolism and craftsmanship of Khachkars
3.	Monastery of Geghard and the Upper Azat Valley	Performance of the Armenian epic of "Daredevils of Sassoun" or "David of Sassoun"
4.	-	Lavash, the preparation, meaning and appearance of traditional bread as an expression of culture in Armenia
5.	-	Kochari, traditional group dance
6.	-	Armenian letter art and its cultural expressions
7.	-	Pilgrimage to the St. Thaddeus Apostle Monastery

At the same time, there are other cultural values which receive special attention from UNESCO, although they do not have a special status, such as those listed in Table 1 (such as Garni Pagan Temple, Tatev Monastery and Tatevi Anapat, Noravank Monastery, the more than 5500 year-old shoes found in Areni Cave and 6100 year-old wine complex). The mentioned cultural values increase the potential of the RA becoming a tourism destination based on cultural heritage. The development of tourism in the RA started on the basis of the tourism packaging of these cultural values, which has been taking place especially since the 2000s. Initially, the main tourist cultural products were the values of tangible cultural heritage (churches and monasteries, including the above-mentioned along with Sevanavank, Haghartsin, Goshavank, Makaravank, fortresses and castles: Erebuni, Amberd, museums: the National Museum, the Matenadaran, the Sardarapat State Ethnographic Museum, etc.). Later, especially in the last ten years, the values of intangible heritage (as a primary, not accompanying tourism product) were added to them, due to which new tourism offers were formed in the country, expressed as festivals (Areni Wine Festival, Tolma Festival, Water Festival (Vardavar Holiday), etc.), in the form of gastro tours (gastro-yards, national-local restaurants, etc.) etc.

In recent decades, based on the listed cultural values (as tourism resources) in the early stages of positioning in the international tourism market (early 2000s), the RA started to become a tourist destination. Since then, the RA has presented itself in the international tourism market as a country that mainly exports "cultural tourism products". In this respect, religious (historical-cultural) tourism, wine tourism and gastro tourism are considered the key types of tourism based on historical and cultural values in the country.

The RA also stands out with its various natural-climatic features. It is located in the Alpine-Himalayan geosyncline zone and has a pronounced mountainous terrain, which, due to its location in the subtropical climate zone, stands out for its diverse natural conditions and landscapes (desert-semi-desert, steppe, forest, meadow-steppe, alpine, near-alpine, snow-covered) [2].The mountainous nature of the RA, being far from the sea basins and being in the subtropical transitional climate zone has left its impact on the peculiarities of the country's climate, which is also distinguished by diversity (from dry subtropical to snowy) and is expressed in 4 seasons of the year. The RA has a terrestrial climate, which is characterized by large fluctuations in summer and winter temperatures: hot summers and cold winters.

The RA also stands out with its unique water resources - about 9479 mountain rivers (the Debed, the Aghstev, the Hrazdan, the Kasagh, the Arpa, the Vorotan, etc.), two dozen relatively large mountain lakes (Lake Sevan, Lake Kari, Clear Lake, Lake Gosh, etc.), waterfalls (Shaki, Jermuk, Trchkan, Gegharot, etc.), mineral waters with different chemical composition (chloride-hydrocarbonate, sodium-calcium, calcium-magnesium, etc.) [2] .

It is a typical mountainous country, the average height of which is approximately 1830 m above sea level, and the maximum height at the top of Aragats is 4090 m. The relief of the RA stands out with its sharpness and at the same time is "difficult to access" and "easily accessible". It is divided into folded and volcanic types according to its origin, due to which various relief forms have emerged: plateaus, mountain ranges, canyons (Vorotan, Hrazdan, Debed, etc.), caves (Bears, Mozrov, Birds, Magili, etc.), etc. [2].

Due to the above-mentioned factors, as well as being at the crossroads of different floristic and faunistic regions (Caucasus and East-Mediterranean), the RA is also distinguished by its diverse flora and fauna. There are 3200 higher plant species in the RA, 120 of which are endemic (Patutuk Armenian, Oak Araksyan, Toron), and 12000 types of animal species are found in Armenia, of which 75 mammals, 302 birds, 43 reptiles and more than 11,000 invertebrates. Some of these species are specific only to the Armenian Highlands and its surrounding areas: Armenian wild sheep (mouflon), bezoar goat, Caucasian pheasant, etc. [3].

In order to protect such diverse natural elements and conditions from human activity specially protected nature areas have been created in the RA: 4 national parks (Sevan, Dilijan, Arevik, Lake Arpi), three reserves (Erebuni, Shikahogh, Khosrov forest) and about 27 sanctuaries (Vordan Karmir, Sosu Park, etc.), natural monuments (Satan Bridge, Mount Arai, Ajdahak volcano, Jermuk springs, Kasakh gorge, Old Goris volcanic rocks, etc.) [2].

Based on the presented natural-climatic conditions, nature-based tourism products of international and local significance have been formed in the RA, expressed in the following types of tourism: ecological, rafting, medical and sanatorium, winter (skiing), adventure, geological (cognitive, scientific and cave), hiking, mountaineering. Such diversity of natural conditions has left its impact on the seasonality of tourism. In particular, the high tourist season of the RA is the period from April to September, during which about 60% of the inbound tourists arrive. The diversity of the natural-climatic conditions of the RA has also left its impact in the form of the emergence of internal spatial features of the intangible cultural values of the RA, expressed both in the cuisine based on natural goods and in the thinking and lifestyle of the people.

RA tourism sector management

The state management of the tourism sector in the RA is carried out by the third model of the tourism management, in which case the function of the state regulation of tourism is carried out by multifunctional departments. In Armenia, according to this model, the Ministry of Economy has a Tourism Committee, the purpose of which is to develop and ensure the implementation of the state policy in the field of tourism. Those responsible for tourism development in the regional governments (within the framework of regional governments' development programs, tourism and analysis department) are considered to be an element of state management in the sector of tourism. The RA Law on “Tourism and Tourism Activity” is considered a key tool for management. Currently, in order to make the state management of the tourism sector effective, a development strategy for the sector for 2020-2030 has been developed, which is still in the design phase and has not been approved by the government. In general, the key components of the sector, the enterprises, manage their activities according to the relevant laws of the RA, of which the following ones are of primary importance for the sector: the RA Law on “Trade and Services”, "Tax Code" of the RA, "Civil Code" of the RA, Law on “Consumer Rights Protection”, the RA Law on “Foreigners”, the RA Law on “Advertising”, the RA Law on “Food Safety”.

Public organizations, such as the “Armenian Tourism Federation”, “Armenian Guides Guild”, “Armenian Guesthouse Development Association”, “Festivar Armenian Festivals Association”, “Tavush Tourism Development Agency”, "Armenian Chefs Association", etc. play an important role in managing Armenia's tourism sector. In their field of activity, these organizations are engaged in the development of relevant tourism components and in the revelation of problems and opportunities. A number of international organizations are also considered to be public organizations, which are also part of the management of the sector in the sense that they are also engaged in planning and implementation of development programs throughout the RA. Such functions have been or are being performed by UNDP, USAID, GIZ, and WFTGA.

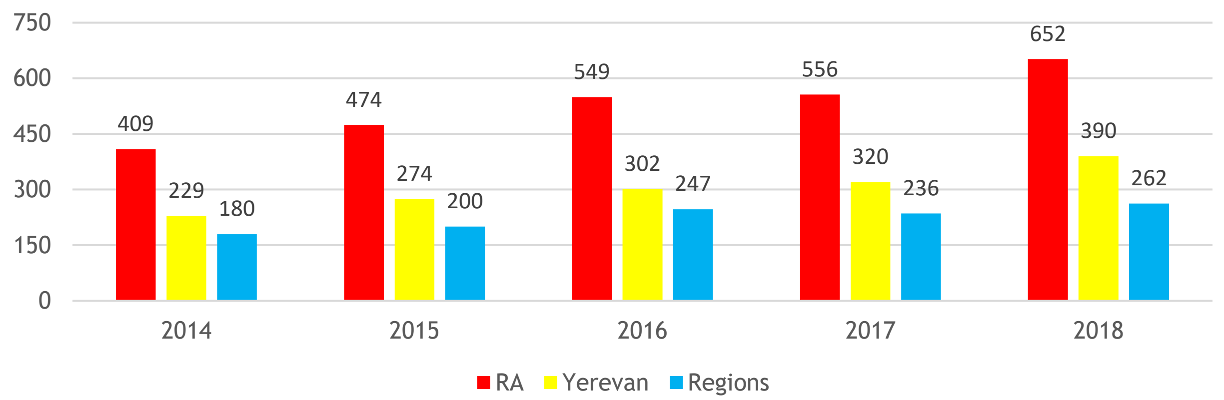
RA tourism industry

In recent years, quantitative and qualitative positive changes in the tourism industry of the Republic of Armenia have been observed. Especially the development of the following key components - tour operators/agents, accommodations, catering, transport infrastructure should be highlighted.

Currently, there are about 540 travel companies (operators/agencies) in the RA, about 97% of which are located in Yerevan, and about 70% of which are located in the Kentron district of Yerevan [17].

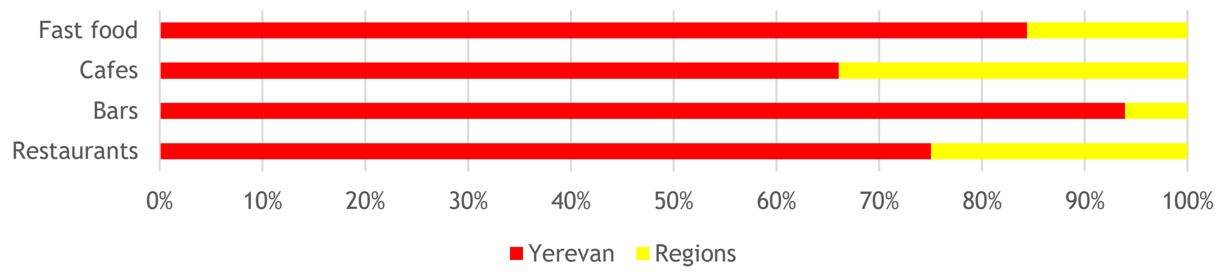
The number of accommodations in the RA has significantly increased in recent years. Figure 14 shows that accommodations are also unequally distributed, most of them being located in the city of Yerevan. In recent years, there has been an increase in the number of small hotels and guesthouses, which leads to an increase in the number of such enterprises outside Yerevan and ensuring spatial proportions. Small hotels, especially in the regions, are currently being built in rural communities or in rural areas, which also ensures the active involvement of locals in the field, the creation of new jobs and the opportunity for tourists to be closer to Armenian culture and lifestyle.

Figure 14. Dynamics of the number of hotel facilities in the Republic of Armenia (2014-2018) [15]



The food service sector has advanced rates of development. Especially, restaurants based on Armenian culture, national values and cuisine began to develop. Almost all types of food serving enterprises can be found in all regions, nevertheless, in this sphere there is an unequal spatial distribution as well. Currently, there are about 1600 food service enterprises in the RA, of which about 825 are restaurants, 205 are bars, 330 are cafes, and 240 are fast food [15,17]. From Figure 15 it becomes clear that the city of Yerevan is the leader in all types of food service enterprises, but, in comparison, cafes and restaurants are the leaders in terms of the share of enterprises in the regions. The relatively large number of the latter also contributes to the active involvement of local human and cultural resources in the tourism sector, especially in the development of gastronomic tourism in rural or other urban communities far from Yerevan.

Figure 15 . Distribution of the RA food service enterprises by Yerevan city and regions: % (2020) [15,17]



Transport infrastructure has also been developed in the RA in recent years, but due to the regional geopolitical situation (transport blockade of the RA by Azerbaijan and Turkey, stopped railway connection with Russia due to the conflict between Russia and Georgia), Armenia's foreign transport relations have problems which affects the development of tourism. Currently, there are two international civil airports in the RA - "Zvartnots" in Yerevan and "Shirak" in Gyumri, through which mainly incoming tourists arrive. Domestic transport is expressed in the form of inter-community passenger transportations (by minibuses/buses) and by taxi services. In recent years (especially during the high season) there has been an increase in private taxi drivers offering tourist transportation services to different regions of the RA. Domestic interregional passenger transportation in Armenia is carried out by railways as well (Yerevan-Gyumri-Yerevan, Yerevan-Araks-Yerevan, Yerevan-Yeraskh-Yerevan). In recent years, the zipline (Yerevan, Tsakhkadzor, Yenokavan) has developed as a unique tourist transport infrastructure in the RA, as well as ropeways in Tsakhkadzor, Jermuk and Tatev (registered in the Guinness Book of World Records as the longest reversible aerial ropeway built in only one section, and holds the record for the longest non-stop double track cable car).

The key issues of the RA tourism sector

The situation created by the COVID-19 pandemic is currently considered a serious problem for the development of tourism both in the world and in the RA. But, apart from this issue, at present a number of key issues for the development of tourism in the Republic of Armenia are considered, which are presented below, by types.

Table 2. The key issues of the RA tourism sector

Types of the issues	Issues
Managerial	a) At present, the tourism sector of the RA does not have a single management system as such. The only state body, the Tourism Committee, is unable to fully perform its main management functions, especially monitoring the sector, due to its lack of powers and rights;
	b) There is no bottom-up model of sector management in the RA as a tool to support the existing top-down model;
	c) Inadequate cooperation between stakeholders in the tourism sector (state, private, education/science);
Legal	a) The current RA Law on "Tourism and Tourism Activities" does not meet the current requirements of tourism, and the new law is still in the draft stage, which also needs to be amended;
	b) The absence of licensing of units operating in the tourism sector;
Strategic	a) RA tourism does not have a development concept (the previous concept was valid in 2008-2018);
	b) RA tourism does not have a development strategy: the tourism development strategy (2020-2030) has not yet been approved by the government;
Geopolitical	a) Transport and economic blockade of the RA by the two neighbouring countries, Turkey and Azerbaijan, and the war unleashed by them in 2020 (Sep.-Nov.) and the tension on the interstate borders;
	b) Due to the previous point, difficult transport access for the non-bordering countries of the territory of the RA;
Spatial disproportion	a) Spatially disproportionate distribution of RA tourism infrastructure;
	b) The spatial disproportion of the use of RA tourism resources;
Marketing	a) Weak representation of the RA in digital platforms;
	b) Lack of a unified marketing policy;
	c) Weak international recognition of the RA from the point of view of tourism
Infrastructural	a) Inadequate transport infrastructure leading to tourism resources;
	b) Insufficient number of restrooms and poor condition or absence in some areas;
Environmental	a) Pollution of areas that are attractive for tourism (especially household waste);
	b) Environmental pollution (especially by sewage) by tourism industry enterprises;
Natural hazards	a) Impact of landslides on tourism, especially on transport infrastructure;
	b) Being a seismic area.

4. Heritage and Culture-based Experiential Tourism (HCBET) in the RA

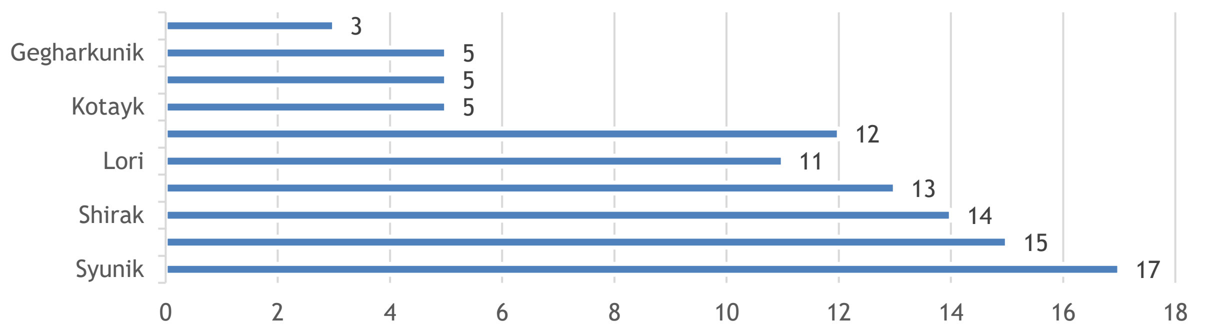
Historical overview

The roots of cultural tourism in Armenia can be found as far back as the 1960s, when, especially Armenians living in the Diaspora, visited their historical homeland to re-perceive, enjoy and reinterpret it. These visits were mainly of cognitive nature, in the form of excursions to tangible historical and cultural monuments. After the independence the same picture was preserved in the RA, but as presented in the previous chapter, especially in recent decades, the RA began to use intangible cultural heritage for touristic purposes as well, which laid the foundation for the development of HCBET in the country. At present, this type of tourism is developing in the RA on an organized basis, that is, with the support of various, particularly international organizations, locals are found who are the carriers of unique elements of the Armenian intangible cultural heritage, all this becomes a tourism product in the form of micro, small or medium enterprises or simply in the form of tourist cultural tours. In recent decades, the development of this tourism in the RA has been launched by USAID's "My Armenia" program, which is implemented by the Smithsonian Institution and by the "Integrated Rural Tourism Development (IRTD) Project (Development of Gastro Yards)" implemented by UNDP and funded by the Russian Federation in partnership with the Ministry of Territorial Administration and Development of the RA (this project has already been completed). The mentioned organizations have established enterprises in the RA based on the usage of intangible cultural heritage and have developed the existing potential of HCBET of the RA.

Current situation

There are currently more than 60 enterprises with the offerings of HCBET, located mainly in the regions, especially in rural communities (Figure 16). In Yerevan such offers are limited to a few large national restaurants (lavash baking, national dances) and hotels (carpet weaving).

Figure 16. Heritage and culture-based experiential tourism enterprises by regions (%), 2020 [8,12]



These offers are based, as it was said, on the Armenian intangible cultural heritage, mainly expressed in the form of master classes, storytelling and cognitive visits (tours).

Figure 17. Key types of intangible cultural elements of the RA in experiential tourism (%)

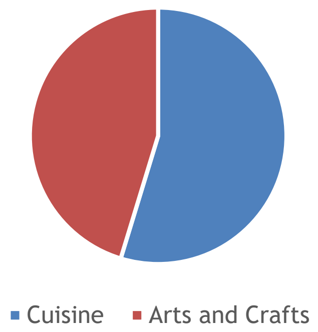


Figure 17 shows that from Armenian intangible cultural heritage values national cuisine and some elements of Armenian arts and crafts are used in HCBET (compiled after studying the offerings of more than 60 companies providing experiential tourism services [8,12]). In particular, national cuisine includes not only tasting the elements but also the process of preparation of the latter in which tourists can participate: lavash, chanakh cheese, poghindz (khashil and khavits), tanapur, ghapama, baked bread, barbecue, wild plants (asparagus, sindrik or polygonátum), tolma, pilaf with beech, ishli kufta, gata, sweet sujugh, wine and homemade vodka (tasting), decanting of honey, zhengyalov bread, paklava. As for the elements of national arts and crafts, the following are packaged and offered: making tuff souvenir and engraving, traditional pottery, khachkar (cross stone) making, painting on ceramics, making of Armenian dolls, blacksmithing (hand processing of metals), making soaps, carpet making, woodworking, batik making, wood carving, willow weaving, kamancha (musical instrument) lessons. Festivals, which have become widespread and developed in recent years, also provide a unique experience for tourists in the RA, where in one place tourists can often see the values of intangible cultural heritage presented above and enjoy them in the local environment. In particular, not only in local but also in international markets there are famous festivals: Areni Wine Festival (v. Areni), Yerevan Wine Days, Arts and Crafts (c. Dilijan), Gata (v. Khachik), Gutan (national dance and music) (c. Yerevan), Honey and berries (c. Berd), Khorovats (p. Lori), Tolma (p. Armavir), sheep shearing (v. Khot), etc. The listed intangible cultural values as tourism offers, in addition to the traditional tourism offers based on tangible cultural values, further increase the tourist attractiveness of the RA and make it as one of the implementers and creators of new trends in the world of tourism development. The development of this tourism contributes to the balanced spatial development of the tourism sector of the RA and the involvement of locals in the tourism value chain a lot more.

Preservation of cultural heritage in the RA

The development of tourism on the basis of cultural heritage in any country is full of various risks, and for that reason its preservation and protection are of key importance. Legal relations in the field of cultural heritage in the RA are regulated by the RA “Civil Code”, the RA “Code on Administrative Offenses”, the RA “Criminal Code”, RA Government decisions, normative-technical documents, departmental and other legal acts and international treaties, conventions, which are being implemented by cultural heritage protection governing bodies. Cooperation with the United Nations Educational, Scientific and Cultural Organization (UNESCO), International Council on Monuments and Sites/ICOMOS, the International Council of Museums (ICOM), and The International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM) is of particular importance for the preservation and development of cultural heritage. For the preservation of cultural heritage, historical and cultural reserves and reserves-museums have been created in the RA (Table 3).

Table 3. Historical and cultural reserves and reserves-museums of the RA [9, 10]

Reserves	Reserves-museums
“Arpi” natural-historical	“Metsamor” historical-archaeological
“Goshavank” historical-architectural	“Garni” historical-cultural
“Smbataberd” historical-cultural	“Glagzor University” historical-cultural
“Berd” historical-cultural	“Zvartnots” historical-cultural
“Zorats Qarer” settlement historical-cultural	“Kumayri” historical-cultural
“Lori berd” old city settlement historical-cultural	“Erebuni” historical-archaeological
"Bjni Fortress" historical-cultural	“Dilijan” folk architecture
“Agarak” historical-cultural	-
“Amberd” historical-cultural	-

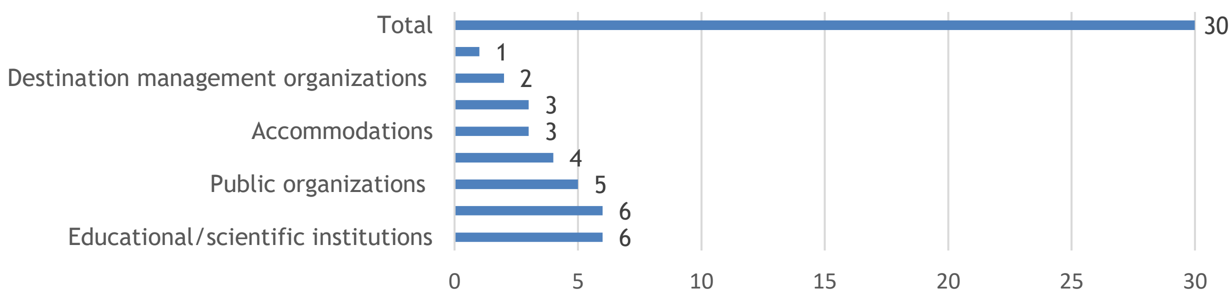
Table 4. The key organizational components of the RA cultural heritage preservation system [7, 14]

Conventions signed and ratified by the RA for the protection of cultural heritage	Key laws of the RA for the protection of cultural heritage	Management bodies in the field of protection and use of cultural heritage in the RA
Protection of Cultural Property in the Event of Armed Conflict (The Hague)	On the use of history, immovable cultural monuments and preservation of the historical environment	RA Government
European Cultural Convention (Paris)	On the basics of cultural legislation	Ministry of Education, Science, Culture and Sports
Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property (Paris)	On historical and cultural monuments not subject to alienation, which are considered state property of the RA	Department of Cultural Heritage and Folk Crafts
Protection of the World Cultural and Natural Heritage (Paris)	On the export and import of cultural values	Agency for the Protection of Historical and Cultural Monuments
Protection of the Architectural Heritage of Europe (Granada)	About intangible cultural heritage	Cultural Heritage Preservation Agency
Council of Europe Framework Convention on the Value of Cultural Heritage for Society (Faro)	About libraries and library work	“Expert Centre for Cultural Values" State non-profit organization
European Convention on the Protection of the Archaeological Heritage (La Valletta)	About copyright and related rights	"Historical-Cultural Reserve-Museum and Historical Environment Protection Service" State non-profit organization
Safeguarding of the Intangible Cultural Heritage (Paris)	About the archive case	"Historical and Cultural Heritage Research Centre" State non-profit organization
Protection and Promotion of the Diversity of Cultural Expressions	Mandatory copy of documents (ratifications)	-

Need analysis of the RA HCBET

Methodology. Target surveys were conducted to identify the needs of HCBET in the RA, in addition to the above analysis based on data from secondary sources. Questionnaires were developed for tourism beneficiaries for the following groups: accommodations, caterings, tour operators (agencies), educational/scientific institutions, government body, public organizations (local, international), tour guides, destination management organizations (DMO) (Figure 18). A total of 30 people took part in the survey, the number of which according to the main groups of tourism beneficiaries is presented in Figure 18. A survey was also conducted within the framework of domestic tourists, in which about 100 people participated. The results of the survey and the analysis of the situation revealed based on them are presented according to the points extracted from the key questions in the questionnaires.

