

RURAL & CULTURAL TOURISM – SERBIA, CROATIA & MONTENEGRO

By Nikola Kovacevic
December 2020

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Tara River, Montenegro

1. Introduction

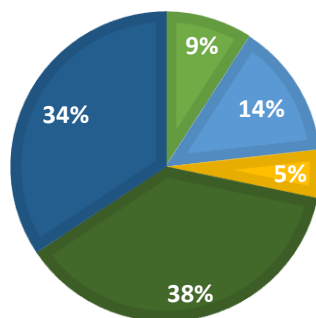
Over the years the travel industry has had setbacks such as the 2008 Economic Crisis and of course the recent Coronavirus which has had unprecedented results. With international tourist arrivals plunging down [to 80% and tourism spending](#) not expected to return to pre-COVID-19 until 2024, the future may look bleak. However, time has also proved that this industry is resilient and been able to adapt. Two trends that have been gaining momentum prior to and during the Coronavirus are cultural and rural tourism. [With the preference of open spaces](#) that allows for social distancing activities such as hiking, adventure sports and national parks have grown in popularity.

While tourism has had setbacks over the past couple of months new strategies are being incorporated that will allow culture and tourism employees to continue to work closely and develop a product that is [suitable for new audiences](#). This could include learning new skills but also understanding what current travelers seek. Before we dive into the trends circulating cultural and rural tourism let us define them.

*This research, inclusive of **514 respondents**, between **October-December 2020**, **71% which are foreigners** (not citizens of either Croatia, Serbia or Montenegro) aimed to evaluate the potential rural and cultural tourism have for all three countries. This included analyzing future correspondence between Serbia, Croatia and Montenegro that could develop a Balkan-regional offer for foreign and local tourists. This report is also an initiative that aims to partner with future regional travel stakeholders to develop platforms that will allow these stakeholders to cohesively prepare for the 2021 Spring-Summer Travel Season.*

DISTRIBUTION OF RESPONDENTS

■ Croatia ■ Serbia ■ Montenegro ■ Europe ■ Middle East



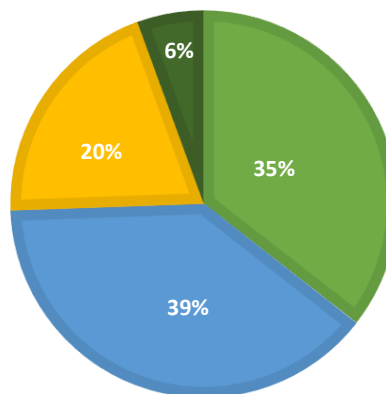
About the Author

Nikola Kovacevic has several years in the hospitality and tourism segment, particularly in market research and assessing consumer needs and trends. Currently based between the United Arab Emirates and Serbia working on various topics that assist travel stakeholders such as hotels, tourism organizations and tour agencies capture their target audience. The work experience is complimented with a Bachelor's degree in Hospitality & Events from the Swiss Hotel Management School in Leysin, Switzerland, a Certificate in Hotel Real Estate & Asset Management from Cornell University and a Certification in Hotel Industry Analytics from STR-AHLEI.

This research would not have been successful without the support and collaboration from the team at [NVOI Hospitality](#) and [Veselinov Tourism Consulting](#). Along with the participants who assisted in providing valuable data such as the [Tourism Organization of Western Serbia](#), [Meneghetti Wine Hotel & Winery](#), [Lazena Tourism Agency](#) and the [Istria Tourist Board](#).

HOW OFTEN DO YOU TRAVEL FOR LEISURE?

■ 1-2 per year ■ 3-4 per year ■ 5-7 per year ■ Monthly



Prior to venturing into the specifications on cultural and rural tourism, the aim was to see generally how often do consumers travel for leisure.

2. Cultural Tourism

[40% of all European tourism](#) is represented by some form of cultural tourism which in parallel preserves historical sites, promotes tradition and generates revenue for small businesses. Cultural tourism includes travelers visiting a destination's attractions such as [artistic events, fairs and other similar events](#). Nevertheless, cultural tourism can also reflect the encounter a traveler has with the locals. Eating with the locals, visiting local villages and witnessing local traditions without visiting official archeological sites or museums. In fact, one of these rising trends is gastronomy which is regarded much more than food.



Gastronomic tourism has become an emerging trend [to protect cultural heritage](#), particularly in rural areas where it creates jobs and develops infrastructure. The concept of eating local produce that is locally grown adds value to the visitor. There is also an unconscious factor, knowing that the quality of this produce can only be sustained at this specific destination. Tomatoes consumed in Tuscany will not have the same taste as those flown from Tuscany to a foreign supermarket that requires a 6-hour flight. The difference in the taste may be questionable but the psychological factor that eating local and experiencing local culture is ever present.

