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PRO EXTOUR

Black Sea
CROSS BORDER COOPERATION

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

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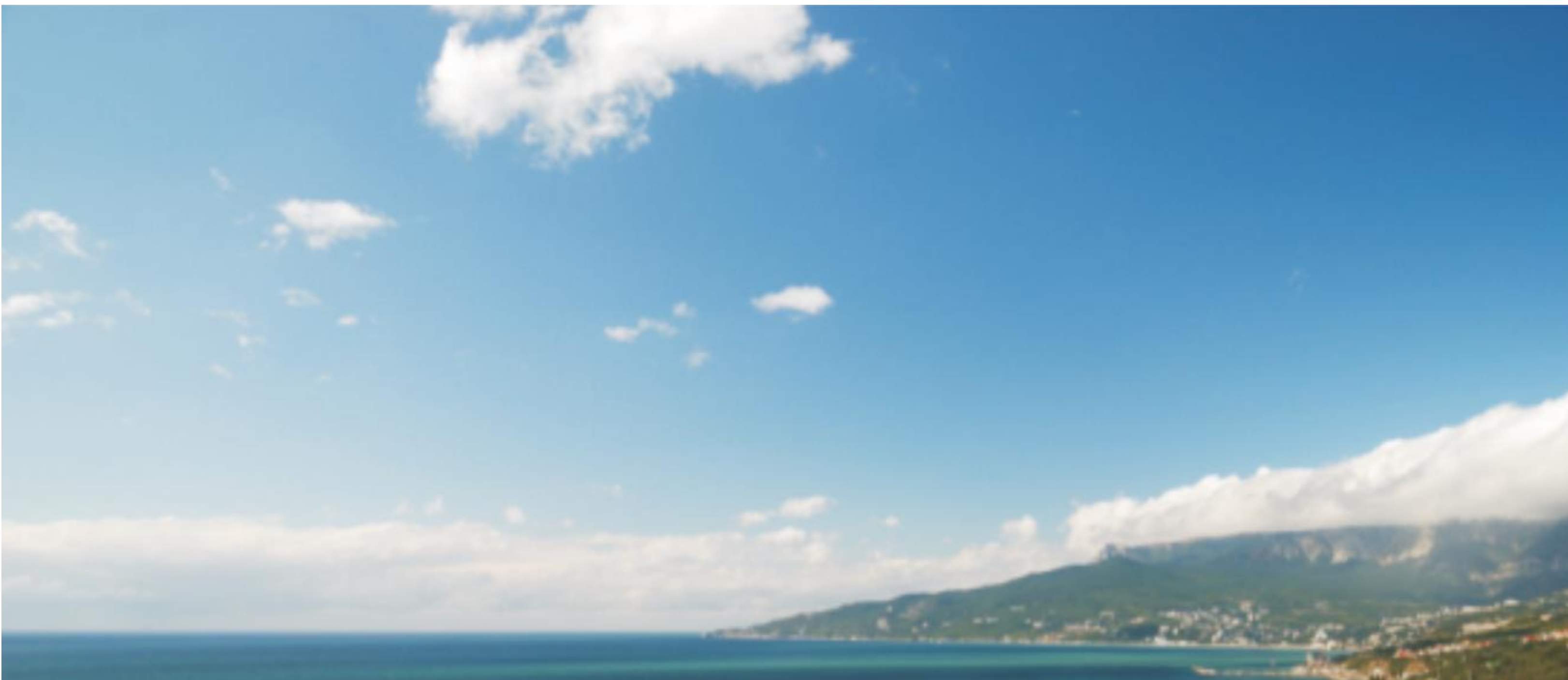

Potential for the Development of Experiential Tourism in Romania, Moldova, Ukraine and Turkey within the Black Sea Basin

Need Assessment Report

COMMON BORDERS. COMMON SOLUTIONS.

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Content

Forewords

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. Altogether, those documents provide a thorough analysis of the issues that need to be considered and addressed in designing policies and actions for the promotion of experiential tourism and hospitality as sustainable development paths for the Black Sea Basin.

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. On this basis, general policy goals are outlined and compared with the results of the needs assessment reports, submitted by the other project partners.

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). Tourism potential in the Black Sea Basin area is rich and diversified, including SPA and medical tourism, culture, nature, eco and agro-tourism, adventure, cave and mountain tourism, and tourism related to cuisine, rivers, hunting and diving as well as winter tourism (skiing) (BSC, 2019). 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.

(i) regional economy

According to one of the last pre-COVID-19 surveys of the organization of the Black Sea Economic Cooperation (BSEC), the Black Sea region with its 12 countries (including Armenia, Azerbaijan, Bulgaria, Georgia, Moldova, Romania, Russian Federation, Ukraine, Albania, Greece, Serbia and Turkey) represents 5% of the world's population, 37% of Europe's and generates 4% of the global and 14% of Europe's GDP (UNTWO, 2018). Until 2016, the region attracted 9% of world's and 19% of Europe's international tourists (overnight stays) with a positive trend of 6% annual growth in arrivals versus 4% for the world on the average (UNTWO, 2018). The figures include the results of countries that are not part of the ENI CBC Black Sea Basin Programme, but they present a good overall picture of the area. Moreover, Ukraine, Romania and Moldova, showed an increase in arrivals 7.12% and 18% respectively for the period 2016-2017 (UNTWO, 2018).