Figure 18. Number of completed questionnaires (items) by groups of tourism beneficiaries



In Armenia, this tourism is generally perceived with the same meaning in the field of experts and practitioners, but it should be mentioned that experts' ideas concerning HCBET are more coordinated and represent the key points, while in the case of practitioners it is somewhat identified with traditional cultural tourism including cognitive tourism based on tangible cultural and architectural resources as well (traditional approach). Nevertheless, it should be mentioned that in general in the RA there is an established idea about HCBET, but there is still no common perception of it.

The study revealed that HCBET is considered to be one of the key pillars of tourism development of the RA, based on the discovery and usage of the hidden potential of the centuries-old Armenian rich culture. In order to build the future of HCBET, a clear state policy is needed, expressed in the form of strategic programs and investments. A key opportunity is also the government's possible announcement of this tourism as a priority or important direction for the RA (not announced yet). At the same time, the sustainable future of this tourism depends on its management system, both at the state and regional levels. It is also necessary to introduce appropriate funding models to ensure its development. The future development of HCBET is especially connected with the increase of active cooperation between business representatives of the sphere and the organization of tourism-oriented events based on intangible cultural values at the international level.

Opportunities include the development of gastronomic tourism offers, conditioned not only by rich cuisine, but also by ecologically clean food, which is highly valued especially by incoming tourists. A unique opportunity for the development of HCBET is considered to be the Armenian scientific-educational institutions in the field of cultural heritage and tourism, which have the necessary scientific base, justifications for the effective, scientifically based inclusion of culture in tourism. A unique opportunity for the development of this tourism is the hospitality of Armenians, as well as the cooperation of locals with their own tourism products and human, material and technical resources (cooking, organizing master classes, presenting unique stories related to the place, etc.) with the enterprises providing relevant services for HCBET.

In general, the risks of this tourism for the RA have been considered from two perspectives: global and practical. Key global risks are the possible alienation and commodification and colonization of local culture, which can lead to the devaluation and loss of identity of the culture, misrepresentation and interpretation of cultural values (due to the lack of relevant knowledge and skills), change in tourists' cultural preferences over time, geopolitical deterioration, the possibility of conflicts due to cultural differences between locals and visitors. Risks of a practical nature are as follows: the possibility of food poisoning, physical injuries while participating in specific experiences, the willingness of locals to be included in such tourism. Currently the following problems are considered to be obstacles to the development of this tourism as well: lack of skills and abilities to organize and provide relevant local tourism services, lack of trained staff, lack of business standards and licensing related to this tourism (who can be HCBET enterprises), lack of financial and accounting knowledge, lack of language skills, lack of a unified marketing policy at the state level for this tourism, lack of statistics on experiential tourism, the price of the offered services, which often does not correspond to its quality being expensive but of poor quality (in terms of service). Experiential tourism sites based on cultural heritage are often polluted by locals with household waste. One of the problems is that tour operators/agents mainly include and present tangible cultural heritage as a primary tourism offer instead of experiential tourism products in their tour packages, or even do not include them. Another problem is that universities preparing specialists in the field of tourism in the RA do not have educational programs for experiential tourism, in the best cases there are courses in the current programs related to culture or any kind of cultural values related to tourism. The uncertain situation created by the COVID-19 pandemic and the war unleashed by Turkey and Azerbaijan are also considered a general problem for the RA’s HCBET.

The study showed that most of the companies involved in this tourism need employees who speak different languages, and this problem is currently being solved with the help of translators. Enterprises need a clear communication strategy in their field, as there is a lack of cooperation with both tour operators/agencies located in Yerevan and similar enterprises in other regions. Sometimes there is a need for in-depth professional research in order to present the existing cultural values correctly to tourists. There are enterprises that need appropriate interior decoration such as furniture, equipment and quality human resources, organized service and development of skills. It is also necessary to increase the level of financial literacy of employees in enterprises. Although companies organize specialized training courses in order to carry out their business activities, there is a need for trainings for the development of general theoretical and practical knowledge of experiential tourism, based on international and local best practices.

These companies use digital marketing platforms such as Facebook, Instagram, Google, booking and digital marketing tools: SMM, blogging, SEO, e-commerce and print media. It should be noted that ‘’word of mouth’’ marketing is quite effective in the RA, especially when it comes to accommodations and caterings, when customers are informed about the company by their friends, acquaintances or colleagues orally. However, it should be noted that these enterprises need marketing communication strategies to enter both local and international markets.

COVID-19 had a relatively large impact, especially on inbound tour operators/agents, guides who did not work locally. Some times after the start of the pandemic, some of these companies began to focus on the domestic market, offering their services to domestic tourists as well. However, similar enterprises and guides specialized in the domestic market were more competitive. Caterings and accommodations also suffered from the pandemic. It should be noted that if restaurants located in large settlements were able to mitigate the effects of the crisis to some extent by offering food delivery services in the domestic market, restaurants located in rural communities which targeted tourists as the main consumers did not have that opportunity due to the territorial peculiarities and the locals did not use food delivery services. In the case of accommodations specializing in this tourism, the situation is relatively better, as they are mainly small hotels and guesthouses, which allow domestic tourists to rent them with their families and, feeling relatively safer, use the services and offers of experiential tourism. There is also a need to develop new standards for working in the conditions of commodity, which will be mandatory for everyone and will give an opportunity to develop the field. In general, due to domestic tourism, tourism companies were able to alleviate some of COVID-19’s consequences. COVID-19 was a big blow to the experiential tourism, because in the situation created by COVID-19, communication was prohibited, and experiential tourism is impossible without communication.

Stakeholders in this field attach great importance to the role of the state in the development of experiential tourism based on cultural heritage. In particular, they believe that the state should develop an appropriate development strategy and promote the implementation of investment programs, coordinate international marketing campaigns of enterprises included in this sector raising awareness about the RA in the target markets for the RA inbound tourism. The provision of loans by the state on special terms and the definition of tax benefits are especially important according to stakeholders.

The enterprises engaged in this tourism are mainly considered individual entrepreneurs in the RA from the legal-organizational point of view, because in this case there are more favourable tax conditions. According to the size the enterprises are micro, small or medium and at the same time most of them are family-based (mainly as restaurants and guesthouses). It is also interesting to note that these enterprises often operate under the philosophy of social entrepreneurship or are considered social enterprises. According to the business trade relationships, these enterprises mainly work with the B2B model, but they use the B2C model as well. These enterprises operate by using sharing economy model as well.

The questionnaire was filled out by about 100 domestic tourists. 70% of tourists travelled 1 day, 25% - 2-3 days, 5% - 4-5 days. About 60% chose discovering/visiting new areas, resting in a peaceful environment and discovering the culture of the visited areas as primary goals. Other goals (learning new recipes and traditional dishes, participating in events, socializing, active recreation, treatment) scored relatively low. Tourists were informed about the destinations mainly through social networks, friends and relatives (about 80%). In the destinations, tourists mainly preferred (about 70%) master classes, national performances (if there are any). The tourists were mainly satisfied with the hospitality, the quality of the service and products, and local food. The main complaints were related to the limited number of services, the price of services, the lack/absence of services for children, especially the insufficient quantity and quality of relevant information about tourism destination/attraction on the Internet.

5. Sustainability and Innovation in the RA's HCBET

One of the key principles of sustainability, namely the principle of sustainable tourism – "Respect the socio-cultural authenticity of host communities, preserve their constructions and living cultural and traditional heritage values, and contribute to inter-cultural understanding and tolerance" and the following goals out of the twelve ones "Economic viability (providing long-term benefits)", "Local prosperity (contribution of tourism to the economic prosperity of the host destination)", "Employment Quality (creating new jobs and improving quality in the communities)", "Cultural richness (respect for local culture, historical heritage)"are maintained in the RA experiential tourism offers. They rely mainly on local communities, using local cultural and human resources, creating jobs for locals, and contributing to the greater involvement of local communities in the tourism value chain. At the same time, due to this tourism, not only the elements of the Armenian intangible cultural heritage have been preserved, but they have also been revived and as a result of glocalization (which is an important component for sustainability) have reached a new territorial level, becoming world cultural values and tourist attractions. There are certain risks for sustainability in the long-term operation of established enterprises, based on the fact that there is a lack of professional skills and professionalism in some of them, which may lead to the closure of these enterprises. From an environmental point of view, as these enterprises are small, their impact on the environment is also small (mainly in the form of use of water and energy resources). Nevertheless, the wastewater generated by them is discharged into various water basins without treatment, which over time can cause environmental problems (this is a global problem, due to the poorly developed sewage treatment system in the RA).

By its nature, this tourism is considered a transforming or improving innovation in the RA, as it gave a new breath to cultural values and came up with new tourism offers in the market, based mainly on Armenian cuisine and crafts and arts. According to market prevalence, it is considered a local innovation in the RA, as the products have not yet gained wide international recognition and distribution. In Armenia, in terms of economic innovations, HCBET belongs to the types of experience and shared economy innovations (the offered products can leave unforgettable impressions, and enterprises follow the philosophy of shared economy), but it can also be presented as a social innovation (as there are enterprises that carry out social entrepreneurship). In any case, it should be noted that we must be more than careful with innovations in this field, because we are dealing with a culture where traditional values are of paramount importance.

6. Main conclusions

1) HCBET is already developing in the RA, mainly due to the investment programs of international organizations.
2) HCBET has developed mainly in the regions, especially in rural communities of the RA.
3) HCBET is based on the use of the intangible cultural heritage of Armenian cuisine, arts and crafts.
4) HCBET does not yet have a widespread perception or interpretation in the RA.
5) The RA does not have a HCBET development policy, expressed in the form of concept, strategy and development programs.
6) Public-private-educational/scientific cooperation is almost non-existent for HCBET in the RA.
7) The development of HCBET is hampered by the problems of service in enterprises, sometimes by low qualification of human resources, imperfection of legal regulations (within the framework of standardization-licensing), low or no cooperation between enterprises, lack of inclusion of these tourism offers in tour packages developed by tour operators.
8) Lack of educational programs on HCBET in the RA universities.
9) There is a need for specialized training for people involved in HCBET.
10) There is a need to improve marketing strategies for companies operating in HCBET.
11) There is a need for guidelines for COVID-19 pandemic for HCBET companies.

Bulgaria has a huge potential for tourism development due to its rich cultural heritage, natural resources, and unique sites. The country has established traditions in tourism and hospitality and the travel sector has been recognized as a priority in the policy making agenda. In 2020 the country was visited by 12.55 million tourists and the tourism sector has contributed with 8.17 billion BGN (4.09 billion €) or 10.8% of the Bulgarian GDP, and employed more than 340,600 people (WTTC, 2020). Despite its plethora of resources, the tourism activities are mainly focused on leisure. In the same time, Bulgaria is among the top countries in Europe for the number of cultural and historical monuments and boasts with 10 UNESCO heritage sites. It is evident that the country has unleashed potential for development of cultural and heritage-based experiential tourism (HCBET).

The present document attempts to summarize the problematics related to experiential tourism development, based on a conducted applied research of the stakeholders' opinion and attitude. It presents an overview of the Bulgarian tourism sector in general, with a specific focus on the resource base, potential and challenges for heritage and cultural experiential tourism development. It outlines future trends and serves as a foundation for developing of a Regional Action Plan.

1. Country profile: Bulgaria and BSB Areas

Bulgaria is divided into six regions of planning. The eligible areas as per the Black Sea Basin Cross-border Cooperation Program (BSB Program) are North East and South East planning regions.

The North East planning region spans on a territory of 14,645 km^2. bordering the Black Sea on the East and Danube River on the north. The major administrative districts are: Varna, Dobrich, Shumen, Targovishte. 13.2% of the Bulgarian population lives here. The regions generated Euro 5.95 bln or 10.6% of the Bulgarian GDP. The service sector (mainly tourism and hospitality) is particularly important for the North East Region and accounts for the 66.8% of the GVA (Gross Value Added).

The **South East** planning region is the third biggest in Bulgaria, with an area of 19,664 km^2, that covers almost a quarter of the country's areas. It borders Black Sea on the east and Turkey to the South. Its main districts are Bugras, Sliven, Yambol and Stara Zagora and has a population of 1,032,079 inhabitants. The South East Region relies mostly on the service sector (54.1%), followed by the Industry (41%), while the Agriculture accounts for only 4.9%. Due to the proximity of the Black Sea Coast, Tourism is one of the most important and rapidly growing sectors.

2. Tourism system of the country and the Black Sea Area

According to data from the Ministry of Tourism and the National Statistical Institute, in 2019 Bulgaria welcomed a total of 9,311,681 international visitors, which is a 0.4% increase compared to 2018. The tourism sector in Bulgaria generated more than 3.6 bln € income in 2019 and 3.7 bln € in 2018.

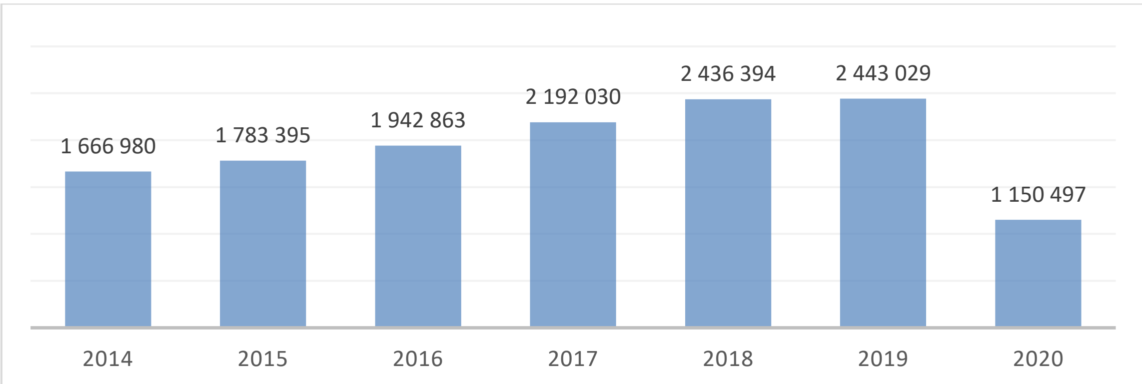
The main factors that attract tourists to Bulgaria are: affordable prices, quality accommodation, high service quality, climate and nature, the perceived safety, security and cleanness and the sightseeing opportunities.

According to a survey, conducted by the Ministry of Tourism, the overall satisfaction rate of the international visitors in Bulgaria is very high (ranging between 88-95%). The tourists enjoy the beauty of the nature, the traditional cuisine and the cultural heritage of the country. They also appreciate the friendly and welcoming attitude of the local people who usually speaks at least one foreign language.

Along with international visitations, the domestic tourism also shows significant growth. It accounts for 3,300,000 visits, which is a 7% increase compare to five years ago. Bulgarians are also active in outbound travels. In 2017, for example 6,227,623 Bulgarians visited other countries which is a 15.5% growth compare to 2016.

Unfortunately, the Covid-19 global pandemic has a disastrous impact on the tourism industry in the country. The data comparison between January-May 2020 and the same period of 2019 shows decrease with 52.9% in the number of tourists' visits (the latest available statistics). This means that the arrivals to Bulgaria during 2020 were twice less than the previous year with the biggest decrease registered is of the vocational and leisure tourism (- 57.1%).

Figure 1. Tourist arrivals for the period January-May (in absolute numbers)



Source: Ministry of Tourism, 2020

The total income from the hospitality sector amounts to BGN 1.5 bln (0.75 bln €). The average stay per visitor is 3.5 days and the average income per tourist is BGN 186 (93€). An average night-stay costs BGN 56 (28€) which situates Bulgaria within the less expensive destinations in Europe (according to Eurostat, 2019).

Tourists in Bulgaria spend mostly for accommodation services, food and beverages. The third biggest consumption item is transportation. The cultural services rank 4th with BGN 471.56 mln.

Tourism and hospitality sector provides favourable conditions for investments. The statistics reveals that the sector has attracted capital investment of BGN 1 294 mln. (645 mln. €) in 2016. In 2017 the investments have increased by 5.8%. The predictions are that in the next ten years, the investments in tourism will rise by 1.5% annually to reach BGN 1,586.8 mln. in 2027 (WTTC, 2017).

The data show that both BSB eligible regions in Bulgaria (North-eastern and South-eastern) rely heavily on tourism and hospitality, mainly because of their proximity to the Black sea coast. The service sector represents a share of 66.8% and 54.1% respectively of the total Gross Added Value in the regions. The both regions also host many important historical site and cultural resources, due to their ancient history and a number of cultural artefacts preserved on their territories.

Both regions combined account for the biggest share of tourists' accommodations in the countries. More than 71% of the hotel beds in Bulgaria are situated either in North-Eastern or in South-Eastern planning region. This area has attracted 57% of the international visitors and accounts for 72% of the tourism income in 2019. The Table below shows the performance of tourism sector in the North-Eastern and South Eastern regions compare to the whole country.

Table 1. Overview of the tourism industry in North Eastern and South Eastern regions

Region	Accommodations	Beds	Overnight stays	Visitors	Tourism receipts (in BGN)
North-Eastern	**735**	**103 763**	**7 888 370**	**1 784 731**	**465 919 010**
Varna	468	71 550	5 526 625	1 231 463	326 422 781
Dobrich	180	29 788	2 223 237	476 364	133 884 857
Targovishte	17	683	45 740	23 961	2 115 612
Shoumen	70	1 742	92 768	52 943	3 495 760
South-Eastern	**1 140**	**141 229**	**10 565 610**	**2 089 330**	**576 950 103**
Bourgas	994	134 411	10 080 396	1 874 375	554 375 806
Sliven	66	2 181	88 011	53 627	3 676 979
Stara Zagora	58	3 912	356 454	140 622	17 180 905
Yambol	22	725	40 749	20 706	1 716 413
Bulgaria (total)	**3 664**	**341 506**	**27 154 791**	**8 187 634**	**1 521 865 800**

Source: National Statistics Institute, 2020

3. Tourism management in Bulgaria

On national level, the travel, tourism and hospitality industry in Bulgaria is governed by the Ministry of Tourism with the National Tourist Council as a consultative body. On local level, tourism policy is implemented by the county municipalities. A number of professional, regional, citizen and non-government organizations are also involved in the decision making process such as Bulgarian Tourism Chamber, Regional tourist chambers, Bulgarian Hotel Association, Bulgarian Association for Alternative tourism, etc. The most important legislative documents concerning tourism and hospitality is the Tourism Act.

The sustainable tourism development, including the experiential tourism offering, has been outline as a priority in the work of the Ministry of Tourism and as a result the National Strategy for Sustainable Tourism Development for 2014-2030 has been prepared and proposed for a public debate. The Ministry of Tourism has designed and developed eight tourists' routes for culture and heritage tourism, three of which are situated in the BSB eligible regions.

4. Resources for development of heritage and culture-based experiential tourism in Bulgaria and the eligible regions

4.1. Cultural resources and heritage sites

Bulgaria is a mix of Eastern and Western cultural heritage, which is evident in its architecture, religion, traditions, crafts and cuisine. The total of cultural and historical sites on the territory of Bulgaria is around 40,000, placing country in the top three in Europe (right after Greece and Italy). Bulgaria proudly hosts 10 of the UNESCO world heritage sites, four of which are situated in the Black sea coast region (The BSB eligible territory of the country).

In the North –Eastern region the world's oldest gold was discovered dating more than 4000 B.C. Both Eastern regions are rich in ancient sacral sites and tombs such as the Thracian rock sanctuary Kabile (near Yambol), the Kazanlak Tomb, the rock monastery near Onogur village in Dobrudzha region, etc. There are a number of unique heritage sites which reveal the glory of the past, such as the ruins of the first Bulgarian capitals in Pliska and Preslav, The Madara horseman (a rock-crafted sculpture) near Shoumen or villa Armira near Ivailovgrad which is an example of fine mosaic art. The coastal villages of Nessebar (ancient Messabria) and Sozopol (ancient Apolonia) are a living museum of Roman, Thracian and Bulgarian medieval heritage, hosting centuries of history.

Other sites include ancient fortresses (such as Ovech near Provadia), museums and memorial complexes, archeological sites (such as Kaliakra cape near Shabla and the ancient town of Marcianopol near Devnja), castles such as Euxinograd near Varna and Romanian Queen Maria' castle in Balchik.

There are also purpose-built attractions, such as the Historical park near the Village of Neophit Rilski. This park reproduces the Bulgarian history from the creation of the first Bulgarian kingdom in 681 A.D. to our days. It encompasses many attractions and activities (such as archery, horse riding etc.) and provides for a unique visitors' experience through the use of traditional and modern technologies.

4.2. Intangible cultural and heritage resources

The revival of traditional fests becomes more popular, thus including Christian and pagan rites and celebrations such as Name days (celebrating people named after a certain saint as per the Eastern Orthodox Christian calendar), *Kukery* (pagan masquerade -like festival in which people dress like monsters to chase away evil spirits), *Lazarki* (a rite practice during Palm Sunday when young girls gathers and visit neighbour homes while chanting blessings; *Koledarari* (groups of young men in traditional costumes, performing blessing rituals during Christmas). *Martenitzi* is a wide-practice tradition where people exchange home – made *"martenitzi'* (originally – a bracelet or brooches made from white and red threads given with a blessing for health and longevity).

Another unique rite is that of the *"nestinarstvo*" or fire walking, when young men and women dance on the embers of an extinguished fire. The tradition has originated in Strandzha region (South-Eastern region) but nowadays is practiced as a tourist attraction along the entire Black Sea Coast.

4.3. Bulgarian cuisine

Bulgaria is known for its healthy and delicious traditional meals based on fresh produce, herbs and spices. The HCBET-related culinary activities could focus not only on consumption of tasty authentic and unique for the region food products and dishes, but also on the whole process of preparation, serving and social interactions before, during and after meals. Culinary classes in traditional regional Bulgarian recipes could be an excellent way to understand better the country and to involve some learning-by doing activities where tourists could actually use their hands to prepare food and gain knowledge and skills they can later use. Thus, culinary activities could be all: socializing, educative, relaxing, transformative and fun.

4.4. Events, festival and exhibitions

The events calendar in Bulgaria is enriched every year. In 2017 there were more than 120 various group activities that the visitors could participate in throughout the territory of the country. Those events vary from music and dance fests to culinary competitions or carnival parades. Some of the most notable cultural events which takes place annually in Bulgaria is the so-called *"July Morning":* a rock music festival started a decade ago on the shore of the picturesque Kamen Briag. The festival is held in the early morning of 1st of July and attracts thousands of participants and spectators from all over the country.

Another important heritage event is the *National folk costume festival* in Zheravna which showcases costumes of the different regions in Bulgaria. It is a meeting point of many like-minded people who cherish the Bulgarian tradition and care for preserving the national pride and spirit.

The *Rose picking festival* is another major attraction that brings tourists to the Rose valley (near Kazanlak in the South-east region). The oil-bearing rose is the national symbol of our country. The rose oil is distilled from a special breed of rose, called Rosa Damascena. The festival takes place mid-May and is a wonderful occasion for all perfume-lovers to take part in it or to observe the rose picking process and to learn some more about the rose growing and rose oil production in the nearby rose museum.

There are many other meaningful and memorable events and activities in which tourists can participate during their stay in Bulgaria. For example, the numerous re-creations of historic events such as battles and celebrations can help immerse fully into the atmosphere of the past. Those events are often staged by local drama groups or volunteers and include specific settings, decors, costumes etc.

5. Study on the stakeholders' attitudes and perceptions on the cultural and heritage-based experiential tourism development in Bulgaria and the eligible region

In the framework of the present Needs Assessment Analysis, a primary study was designed and conducted. The study includes a survey on the perceptions and attitudes of the actual and potential visitors and consumers of the experiential-based tourism products and services, as well as a semi-structured interview with various stakeholders. The number of persons contacted in the survey was 300, while the number of filled-in forms was 80, accounting for 27% of responsiveness rate.