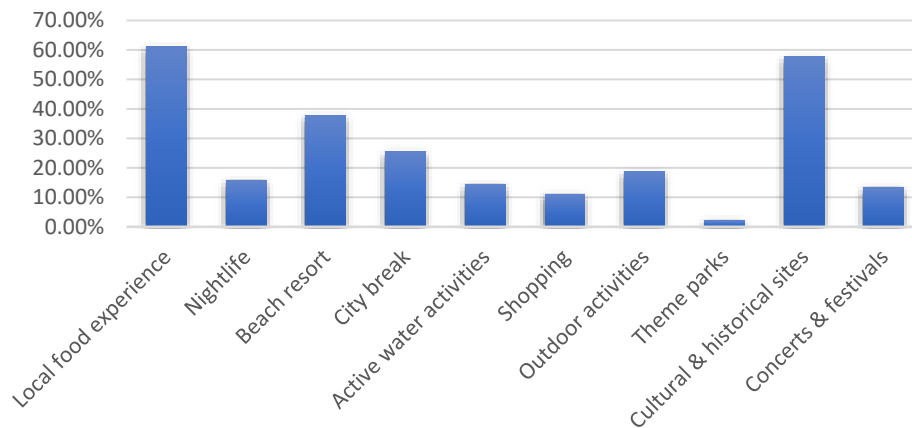


Manufaktura Authentic Balkan Food & Drinks,
Belgrade Serbia

The interest in gastronomy tourism has grown in recent years alongside its intrinsic promotion of regional identity, economic development and traditional heritage. Having identified its competitive edge, more and more destinations around the world are looking to position themselves as destinations for gastronomy tourism.

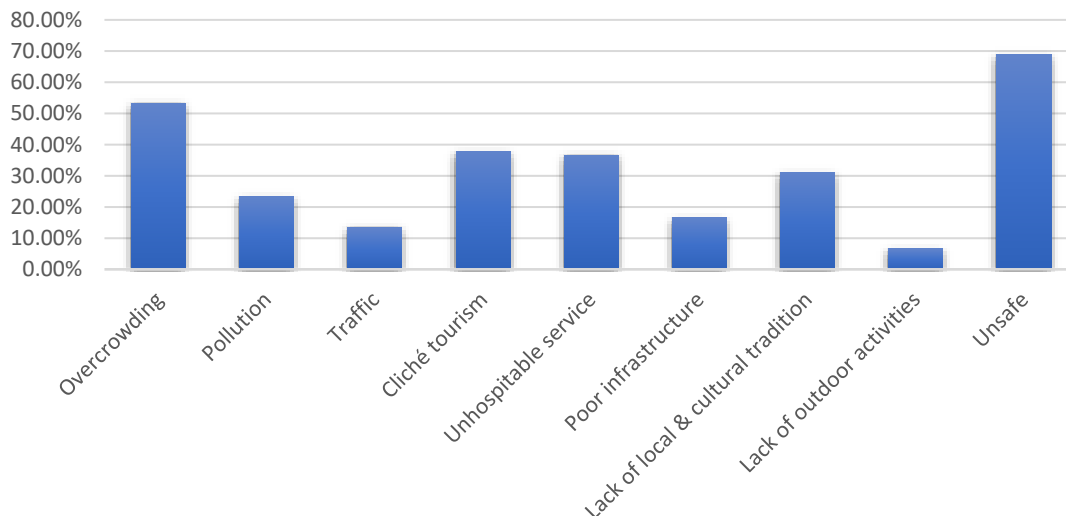
*Zurab Pololikashvili Secretary-General,
World Tourism Organization (UNWTO)*

Q. What type of attractions/activities would you like to do during your next trip? Choose top 3



As noticed in the survey **61% of respondents chose 'Local food experience'** and **58% of respondents chose to visit 'Cultural & Historical sites'** during their next trip. This information should be an eyecatcher for tourism authorities and travel agents when it comes to promoting destinations or planning tours.

Q. What do you see as an immediate turn-off for a destination? Choose top 3



38% of respondents chose 'Cliché tourism' as a major turn off which was the third highest turn off, compared to **'Overcrowding' in second** and **'Unsafe' in first**. Other top turn offs for travelers includes **'Unhospitable service'** and **'Lack of local & cultural traditions'** which surprisingly rate higher than pollution and poor infrastructure. Obviously, this is not to say that pollution and poor infrastructure should be neglected.

3. Rural Tourism

It is established that cultural tourism has a strong contribution to local economies but what is further fascinating is that [90% of cultural routes in Europe are through rural areas](#). This is why the correlation between rural and cultural are ever so essential. For tourism authorities, and for tour agencies. The term rural refers to areas that are non-urbanized that includes places such as parks, forests, countryside, mountains and many more. Naturally this type of tourism attracts plenty of outdoor activities that blend with the natural surroundings. In parallel, it can be termed as 'sustainable tourism' considering it is usually in outdoor areas but one should really look at [rural tourism more as an umbrella](#) that includes divisions such as Agri-Tourism, Events & Festivals, Sports Tourism, Heritage Tourism and Eco-Tourism. These divisions naturally have plenty of outside activities that are very much appreciated during the Coronavirus. One example being glamping, that has gained momentum over the years.