BSEC identified the main development opportunities for tourism and hospitality as based on positioning as a multi-destination area, improved intra-regional connectivity and offering of multi-destination tourism products and routes focused on experiences rather than places (BSEC, 2018). In that, the unique natural and cultural heritage of the area provides a niche for sustainable development. BSEC puts development of tourism and protection of cultural heritage into a single priority of operation (BSEC, 2018).

(ii) sustainability

A main challenge for the tourist sector in the Black Sea area refers to sustainability in all its aspects (Dimadama & Chantzi, 2014). The countries here lag on their sustainability index compared to western and northern Europe. Despite the positive growth rates, the reliance on mass tourism was severely challenged in the last decade due to the overexploitation of the resources in many regional destinations. In 2020 individualized travelling and special-service tourism emerged as the new mode of functioning of the sector in the post-pandemic period. Experiential tourism can be regarded as part of the solution as it focuses on the interaction with the service and activity providers rather than on mere consumption of delivered services.

(iii) COVID-19 Pandemic

Tourism and hospitality sector, along with the culture and entertainment are amongst the most affected industries by the COVID-19 pandemic in the Black sea region (ENI CBC Black Sea Basin Programme 2014-2020, 2020). The lockdown and the restrictive measures have put many kinds of experiential activities on hold or transferred them to the on-line platforms of the virtual consumption.

The new situation calls for dramatic changes in the tourism paradigm and new attitude towards travelling. Some of the global trends initiated in 2020 include the shifting from international to domestic and local travels, automation of services, prioritizing safety concerns, preferences for small-scale catering and accommodations, etc. The trends conform with a recent OECD research, according to which international tourism is expected to have decreased with about 80% in 2020 and the suggested pathways of recovery include the prioritization of domestic tourism and targeted government support to this end; building-up sustainable recovery and greener tourism systems, digital transitions and new business models (OECD, 2020).

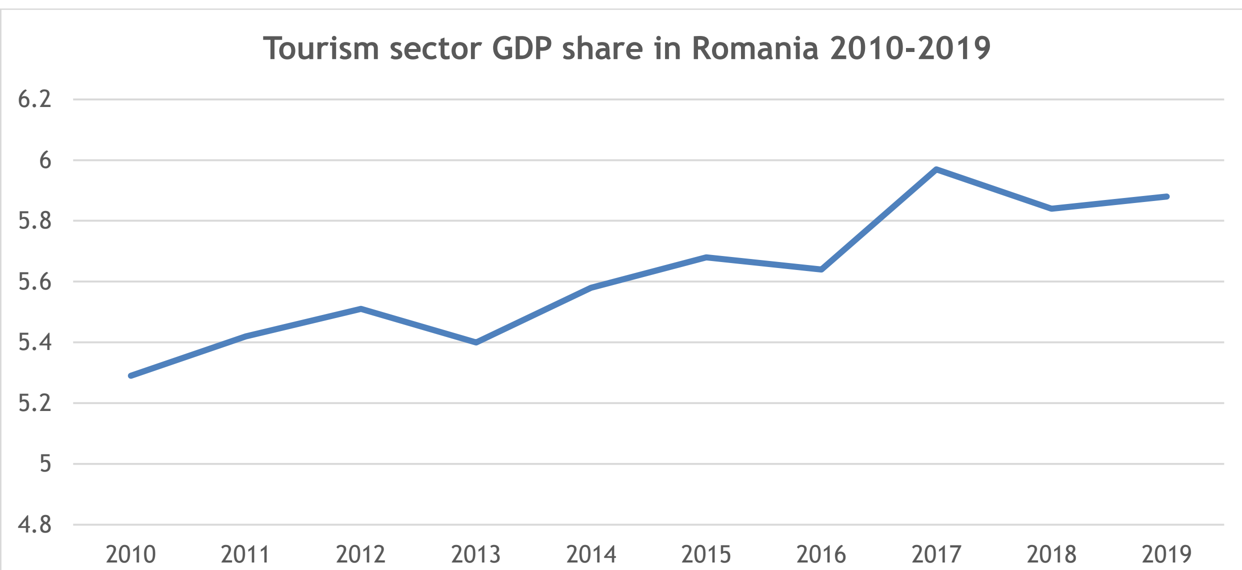
Along this line the main task of the researchers was to identify how stakeholders in tourism and hospitality perceive experiential tourism and to what extent they recognize it as a development prospect and opportunity in the post-pandemic period.

1. Tourism systems in Romania, Moldova, Ukraine and Turkey and Opportunities for Experiential Offerings

The research covers four countries - Romania, Moldova, Ukraine and Turkey - with the particular specifics of their tourism sectors and performed research regarding the potential of experiential tourism in each of them.

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.



Source: https://www.statista.com

The tourism industry in Romania relies on the historic heritage sites, medieval castles, mountains, seaside resorts and the Danube Delta (Statista, 2021). There are 30 architectural, historic monuments and archaeological sites that have been included on the UNESCO built heritage list (UNESCO 2015), 6600 additional monuments represent the rich cultural heritage of the country together with 670 museums. In additions, traditional folk art is strongly represented in Romania and partially acknowledged abroad while the rural areas revive a wide range of traditions and folk events (Postelnicu & Dabija, 2016).