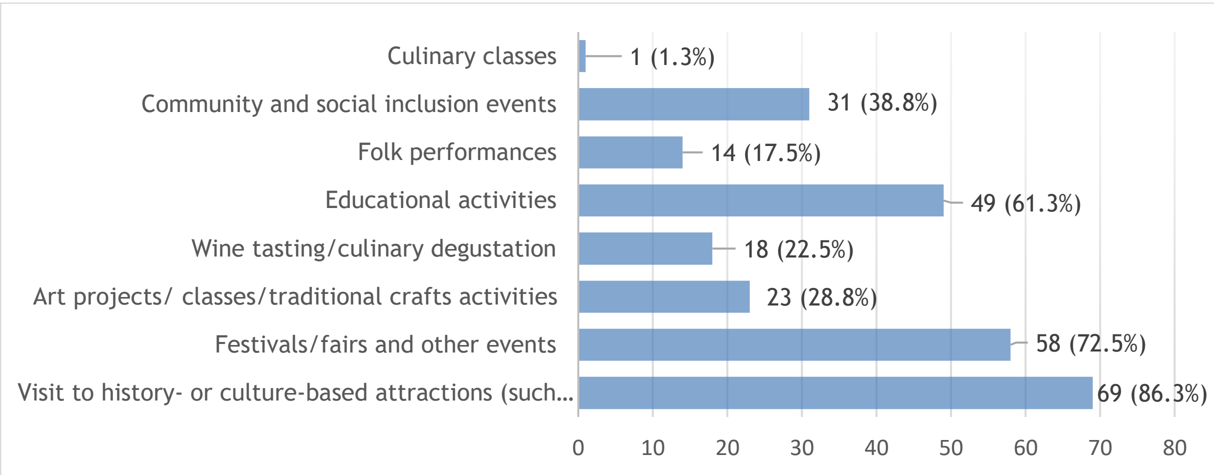
5.1. Results

5.1.1. Qualitative study: survey results

The survey suggests that the major motivators for the tourists when planning a trip is the quest of knowledge of other people and cultures (90%), followed by recreation and relax (61.3%). The third important motivator is to experience local culture and style of life.

The tourists are most likely prone to visiting history and culture-based sites and attractions (86.3% of the cases). They also would like to participate in events and other activities (72.5%). Culinary and wine degustation ranked third with 61.3% of the votes. Folk performances, crafts and community events were desired by 29-32% of the survey participants.

Figure 2. What are the heritage-based and cultural-based activities that you would like to participate in during your visit?

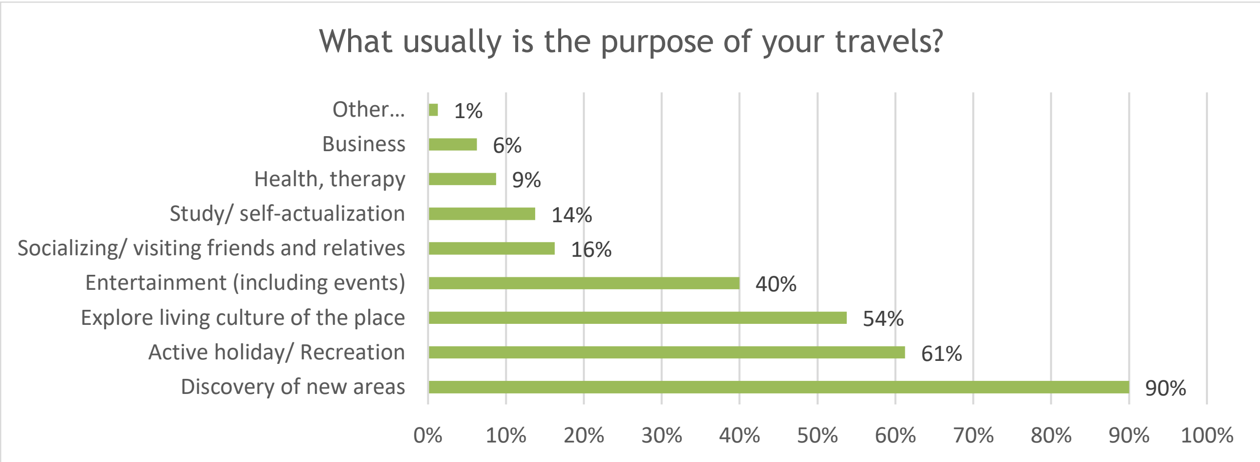


Concerning the decision making and consumption patterns of the tourists, the majority claims that they always or sometimes plan every detail of their trip. Just one out of 80 give “never” as an answer to this question.

The responses related to preference of organize or individual travel are more or less equally distributed and vary between 16-21. Almost all of the respondents (90%) wants to experience something new when travelling, outlining once again the importance of the well-designed tourism experience. Similar response is given to the next questions about trying new food products, typical of the region. 62 out of 80 always like to try new tastes, while 15 more would like sometimes.

Most of the visitors like to socialize with local people and make friends with them (75%). They also would preferably participate in enriching and stimulating activities (36 – sometimes, and 21 – always). 60% of the participants are interested in visiting cultural and heritage sites. 30 of them want to participate sometimes in local rite, custom or tradition.

Figure 3. What usually is the purpose of your travels?



Tourists’ opinion about whether the technologies add value to the tourism experience is quite diverse. Most of them stated affirmative (either “always” or “sometimes”) but there are those who would not like to exchange (or augment) real experience for artificially generated one.

The majority of the respondents are ready to make sacrifices in terms of higher costs or less convenience in order to have more fulfilling and meaningful experience (roughly 68% are the affirmative answers).

The demographic distribution of the respondents is in favour of female participants over the males (82.5% vs. 17.5%). Participants represented various age groups, ranging from 19 to 56+.

5.1.2. Content analysis of the semi-structured interviews

The content analysis of the interview questions is as follows:

Q1. How do you understand the term “culture and heritage-based experiential tourism (HCBET)”?

It is evident that most of the respondents understand in essence the notion behind “culture and heritage- base experiential tourism (HCBET)”. Some of them define it as *“… a type of tourism, which is based on different types of experiences, emotions, tasting local food and drinks, getting to know the local way of life and culture”*

or

“…..this is tourism, which is associated with the reproduction of historical events, folk customs and cultural events. I think that this type of tourism is extremely promising, because the emphasis is on sharing and creativity, as well as self-knowledge on the part of the tourist, and not just consuming one or another type of tourist service”.

These are some of the most often used words associated with the definition of HCBET: memorable, positive emotions, authentic, immersion into destination, sharing, passion, meeting new people, tasting food, interactivity, participation, community –based tourism, gaining knowledge, getting to know history and culture of the destination.

Q2. How do you see the role of your organization for HCBET development?

Most of the respondents which are representatives of service providers like hotels, lodging establishments, restaurants, tour agencies see their role in:

- ✓ adding value to the final product
- ✓ providing comfort, different experience, removing tension and stress from the everyday life
- ✓ coordinating efforts with other stakeholders
- ✓ participating more actively in the cultural life of the community
- ✓ organizing events, festivals, wine and food tasting, celebrations of holiday
- ✓ organizing training in traditional crafts and cooking techniques
- ✓ creating unforgettable memories and designing original products by utilizing unknown or new tourist sites and resources.

The public and governmental institutions see their role as:

- ✓ informative
- ✓ showing the little known part of the destination (as the old city)/ reviving the spirit of certain sites
- ✓ enhancing the access and promoting historical and archaeology sites
- ✓ organizing events and attracting international awareness.

Q3. What kind of culture-based experiential activity you can organize for your tourists?

The answers here depend on the stakeholder’s main activity.

The accommodation sector representatives offer theme dining experiences, delicious home-made food, many activities such as fishing, sailing, rural tourism. Some of them offers preserved Bulgarian traditional houses in which the guests are accommodated (which can also add value to their authentic experience), some see an opportunity to organize events.

Tour guides, TOs and TAs suggest doing online presentations; delivering talks and narrating stories, as well as engaging in discussion with the tourists; playing games; presenting the cultural calendar of the destination and encouraging tourists to participate more actively in the events; using holograms and other high-tech solutions for storytelling and visualization; organizing demonstration of local crafts.

The public organizations can assist in staging exhibitions related to history and important events; restoration of historic sites; showcasing the unusual and unexpected faces of the city (apart from the famous and known tourist attractions).

Q4. What kind of cultural-based or other animations/activities do you organize for your tourists?

The answers here are quite similar to the previous question, for example staging theme dining with folklore programs; engaging tourists in rural and farm activities (where applicable); organizing games, events, competitions and celebrations.

A guesthouse is organizing an annual concert which is visited by locals and international tourists. A restaurant is staging drama, music events, poetry recitals, national and religious holiday celebrations to promote the Bulgarian-Russian intercultural exchange.

A tour operator offers excursions, which have a cultural and cognitive focus. Another tour operator has designed over 1000 products/ tourist packages, which are related to experiential tourism to one degree or another with an emphasis on local traditions and crafts and the everyday life of the host community.

The public organizations offer re-creation of traditional rites, literature readings and exhibitions; creative art installations throughout the city to provoke people to explore the unknown cites; hiking and walks with an element of fun.

One organization declared that due to the Covid19 pandemic all their activities are suspended.

Q5. What kind of resources do you need to enhance the culture and heritage-based experiential tourism development?

The answers of this question include:

- ✓ Material resources: ex. theme food and beverages, costumes etc.
- ✓ Human resources
- ✓ Multimedia/equipment/technical support
- ✓ Financial resources/ funding
- ✓ Support from the state, local communities, municipalities
- ✓ Tourist resources: crafts, sites, historical and cultural sites and events
- ✓ Improved infrastructure
- ✓ Know-how and skills of all providers and suppliers involved
- ✓ Networking with relevant organizations and decision makers
- ✓ Sound strategy and management

Q6. What kind of communication marketing strategies (technologies) do you use?

The respondents declared that they mainly use internet (including their company sites and other on-line platforms) and social media for advertising or rely on peer-to-peer reviews (word of mouth). Several utilize also printed materials (brochures, leaflets) and mass media advertising. One of the establishment advertises their folklore program on the hotel reception.

Q7. What kind of skills do you (you and your employee) need in order to be more experiential for tourists?

Answers include:

- ✓ Creativity/ Innovations
- ✓ Unconventional thinking
- ✓ Commitment and enthusiasm
- ✓ Communication, marketing
- ✓ Artistic/performance skills
- ✓ Professionalism
- ✓ Personal touch or "being human"

Two respondents have answered that no special skills are needed to provide HCBET products.

Q8. Do you organize trainings for your staff? What kind of training do you organize?

The analysis of this question reveals that only few of the stakeholders dedicate time and resources for some type of training activity related to HCBET for their personnel.

Q9. How do you see the future of heritage and culture-based experiential tourism development in Bulgaria and in general?

Most of the respondents agree that experiential tourism has huge potential, is growing and developing, and will be more and more considered a priority sector in the future. Some see it as an antidote against the disastrous consequences of the Pandemic crisis. Most of the replies sound like this one: *"I think, this is a very promising form of tourism offering and is a chance for our country to gain competitive advantage and to be recognized on the market with a new image".*

Q10. What kind of risks do you see in experiential tourism development for your company/ organization and in general?

The majority of the respondents do not see any risk for their organization/company related to HCBET development.

Some, however noted that there might be an opportunities costs or costs of switch. For example, a restaurant might actually loose customers if decide to give stage for more intense performance of music, drama, loud celebrations etc. because not everyone might enjoy it.

A tour operator cited as risks the possible creation of staged authenticity: *"Offering fake, pseudo-experiences based on non-existent, fictional stories / traditions or offering a credible product but presented in an unprofessional way".*

Other risk for the tour operators is the fact that the experiential tourist might organize more often their trips by themselves and cut the intermediaries, which will directly lead to loss of business and profit.

Another group of risks are related to the infrastructure deficiency such as inaccessible sites, bad roads, poor signalling system, lack of public WCs, etc. A respondent noted as a risk the shadow (unobserved) economy or business activities that are not regulated by the state. They may not only incur losses for the budget and create unfair competition, but also pose danger for the wellbeing and prosperity of the local communities.

Q11. How do you see the role of State/Government of Bulgaria in heritage and culture-based experiential tourism development?

According to the respondents, the government should promote and finance the cultural heritage of the country. Other functions of the government include construction and maintenance of the infrastructure, education and training of the personnel, crime reduction, ensuring safety and security.

Most of the respondents find that the government does not support enough those types of activities and might do a better job by organizing (funding) public cultural events, promotes and advertises sites and destinations and cooperates more intensely with private and public institutions.

Q12. How do you see the role of the locals/ stakeholders on heritage and culture-based experiential tourism development in Bulgaria?

According to the respondents, the locals directly or indirectly participate in the creation of the experiential tourism products, so they role is by all means important. "*The local people with their customs and traditions, folklore, with their dishes, crafts are always attractive for the tourists, especially foreign tourists, and in this sense their role is extremely important*". Moreover, the host community can create an atmosphere or friendliness and welcoming for the newcomers.

The role of the other providers such as hotels, restaurants and tour operators is also important (according to the public organizations). They support and provide for the activities of the latter and the quality of their services reflect on the entire visitor's experience.

Q13. What kind of challenges do you see for heritage and culture-based experiential tourism development?

Some respondents claim that Bulgarian tourist is not yet ready to be or to act as an experiential tourist. Others see marketing barriers for promoting this type of products. Other challenges might include finding the right providers and suppliers or involving the local communities.

Q14. What kind of opportunities do you see for culture-based experiential tourism development in Bulgaria?

Most of the respondents confirm, that Bulgaria has a huge potential to be developed and positioned as a desirable destination for HCBET. It needs however, coordinated efforts of all stakeholders involved and a sound national policy. Often the respondents use phrases such as: "*limitless possibilities, amazing opportunities, huge potential, and promising type of tourism*".

Q15. How your organization can benefit from or assist the tourism sector in the present COVID-19 crisis?

On this question, most of the respondent reply in terms of finding a way to adapt to the new reality as for example by offering of a diversified products and services or redirecting to a different market segments (ex: domestic tourists and neighbouring countries residents).

A tour operator see solution in new technology and digitalization by organizing on-line virtual tours. Developing a niche tourism product is the answer for another tour operator.

Another provider expects better market share after the redistribution of the market as a consequence of the bankruptcy of many competitors.

Q16. What business models for HCBET does your company employ? / What managerial or strategic models are suitable for heritage and culture-based experiential tourism development?

Most of the respondents did not describe their specific business or strategic model for development of the HCBET. A company owner refuses to reveal their business model because of a possible industry espionage.

A group of respondents emphasize on the need of adequate promotion and communication strategies. For example, developing an informational portal. Others underline the importance of implementing new technologies like 3D visualisation, stereo sound systems in the museums and on site, holograms etc.

Some confirm, that big changes are needed and that the approach should be to aspire for long-term benefits, rather to seek short-term solutions. Others think that the key to success is in the cooperation between all stakeholders involved including local communities, government, public organizations and providers of services.

6. Conclusions

The analysis of the needs assessment confirms that the culture - and heritage based experiential tourism has high potential for future development. Bulgaria, in particular, can take advantage of its abundant tourist resources, cultural, and historical sites, artefacts, preserved traditions, folklore and unique cuisine to promote (HCBET) on the global and domestic market.

The desk research revealed that our country has all the predicaments to be a HCBET destination. On one hand, Bulgaria has strong traditions in providing tourism services and a well performing tourism industry. On the other hand, the government has made genuine efforts to develop a strategic policy framework towards more sustainable, niche tourist offering and to work in coordination and partnership with the private and public companies and organizations. It is also evident that the richness of the Bulgarian cultural heritage is underutilized and Bulgaria remains “terra incognito” or “the best kept secret” for most of the international and even domestic tourists. There is an urgent need to diversify the structure of the tourism offering and to prioritize greener, community-friendly and higher-income generating sustainable forms of tourism. Creating a new image of the country is another important task if we want to renounce the association with a mass, cheap tourism destination. The advantages of the HCBET development are as follows:

1) improvement of the image of Bulgaria as a tourism destination on the global tourist market (escaping the “mass tourism” image trap)
2) increasing the share of the individual tourists, counterbalancing the seasonality and raising the average income per visitor.
3) Valorization, preservation, protection and quality improvement of the cultural and heritage resources.
4) Enhancing the overall competitiveness of the Bulgarian tourism industry.

The primary study confirmed that both demand and supply sides are ready to welcome and support HCBET development. The tourists are seeking for new, meaningful activities. They want to participate more actively in the life of the local community. They are ready to sacrifice convenience and comfort and to pay more in order to gain insightful and transformative experiences. The tourism stakeholders regard CHEBET as promising, high-yield and a potential remedy for the global crisis. All of them believe that the country has an unleash potential for HCBET development and it should be given a priority in the policy and decision making initiative of the government and the private sector. The success however could be achieved only by coordinated efforts and partnership between all stakeholders involved.

Georgia with old history, rich culture resources, and heritage has a potential to meet postmodern tourists' need and expectation. The country has long traditions in tourism and hospitality and over the last decades, tourism has become one of the leading industries in Georgia in terms of generating income and compensating the country's trade deficit. It has become an integral part of a wide range of government organizations and their strategic documents due to its potential to revitalize and diversify rural and particularly mountainous areas, where unemployment, lack of economic infrastructure and high migration remain major challenges.

In 2019 the country was visited by 9.4 million international visitors, among which around 5.5 million were tourists and the tourism sector has contributed with 10.4% of the Georgian GDP (WTTC, 2019). The main pillars that build the brand for Georgia and positions the country in the international travel market are (Municipal Development Fund of Georgia & GNTA, 2018): Nature & adventure, History, Cultural Heritage & Traditions, Wine and Gastronomy, The Hospitality of Georgian people. The country is rich with its cultural and historical monuments among them 4 are included in the list of UNESCO material heritage sites and 4 Georgia elements are inscribed on the Representative List by The Convention for the Safeguarding of Intangible Cultural Heritage of UNESCO (UNESCO.org, 2019).

The country has a great potential for development of cultural and heritage-based experiential tourism (HCBET). It was first mentioned in the National Strategy for Culture of Georgia, which promotes sustainable tourism and highlights cultural resources (tangible, intangible heritage, festivals and other events) and creative industry (museums, handicrafts, cultural and natural sights, monuments, folklore, national cuisine, wine, etc.) as a potential for social-economic development, and promotion of Georgia as a unique, authentic and competitive place for new explorations and experiences (p.40).

This document presents the current understanding of the concept of ET in Georgia in context of cultural tourism and summarizes the problematics related to experiential tourism development in the country using applied research of the different stakeholders' opinion and practice in this filed. It provides an overview of the tourism sector, outlines the main resources, constraints and opportunities, and serves as a basic for developing of a Regional Action Plan.

1. General overview of the country

Georgia is a small mountainous country of 69,700 km² in the South Caucasus region with population of 3.7 million. Located at the geographic meeting point between Europe and Asia, the country has been distinguished by the diversity of cultural traditions throughout the centuries. About 54% of the territory lies at elevations higher than 1000 m above sea level and 43% of the population lives in rural and mountain areas. The country is divided into 11 regions and 69 administration districts. Every single province in Georgia is distinguished by its living culture, nature and traditions, which ensures the ethnographic mosaic of the country and its special attractiveness; and such diversity creates a long list of intangible cultural monuments of all regions of Georgia (GACC, 2012).

GDP by sectors consists of: Industry 14.8%, trade 13.9%, real estate activities 11.4%, construction 8.3%, agriculture 7.8%, public administration 7.5%, transportation and storage 6.3%, financial and insurance activities 6.1%, accommodation and food service activities 4.6% (National Statistics Office of Georgia, 2021). FDI by economic sectors in 2019: Transport and communication 10%, Financial sector 21%, Construction 2%, Energy sector 20%, Hotels and restaurants 9%, Manufacturing and Other sectors 29%.

Pursuant to the Association Agreement (AA) between the EU and Georgia (signed in 2014) (Parliament of the Republic of Georgia, 2014), Georgia seeks to promote multifunctional development of rural areas for the economic well-being of rural communities. Based on the European experience, the diversification of the rural economy is seen as key, and intersectoral measures for the development of rural areas are considered crucial for the rural regions of Georgia. AA promotes cooperation in the field of tourism, with the aim of strengthening the development of a competitive and sustainable tourism industry (Article 9). The document also encourages the development of cross-border cooperation in other areas covered by this Agreement such as, inter alia, transport, energy, communication networks, culture, education, tourism, and health (374).

2. Tourism system in Georgia

In 2019, international tourism reached a record number of 9,357,964, which represents an annual growth rate of 7.8%. International traveller trips include trips made by international visitors (83%) and other (non-tourist) trips (17%).

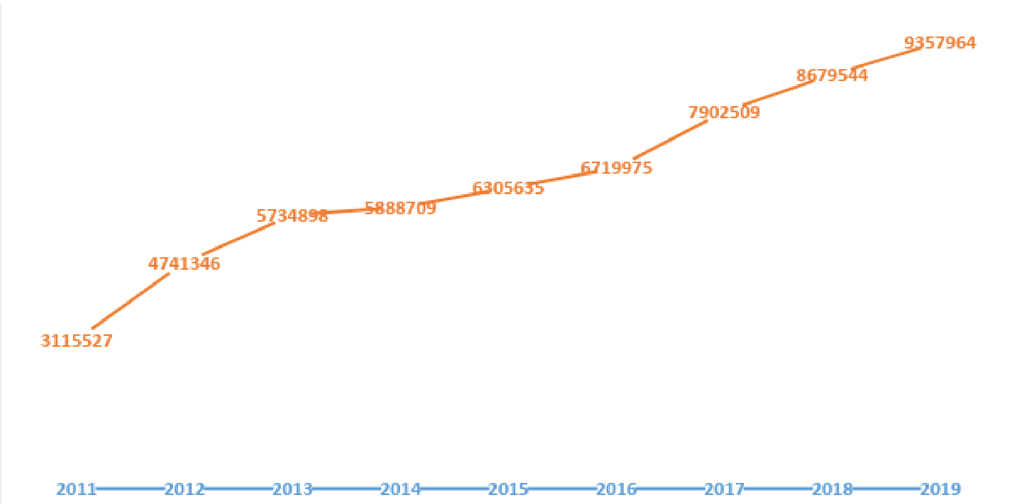


Figure 1. International Travellers trips to Georgia. Source: GNTA

The majority of international visitors (80%) were from the neighbouring countries Azerbaijan, Armenia, Turkey, and Russia, mainly for vacations at sea resorts - Adjara (Kobuleti, Ureki, Batumi) and mountain resorts (Tskaltubo, Borjomi, Sairme). Consequently, the largest share of international visitor trips to Georgia, (74.8%), was via land transport, followed by air transport (23.7%). Only a few were made by rail and sea (1.5%). From the EU countries, Georgia was visited mostly by Germans, Polish, British travelers. The largest number of trips were made by tourists aged 31 to 50 (48%), followed by the categories of 15-30 age (26%) and the 51-70 age (25%) (GNTA, 2019).

Seasonal distribution of all international trips shows that around 80% of all trips happen in May-October, with a peak in August (over million tourists). Only 6% of international trips take place in January.

International visitor trips were mostly undertaken for holiday, leisure, or recreation purposes (43.5%). Other frequently observed purposes included visiting friends or relatives (19%), transit (16.1%), business/professional trips (10.8%) shopping (6.8%), and health and medical care (1.8%). Only 1.5% of trips were for other purposes. Among conducted activities by international visitors, the most popular were Tasting Local Cuisine and Wine (75%), Sightseeing, Visiting Cultural and Historical Heritage, Museums (45%), Going to the Beach, Swimming in the Sea, Lake, River (20%), Visiting National Parks, Nature, Landscape, Exploring Remote and Exotic Places (16%) and other (National Statistics Office of Georgia, 2021). The figure below lists the shares of conducted activities by international visitors throughout their stay in Georgia. Based on the statistics on international tourism demands, 60% of tourists get information from friends, while 15% use internet pages to refer to travel agencies (3.4%).

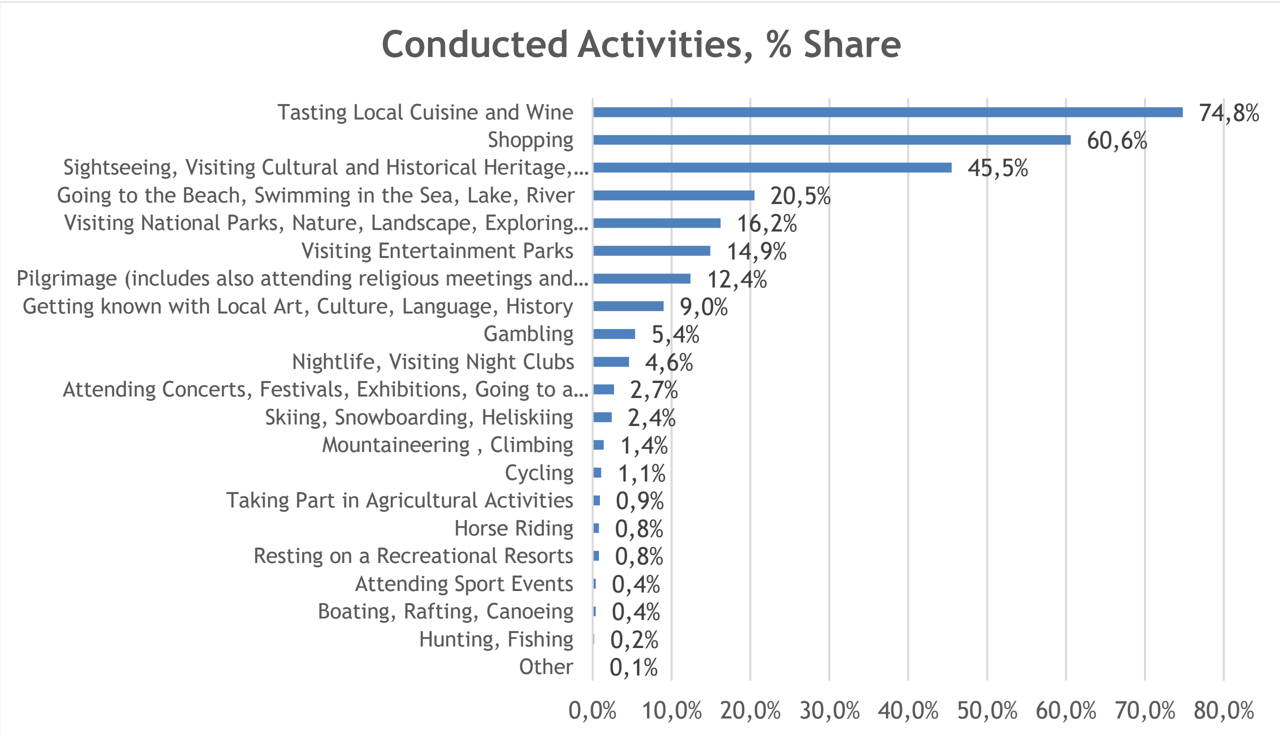


Figure 2. Tourism activities by international travellers. Source: GNTA

Project funded by EUROPEAN UNION

Table 2. The most requested tours by international customers in Georgia

Tours	Inbound	Domestic
Cultural Heritage Sightseeing Tours	15.6%	14.6%
Wine tours	15.6%	12.1%
Sea tours	12.4%	12.1%
Gastronomic tours	11.7%	11.3%
Nature / Ecotourism / Adventure Tours	11.7%	12.6%
Winter sports	10.4%	10.5%
Health, spa, health tours	8.6%	8.8%
MICE Tourism	7.7%	3.8%
Argo tours	3.4%	5%
Gambling tours	2.3%	4.2%
Other	0.7%	5%

NOTE: The European Travel Commission foretells that domestic and short-haul travel will be the first recovery source for the European tourism. Experts also foresee changes in consumer behaviour. In addition to trips closer to home or adjacent countries, there will also be bookings closer to the departure dates of the trip or preference to travel by car rather than public transport (bus, train, aircraft). The opportunity during the COVID-19 pandemic situation is to increase domestic tourism and encourage visits from neighbouring countries if COVID-19 restrictions and situations allow (European Travel Commission, 2020).

In 2019, the number of domestic trips within Georgia amounted to 14.3 million. Domestic visitors participated in different activities while travelling in Georgia. Among the popular activities undertaken by visitors were: visiting friends and relatives (66.6%), shopping (55.4%) and tasting Georgian cuisine (40%), followed by luxury holidays to the Black Sea side, visiting national parks, and sightseeing, Visiting Cultural and Historical Heritage, Museums. Based on the statistics on domestic tourism demands, the most of customers (27%) get travel information from friends who already visited places.

The GNTA manages the tourism sector at the national level, while at the regional and local levels there are five destination management organizations (DMOs) in Kakheti, Samtskhe, Samegrelo, Imereti and upper Svaneti and 17 Tourism Information Centers (TIC).

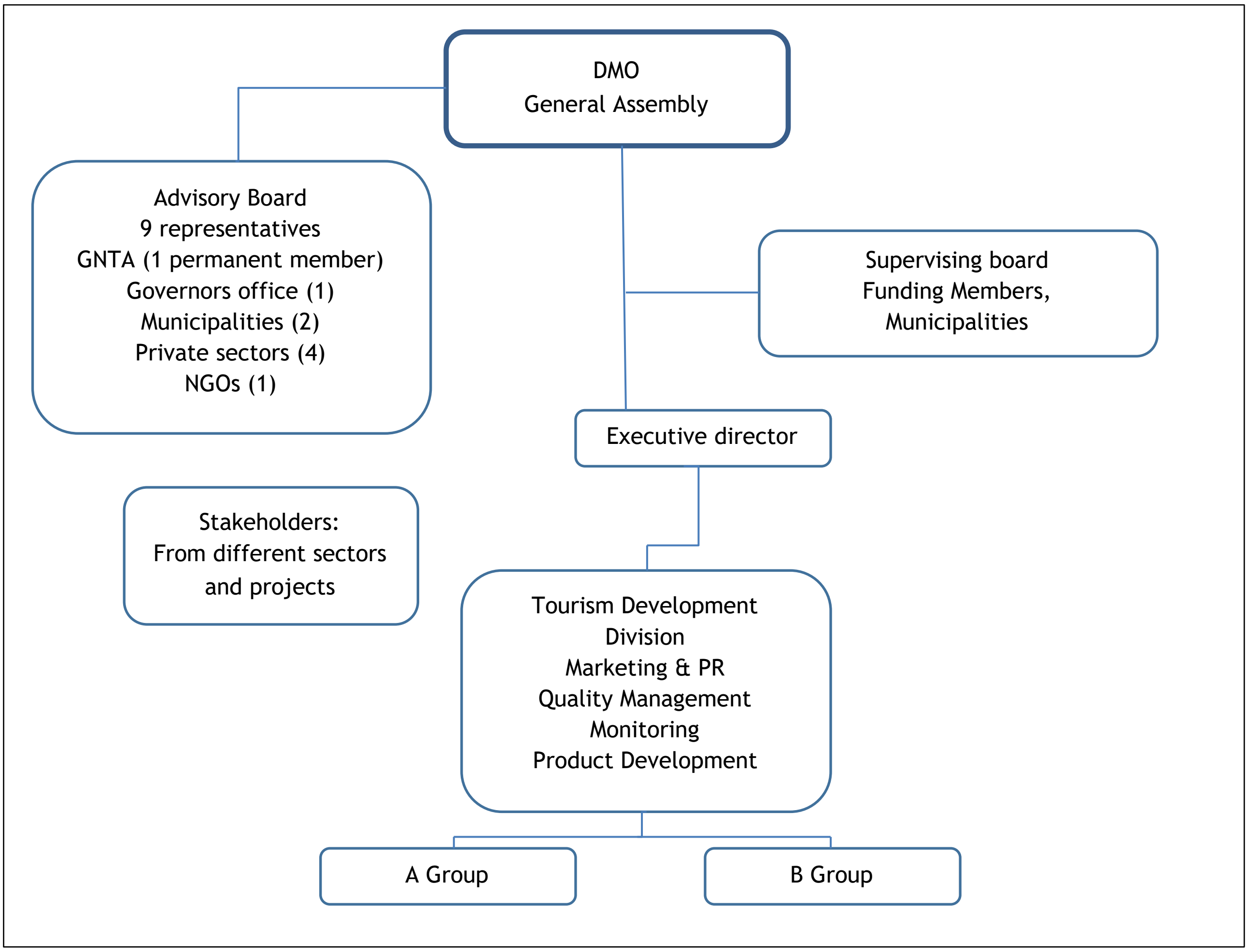


Figure 3. A model of tourism management in the country

DMO is a new model of regional management of tourism in Georgia. It serves to facilitate multifaceted dialogues in which tourism, industry, local government representatives and community leaders plan future tourism development together to effectively manage destinations, attract fresh investments and foster job creation. DMOs' funding members are local municipalities (except for the new DMO entity in Upper Svaneti, Mestia) but the advisory boards consist of representatives of the GNTA, local governments, private businesses and non-governmental organizations (NGOs).

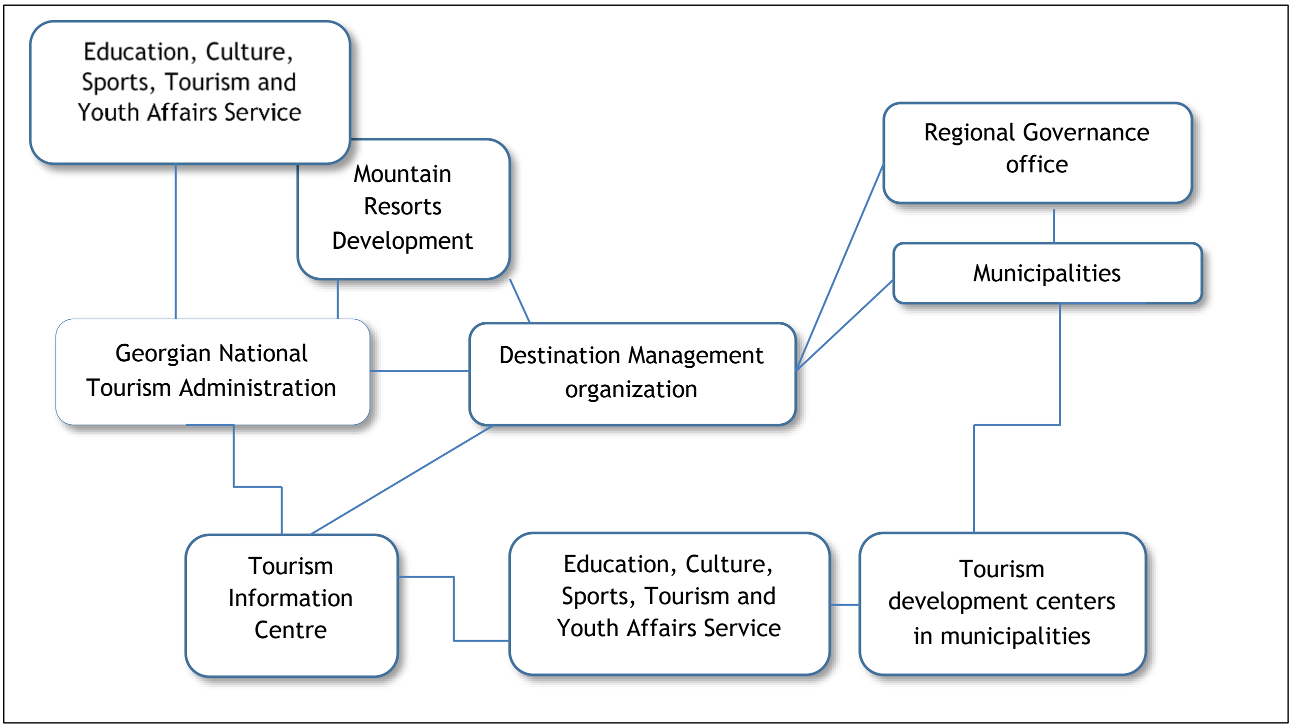


Figure 4. DMO structure

3. Heritage and Cultural-based experiential tourism (HCBET) in a country

The uniqueness of Georgia's resources lies in their continuity. The variety of local customs is best preserved in the mountain villages, which creates their characteristic features. The list of intangible monuments of Georgia, which has existed since 2011 includes examples of living culture, such as folk dances, Georgian polyphony, culinary and gastronomy, heritage crafts and visual arts, Social practices, rituals, and festive events, oral traditions and expressions etc. Among them, following our Georgia elements are inscribed on the Representative List by The Convention for the Safeguarding of Intangible Cultural Heritage of UNESCO (UNESCO.org, 2019):

1. The Georgian polyphonic singing, recognized by UNESCO as a Human masterpiece of and inscribed on its Representative List in 2008;
2. The Ancient Georgian traditional Qvevri wine-making method - on the list since 2013;
3. The living culture of the three writing systems of the Georgian alphabet – on the list since 2016, and
4. Chidaoba, wrestling in Georgia – on the list since 2018.

Culinary and gastronomy

Georgian cuisine has similarities with Caucasus cuisine. Every region of Georgia offers unique traditional dishes and has its own distinct style of food preparation by using spices, walnuts. For example, Khachapuri has different shapes and taste in different regions. Ajaruli Khachapuri and Achma in Ajara, Imeruli khachapuri and korkoti in Imereti region, Guruli khachapuri in

Guria, Khabizgina and pkhlovnebi in Khevi provine, etc. The country was one of the countries on the Silk Road, which resulted in travellers influencing Georgian cuisine.

Georgian gastronomy and wine are essential to place the country on the Gastro-tourism market. The country is recognized as the homeland of wine. The international recognition of Georgian wine was brought by the continuous practice of applying the knowledge of the aging process of wine and fermentation in clay vessels; and as mentioned above, the traditional way of wine-making became the Intangible Cultural Heritage of UNESCO in 2013. A wide range of the variety of Georgian wheat and some other cereal crops are also a topic to discuss about culinary tourism development in the country. Varieties of autumn wheat (*Ipkli, Tsiteli Doli, et*c.) and spring wheat (Dika, Zanduri) as well as legumes are still preserved in the regions, especially in Kakheti, Kartli, and Samtskhe.

Social practices, rituals, and festive events

The social practice and rituals tell a lot to tourists - displaying structured (social and hierarchical) models of society, such as the Svan Machubi houses, мountain customs, history, and traditions of family life, etc. Ethno-cultural traditions in mountain rural communities are unique. Fortress-villages in the regions are impressive due to their historical cross-icons and specimens. Svan, Pshav, Khevsur houses, which are far from urban architecture style are traditionally two or three-story dry-stone structures.

Local festive events are preserved better in mountain villages. For example, in Svaneti, the *Lamaria* event coincides with the New Year's cycle and early spring holidays. One of the beautiful events is *Lamproba*, which only exists in Svaneti. This holiday is held before spring, for good weather and yield. The main attributes of this holiday are the special wooden lamps. After the rituals, they gather around the fire and sing. Georgian wrestling is also part of this festive event.

Other fests, which are still preserved in mountain areas are "Shatiloba", "Shuamtoba". A fest and sporting events, a horse race, take place surrounded by a background of singing, poetry and rhythms. One of the largest and most popular folk festivals in mountain regions are „Atengenoba “, which is held during the second half of July, when not only locals but also those who migrated to the lowland come back to the mountains to celebrate.

Heritage crafts and visual arts

In Georgia, heritage craft is mainly referred to as the "folk handicraft", which involves the integrity of traditional crafts, though the major criterion of their identification is their "folk" basis. In their study about the heritage crafts in Georgia, GACC selects the term "heritage crafts", which in contrast to the "folk handicraft" encloses the tangible cultural heritage sites and museum collections, their shapes, and ornamental patterns; this does not limit the scope of this sector and its "folk" origin. It should also be noted that the term "crafts" mainly involves traditional technologies, which are transferred from generation to generation, though the crafts are upgrading along with the technological progress that implies the technological innovations and causes the changes in the process.

4. Needs for HCBET development based on the results of the survey

The finding of the NAR is based on a desk research and empirical research. Secondary data are obtained from policy documents, tourism projects, and scientific research articles. Empirical research encompassed the combination of both quantitative and qualitative research methods, in particular, questionnaires on visitors' attitudes and perspectives, thematic semi-structured (in-depth) interviews with various stakeholders. Among the 100 respondents there were representatives of national and regional tourism organizations (5), non-governmental organizations (5), tour operators and rural tourism entrepreneurs (29), national and international tourism consultants (3), and tourists (59).

4.1 Understanding of Heritage and Culture-based Experiential Tourism by different actors (from academia and beyond, practitioners)

Local knowledge and living culture are the main assets of HCBET in Georgia; and it mostly is discussed in wider context. Practitioners perceive HCBET as an alternative form demanded by post-modern tourists who look for new emotions and knowledge. They generaly use the term interchangeably with cultural, gastro, rural tourism, where the main actors are community members/residents with unique culture and traditional ways of (local) production. Respondents from academia descried experiential tourism interchangeably with "participatory tourism" where guests and hosts are engaged in co-creation and co-production of new experiences (Khartishvili, 2020). They emphasized that the product development is customer- and local community based oriented by focusing on the visitor's value and needs and that it is characterized by the active and interactive connection to the local community. Respondents mentioned that adventure is also a main element of ET and HCBET that cannot be neglected. This was also highlighted in customers' quantitative research questionnaire, where the respondents mentioned that adventure and new places are also their prime interest.

Entrepreneurs describe HCBET activities as a means to be in harmony with nature, to create a space for joy and cognition, transmit cultural traditions, and share them with others (Megrelidze, host at Komli in Guria). The owners of Art Residence call HCBET a type of tourism activity that provides the intersection (space) of Georgian and foreign artists in contemporary art in Georgia. Berdzenishvili in Skiji House (Guria) describes HCBET as a context-dependent tourism activity: "for the local farmers this is a rural eco and agro tourist offer, which enables guests to get familiar with the traditional environment, engage in everyday farm/rural activities, etc". Hosts at Ethno Village in Samegrelo and hotel Mokvare in Upper Ajara perceive HCBET as an activity sharing unique culture with the whole world.

4.2 Customers attitudes and perceptions

A quantitative survey revealed that respondents mostly take a trip throughout Georgia to explore living culture of the place (85%), discover new areas (84%), followed by study/ self-actualization (51%) and entertainment (41%).

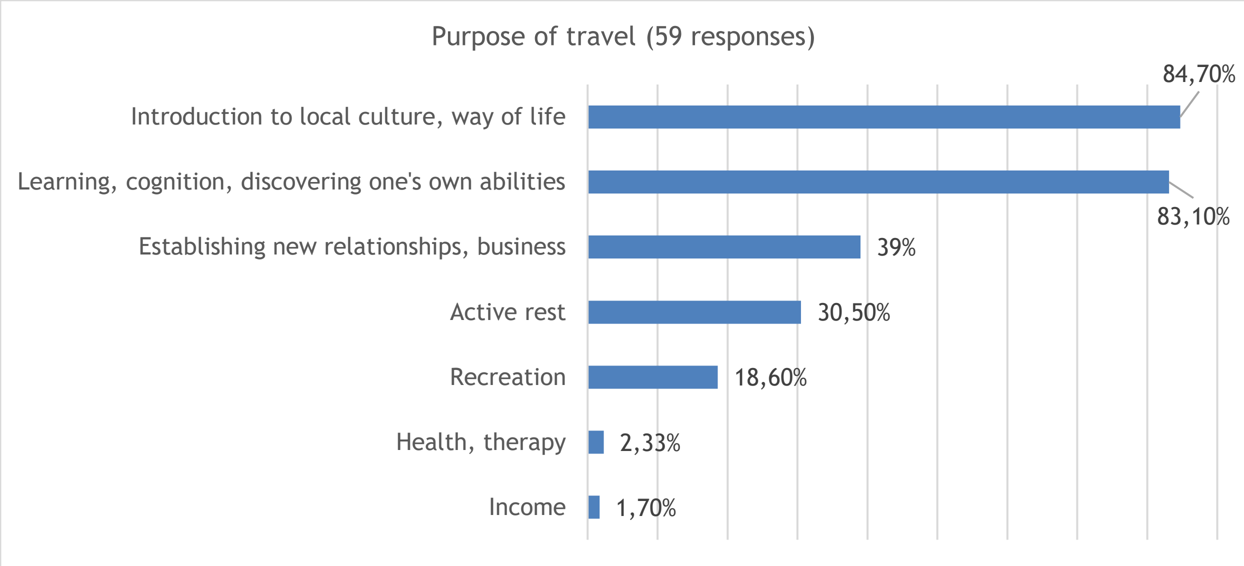


Figure 5. The purpose of the travel

Tourists plan their trip online, mostly using Booking.com, TripAdvisor; they also rely on recommendations from friends and relatives and social media (Facebook, Twitter.). Most of the respondents plan every aspect of their trip/holiday prior; they look for adventures and would like to do and experience something new every time they travel. They love to meet local people and share some aspects of their everyday life. 80% of respondents noted that, when they travel, they like to taste new food, which is typical for the region. Participation in various invigorating/stimulating activities is a bit rare for travellers. They still follow traditional type of holiday visits. Their particular interest is visiting heritage and cultural sites and interested in food & wine tasting. 50% of travellers noted that technologies and innovations (such as digital tours) bring additional value to visitors' experience but still do not represent the prime issue. They seem to be ready to pay to get a meaningful and enriching touristic experiences. Despite various and immense interest in experiences and adventure, more than 30% of respondents are against trips without comfort, and they are not ready to sacrifice their comfort or convenience to acquire memorable and enriching experiences.

4.3 Product and service providers

Qualitative research identified that many HCET product suppliers are neo-rural residents, who moved to villages, back to their ancestors' houses, and started tourism and farm businesses. They revitalized the place by creating an authentic environment. Some of them bought traditional houses, collected old items, investigated old recipes, stories and legends about places. They designed tour packages based on local customs and traditions by integrating Georgian dance and song classes, culinary masterclasses, poetry evenings, etc. For example, families in Adjara (guesthouse "Mokvare"), which are popular with Ajarian folklore, are visited from all over the world to learn Georgian dance and songs. "Arti Residence" in 40 km from Tbilisi, is popular in traditional pottery-making. The studio also offers workshops on graphic design, making Murano glass, Georgian cloisonné enamel, jewellery, offset technology and printing. Musical evenings, live Georgian music, as well as tasting of family made wine are also organized upon guests' request. The hosts revitalized the abandoned place and gave new life to the destination. The tourism product offered by Melita Dance Studio is another example of an experiential tour product with the main focus on participation quality. Melita created a tour within the dance studio, where she offered a dance class to tourists visiting Georgia. The tour price is 60 euro, which includes transportation service, wine tasting, light lunch, dance class, and a photographer's services. In case of good weather Melita organizes an excursion outside the studio, in nature.

4.4. The most promising tours for HCBET market in Georgia

Culinary, combined with elements of Georgian hospitality, is the most promising for the Georgian tourism market. For Gastro-tourism - a niche that involves authentic, memorable culinary experiences while travelling regionally or locally - food is the motivation for travel. The locations merely function as vehicles for gastronomic experiences (food-related-activities that involve behind-the-scenes observations, cultural/regional illuminations and often hands-on participation, culminating in partaking food or drink). Another popular element of Gastro-tourism is Georgian wine. The international recognition of Georgia as the homeland of wine was brought by the continuous practice of applying the knowledge of the ageing process of wine and fermentation in clay vessels.

The main characteristic of heritage and culture-based creative programs is community-based activities. For example, in Imereti, agritourism entity "Korena" has an agreement with a choir of the Gelati monastery and arrange special evenings for guests. They created the folk ensemble "Trio Okriba", purchased new costumes and prepared a special program for "Korena" agritourism visitors. They also recorded a disc and now sell on the spot. Local entity "Khevsureti and community" in Korsha village works with youth (local craftsmen, ethnographers, women working on felt). Their offers focus on community-based activities and characteristics of local customs and living culture. A family in Guria revived forgotten traditions of tea production by reactivating tea culture by generating local knowledge and community practice. Agritourism farms, which offer culinary classes and gastro tours to their visitors, collected old recipes of traditional dishes, customs of using medical herbs, etc. from their neighbors who are also involved in organising special events for tourists. Owners of "Oda House" in Samegrelo cooperate with community members who can provide accommodation service to their customers.

Providers, who selected tourism businesses as an alternative source of income put efforts to rearrange their area, farms and houses for receiving tourist customers; they integrate hospitality elements into their living space that would enable guests to participate in the product making process. For example, "Borjgalo" in Ajara, located 3 km from Batumi, presents Georgia's history in the family museums, samples of various fields of agriculture, models of old village houses, decorative panels and wood carving, 11-meter waterfall. The host makes all these items and displays them under the open-air.