According to many experts and researchers (Simon, Marzilu, Andrei, Marinescu, & Dimitrascu, 2011), seaside tourism has not been the flagman of Romanian hospitality industry. The physical limitations are at place, as the coastline is suitable for tourist purposes only for a distance of approximately 82 km north to the Bulgarian borders. Along this line, there are 18 settlements, only 13 of which are established as tourist resorts of national interest (Simon, Marzilu, Andrei, Marinescu, & Dimitrascu, 2011). Marine erosion and the negative effects of industrialisation led to many environmentally-bound problems that divert visitors (Simon, Marzilu, Andrei, Marinescu, & Dimitrascu, 2011). 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 potential for launching experiential tourism activities is obvious. Also on the policy-making level the trend is reconfirmed by the National Tourism Development Strategy of Romania which 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. Accordingly, the four operational objectives of the Strategy are to:

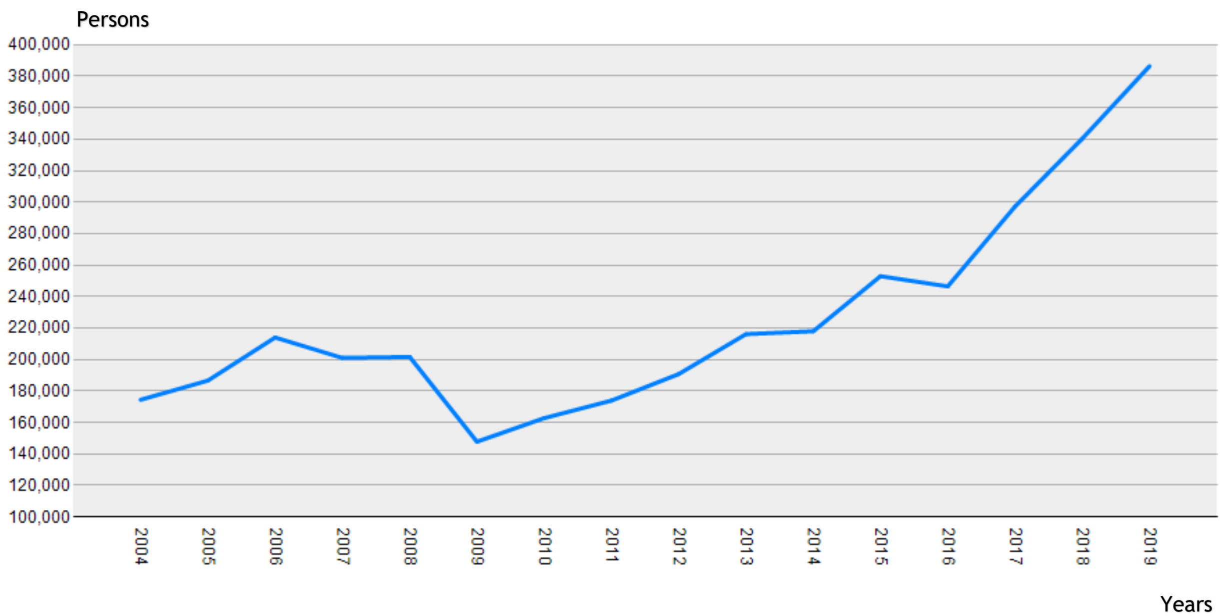
- Improve the connectivity and quality of tourist infrastructure,
- Support the private sector innovation,
- Enhance the quality of visitor experiences and services at destinations,
- Strengthen tourism policy-making capacity, increase digitalisation and better align marketing mechanisms and campaigns.

The concrete implications of COVID-19 pandemic on Romanian tourist industry are still in the process of evaluation. However, it is expected that the urge towards sustainability and new business modelling shall be sustained here as well. The environmental problems that are the ones to be tackled with in Romania's Black Sea area even before the pandemic.

Moldova

Researchers and experts 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.

Total number of foreign tourists who stayed at
the accommodation units in Moldova (by years)



Source: statbank.statistica.md

The country is landlocked between Romania and Ukraine (even though considered as part of the Black Sea basin), relatively small both in territory (33,843.5 km2) (Government of the Republic of Moldova, 2021), economic size (GDP per capita of 4,503.5 USD despite the average high growth of 5.5% in 2019) (World Bank Group, 2021) and population (3,542,708 people in 2019) (National Bureau of Statistics of the Republic of Moldova, 2021). The market for domestic traveling is limited and accordingly the focus should be placed on inbound tourism.

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).

However, it is also recognized that the country has a potential to attract visitors due to its wine, gastronomy and rural life, which are considered as the country's most valuable resources for tourism growth, as well as for regional development of the distant rural communities.

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. There are 18 recognized ethno-cultural minorities in Moldova - the Ukrainians, Russians, Bulgarians, Gagauzians, Jews, Byelorussians, Poles, Germans, Gypsies, Greeks, Lithuanians, Armenians, Azerbaijanians, Tatars, Chuvashs, Italians, Koreans, Uzbeks - which have associations that operate in the form of communities, societies, unions, centres, cultural foundations, and so on. All those minorities are entitled to sustain, revive and develop their traditions, cultures and arts and offer unique diverse events and attractions to visitors (Government of the Republic of Moldova, 2021).