Souvenirs from local businesses and local crafts can be found in regional centres. If managed well, direct sale facilities both for handicraft and agro products have a potential in the country. The current selection of souvenirs needs to be improved. Based on our survey, the products produced by the respondents are: crafts made of felt, cotton, children's decorative objects and toys; enamel, ceramics and stained glass; wooden tables, wine bars, panels, wooden souvenirs;

carpets, wallets, carpets; a variety of decorations: crosses, souvenirs, medallions; and gold and silver products.

The so-called "farm to table" concept is becoming more and more popular, which means eating at the guesthouse or hotel with products grown on their farm. The development of the product life cycle envisages man and nature harmony and represents the activity of involvement of tourists in agritourism farms - picking vegetables, seasonal fruits, tasting, cooking, etc. This increases both the engagement of guests in the process as well as the length of their stay on the farm. For example, hosts in "Lagazi" (village of Alvani, Kakheti) show visitors a whole bread baking process. Their tours begin with a wheat field tour, an old mill, followed by a demonstration of wheat pressing and bread baking processes. They try to make all the processes tangible for guests. The same concept works for wine, cheesemakers. For example, owners of agritourism farms (Oda in Samegrelo, Ruirpiri biodynamic farm in Kakheti, etc.) show their guests vineyards, tell stories about their traditions, viticulture, biodynamic farming (if any), traditions of wine-making and storage, demonstrate special equipment for cleaning Qvevris etc. Owners of "Komli" in Guria begin their excursions with exploring tea bushes (a small plantation) near their guest house, collecting tea leaves, pressing, drying, which ends with tea making and tasting. Interpretation is the central aspect of heritage and culture-based creative tours. The same hosts of "Komli" in Guria packed the history of their ancestors. In particular, stories about the Soviet Union of Georgia and their family members' participation in the Second World War. All this reflects the political and historical events of the country. Guests look through photos, read letters related to family history. The guests are interested in hearing stories about collective farms (Kolkhoz) from the Soviet era and the country and nation's history.

Despite the variety of activities, service providers noted that visitors look for recreational activities such as short walking around their facilities, swimming, mushroom picking, etc. For example, owners of "Sisatura" in Samegrelo suggest places for fishing to their guests, while in Ajara and Guria, hosts arrange excursions to the nearest waterfalls, sea-side area and advice viewpoints to their visitors. Daka's family in Guria arranged a recreational area beyond their territory where guests were able to enjoy the sun-set and communicate with locals. Respondents from the Kakheti region plan to develop trips to the active volcanoes and national parks around the Kakheti area which would add value to their product.

4.5 Access to the market

Hospitality service providers typically use internet platforms, such as Booking.com; Airbnb.com; TripAdvisor (rare case); place.ge; google.com. Some guesthouse owners created their own web sites. Respondents noted that they receive most of the guests from former visitors. They frequently use Instagram, Facebook, especially local tourists. Groups of tour operators were also quite a large segment (mostly for gastro, Agri farms) before COVID-19. Some of businesses are members of national tourism, rural tourism and farmers’ associations. But there is no coordination, network of creative tourism entrepreneurs at a regional level. The capacity of establishing a tourism network at regional level does not exist except Dedoplistskaro. They are also introduced to the market through travel companies and other info tourist websites.

There are two online platforms in Georgia where service providers/hosts offer different experiences online: **Expago.ge** and **20.ge**. Both platforms are in their initial stage of development, trying to compete with Airbnb.com. Among offered services are sightseeing tourist organised by host families, participation in different activities with hosts and local community members. Tourists' feedbacks are positive, they describe hosts as good storytellers, friendly atmosphere in the county, and emphasized the uniqueness of Georgian hospitality. "Hospitality is our second name" was the slogan on the airport present, given to foreign travellers (Datishvili 2020). Recently developed website Georgia Starts Here **www.georgiastartshere.com** is also presentable web-promoting unique sites and stories for getting experiences around the country. The unique experiences of Georgian family traditions are also added to Airbnb.com portal on transformative travel experiences. However, Georgian actors' capacity (similar to other regional actors) does not meet the quality and quantity of experience they promise. As scholars noted (Paulauskaite et al.) authentic experiences via Airbnb related to three themes – the lodging, the host interaction, and the local culture. Interacting with the host and surrounding community, travelling like a local, and engaging in cultural learning is the essential aspects which should be fulfilled via Airbnb offers to global audiences in the new international tourism climate.

4.6 Cooperation with tour operators and national professional associations

Majority of rural accommodation owners receive guests through personal contacts. Only 12-14% of their tourists come from travel agencies and tour operators. Individual travellers, which are the majority of visitors to Georgia contact hosts directly through website contacts. Thus, tour operators are not the major source of bringing tourists to rural regions. For example, in the Kazbegi region, around 25% of international tourists use tour guides / services from ground agencies, visitor information centres and less than 10% of visitors arrange accommodation service through tour operators. Rural, eco and agritourism tour offers are parts of tour operators' packages. On the international tourism market, trips to Georgia and the Caucasus countries are promoted through international tour operators. In some cases, they cooperate directly with local guides, drivers to arrange trips to certain destination areas (GEA and DEPA Consulting, 2019).

4.7 Certain plans of the interviewees for the development of creative businesses

As wine tours are popular segment on Georgian tourism market, most of service providers plan to arrange marani cellars and add wine tasting and interpretation services to their offers. They also think to develop additional facilities in and around their living place, which enable tourists to stay for a long period. For example, owners of "Komli" plan to build wooden constructions such as cottages, a barrel-shaped cottage in the shape of a glamorous camp, treehouses, etc. while others intend to integrate local talents and historical buildings into their offers, such as house-museums of famous Georgian writers (Dumbadze Museum in Khidistavi, Kalandadze, etc.). In Ajara and Samegrelo, families look to revive traditional clothes, special recipes of Georgian, forgotten dishes, especially seasonal dishes, old Georgia musical instruments, which are used rarely, etc. "Khevsureti and Temi" wants to enhance community-based activities by involving locals in organizing camps and cafes, which works both for locals and visitors. They want to develop extra space for services (open-air kitchen facilities, fireplace, presentation or workshop areas, camping areas etc.) to make their destination more memorable and experiential, and will allow them to accommodate larger groups of tourists. They look to install alternative energy resources (e.g., solar systems) look for funds for it. Hosts noted that they are spontaneously developing tourist offers and need a thematic approach - various travel packages that could be popularised online, - in particular, investigation and interpretation of cultural tour routes around their territory.

4.8 Needs in the improvement of management, host professional skills

Service providers as well as representatives from DMOs and local travel information centres attended (certified) training courses in hospitality tourism & service standards provided by the national NGOs and donor organizations such USAID Economic Security Programs, GIZ Private Sector Development and Technical Vocational Education and Training Program, Elkana, Georgian Ecotourism Association and others, and this process is still ongoing. They noted that creative and experiential tourism products are a new topic in the field. They need to organize courses for their staff on gastronomic and culinary issues and food delivery topics. In general, there is a shortage of professional staff in the culinary and gastro tourism market e.g. cook, waiter. The key to success is hospitality and creative skills, and hosts turn such experiences into a business. In terms of agritourism, culinary skills and organic farming knowledge are necessary for this tourism business. They require the necessary competencies for digital branding and marketing, communication skills, learning / improving a foreign language (English, Russian), cultural tourism management basics, improving social media management competencies, business planning, accounting, legislation and fundraising. Financial planning, documentation and service price calculation is still a challenge for service providers. Hosts accept market prices without a clear understanding of the real cost and income, which arises from the need for technical assistance.

Their service prices are not high but do not meet the service level. For example, accommodation owners accept market prices without a clear understanding of the real cost of their services, business profit from tourism, and income.

4.9 The role of State/Government and other stakeholders in HCBET development for the providers of tour products and services

Respondents noted that the general infrastructure is a big issue for the development of the tourism industry, in particular the supply of water and gas in the regions, as well as tourism facilities, road signs, access to regions. Another challenge is the public spaces for communication with locals' residents - arranging recreational areas on the banks of rivers, holding local fairs, farmers' markets, maintenance of the traditions of folk games and local fests that still remain in some regions, and will be forgotten without local municipality support. They also pointed to the needs for information support, small grants and awareness raising programs, promotion and marketing, e.g., image videos, guidebooks that enable them to participate in the grant competition. One of the main obstacles mentioned by service providers was the country's high tax policy. Providers with a turnover of more than 200,000 lari (50,000 euros) pay 20% of Income tax per year.

Respondents spoke about the role of destination management organizations in the regions in terms of an integrated tourism product and promotion. There are needs for community mobilization and joint product development. For example, the famous Erkomaishvili studio in Guria is ready to develop summer performances for community guests if uniforms for singers are prepared (like Okriba folk group made it). Singers usually are dressed in Chokha-Akhalukhi, which is not comfortable in the summer heat. Visitors often need a local guide, a good communication with the locals and a better interpretation of the sights. Among 25 service providers (interviewed) 10 work with local destination management organisations, Tourism administration and local action groups (LAG). 20 of them are members of professional associations such as the Biological association Elkana, Georgian Farmers Association, Ecotourism associations, and three of them cooperate with Caucasus Environmental NGO Networks (CENN). Providers such as Sisatura, Casa de Khasia, Megsruli Oda in Samegrelo, Korena in Imereti, etc. sell their services through Georgian and international tour operators.

4.10 Experimental tourism challenges during a pandemic

Increased restrictions, safety standards, barriers in the new regulation of post-COVID 19 limits host-visitor engagement and active interaction processes. The current situation is aggravated by recent political events in the Caucasus region. However, as experts and practitioners note, new opportunities have emerged against the background of existing challenges in the tourism market. In this regard, three areas have been identified:

- Transfer the experience of experiential tourism to the online practice of sharing specific experiences remotely;
- Emergence of domestic tourism development potential;
- Make short-term plans and make changes to the existing tourism strategy.

In the online format, gastronomy remains the most popular again. In addition, some tours focused more on meditation, healing the body and mind, city tours, etc. Online improvisational tours, despite pleasant communication, humour and pleasant mood, cannot replace real relationships and interactions. However, there are successful examples of online tours (the project of the dancer Melita). Here it is desirable to combine several different directions, as well as a single tour package. Since the thematic workload is important, experts also recommend dividing such tours into professional and amateur. The pandemic has led to the rethinking of strategies and the need for short-term plans. In addition to online platforms, the pandemic has spurred the potential for domestic tourism development. Georgian culture is unknown to a significant part of the local population. According to Maya Kezevadze, the owner of the agro and gastro tourism facility "Korena ", the problem opened new opportunities for the promotion of domestic tourism and destination. Local stakeholders (entrepreneurs, DMO, hotel businesses etc.) joined their forces and implemented projects to support tourism in the region. One of such popular projects was "Musicians for Tourism support ". The goal of the project was to express the kind of solidarity of the musicians towards the tourism industry affected by the World Pandemic. It was aimed at popularizing tourism destinations, promoting cultural industry and offering alternative means of financing. The project was performed in 15 locations in different municipalities of the Imereti region. One of the outputs of cooperation in the Imereti region was also preparation of extraordinary maps of Imereti municipality.

5. Analysis and Summary of the Results

This chapter evaluates the main problem areas and development challenges for outlining remedy actions at policy-making and business level. It prepares the ground to formulate and propose recommendations and fields of interactions for further strategic planning of HCBET, which will be described in RAP.

At present, consumers demand individual travel experiences - activities based on visiting cultural heritage places and combined with experiencing the local crafts or traditional arts, learning the elements of songs, dances, sports, as well as organizing crafts master classes. Also, they want to visit some not touristic, not fancy places at the outskirts. They need a profound knowledge of places and objects (not only the big roadside eateries and New York Times featured 5-star hotels but also extra) for tour planning, proper knowledge of local customs and the ability to explain them without too much legend telling and proper language knowledge. As research revealed the main directions in HCBET in Georgia are: 1) craft, 2) culinary and gastronomy, 3) polyphony and music. In addition, Datishvili & Khelashvili identified the 4) history of the Soviet era as components consisting of cultural tourism experiences in the country.

Post-modern customers look for destinations with more focus on value for money offers, while the image and stability of destinations also have a substantial impact. They are aware of social and environmental concerns, often adopting less consumption-driven, "green" lifestyles.

Young people, unfortunately, are no longer interested in the stories told by their parents, or they no longer want to learn crafts, which had previously preserved their past.

Besides the aforementioned intangible cultural heritage, Georgia's 70-year history in the Soviet Union is also of interest in the context of experiential tourism. Tourists are often attracted by SPA hotels and buildings from the post-Soviet period, modern cafe-bars opened in similar premises, and buildings with the same history. The Silk Road theme is forgotten, not visible on Georgian tourism national and regional markets.

Along with the growth of interest and demand for HCBET practices, especially gastronomy and culinary practice, there occurs a niche for the marketing, promoting and safeguarding the goods, which carry the traditions of people and guarantee the intangible cultural heritage sustainability. One more mechanism of traditional crafts promotion and safeguarding is the copyright protection that favours the communities holding those rights and creates the precondition for protecting their products.

HCBET is a new field in the country. This is a combined product of tourism and culture, which needs strong support from GNTA, the ministry of culture, MEPA, etc. Traditional products need government support in developing of regulations, keeping the identity of the products and labelling and branding. When it comes to the development of HCBET, it is important to understand the scope of its activities - the whole system and elements involved in HCBET value chain. More recently the concept of resilience receives increasing attention in the discourse on transitions towards a more sustainable future of tourism and its socio-ecological adjustments to a rapidly changing world. It puts the process of capacity building at the centre of attention and implies transitions in governance, which enable communities' radical changes in ideas, and practices. Such participatory management mitigates conflicts among competing interests, increases the quality and legitimacy of solutions, and collaboration between various actors at all level. It ensures the coherence of individual projects and balanced and cost-effective trade-offs.

Today, there is no single structure that would promote and coordinate HCBET in Georgia and manage it on all levels. DMOs are strong partners at a regional level, but they are represented only in five regions.

Based on findings and all aspects mentioned above, the main constraints and challenges in HCBET market can be summarized as following:

Figure 6. Identified problems and fields of intervention for the development of RAP

#	Identified problems (summarized)	Fields of intervention
1	- lack of diverse and target-oriented tour product (product for different market segment categories) - lack of additional services (such as organized tours) such as new routes and new tourist destinations, including water-related activities - seasonality, absence of winter offers	Development of market oriented, high quality tour products and services
	- inadequate quality of services in accommodation facilities (including inadequate service, hygiene and comfort) - The lack of appropriate recreational and interpretation facilities in craft-studios for the reception of tourists, language barrier - Insufficient current selection of souvenirs and traditional craft workshops	
2	- low awareness of innovative and thematic product development - lack of on-site entertainment elements, including festivals and other events - Lack of utilization of local resources for the diversification of the products - poor interest of youth in folk heritage development - Lack of locally produced products in tourism market and menu offered both in guesthouses and catering facilities	Support community involvement in sustainable HCBET product development, particularly youth

3	- lack of innovative approach, digital marketing - Low visibility of HCBET on the tourism market	Enhance the visibility of HCBET product and access to the tourism market
4	- approach, cooperation between different structures, both at the local and national level - Poor linkages among service providers (hampering the involvement of craftsmen's in the tourism market)	Enhance a good cooperation at a regional and local level, governance and networking

REGIONAL NEEDS ASSESSMENT REPORT: GREECE

This Report is part of the work package GAT1 Setting Strategic Goals for the Heritage- and Culture-based Experiential Tourism of the EU Project PRO EXTOUR (Promoting Heritage- and Culture-based Experiential Tourism in the Black Sea Basin) and concerns the Greek region which belongs to Black Sea Basin (for now on BSB-GR). The BSB-GR region consists of two administrative regions in the north of the country, the Region of Central Macedonia and the Region of Eastern Macedonia and Thrace (NUTS codes EL52 and EL51 respectively). With an entire area of 33,352 km^2 these two regions cover the largest part of Northern Greece. The total population of BSB-GR is almost 2.5 million people, 23% of the national population.

The Region of Central Macedonia is the second largest region in Greece, after Attica. To a large extent it is an urban region with the city of Thessaloniki, the second largest metropolitan area in the country, being its main urban centre. It has a population of 1,882,108 people, 17% of the entire Greek population, 58.7% of which live in the Regional Unit of Thessaloniki. Administratively speaking, the region is divided into 7 Regional Units, by order of size, the Regional Units of Thessaloniki, Serres, Imathia, Pella, Pieria, Halkidiki and Kilkis. The Regional Units of Thessaloniki, Halkidiki and Pieria assemble the highest tourist activity in the Central Macedonia. The Region of Eastern Macedonia and Thrace is one of the smallest regions in Greece with a population of 608,182 people, 5.6% of the country's total population. The region's population is more evenly distributed amongst 5 of its 6 Regional Units, Evros, Kavala, Rodopi, Xanthi and Drama, while Thasos, which coincides with the island of Thasos, is the smallest one. The Regional Units of Kavala and Thasos assemble the highest tourist activity in Eastern Macedonia and Thrace.

Both BSB-GR regions, as well as the entire country, have a well-developed touristic profile, especially regarding their coastal areas, that is comprised predominately of mass summer vacation tourism and to a lesser extent of other, "alternative" forms of tourism including experiential tourism. The latter has only recently been into the agenda of tourism in Greece either through local initiatives, especially of the private sector, or through the government policy and the 365-days tourism campaign.

Regarding heritage and cultural resources, the entire BSB-GR region has very rich tangible cultural resources, relating to various periods in history, a heritage that serves as a major tourist attraction for domestic and international tourism. They also have very rich intangible cultural resources related to the very rich variety of customs and traditions that construct a remarkable and diverse local culture.

The following report aims to assess the main problems, needs and potential for the development of heritage- and culture-based tourism in the entire BSB-GR region. The report is based on a survey of national and regional statistical data, semi-structured interviews with various stakeholders, such tourist companies or culture and heritage providers, which operate in the BSB-GR region, local, regional and national agents, and a questionnaire on consumers' attitudes and perspectives.

1. Economic profile, share of tourism sector and the development of cultural sectors in the BSB-GR region

1.1. Economic Profile and share of tourism

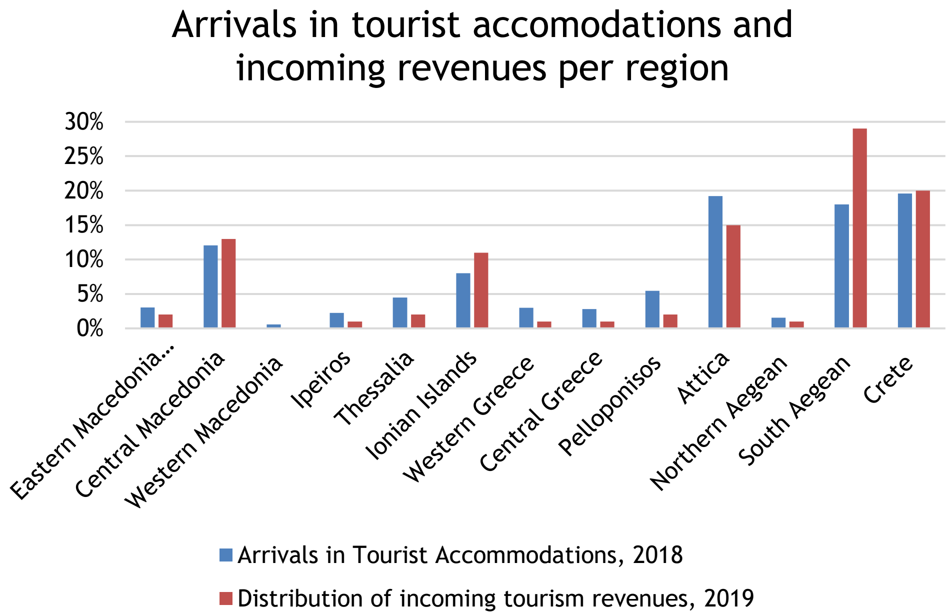
In 2018, Central Macedonia produced 13.7% of the country's total GDP (24,607 mil. €) making it the second region in the country, after Attica, in terms of GDP. The focal point of growth is the Regional Unit of Thessaloniki, concentrating 64.1% of the region's GDP. The Region of Eastern Macedonia and Thrace produced in 2018 only 3.8% of the country's total GDP (6,873 mil. €). Central Macedonia's GDP Per Capita (13,125€), is lower than the country's average and accounts for 54% of the EU28 average. As expected, the Regional Unit of Thessaloniki has a higher GDP Per Capita (14,273€), followed by Halkidiki (13,806€), the major tourist pole of the entire BSB-GR region. The Region of Eastern Macedonia and Thrace has the second lowest GDP Per Capita in the country (11,446€), making it one of the poorest regions in Europe. The Regional Unit of Kavala-Thasos, the main tourist pole in this region, has also the highest GDP Per Capita.

The Region of Eastern Macedonia and Thrace is amongst the more rural regions in Greece with a share of the primary sector in the regional GVA of more than 8%. Central Macedonia also has a higher share of the primary sector compared to the country' average. In Central Macedonia, the share of the tertiary sector accounts for 77.2% of the regional GVA of the region (and 13.1% of the country) while the secondary sector accounts for 16.6% of the regional GVA. In Eastern Macedonia and Thrace the tertiary sector accounts for the 72.52% of the total GVA (and only the 3.4% of the country) and the secondary sector for the 19.2%. Focusing on branches related to tourism industry, in 2019 accommodation and food and beverage service activities (the branch of tourism industry that is recorded by statistical data on GVA) held a share of 7.8% of the total GVA in the country, exhibiting an almost steady increase throughout 2010-2019.

Employment in Central Macedonia represented 16.2% of the total employment in the country in 2018. 73.1% are employed in the tertiary sector, 13.4% in the secondary sector and 12.9% in the primary sector. Eastern Macedonia and Thrace accounts for 5.1% of the employment in the country. Employment in the primary sector is significantly higher (25.7%) compared to the national average and represents 11.7% of the country's total employment in this sector. It is 62.6% in the tertiary sector, contributing only by 4.2% to the country's total employment in this sector).

In 2019 a total of 572,518 people were employed in the sector of accommodation and food and beverage service activity in Greece. Employment in this sector increased by 60% during the entire 2010-2019 period and by 27.8% during 2014-2019. In the BSB region employment in the same sector accounts for 11.7% of the country's total, with the share of Central Macedonia being 8.5% of the country's total. In both regions, employment in this sector increased throughout the period 2014-19.

It is estimated that tourism, through its various sectors and branches, has a very crucial contribution to the national economy which reached in 2018 an estimated figure of more than 30% to the GDP and more than 25% to the total employment. As expected, two island regions, the regions of South Aegean and Crete, concentrate the highest share of incoming tourism revenues amongst the Greek regions, almost half of the total incoming revenues. The share of the BSB region in the incoming tourism revenues is 15%, a figure that represents 13% contribution to its total GDP. The Region of Central Macedonia records the fourth highest share in the incoming tourism revenues in Greece (13%) and the Region of Eastern Macedonia contributes for 2%.



Data source: INSETE, 2020

In 2018, regarding arrivals, the Region of Central Macedonia contributed to Greece's tourism scene by a share of 12.1%. The Regional Units of Thessaloniki and Halkidiki are the two principal tourist destinations in the region. In 2018, Thessaloniki was leading the charts, recording a 49.2% share of the region's total arrivals in tourist accommodations followed by Halkidiki (33.5%) and Pieria (9.5%). Throughout the 2012-2018 period, the region performed a considerable increase in arrivals by 37.7%, though lower compared to the country. The Region of Eastern Macedonia and Thrace plays a rather limited role in the country's tourism scene as it concentrates just 3% of the county's total arrivals in tourist accommodations. In 2018, almost half of the arrivals were recorded in the Regional Units of Kavala-Thasos (48.9%). However, the region achieved a significant increase of more than 50% in arrivals in the 2012-2018 period. Overnight stays in the Region of Central Macedonia represent more than 10% of the total in the country. Eastern Macedonia & Thrace concentrates only 2.3% of the total overnight stays in the country. During 2012-18, overnight stays increased in both regions.