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 to improve visitor experiences
- Organisation of flagship initiatives and cultural events
- Government-business cooperation to improve the business environment for tourism (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).

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 generally decreased in the period 2001-2020 with fluctuations (Knoema, 2020). As in Moldova, the tourism industry has been volatilely growing between 2001 and 2013 in absolute terms in current prices when it accounted for 7.64% of the GDP. There is a marked decrease both in absolute terms and GDP-share after 2014 with a growth rate that has been either negative or close to zero. The number of inbound tourists also decreased substantially after 2014 due to the military actions between Ukraine and Russia, centred on Crimea and Donbass (Knoema, 2020).

Source: The World Bank Group

Negative political factors impeded the development of the sector such as

- Security and the military actions in the east of Ukraine, including the annexation of Crimea by the Russian Federation
- The sensitive ecological situation and the reiteration of the Chernobyl disaster
- Imbalanced use of the resources of country with the historic, cultural and natural ones being neglected
- Unsatisfactory tourist infrastructure
- Corruption scandals that gain international attention (Karabaza, Kozhukhova, & Ivanova, 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, Kozhukhova, & Ivanova, 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). In addition, Ukraine has significant capacity for marine and coastal tourism development. According to the Maritime Doctrine of Ukraine for the period up to 2035, the main tasks of the state marine policy are to support and develop maritime activities at the technological, environmental, social level to meet the needs of Ukrainian society, to build a strong competitiveness in the world market, and to get a full use of the country's geopolitical potential (Stryzhak, Akhmedova, & Aldoshyna, 2020).

The Strategy of Tourism and Resorts 2017-2026 in Ukraine defines national policy for tourism along the following terms

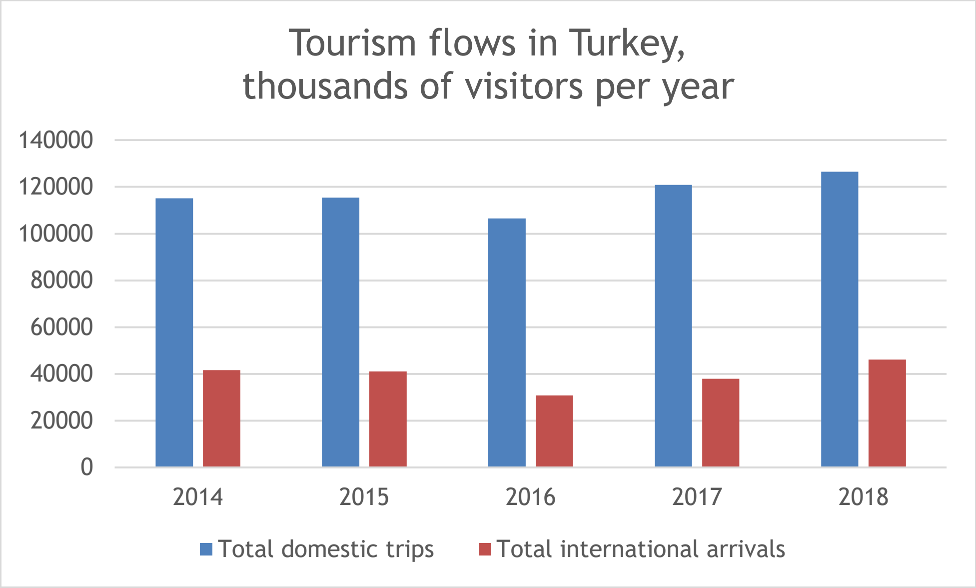
- Safety of tourists
- Regulatory framework
- Development of tourism infrastructure
- Human resources development
- Marketing policy of tourism and resorts (Korsun, 2017).

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.

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).



Source: *OECD Tourism Statistics*

Since the 1980s, Turkey has developed predominantly as a mass tourism destination. For many years, economic growth was a prevailing target at the expense of sustainability and in environment protection in particular (Khan, 2020). Still, the last adopted policy document regarding the development of Turkey's hospitality industry indicate that this is about to change.

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, extending the tourism season, improving the service quality, using tourism as a tool for regional development and alleviating the burden from the visited popular destinations, improving the environmental performance of the sector (Khan, 2020). Furthermore, 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 as a destination - as a result thematic focuses are adopted on a yearly basis e.g. 2018 was the Year of Troy, 2021 - the Year of Patara, etc. (Ministry of Culture and Tourism, 2021). 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, Avci , Kılınç, & Walls, 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. Seven provinces in it belong to the area of the Black Sea Basin.

With its diverse relief and cultural richness, they provide good alternatives to develop tourism out of the crowded areas (Okumus, Avci , Kılınç, & Walls, 2012). However, the eastern Black Sea region of Turkey has been popular among the domestic tourists (Okumus, Avci , Kılınç, & Walls, 2012). The region is popular for nature-based activities but also for experiencing local cultures and varied cuisine. 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, Avci , Kılınç, & Walls, 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 to building a regional brand.

While the COVID-19 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

Methodology

In order to study the attitudes and perceptions of various stakeholders involved in experiential tourism, cultural and heritage-based in particular (HCET), 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. The same is valid for the questionnaires and forms for the semi-structured interviews. However 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 contacted and 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.