Arrivals in Tourist Accommodations (2012-2018)				
BSB-GR	**2012**	**2018**	**Share in the country, 2018**	**Average Annual Rate of Change**
Central Macedonia	1,954,631	2,691,440	12.07%	7.13%
Eastern Macedonia & Thrace	446,384	674,734	3.02%	5.48%
Greece	**14,790,696**	**21,304,135**	**100.00%**	**7.09%**
				Data Source: EL.STAT., 2019

Overnight Stays in Tourist Accommodation (2012-2018)				
BSB-GR	**2012**	**2018**	**Share in the country, 2018**	**Average Annual Rate of Change**
Central Macedonia	7,707,423	9,538,709	10.42%	3.62%
Eastern Macedonia & Thrace	1,532,316	2,101,808	2.30%	5.41%
Greece	**64,384,415**	**91,569,437**	**100.00%**	**6.05%**
				Data Source: EL.STAT., 2019

1.2. The cultural sector in Black Sea region and its links to tourism

The BSB-GR regions have a rich and diverse stock of both tangible and intangible heritage related to their long history and human presence in their territory from the pre-historic era to the modern years.

Regarding the tangible cultural resources, being the cradle of the ancient Macedonian civilisation, boasts a very rich cultural heritage that serves as a major tourist attraction. BSB-GR region incorporates the majority of the territories of ancient Macedonia and is home to 4 of UNESCO’s 18 World Heritage sites in Greece, including Aigai (modern Vergina), the first capital of the Macedonian kingdom, where a world-famous museum is located, and Pella, the historical capital of the ancient kingdom of Macedon and birthplace of Alexander the Great. Additional points of interest are the ancient city of Stagira in Halkidiki (birthplace of Aristotle); Dion in Pieria (the most important sacred city of the ancients Macedonians); the archaeological areas of Amphipolis and Philippi (another UNESCO World Heritage site), Abdera (home of Democritus and of Protagoras) and Maroneia (the most important of the ancient Greek colonies of Western Thrace) in Eastern Macedonia and Thrace. During the Byzantine Empire era, Western Thrace benefited from its strategic location and became a centre of medieval Greek commerce and culture; later, during the Ottoman Empire era, a number of Muslims settled there, marking the birth of the Muslim minority of Greece.

Thessaloniki, the capital of the region, is an important pole of attraction with specific potential for growth of experiential tourism. Historically, Thessaloniki has been playing an important role in the formation of the Greek and the Balkan area culture. A great number of buildings with significant architectural interest of all historical periods are located at the city centre. Fifteen monuments are listed as UNESCO World Heritage Sites. The city also hosted the largest community of Jewish people in Europe of Sephardic origin that were persecuted by Nazis during the Holocaust. Apart from the historical monuments and important museums, Thessaloniki hosts regular fairs of international appeal in the field of commerce and arts and is also an important hub for urban tourism and gastronomy. Veroia, another important city, has a significant number of monuments from the Byzantine era, including numerous churches. In Eastern Macedonia and Thrace, the Old Town of Xanthi is widely known for its distinctive architecture. Residences' local architecture in several traditional settlements of the BSB-GR region is characterised by features quite similar to the ones of the ancient Greek and Byzantine architectural period.

Furthermore, Mount Olympus, Greece's tallest mountain, known worldwide as the home of the Greek gods, is also noted for its exceptional biodiversity and rich flora and is on UNESCO's tentative list for nomination. Mount Athos, known as "Agion Oros", the third UNESCO heritage site with the great number of monasteries there and the unique landscape of the peninsula is an important centre of religious tourism.

The "Wine Roads of Northern Greece" is an initiative of the wine producers' association to support the vine-growing and wine-making tradition and give the opportunity to Greek and foreign visitors to discover the vineyards of Northern Greece. 33 wineries participate in this association offering a wine tourism proposal to visitors and supporting cultural heritage, focusing on grape growing, wine and on local cultural activities.

Regarding the intangible resources, both BSB-GR regions have a very rich variety of customs and traditions that construct a remarkable and diverse local culture. These traditions create a palimpsest, prosperous, and varied cultural profile. Most of the customs are often linked to religion and practiced in the celebrations called "*Panigiri*". Some well-known rituals also survive in their original form in certain villages similar to those surviving in areas of Bulgaria. The BSB-GR region is well-known for its cuisine and it could definitely become a gastronomic destination. Local cuisine includes a mosaic of tastes, influenced by the Greek and wider Balkan and Mediterranean cuisine, including dishes from the byzantine and ottoman past. These influences are met in dishes from the Cappadocian, Pontic, Arvanide's, Jewish population and the local Macedonian and refugees from Asia Minor and Istanbul.

Overall, the BSB-GR region combines a strong history and a high number of various historical monuments while hosts people with a deep cultural background. Considering also the rich natural recourses, the region could play an important role in the development of experiential tourism both in the country and in the wider area.

2. Heritage and culture-based experiential tourism in the BSB-GR region: specifics, main problems and needs

2.1. Methodology of the field research

The methodology utilized both qualitative (in-depth interviews with the use of an interview guide) and quantitative methods (survey with the use of a questionnaire) that allowed us to collect rich inputs on the topic. As a first step, the research team performed an extensive desktop research aiming to better understand the historical background and map the cultural heritage (both tangible and intangible) of the BSB-GR region. An initial list of almost 100 potentially relevant interviewees was constructed representing all the categories of stakeholders. Based on this initial survey, a total of 26 in-depth interviews were conducted over the phone or skype and with the use of the interview guide, common to all the participating countries of the project. In addition, based on a structured online questionnaire, common to all the members of consortium, a consumers' survey was conducted in the period 22-12-2020 to 11-01-2021. A total of 554 questionnaires were completed.

2.2. Specifics of the offered tourist products/services: main problems and needs

Selective forms of tourism are gaining importance in the tourist market of both BSB-GR regions, Central and Eastern Macedonia and Thrace. In particular, the new competitive environment and the dynamic character of tourism impose a transition from the conventional understanding of a destination from the aspect "sun and sea" model toward the concept of destination as an overall and integrated experience. Mass tourism seemingly has, and will continue to have, an indubitably great importance for the development of Greece's tourism industry. However, the current tourist demand is undergoing a great transformation, with experience becoming an essential part of a journey, by integrating multidimensional parameters such as the environment, culture, gastronomy and overall sustainability.

The experiential touristic product in Greece is a dynamic combination of various complex elements. So, it is crucial to identify those dimensions that diversify the experiential touristic product from the traditional one. First, the basis of the product is the anthropocentric approach. This means that the product development is customer- and local community based oriented, by focusing on the visitor's value and needs. For instance, some of the already developed experiential activities in the BSB-GR region are designed based on the interests and specifics of the visitor. In addition, it is characterized by the active and true connection to the local community. Personalized encounter between the local people and visitors, as provided in some themed walks, alternative routes and experiences, plays a central role in the quality of the tourist product and experience. Hospitality and friendliness of Greek people are key elements in the creation of unique, "authentic", and memorable tourist experiences.

The existing experiential activities provide the stimulation of senses, the generation of emotions, as well as the physical activation. In other words, the tourist experience product can be defined as a way to stimulate the senses, heart, mind and body. Another key element in the experience economy of both the BSB-GR regions is memory. The interviewed tourism experts support that linking memory with local culture, through culinary ways, for example, enhances the visitor's experience and influences the ability to recollect past travel experiences or to retrieve vivid information about them. To achieve a memorable experience, the outstanding role of active participation is underlined, while the fewer the participants, the more authentic the experience is perceived. So, most of the developed activities are in small groups.

The findings from the stakeholders' questionnaire indicated that in both BSB-GR regions, experiential tourism is confronted as a 'general term' that encompasses culture, gastronomy, rural and adventurous experiences.

In the cultural field, there are alternative guided tours, themed walks and routes in the city and nearby archaeological sites. In some cases, these activities combine physical activities such as biking, wine and food tasting and local cooking lessons. The selected sites are not necessarily historical landmarks or basic historical places of the city, but points with a hidden history. In such experiences, the enrichment of the touristic product is achieved by raising issues such as fantasy and play. Visitors are invited to uncover mysteries or solve enigmas and many times historical information is given through a small minute performance by actors.

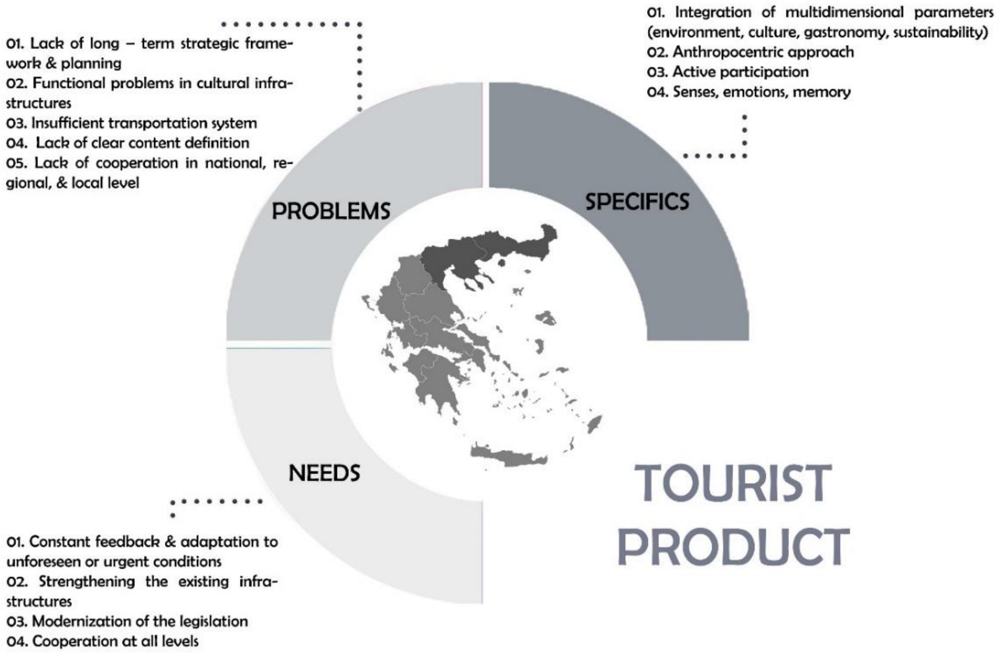
In the context of gastronomic tourism there are wine trails and wineries that introduce visitors to local culture and tradition through wine-tasting, but also with their active participation in the wine production process, depending on the season (for example vine-harvest). Sometimes, cooking workshops are organized for the visitors by using not only ingredients by the vineyard, but also local ones.

In the field of agricultural tourism, in both BSB-GR regions, activities related to tourism experiences have been developed mostly in rural, remote areas. Rural territories often present a rich set of unique natural resources that allow an "authentic", and memorable tourist experience. The experiential activities related to this field are essential oils distillery, visits in farms and olive groves and participation in the agriculture and beekeeping process, and also tours about the agriculture way of life. Most of these experiences cannot be categorized in the basic, existing touristic sectors such as accommodations, restaurants, tour agents, tour guides etc. This can be translated as a need for the revision of the existing touristic model and context in Greece. In the rural areas there are many physical and adventurous activities such as trekking, horse riding, river trip with canoe-kayak, rafting and mountain biking. Some of them are connected to cultural activities, such as mushroom and traditional herb hunting.

Existing experiential tourism product should be characterized by high quality. The quality dimension derives, except for the basic tourist product and services, also from factors and related services such as infrastructures, public transport, banking, insurance (safety and security) and accessibility. The research has shown that both BSB-GR regions lack a strategic planning of cultural infrastructures. Of special importance are the problems related to the transportation system. There is insufficient interoperability between different modes of transport and poor connection between distant geographical areas with the central ones. Regarding accessibility, in some of the existing activities, especially related to alternative tours, particular attention is given by specifically designed tours for the disabled, the elderly and people with less opportunities by well qualified specialists. All these actions comprise private initiatives.

Practice shows a lack of long-term strategic framework and planning for managing experiences and a lack of clear content definition by government. All geographical areas are approached in the same way, without paying attention to several distinctive particularities and specific characteristics of minority areas. The anachronistic legislative framework acts as experiential tourism growth inhibitor. The deficiency of a strategic framework for the implementation of strategies for cultural experiential tourism at all levels is intensified by the lack of cooperation at a national, regional, and local level. The findings of the survey highlight the fact that it is necessary to mobilize several players in order to achieve an efficient cooperation between essential participants and build an attractive, high quality experiential tourist product. An alternative operational body, such as a Destination Management Organization (DMO) with deep knowledge on the advantages and special features of each destination, may be required.

All the aforementioned findings prove that the experiential touristic product is dynamic and multidimensional and requires a constant feedback and adaptation to unforeseen or urgent conditions, such as the COVID-19 pandemic, in order to become sustainable and face all challenges. It is necessary to strengthen the existing infrastructures and modernize the legislation related to tourism and its alternative forms, under a climate of cooperation and solidarity at all levels. The graph below summarizes the specifics of the tourist product and the main problems and needs raised by the present research.



2.3. Specifics of the tourism enterprises

Increased interest in alternative forms of tourism has been observed in tourism businesses in Greece in general, as well as in both BSB-GR regions. Despite the growing attention to experiential tourism internationally, only a small percentage of enterprises related to tourism have developed experiential activities in both BSB-GR regions.

Among the interviewed enterprises only a few have a deep understanding of the definition and dimensions of experiential tourism. These were newly established businesses related to alternative tours and experiences and focus their activities exclusively in the experiential sector. In other words, their philosophy is to create unforgettable memories to visitors related to the local history and way of life. All the other interviewed tourism businesses are existing accommodations or tourism enterprises that have shifted from offering mass tourism services to services which incorporate physical activities such as horse riding, hiking and walks in nature. The survey revealed a gap between the existing and conventional categorization of tourism enterprises as some of the existing businesses in the experiential sector could not be classified in the existing tourism categories (accommodation, restaurants, tour agents, tour guides, public institutions etc.). In addition, it has been observed that some businesses (tour guides and accommodations) miscomprehend the term “experiential tourism”. This proves that experiential tourism is still also a new research field in Greece.

Regarding the existing businesses, the most experiential-oriented ones with a fully designed tourism product are related to alternative tours, agricultural and wine activities and are located mainly in the Region of Central Macedonia. In the rural and remote areas of the BSB-GR region, appealing and distinctive experiential offerings have been developed by accommodation enterprises, in order to survive in the competitive international context. Gastronomy experiential activities, such as food and wine tasting and traditional cook lessons, are organized by wineries, agricultural businesses and traditional cooperative organizations. This reflects a lack of involvement in this sector of the restaurant industry, in both BSB-GR regions.

Tourism enterprises related to experiential tours, walks and activities pointed out that their activities must appeal to the tourist’s fond desires and imaginative associations. To do so they have to draw on myths, histories, and fantasies, mainly associated with the local culture and history of the region. Considering that visitors are on a “quest for authenticity” on their trips and experiences, tourism enterprises offer “staged authenticity” to promote locality through storytelling techniques. In order to offer a high-quality experiential product, they highlighted the need for a strategically designed scenario, with an emphasis on the surroundings and the triggering of senses, feelings, emotions and thoughts. It is worth mentioning the absence of co-creation process between businesses and visitors, but many times, their active participation is observed.

The survey has revealed a huge gap between the philosophy and pricing policy within experiential tourism businesses and travel agencies. Well organized experiential businesses acknowledge that a high-quality product (fully designed with a qualified personnel) requires higher pricing policies compared to mass tourism services. Travel agencies in Greece, in contrast to international travel agencies, regard the offered experiential product as overpriced. This proves a lack of cooperation between these sectors and a low level of knowledge of the experiential’s product quality importance.

A successful experiential tourist offer requires deep and specific knowledge and skills of the particular activity, history and culture of the place and the dimensions of experiential tourism. An interdisciplinary approach seems to be a key element in order to design, package, and deliver the resulting experiential content. Constant passion, inspiration and creativity about the activity's subject are basic features for an employee in an experiential tourism business. Crucial requirements also include very good knowledge of foreign languages, as well as social and communication skills (such as storytelling) for shaping a friendly and interesting cultural contact, and promoting Greek hospitality, which comprises a major asset of Greek culture. A sustainable tourism product should adapt in the global competitive environment. Therefore, employees should constantly be trained and educated in the new tourism trends and challenges.

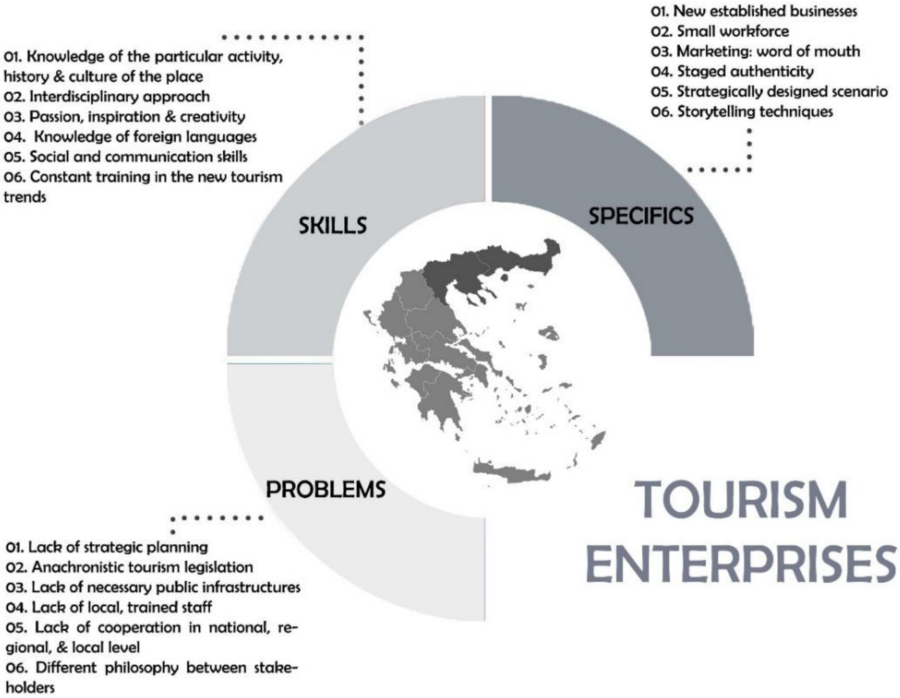
The concept of an experiential product has been implemented mainly by newly established businesses with a small workforce that, most of the times, comprises family businesses. The promotion techniques of experiential products focus on digital marketing through social media, websites and web platforms. However, according to the enterprises surveyed, the "word of mouth" communication is the most important and efficient marketing practice. Today, internet enables the traveller to socialize the experience during the whole process. This socialization of the travelling experience entails an opportunity to promote the company when it has met or exceeded the expectations of its clients, but at the same time there is the risk of defamation, in the case of an experiential product that does not fulfil its visitors' expectations.

From the marketing and management perspective, the aspects of interaction and network creation are important. Until today, only the well-organized businesses have developed strategic partnership networks with large companies, local enterprises and institutions of the region. Research has shown a lack of cooperation in the field of experiential tourism at all levels (national, regional, local). A high quality experiential product and service, through information sharing and synergies, requires an efficient cooperation of all stakeholders involved in tourism. Collaborations between the public and the private sector would help towards maximizing the touristic benefit.

Despite the fact that experiential tourism feedbacks to the community welfare, the dominance of mass tourism, and therefore the easy economic benefit, prevent locals to realize the importance of this tourism model. So, most of the locals are positive but not supportive to the existing experiential tourism businesses.

Regarding the COVID–19 pandemic, the major priority of the Ministry of Tourism is the support of tourism businesses and employees. Promoting alternative development efforts, encouraging new skills and retraining staff are also priorities for the government, in order to support alternative forms of tourism. It should be noted that the Ministry of Tourism operates Schools for Tourism Education, which, through specialized and updated courses, provide tourism enterprises with qualified employees with a deep knowledge on the modern tourism trends.

A major problem is the lack of clear legal framework for the creation and implementation of strategies for experiential cultural tourism at all levels. The anachronistic tourism legislation, in combination with the lack of strategic planning and clear content definition, inhibits the development of experiential tourism activities and businesses. This implies bureaucratic delays and tax problems, especially to small tourism enterprises. The government has yet to develop a complete action plan for alternative forms of tourism, such as experiential tourism. However, according to the Ministry of Tourism, their basic intention is a 10-year National Strategic Plan for Tourism Development, by emphasizing in alternative forms of tourism. The lack of necessary public infrastructures further complicates the planning and organizing practices for a tourism enterprise. In rural and remote areas, there is also a lack of local, trained staff, so it is difficult for businesses to develop. The graph below summarizes the specifics of the tourism enterprises and the main problems and needs raised by the field research.



The field study has shed light not only on the specifics of the experiential tourism enterprises, but also on the risks related to such activities. Experiential tourism is still a new field in the tourism industry in Greece. The development of a new activity, where there is not even enough knowledge about it, requires a careful plan and combination of many factors and dimensions. The absence of a strategical framework that defines responsibilities, management and marketing practices, cooperation between public and private sector poses the risk of an unequal development of the experiential product with negative results for the local community. For instance, unequal distribution of financial benefits to members of the community, local life disturbances and increase in the living costs of locals are some of these negative results. Unpredictable, unforeseen or urgent conditions, such as the Covid-19 pandemic, always increase the risk of developing tourism businesses, and especially when there is not a complete strategic plan. In order to reduce business defamation risk due to low quality, it is necessary to impose a quality control or quality certification of the offered product in tourism enterprises.

2.4. Consumers’ attitudes and perceptions

The purpose of consumers’ survey was to shed light on the expectations that consumers have from the culture and heritage-based experiential tourism and thus allow policy makers and tourism managers to use these insights in order to further improve the characteristics of tourism product/services that would in return allow the consumers to receive surveys of improved value and furthermore have memorable and meaningful travel experiences. A total of 554 questionnaires were completed (117 in English and 437 in Greek). In terms of the demographics of the sample, over two-thirds of people surveyed were women (about 70%). The majority of the participants aged between 19 - 35 years (about 60%).

The survey results highlight some important aspects that allow to further improve our understanding regarding the consumers' attitudes and perceptions related to culture- and heritage-based experiential tourism:

- In terms of the purpose of travelling, most people travel to discover new areas, explore the living culture of a place but also engage in active holidays and recreation. This signifies the importance of having a "winning mix" in the touristic offering of a destination / experience by combining three factors: a) new places, b) living culture and c) recreation.
- Travellers prefer to plan their trip online and also based on recommendations from their inner trusted cycle. Given the high number of people using the web, it becomes clear that any destination, in order to be visible to potential tourists, needs to have an online presence capable of attracting visitors. Although touristic info centres and brochures are the least favourable ways to attract visitors, we see that these remain to be often the choice especially from the state or local organizations. Besides the web, people do not see much value in using technologies for improving a visitor's experience (e.g., digital tours). Here, we could presume that technology is not, (yet) part of the travel experience itself and that a digital tour cannot replace a live visit.
- People seem to prefer visits to the traditional (and "typical") places of cultural heritage interest like monuments, museums and galleries and to festivals and fairs instead of participating in culinary or arts and crafts classes. Although most of them are interested in visiting heritage and cultural sites they are not necessarily interested in participating in local / traditional events.
- When travelling, most of the visitors do not organize all the exact aspects of their travel and holidays in advance; neither they prefer to travel as members of a touristic group. On the contrary, they do like adventures and would like to experience something new every time they travel. They are also open in tasting new food, in meeting local people and in participating in various invigorating/stimulating activities during their stay in the place of their destination.
- Overall, the participants seem to be willing to pay more to have a meaningful and enriching touristic experience and also willing to sacrifice their comfort and convenience in order to acquire memorable and enriching memories. Finally, we need to underline the fact that, based on our descriptive analysis, the results do not seem to differ based on the sex of the respondents or based on the age group to which they belong. Especially for the second dimension, although the numbers of the replies are different their order interestingly, remains the same across all the different age groups.

2.5. Sustainability and Innovation

The research highlighted the dominance of small tourism enterprises (STEs) in the experiential tourism sector. Therefore, concerning environmental sustainability, it can be assumed that STEs have the potential to play a major role in helping destinations progress towards sustainability objectives. This is justified by the fact that small-scale and locally owned tourism businesses do not exert excess pressure on the environment by diverting resources away from the local or destroy natural vegetation and disrupt wildlife. However, as a poorly operated small-scale tourism business in a wrong location could be just as harmful and non-sustainable as a single large one.