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). The distribution of the participants among countries is presented as follows:

Figure 1

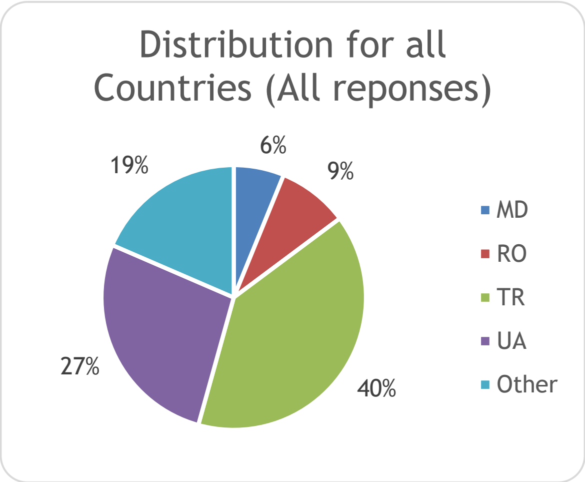
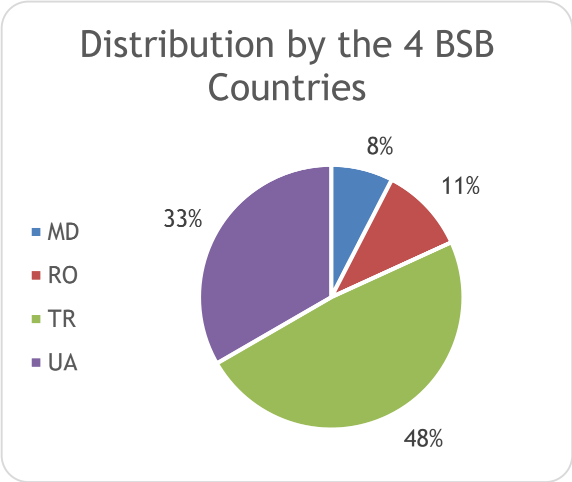


Figure 1a



As evident from the charts above, translating the survey questionnaires into the official (or widely used) languages in the countries observed can highly increase the likelihood of receiving responses from their residents. As there was the possibility for filling in the GoogleForms in Russian and Turkish languages, the majority of responses received are from residents of Turkey

(48%) and Ukraine (33%), while Romania and Moldova are less represented (19% in total), having the options to fill in the forms either in English or Russian[1].

Demographic profile of the respondents

Figure 2*: Distribution of the responders among all the received replies*

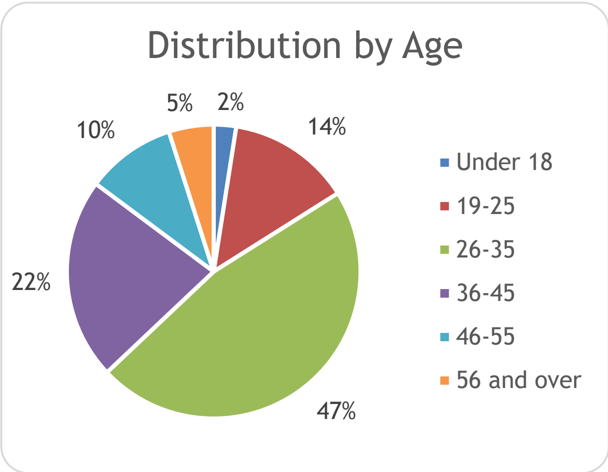
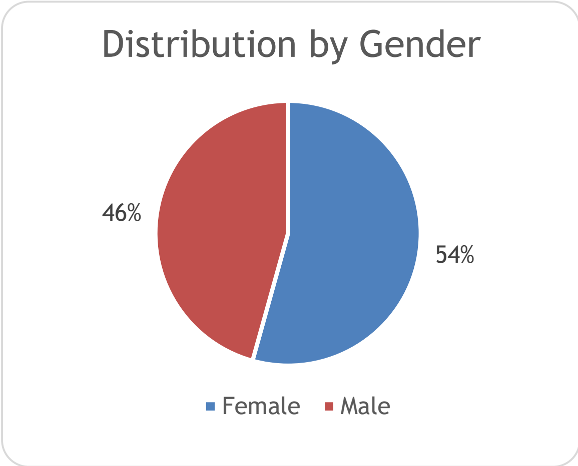


Figure 3*: Distribution of the responders by gender*



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).

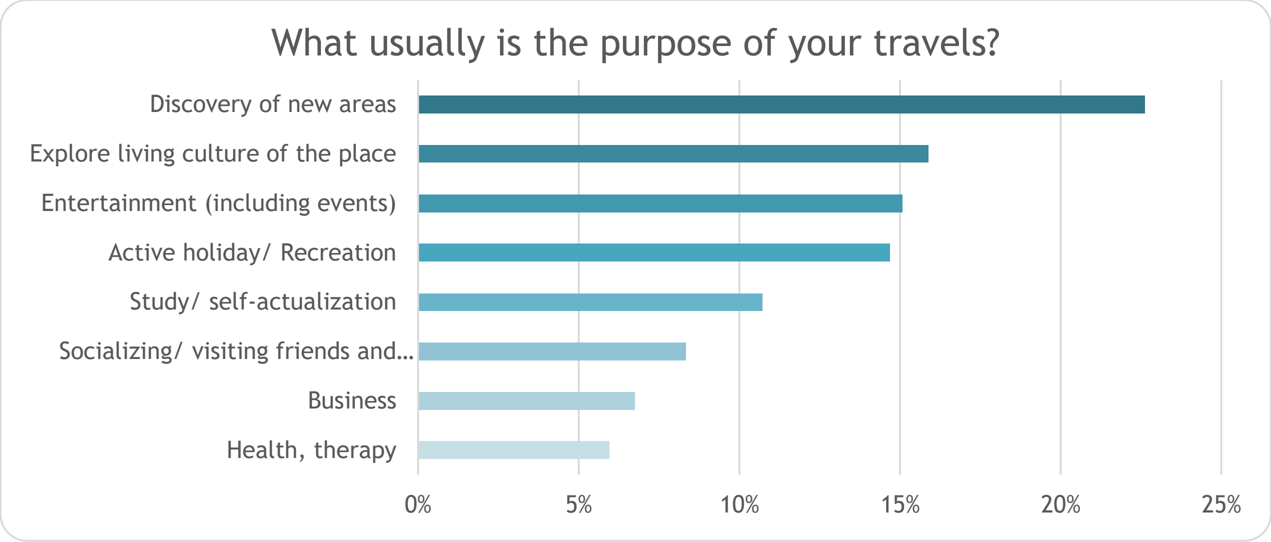
[1] The survey is performed by a Bulgarian higher education institution. It avails of native Turkish and Russian-speaking staff who supported the researchers in communication. Unfortunately, the unavailability of a Romanian-speaking team member resulted in a weaker activity in Romania and Moldova.

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 and in the charts below the results are presented.

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, presented in the chart below, 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 has a lower weight than the above-mentioned four options - so, for the travellers the possibility to discover/experience/learn something new is more important than the social aspects of the travelling.

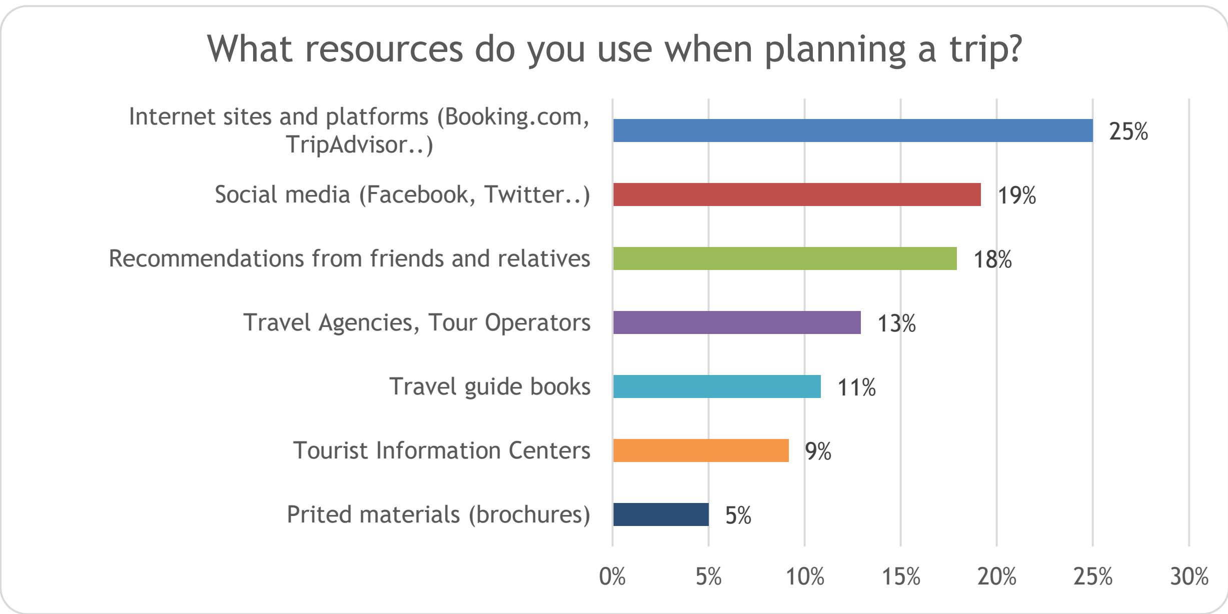
Figure 4: *Distribution of the answers according to the usual purpose for travelling*



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% of the respondents search for information on specialised websites and platforms and 19% use social media. The third most common answer is the recommendations from trusted people (friends or relatives) - 18% of the respondents have marked this option. Based on these results, it can be concluded that the providers of tourist services should pay special attention to their presence on the internet. In addition, it should be very important for them to ensure delivering positive experiences to their guests, so they can recommend them to other travellers (by leaving a positive review on the internet platforms, or by talking about them with their friends, relatives or colleagues).