In the context of environmental sustainability, during the last years, accommodations have adopted environmentally friendly policies and strategies. Many of the developed experiential activities are related with rural and agricultural experiences and therefore potentially can be considered that contribute to a sustainable or balanced development and promotion of local agricultural, social and economic resources. The experiential tourism activities that are being developed in non-basic historical landmarks and places of the BSB-GR region could channel visitor flow to areas that may not independently interest visitors, thus alleviating pressure on "mass tourism" sites; motivating heritage conservation and reducing intraregional inequalities by providing socio-economic, cultural, and environmental benefits to disadvantaged localities. In the economic sense of sustainability, most of the interviewees indicated that the shift in experiential activities and, generally, in alternative forms of tourism is the only way for tourism diversification and survival in the global competitive tourism market.

A strategy of competitiveness of the BSB-GR region, requires an innovation management. Innovation as described by interviewees is a unique mix of resources, emphasizing in the unknown, attractive distinctiveness of the BSB-GR region, that can be used for the development of an innovative tourist product, which will have a form of module consisting of activities that originally belong to various tourism types: rural, gastronomic, cultural, etc. Such a product should offer unexpected pleasures to tourists meet their excitement needs and induce emotions that will tie them to the destination and motivate them to come again and/or prolong their stay.

Innovation is perceived by BSB-GR region stakeholders as "*a different road than the one followed by competitors*". The field research highlighted that in order to create such a tourist product, it is necessary to build trust among different public and private players that deliver different parts of the innovative tourist module. Such a complex product requires a plethora of ingredients experienced over time, and it is therefore impossible to have a single player who has the control over everything. Tourism businesses need creativity in order to enhance the tourism experience and provide tourist destinations with a unique atmosphere. Hence, implementing creative ideas, ultimately leads to innovation. According to the interviewees, new technologies, also offer opportunities for developing innovative tourism products. Among the existing experiential tourism enterprises in the BSB – GR region, some of them have been awarded for their innovative activities, while others have been implementing innovative technological practices. However, the innovative behaviour of tourism companies remains limited.

3. Conclusions: Opportunities and implications for action

The Regions of Central Macedonia and Eastern Macedonia and Thrace (BSB-GR regions) are two regions with rich history, wealth of natural resources, many important historical monuments, and population with vivid and diverse cultural background. Thus, the BSB-GR region possesses all the ingredients, both tangible and intangible, that could be utilised to create and offer remarkable experiences for the visitors and many opportunities for the development of experiential tourism. The BSB-GR region already has a well-established touristic profile based primarily on mass tourism. However, as the filed survey of the present research project has shown, an alternative form of sustainable tourism could further support the economic, social, and environmental development not only of the regions themselves, but for the broader area and the country itself as well. As an interviewee stated:

> *"The economic and social conditions of the pandemic create the need of an alternative form of tourism, the need of offering "the experiences". You cannot survive otherwise. Sustainable development is essential, otherwise you become a commodity. In order to have returning visitors, it is necessary to adapt to the new form of tourism. Experiential tourism could be the new trend for any place."*

After the COVID-19 pandemic, the criteria for selecting a destination might change. The tourism structure would thus need to be reconstructed, following the rules the "new normality" will impose. To this end, a review of the legislative framework to facilitate the development of experiential tourism appears as a necessity. It is important that, after the pandemic crisis, tourism is expected to offer higher quality products of that will provide added value to all stakeholders, including visitors and the local community. However, reshaping the tourism model will definitely be time consuming and will cause periods of uncertainty, especially short term.

An important factor that would also create an opportunity for experiential tourism is the cross-border cooperation. The BSB region has a very rich variety of customs and traditions and it is worth mentioning that some of them survive in the wider area too. The experiential tourism would also assist in collaboration between touristic companies and local producers in order to support the local community.

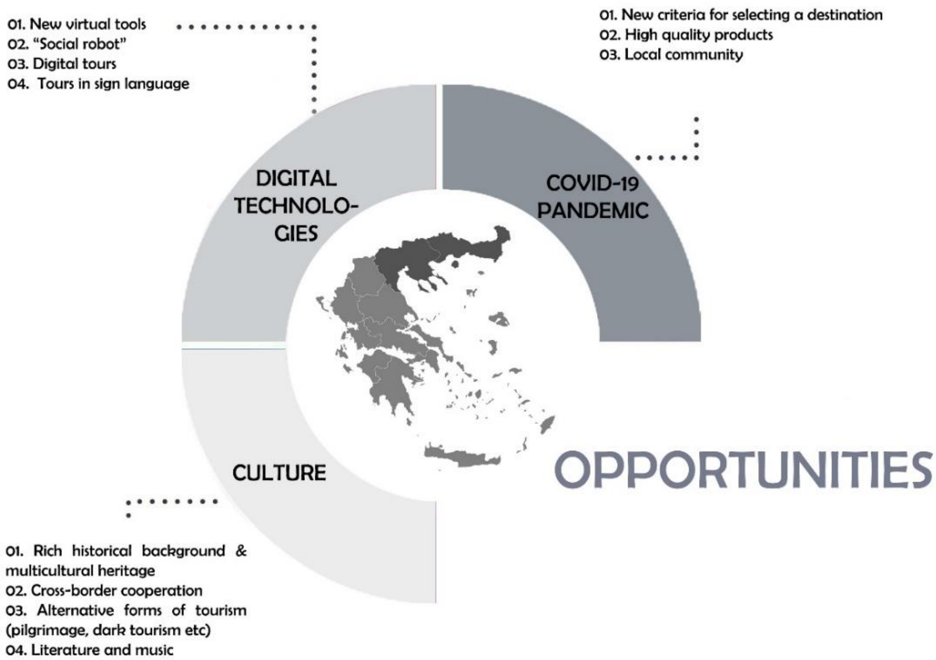
Digital technologies enable a new area, allow the offering of differentiation and also enrich the visitors' experience using virtual tools such as "social robot" that talks to visitors through artificial intelligence and gives personalised information; digital tours in the modern city and virtual tours in the ancient city; tours in sign language for people with hearing problems.

Through discussions with the various public institutions (ex. Ephorate of Antiquities and the Archaeological Museum of Thessaloniki), a number of proposals have been made regarding the development of the experiential tourism, such as the simulation of an excavation, role-playing games, a "night at the Museum", revivals of ancient practices and so on.

The rich historical background and multicultural heritage in the multiple places of the BSB region offers opportunities attractive to many types of visitors. Special opportunities for experiential tourism are traced in the urban settings, where an interesting approach would be the organisation of themed walks in the city adjusted to the participant's interests. For example, in Thessaloniki (or Veroia), these could include walks of pilgrimage tourism for visitors from Israel, who would like to experience the history of the Jewish community in of the city, or city walks highlighting the ancient, byzantine or ottoman past. Other alternative forms of tourism could be developed, like dark tourism, utilising the historical cemeteries of the cities.

Most cities have a rich impact in the literature and music, forms of literary or musical tourism could be further developed. For example, touristic products for book lovers could include tours in city paths that a book hero has walked in; musical tourism could include ideas, for example, a "rebetiko" walk (an intangible resource protected by UNESCO) in the city of Thessaloniki where participants would visit places with a historical significance to for the flourishment of this music genre in 1930s.

The graph below summarizes the opportunities for the development of experiential tourism in the BSB-GR region.



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PRO EXTOUR

Black Sea CROSS BORDER COOPERATION

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GOVERNMENT - PUBLIC ORGANIZATIONS		
1. Ministry of Tourism	Dionisopoulou Panayiota, *Head of the General Directorate of Tourism Policy*	Athens
2. National Organization for Tourism (EOT)	Lazaridou Sophia, *Head of General Directorate of Administration, Organization and Promotion*	Athens
3. Region of Central Macedonia, Tourism Directorate	Kiskinis Andreas, Rapporteur	Thessaloniki
4. Archaeological Museum of Thessaloniki	Tsougaris Charis, *Department of Exhibitions, Communication and Education AMTH, Head of educational programs*	Thessaloniki
5. Folklife & Ethnological Museum of Macedonia - Thrace	Bintsi Eleni, *Head of Management*	Thessaloniki
6. Ephorate of Antiquities of Halkidiki and Mount Athos	Polyzoudi Archontia, Mertzimekis Nikolaos, *Archaeologists*	Poligiros, Chalkidiki
7. Ephorate of Antiquities of Drama	Poulioudi Vasiliki, *Deputy Head of the Ephorate of Antiquities of Drama, Head of the Department of Prehistoric and Classical Antiquities and Museums of EFA Drama*	Drama
8. Rodopi Mountain Range Management Body	Psaltopoulos Paschalis, *Environmentalist-Cartographer*	Mesochori
9. Tourism Office of the Regional District of Imathia	Andreadou Maria, *Rapporteur*	Veria

PRIVATE BODIES AND ENTERPRISES		
10. Greek Tourism Confederation (SETE)	Karagkouni Aggeliki, *Content Manager*	Athens
11. Helenic Hoteliers Federation	Tasios Grigoris, *Chairman*	Halkidiki
12. Dot2dot	Kartsiakli Vasiliki, *Founder - Research and design of tours*, Vraka Christina, *founder - business administration, organization and marketing*	Thessaloniki
13. “Paizontas se paradosiaka monopatia”, Workshop "Playing on Traditional Paths"	Pikoula Varvara, *Founder*	Thessaloniki
14. Ziogas Western City	Ziogas Christos, O*wner - Riding instructor*	Leukochori, Thessaloniki
15. Veroia Volta – discover Veria	Nazlidou Mary, *Co- Founder*	Veria
16. Ktima Kyr Gianni	Palamida Elpida, *Visitors Executive*	Naousa
17. Wine Museum Gerovassiliou	Leivadioti Magdalini, *Museologist, Event Executive*	Thessaloniki
18. TRIGIRO	Amanatidou Niovi, *Co-founder*	Naousa
19. Epiculiar Tours	Makris Thanasis, *Executive Consultant*	Thessaloniki, Athens
20. Travel agent Miltos Kesoglou	Kesoglou Miltos, *Travel Agent*	Thessaloniki
21. The estate in Bairi	Konstantinos Giantsis, *Owner*	Kilkis
22. Kapsali Farm	Kapsali Maria, *Owner*	Veroia
23. Traditional guesthouse of Demosthenes	Mouzouris Dimitris, *Owner*	Kilkis
24. Alexandrou Traditional Guesthouse	Alexandrou Dimitris, *Owner*	Halkidiki
25. Hotel Nemesis	Tseggelidis Ioannis, *Owner*	Xanthi
26. Karaiskos Farm	Andrinos Meletios, *Reservation Manager*	Pelion

REGIONAL NEEDS ASSESSMENT REPORT: ROMANIA, MOLDOVA, UKRAINE AND TURKEY WITHIN THE BLACK SEA BASIN

This report presents a needs assessment analysis on the prospects for the development of experiential tourism in the Black Sea Basin, and particular, in the countries of Romania, Moldova, Turkey and Ukraine. It supplements the counterpart needs assessment reports for Armenia, Bulgaria, Georgia and Greece, elaborated by the partners in PRO EXTOUR project.

As Romania, Moldova, Ukraine and Turkey are not represented in PRO EXTOUR, this needs assessment is based on primary research via questionnaires and structured interviews and secondary desk research based on policy documents, projects, scientific and statistics research, performed by the academic and policy-making institutions from the countries as well as ones working on regional and international level.

Tourism has contributed substantially to the economic growth and employment in the Black Sea Basin due to the benevolent climate and favourable mix of natural and cultural resources (ENI CBC Black Sea Basin Programme 2014-2020, 2020), (European Neighbourhood Instrument Cross-Border Cooperation, 2015). Until 2020, the tourism sector registered a constant annual growth in terms of economic benefits and employment with recreational and seaside tourism contributing the most, but its upwards trajectory has been affected by the recent global crisis. The significant competitive advantage for the countries in the region regarding the relatively low prices of the travel and hospitality services nowadays has also has a negative connotation, since it is associated with unsustainable business practices and insufficient level of security.

It is expected that post-2020 trends in tourism and hospitality in the BSB shall be determined by three main factors: (i) regional economic development, (ii) quest for sustainability, (iii) global COVID-19 pandemic. Experiential tourism, as part of the experiential economy, outlines possible paths for recovery from the current crises depending on the joint efforts of all the stakeholders involved and the implementation of an adequate governmental policy to this end. At the same time, tourism and hospitality sector, along with the culture and entertainment are amongst the most affected industries by the COVID-19 pandemic (ENI CBC Black Sea Basin Programme 2014-2020, 2020). The new situation calls for dramatic changes in the tourism paradigm and new attitude towards travelling.

1. Tourism systems in Romania, Moldova, Ukraine and Turkey and opportunities for experiential offerings

1.1 Romania

In Romania the tourism industry composes from 5.2% to 5.97% of the country’s GDP for the period between 2010 and 2019 (Statista, 2021). What is particularly interesting in this case is that both domestic and international arrival were steadily growing (Statista, 2021). Domestic traveling is as important for this sector in Romania as the international one. In that, almost one-quarter of the international overnight stays are attracted by the Southeast region that borders the Black Sea.

The tourism industry in Romania relies on the historic heritage sites, medieval castles, mountains, seaside resorts and the Danube Delta (Postelnicu & Dabija, 2016).

According to many experts and researchers (Simon, et al., 2011), seaside tourism has not been the flagman of Romanian hospitality industry. The Danube Delta to the north of this area is considered much more attractive and suitable for nature-based tourism. In addition, Romania's South-east avails of many other resources that can attract visitors as much as the coastline - these include the fresh-water lakes, caves and landscapes, ancient archaeological remains and Dacian ancestry, various local events and festivals.

The National Tourism Development Strategy of Romania aims to turn the country into a well-known premier, year-round tourism destination by 2030, focussed on unique cultural and natural heritage, and world-class customer service. Its four operational objectives refer to improved connectivity and quality of infrastructure, private-sector innovation, enhancing the quality of visitor experiences and services at destinations, as well as increased digitalisation and adequate marketing.

1.2 Moldova

Many researchers identify the Republic of Moldova as the least visited country in Europe that has remained unknown to tourists and has been lacking adequate tourism structure (USAID, 2018). Nevertheless the tourism industry has been steadily growing since 1995 in absolute terms, but the growth rate has remained within the 2.9%-5.2% range and in 2018 formed 4.4% of the GDP (WorldData.info, 2019). The largest share of international tourists arrive from Romania, Ukraine, Russia, Austria, the USA, etc. (Dulgher, 2019), and a considerable part of these travellers come for family reunion reasons.

Mass tourism is not evident in Moldova. Part of the problem refers also to the underdeveloped infrastructure - particularly regarding accommodation and the lack of unified categorization system for the accommodation facilities (USAID, 2018).

The Moldavian government defines four types of tourism as priority over the last decade, namely: rural, wine, cultural, health and beauty tourism. The preservation of cultural heritage (both tangible and intangible) as well as safeguarding a unique ethnic and ethno-cultural diversity are a policy priority and a development opportunity for the country, which has 18 recognized ethno-cultural minorities that sustain, revive and develop their traditions, cultures and arts and offer unique diverse events and attractions to visitors (Government of the Republic of Moldova, n.d.).

With the support of USAID some innovative steps for the promotion of Moldavian tourism were undertaken, such as a national social media campaign, raising the quality standards in B&Bs and wineries in view of the international accommodation standards, organisation of flagship initiatives and cultural events, etc. (USAID, 2018).

The Moldavian tourism and hospitality industry was severely hit by COVID-19 pandemic as the stays in the Moldovan accommodations were down 78% in the first nine months of the year, compared to 2019, according to the state statistics service (France 24, 2020). It is expected that the tourists from the neighbouring countries will return for short stays when the situation improves (France 24, 2020).

1.3 Ukraine

The tourism sector in Ukraine is considered underdeveloped, but with excellent growth potential as the large territory of the country avails of vast mountains, coastline, rich culture and heritage resources at the crossroads of three religions on the border between Europe and Asia.

Tourism accounts for 5.3% of Ukrainian GDP in 2020 and decreased in the period 2001-2020 with fluctuations (Knoema, 2020). Negative political factors impeded the development of the sector – such as unresolved Security and the military actions in the east of Ukraine, including the annexation of Crimea by the Russian Federation, sensitive ecological situation and the reiteration of the Chernobyl disaster, as well corruption scandals (Karabaza, et al., 2020). However, the sector-related problems remain as well – such as the imbalanced use of the resources of country with the historic, cultural and natural ones being neglected and the unsatisfactory tourist infrastructure (Karabaza, et al., 2020).

The southern and south-eastern regions of Ukraine belong to the Black Sea Basin. The Black Sea tourism potential is not yet fully exploited due to the limited investments, insufficient transport infrastructure, inadequate tourist facilities, and relatively poor quality of services (BSC, 2019).

The Strategy of Tourism and Resorts 2017-2026 in Ukraine defines national policy for tourism along the safety of tourists, regulatory framework, development of tourism infrastructure and human resources, marketing policy of tourism and resorts (Korsun, 2017). The government aimed to create a new positive destination Image for the country and relied on a 2.5 times increase in the number of foreign visitors and 5-times increase of domestic tourists.

In the summer of 2020, Ukrainian resorts along the Black Sea enjoyed a 30% increase in visitors as the Ukrainian preferred the domestic destinations for safety reasons and due to COVID19-restrictions (Dickinson, 2020). Still, this was considered a temporary surge and the effects of the COVID19 pandemic are still to be assessed.

1.4 Turkey

Turkey is a leader in tourism development among the Black Sea countries and in Europe, popular as a mass-tourism destination. On a national level, tourism was one of the most vibrant and fastest growing sectors, contributing to 3.8% of the GDP and 7.7% of employment (OECD, 2020). The growth in inbound tourism was accompanied with a growth in domestic tourism, for which 2018 was the positive record over a 5-year period (OECD, 2020).

The National Development Plan 2019-2023 and the New Economy Programme 2019-2021 for tourism in Turkey call for diversification and innovation of tourism activities in accordance with changing consumer trends and technology, using tourism as a tool for regional development and alleviating the burden from the visited popular destinations, improving the environmental performance of the sector (OECD, 2020). The Ministry of Culture and Tourism links the conservation of Turkey's heritage resources with enhancing the image of the county and its international branding, promoting thematic focuses on a yearly basis e.g. 2018 was the Year of Troy, 2021 - the Year of Patara, etc. (Ministry of Tourism and Culture, Republic of Turkey, 2020). Still some researchers consider that the policy documents regard culture-based tourism as an alternative and not mainstream development goal as the country kept to be promoted as a sun-sand-and-sea destination (Okumus, et al., 2012).

The Black Sea region has not been among the most internationally popular touristic regions of Turkey but until 2020 it also enjoyed an increasing number of visitors. With its diverse relief and cultural richness, they provide good alternatives to develop tourism out of the crowded areas and has been popular among the domestic tourists (Okumus, et al., 2012). The Ministry of Tourism and Culture has developed 38 tourism centres in the region and 4 culture and tourism protection and development regions to foster sustainability (Okumus, et al., 2012). The potential for experiential activities is present. Some of the challenges refer to the need to build infrastructure, keep the sustainability balance in case of rapidly increasing numbers of visitors and eventually building a regional brand.

While the COVID19 pandemic affected mass tourism, the Black Sea region can be rediscovered as a destination for short-term experience-based activities.

2. Study on the stakeholders' attitudes and perceptions on the cultural and heritage-based experiential tourism development in Romania, Moldova, Ukraine and Turkey within the Black Sea Basin

2.1 Methodology

In order to study the attitudes and perceptions of various stakeholders involved in experiential tourism, cultural and heritage-based in particular (HCBET), the desk survey was complemented by an empirical survey using questionnaires for examining visitors' perceptions and attitudes towards experiential tourism offers and semi-structured interviews with representatives of the main stakeholder groups. The methodology was the same as the ones for the single-country based surveys in Armenia, Bulgaria, Georgia and Greece. In order to extend the outreach of the survey, the questionnaires and the semi-structured interviews forms were translated into Russian and Turkish and three languages versions were distributed. On-line media and informal interest groups were widely used to gather qualitative replies. Representatives of countries outside the BSB area voluntarily participated in the questionnaire-based research and their replies were considered because the respondents got contacted based on their interest in the Black Sea Basin.

2.2. Results of the survey of visitors' perceptions and attitudes towards experiential tourism in Romania, Moldova, Ukraine and Turkey

The questionnaires for surveying the visitors'/tourists' perceptions and attitudes towards experiential tourism in English, Russian and Turkish were open to responses between 1st and 31st December 2020 via Google Forms. In total, 81 questionnaires were completed in the three languages: 66 of them were filled by residents of the countries involved in the analysis and another 15 responses were received from residents of other countries (Australia, Germany, Estonia, Italy, Slovakia, Sweden, Tajikistan, Russia).

Figure 1.

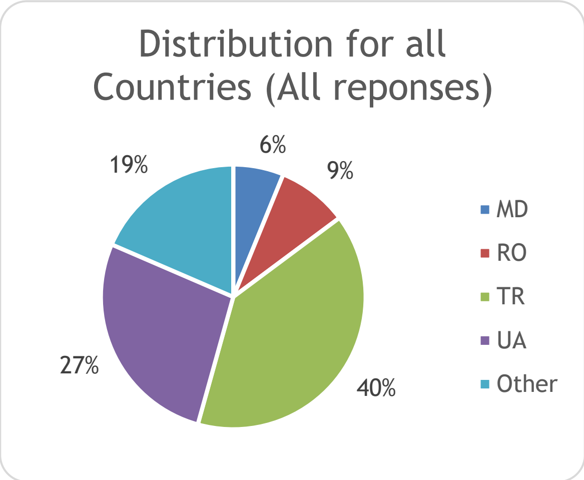
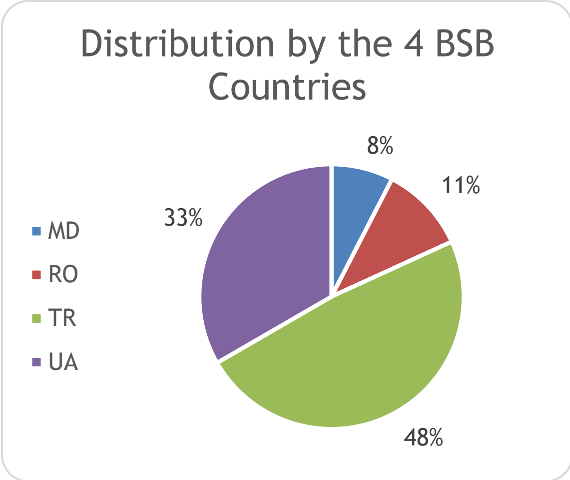


Figure 1a.



Demographic profile of the respondents

Figure 2.

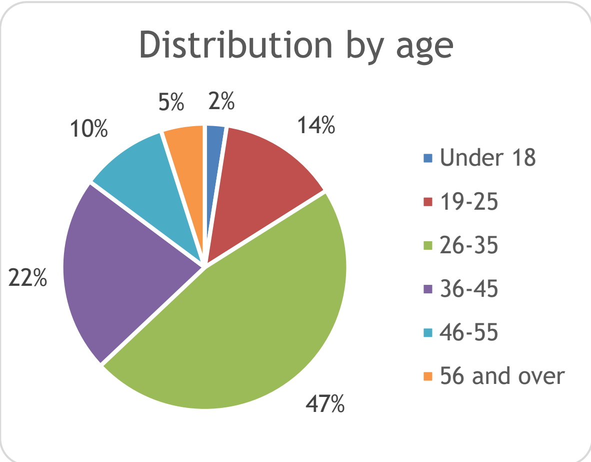
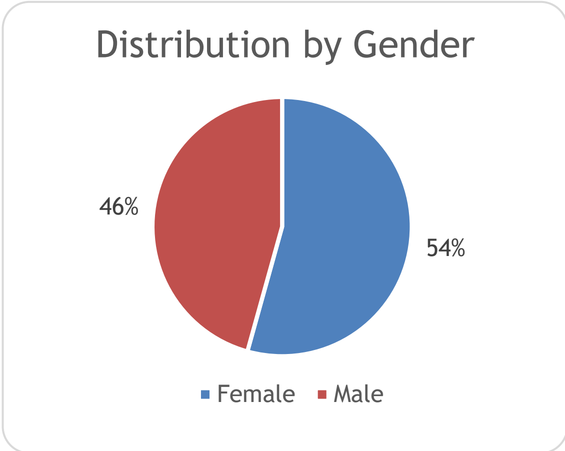


Figure 3.