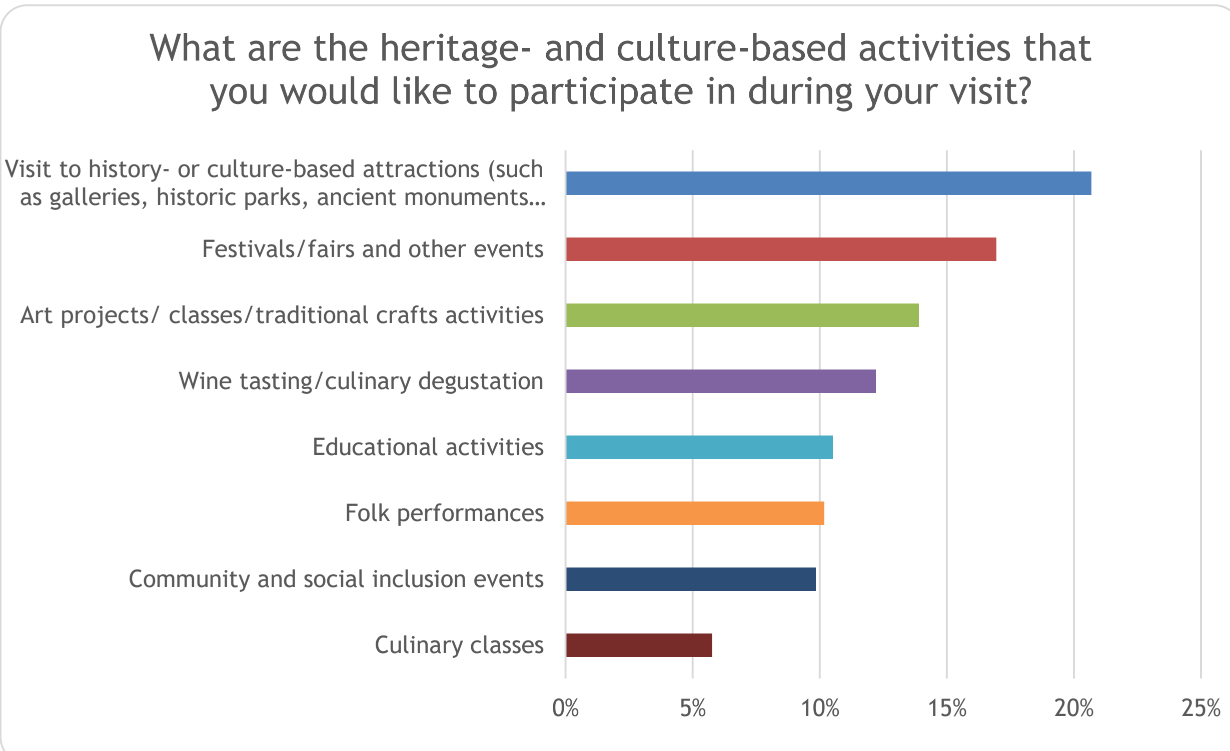
13% of the respondents use the information provided by travel agencies and tour operators, and only 9% use the Tourist Information Centres when planning their trip. This means that the big majority of the participants of the survey tend to plan independently their trips and they mostly prefer online 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*



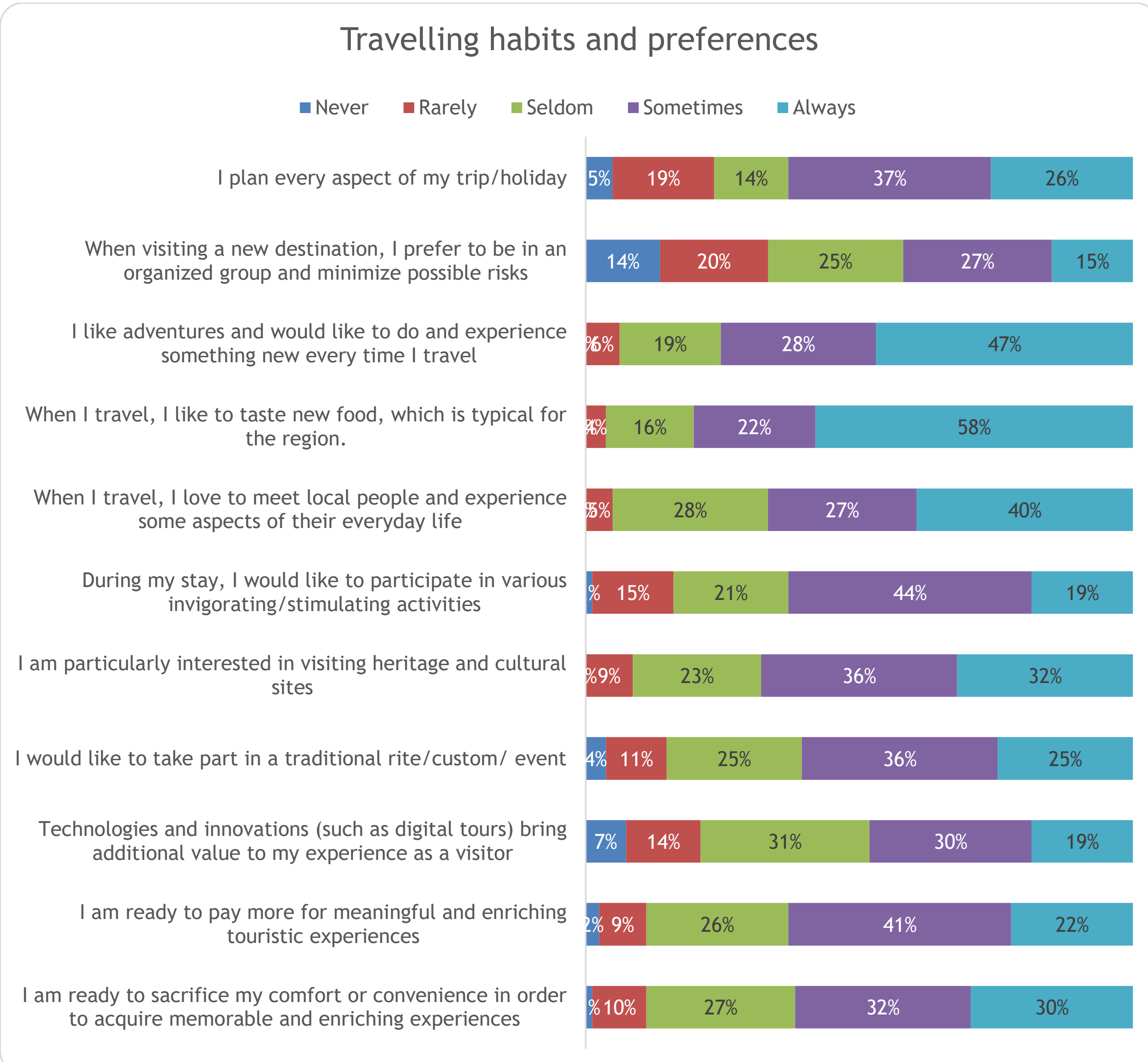
The third question from the survey was about the culture and heritage-based activities which are preferred the most by the respondents (Figure 6). The most preferred option is “Visit to history- or culture-based attractions (such as galleries, historic parks, ancient monuments etc.)", which is marked by 21% of the respondents. This means that the leading motivational factor to travel is the act of visiting the authentic places, where the cultural heritage is presented. 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. In other words, the greatest motivators for travel are: (1) visiting the actual place and (2) experience the culture - attending activities and events, related to it and tasting authentic dishes/wines from the region.