The majority of the respondents (47 %) fall in the range between 26 and 35 years, another 22 % are aged between 35 and 45. About 15 % of the respondents are older than the age of 46 and another 16% are younger than 25. The lower level of participation of the latter two groups can be explained differently - the questionnaires were shared mainly through the social media, where the elder generations are less active in general, so less people from this age group could find the information about it and fill in the questionnaire. On the other hand, the younger groups of respondents might be interested in types of experiential tourism, different from heritage and culture-based one, and this could be the reason for their lower participation (Figure 2).

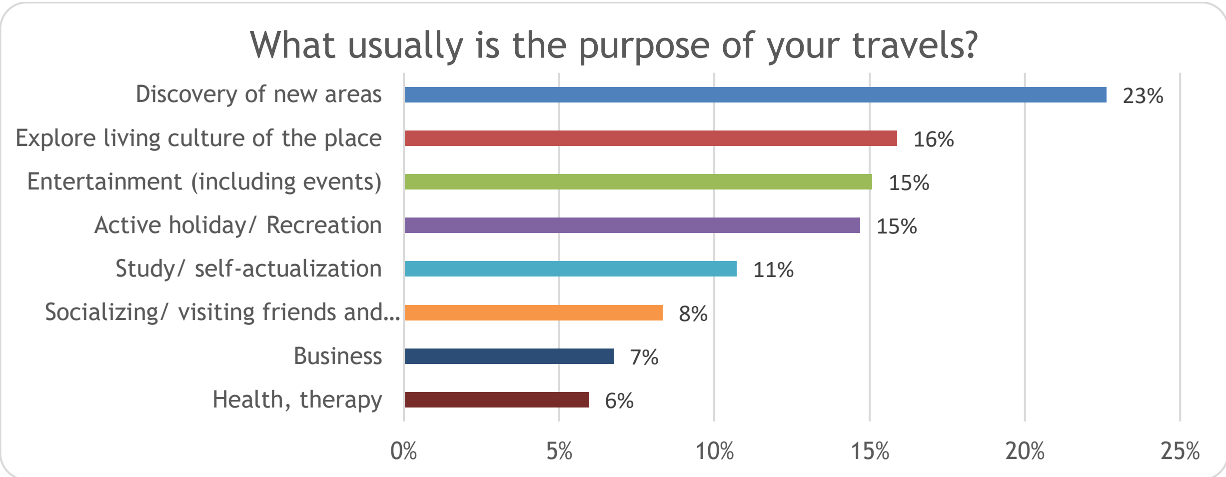
Both genders (male and female) are almost equally represented, which indicates that the topic of experiential tourism is gender-neutral (Figure 3).

Travelling habits and preferences

The main purpose of the survey was to understand better and assess the travellers' attitudes, perceptions, behaviour patterns and decision-making factors related to participation in experiential tourism activities. The core part of the questionnaire included four questions gathering information about these aspects.

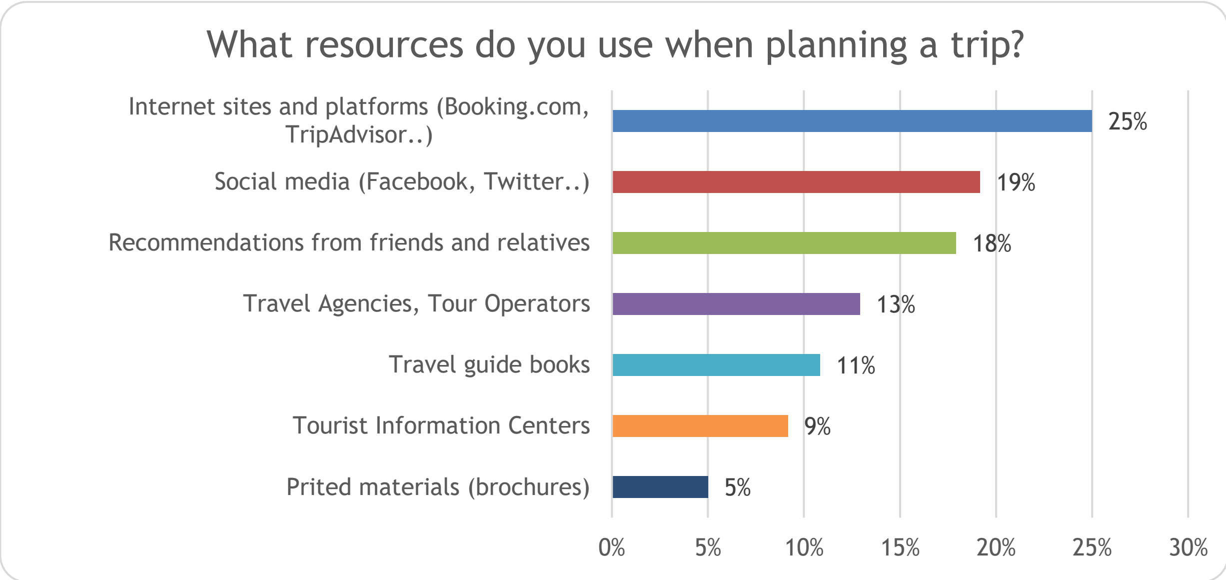
The first one was about the **usual purpose for travelling** and the respondents could mark several options, which fit their travelling intentions the best. The results show quite diverse preferences, however one can distinguish that all four options, which have gathered more than 10% of the votes are connected with **enriching experiences**: discovery of new areas (23%), explore the living culture of the place (16%), entertainment and active holidays (15% each) and study/self-actualization (11%). Even the option about socializing/visiting friends and relatives is below the above-mentioned ones - so, for the travellers the possibility to discover/experience/learn something new is more important than the social aspects of the travelling (Figure 4).

Figure 4. Distribution of the answers according to the usual purpose for travelling



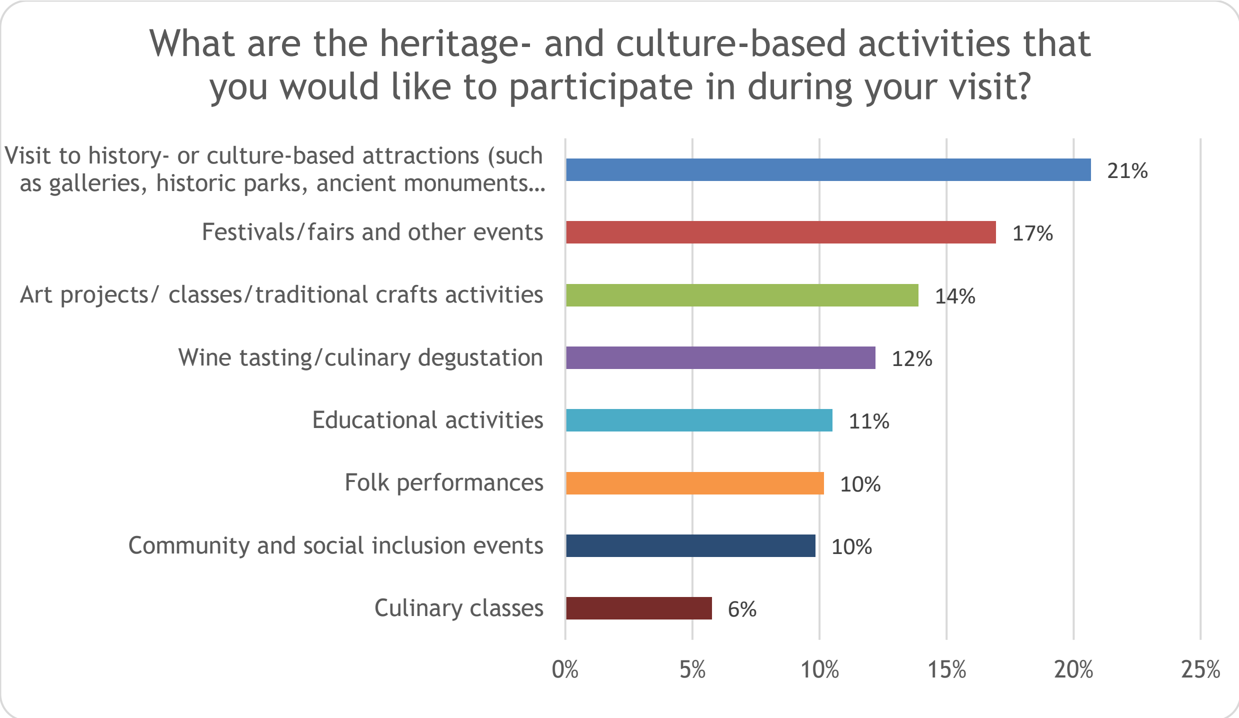
The second question was about the **sources of information, which the respondents usually use when planning their trips** (Figure 5). The two internet-based options have gathered the highest number of votes - 25% for information on specialised websites and platforms and 19% for the social media. The third most common answer is the recommendations from trusted people (friends or relatives) - 18% of the respondents have marked this option. This implies that the providers of tourist services should pay special attention to their presence on the internet as well as to "word of mouth", including positive recommendations within on-line interest groups. 13% of the respondents use the information provided by travel agencies and tour operators, and only 9% use the Tourist Information Centres when planning their trip. This means that the big majority of the participants of the survey tend to plan independently their trips and they mostly prefer online sources than physical ones (including printed materials and brochures - marked by only 5% of the respondents), when they prepare for travelling.

Figure 5: Distribution of the answers according to the sources of information used when planning a trip



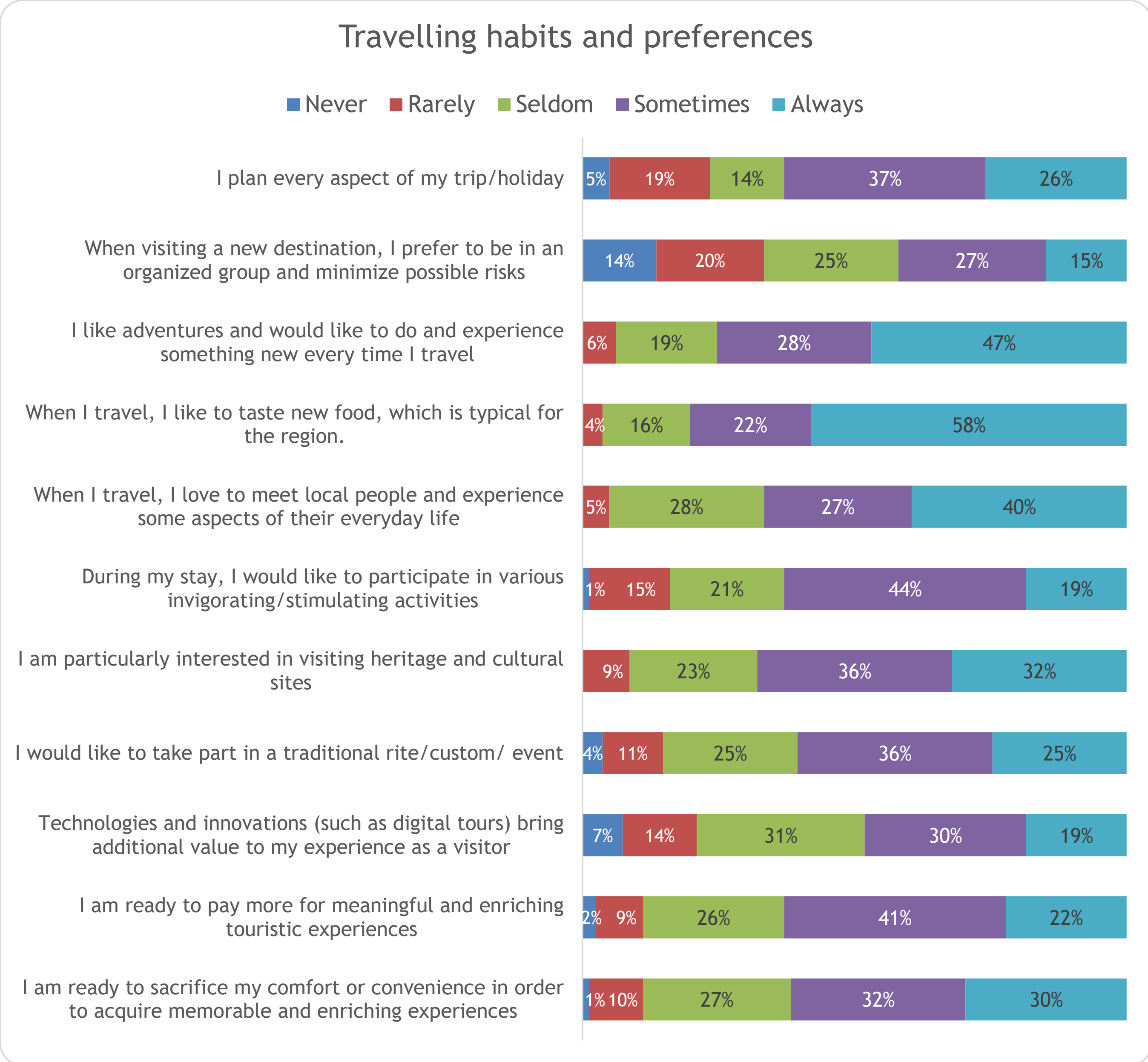
The third question from the survey was about the **culture and heritage-based activities**, which are preferred the most by the respondents (Figure 6). The most preferred option is "Visit to history- or culture-based attractions (such as galleries, historic parks, ancient monuments etc.)", which is marked by 21% of the respondents. The next three most-voted options are related to actual activities and experiences: the option "Festivals/ fairs and other events has gathered 17% of the responses, "Art projects/ classes/traditional crafts activities" has gathered another 14% and "Wine tasting and culinary degustation" - 12% of the vote).

Figure 6: Distribution of the answers according to the most preferred HCBET activities



The fourth question of the survey was aimed at exploring the **travelling habits and preferences of the participants** (Figure 7). 11 different statements were listed and each respondent was asked to indicate the extent to which these types of behaviour/attitude applies to them. When talking about attitudes, 63% of the respondents are ready (always and sometimes) to pay a higher price for it and 62% are ready (always and sometimes) to sacrifice their comfort in order to gain enriching and meaningful travelling experiences. A vast majority of the respondents prefer (always and sometimes) to experience something new every time they travel (75%), to meet the local people and experience some aspects of their everyday life (67%) and taste new food, which is typical for the region (80%). Organized travelling (associated with lower prices) is not a preferred option, and the reliance on technologies for augmenting the experiences is selective.

Figure 7. Distribution of the answers according to the travelling habits and preferences



2.3 Interviews with stakeholder representatives

The second part of the primary research involved representatives of the different stakeholders in the process of creation and provision of experiential tourism offerings were approached to assess the:

- providers' understanding of the concept "heritage and culture-based experiential tourism" by stakeholders,
- potential, opportunities and risks for the development of heritage and culture-based experiential tourism,

- needs for governmental support

The interview formats were adapted to the specific profiles of the different types of service providers in tourism. The research created a database of 120 contacts, out of which 25 agreed to be interviews or replied to the questions via e-mail.

The following types of stakeholders participated in the survey:

Table 1:

	Romania	Moldova	Ukraine	Turkey	Total
Public organizations	3	1	0	1	5
Accommodations	1	4	3	2	10
Tour guides	2	2	1	1	6
Tour agencies	0	0	3	1	4
Total	**6**	**7**	**7**	**5**	**25**

Understanding the concept "heritage and culture-based experiential tourism" by stakeholders in Romania, Moldova, Ukraine and Turkey

It is interesting to note that the stakeholders who participated in the survey had an idea of what experiential tourism is and this was one of the reasons why they agreed to discuss this issue with the research team. All 25 of them understood experiential tourism along the same lines as it is interpreted in academic literature namely as means of immersing into the visited place in terms of getting to know better the culture, traditions, lifestyle, to taste the local food and cuisine, to participate in local events and festivities, etc. By "culture" the respondents identify almost equally the historical aspects (mentioned by 9 of the respondents) and the contemporary culture - the way how people live now (mentioned by 7 of the respondents). 9 out of 25 respondents (or 36%) connect the heritage and culture-based experiential tourism as a visit to a certain place (historical site, monument or even an old village). 4 respondents identify the process of making meaningful memories for the visitors as another key aspect of the HCBET.

Opportunities, risks and challenges for the development of heritage and culture-based experiential tourism (HCBET)

The vast majority of the interviewees (23 out of 25) agree that there is a great capacity for development of HCBET, as it is an emerging niche that provides opportunities for development of sustainable business, which can run all year long (independently from seasons and the weather conditions). The major challenge seems to be the lack of support from the government, which has two dimensions:

- ✓ Insufficient (or no) support for the business (mentioned by 6 of the respondents)
- ✓ Lack of support for the sector in general: inconsistent policy in the field of tourism (mentioned by 2 respondents), need for better promotion of the country and its regions as a destination (mentioned by 4 respondents), poor infrastructure (mentioned by 3 of the respondents), corruption (mentioned by 1 respondent)

In addition, 3 respondents underlined the role of the governments to regulate this type of tourism properly, so the (natural and historical) resources do not get overexploited.

The marketing and the proper presentation of this type of tourism is mentioned as a challenge by a large share of the respondents. 4 of them expressed concerns that the people working in tourism and hospitality are not prepared enough to present and "sell" the heritage and culture-based tourism product to the visitors properly, which may lead to lack of interest on behalf of the tourists (mentioned by 5 respondents). 2 respondents pointed out that there is a need for better cooperation between the stakeholders from this field and a holistic approach for developing HCBET.

The COVID-19 and its effect on the sector

All 25 interviewees stated that the pandemic has had a strong impact on their work. While the 19 respondents indicated that the effect was strongly negative, still 4 mentioned that their organisations found a way to make a better use of the situation in terms of revising their organisational strategy, development of new products and improving their existing ones for the domestic tourists, launching short-term (daily) packages, creating supplementary on-line activities and improving their presentation on the Internet, as well as introducing new and improved safety measures.

Perception of the role of the government

All 25 respondents identified the importance of the public policies in the development of HCBET. According to the results, supportive actions from the government were defined as needed in the following directions:

- ✓ Improved conservation of the heritage sites (mentioned by 13 of the respondents). 3 of the respondents identify the importance of a proper legislation regulating the access of tourists and visitors and the way they the heritage sites get exploited, in order to ensure both - equal access to all and to prevent damage of the artefacts ("people should have access to the historic sites, but the government should take care not to overexploit them"; "the State should improve the legislation about "safety and promotion" of our cultural heritage", etc.)
- ✓ Support for the business, especially in the context of the COVID-19 pandemic (mentioned by 10 of the respondents).
- ✓ Improving the national tourism-related policy - "consistent and global program for the development of the tourism industry as a whole in the country and in the individual regions", "this type of tourism (HCBET) has to have a strong promotional campaign on the governmental level", etc.

- ✓ Improving the infrastructure (roads in particular) in order to make the rural areas more accessible and attractive for tourists (mentioned by 3 of the respondents).

Offered HCBET Activities

The tour operators and tour agents consider HCBET as event- and occasion-based and have experimented with offering participatory activities. They include local activities in the programmes they offer), handicraft masterclasses and art workshops (offered by all 10 accommodation providers) and possibilities to taste traditional foods and drinks from the region (all 10 accommodation providers have their own restaurants, where they can offer their special menu; the tour guides and tourist agencies involve a visit to traditional restaurants in the tours they organise). They also offer short-term packages on occasion of national and/or religious holidays. The 4 public organisations, represented in the survey as well as 2 accommodation-providers organise regular activities for national celebrations that attract many visitors and have turned into annual events over the years. These events are included in the offerings of the local business stakeholders.

Marketing Channels

All 25 respondents mentioned that they use the Internet to promote themselves to potential tourists - mainly through social media. The majority of them maintain several profiles in order to reach more clients. The tour agencies and accommodation providers have their own websites, maintained in several languages. All 10 accommodation providers promote themselves through specialised platforms (such as TripAdvisor, Booking, LonelyPlanet), as well.

Sustainability and Innovations

Sustainability and innovations were embedded in the questions referring to the business models and HCBET-activities that are offered to the tourists. Aside from the predefined questions, the issues of sustainability and innovations were discussed informally with the tour guides and tour operators, who participated in the research. They seemed to link sustainability mainly with its environmental aspect (e.g. the need to preserve the nature which tourist use for recreations and the need to use less polluting technologies when providing the basic services such as solar energy and co-generation in hotels and restaurants, towel-reuse practices, zero-waste cooking, etc.). The social and economic aspects were not directly mentioned, but the respondents were tacitly aware of them when they raised the issue of proper conservation of heritage sites and suggested that the visits there should be kept within healthy limits. In fact, the respondents were aware of the possible trade-off between the economic, social and environmental aspects of the development of tourist industry even though they did not name this sustainability. The connotation with innovations was interpreted in view of using ICT in order to improve the market presentation of the companies and attractions. Experimentation with virtual and/or augmented reality or digital performances were considered as ad hoc activities, which indicated that there is a niche for development there. New business models were considered as innovations, still the respondents replied that tourism and hospitality were regarded in their countries as "traditional" and not innovation-intensive sectors.

3. Conclusions and implications for action

The needs assessment affirms that the culture- and heritage based experiential tourism (HCBET) has high but underutilized potential in the Black Sea Regions of Romania, Moldova, Ukraine and Turkey.

The main challenge before the analysis in this chapter is the diverse profile of the four countries in view of their tourism and hospitality sectors. It is difficult to make comparisons between Turkey, which is an established destination for international tourism, even though its Black Sea destinations are not as developed as the Mediterranean ones, Romania with its emerging destinations, Moldova, where the tourism sector is the least developed in Europe, and Ukraine, which has been struggling to utilise its potential against the background of the ongoing military conflict.

The main common feature of the Black Sea regions of Romania, Ukraine and Turkey has been the relatively high value of domestic tourism as well as of cross-border tourism in the case of Moldova, Ukraine and Turkey before the pandemic, which provides for excellent opportunities for offerings based on common and shared heritage. During the summer season of 2020 Black Sea tourism featured domestic and cross-border travels and the situation is expected to remain the same in 2021 as well.

The desk research revealed that the experiential or experience-based tourism is implicitly considered in the government policies of the observed countries. Only in Romania, the national strategy for tourism links culture and heritage with experience and innovations. In the other three countries, the focus is rather on special interest based tourism based on culture and heritage. In this regard, a more integrated approach is necessary in the policy documents as well as pathways for proper localisation of the strategic aims and priorities in the development strategies of the regions and communities, where culture is created and preserved. In addition, the tourism and culture policies should be made coherent in order to preserve and conserve the unique resources of the Black Sea Area while avoiding overexploitation. Better use should be made of national and international flagman initiatives that promote the cities and regions across Europe - such UNESCO list, European Capital of Culture, European Youth Capital, Council of Europe Years and so on.

The primary study confirmed that both tourists/visitors and service providers are intersected and support the development of HCBET. Both groups identify two key elements of the travelling experience: the visit to a certain place and the experience, related to it. But, while for the travellers the act of visiting the destination is the leading one, the service providers identify the experience (and the memories related to it) as more important. Accordingly, the primary task of the service providers is to attract the visitors to a certain place/destination. In this regard, both the survey respondents and academic researchers call for improved national branding of their countries, improved accessibility in the form of infrastructure and higher security standards.

In terms of information gathering, the tourists/visitors mainly use the Internet and social media. This is recognized by the service-providers who invest much more time and resources for their presence on the Internet. However, regarding HCBET they are expected to use on-line media not only for promotion, but also for augmenting the presentation and experiencing of the cultural and historic heritage. Better interconnectedness in the BSB will contribute to this. The lag in technological advancement at a time when tourism services are linked with emerging technologies and digitalisation of the economy is a problem. Targeted training needs to be offered so that the tourism offerings and participatory activities use ICT and on-line technologies both to create experiences and to preserve destinations and resources.

Experiences become central when the visitors get to a place. Sustainability and innovation were not explicitly mentioned as integral parts of this process, even though the survey respondents were intuitively aware of their importance. Visitors tend to use technologies to intensify their experiences only under condition and therefore should be used wisely by the service-providers. A holistic approach is needed, including the local community, local and regional authorities, along with the service providers. It is the personal involvement that builds in tourists a sense of care and responsibility, and form a long-lasting memorable associations with the visited destinations.

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