Figure 6: *Distribution of the answers according to the most preferred CHB 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%).

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



These results of this survey prove that the visitors are interested in gaining meaningful experiences, related to the cultural heritage of a given region, even offered at a higher price and not necessarily delivered in the most comfortable setting. Most of them plan their trips independently, using internet-based sources of information and recommendations by other travellers.

Interviews with stakeholder representatives

The second part of the primary research was conducted in the form of interviews along with open-question templates, elaborated for the whole PRO EXTOUR research. 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 and hospitality and made available in English, Turkish and Russian. The research created a database of 30 organisations per observed country (about 120 contacts in total) and contacted them via email, social media or on-line conference tools to organise respondents. As a result, 25 interviews were performed and the information was provided in writing via completed interview-sheets or via transcribing the interviews by the researchers based on the performed conference calls.

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**

The interviews were adapted to the profiles of the responding stakeholders. The results from them are presented as summary herewith, while the transcript with the full answers given as an Appendix to this document.

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. It is interesting to mention that 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 HCET.

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

The vast majority of the interviewees (23 out of 25) agree that there is a great capacity for development of such kind of tourism, 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). Some respondents mentioned that the national and international donor programs targeting culture and cultural-heritage conservation can be used to support start-up activities in experiential tourism.

When discussing the challenges and risks however, the respondents list quite many factors that might negatively affect the development of HCET. The major one 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 underline the role of the governments to regulate this type of tourism properly, so the (natural and historical) resources do not get overexploited.

Another identified challenge is the COVID-19 crisis and its consequences not only for the business, but also for the travellers and tourists - 6 respondents expressed concerns, that even after the crisis is over and there will be possibilities to travel freely, the tourists might not have enough money to afford that.

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 HCET.

The COVID-19 and its effect on the sector

The negative impact of COVID-19 crisis on tourism and hospitality was observed when the stakeholder database was gathered: the researchers identified 28 SMEs from the region, offering interest-based activities, that stopped functioning in 2020. In addition, representatives of two of the active ones (according to their websites/pages on the social media) to whom the researchers have sent an invitation to take part in the research, responded that at the moment their teams are working on different projects in sectors, which are less affected by the crisis.

The research team has included a question about the COVID-19 crisis and its effect on the activity of the interviewees. All 25 of them stated that it 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 identify the importance of the public policies in the development of HCET. 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) - providing funds and organization of the conservation activities and maintenance of the historical sites and facilities (like museums, archaeological sites, visitors' centres, etc.). In addition, three 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). However, 6 of the interviewees clearly state that they are lacking this kind of support in their countries.
- ✓ 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 (HCET) 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 HCET Activities

The tour operators and tour agents consider HCET 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 authorities, 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, Lonely Planet), 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. Summary and conclusions

The needs assessment affirms that the culture- and heritage based experiential tourism (HCET) 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 from the point of view of development 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 regions are not as popular 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 an ongoing military conflict. Still the questionnaire- and interview-based research identified some common issues that can be considered by the policy-making institutions in all four countries.

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 CHBET. 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 CHBET 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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