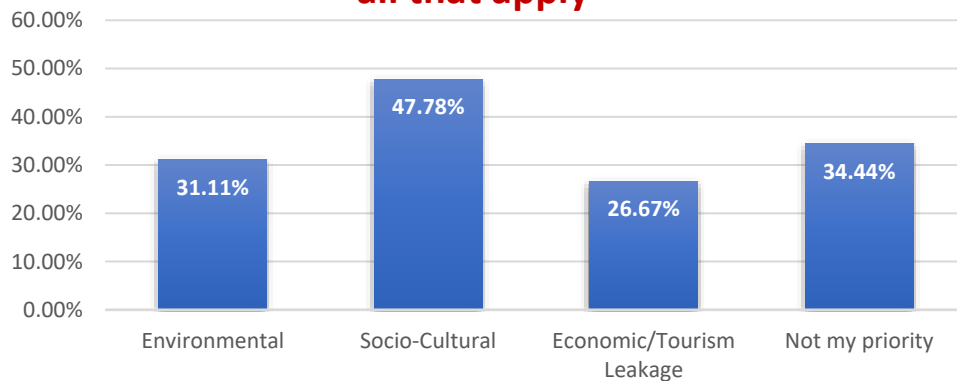
Meneghetti Wine Hotel & Winery – Relais & Chateaux, Istria Croatia

4. Combining the Cultural and the Rural to fit the Sustainable

When mentioning Eco-Tourism, it is worth revealing the sustainable aspects of both cultural and rural tourism with references to the socio-cultural, economic and environmentally friendly benefits. [A sustainable tourist or destination](#) would make optimal use of their environmental resources, respect the socio-cultural authenticity of host communities and ensure long-term economic benefits for all stakeholders particularly local employees, host communities and firms.

There is a misconception that sustainable only refers to environmental aspects but the other two are just as important. In fact, the survey showed that in terms of sustainable measures respondents are more concerned about the socio-cultural impact they have during their travel.

Q. When you plan your next trip would you consider any of the following? Select all that apply



The link between sustainable, cultural and rural tourism lies in these three factors (environmental, socio-cultural and economic). While this report does not focus on sustainable tourism it does encompass parts of it. Considering rural encourages outdoor activities, it is natural that the protection of the environment is adhered or at least it should be. One of Serbia's natural wonders on the Tara mountain, [Lake Perucac](#) has its annual cleaning in September but with growing tourism figures one has to ask if this method is sustainable or stricter measures on waste need to be implemented.

[Montenegro is looking](#) to shift the mindset for some of their tourists to a more culturally aware tourist, who on average spends more. The purpose also being that the cultural tourist will spend on other industries that can include manufacturing, preservation of heritage and minimize tourism leakage.

The concept of tourism leakage is naturally an issue across many top tourism destinations. Croatia which has become one of the main tourist destinations in the region due to its coastline has witnessed [major economic leakages](#) due to low levels of per-capita tourist spending which limits the multiplier effects for spending on other areas along with the repatriation of profits by foreign-owned enterprises which limits the positive contribution of tourism receipts.

We see here through these samples the involvement of sustainable tourism in rural and cultural tourism. There is the obvious notion that destinations seeking to increase visitor figures need to be cautious on the environmental impact but also enabling local and independent businesses to thrive.

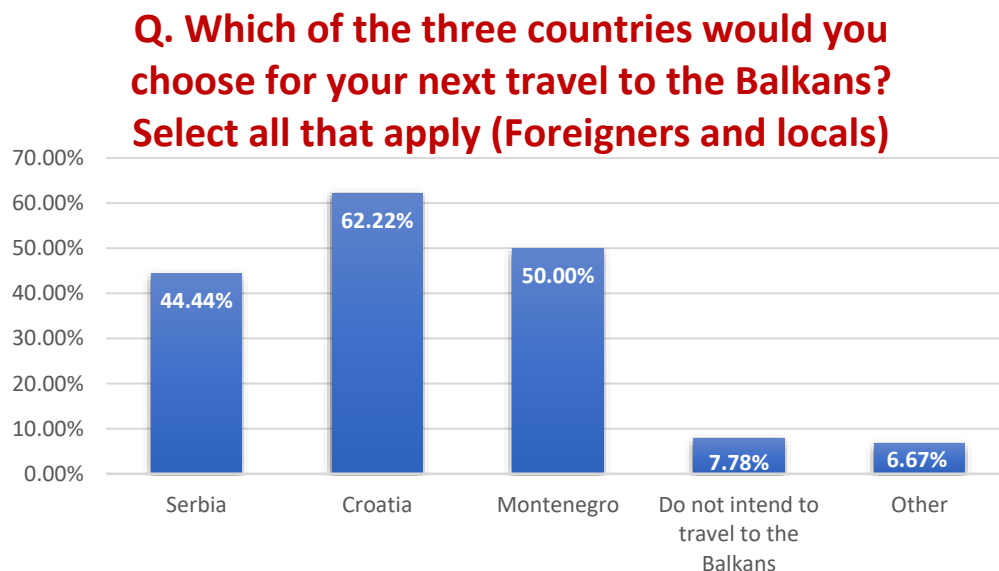
Only in this manner can the rural and cultural aspects be secured and maintained for future visitors.

Miroslav Radjen, the Managing Director of the Tourism Organization of Western Serbia mentioned:

‘In order to preserve the natural abundance of the mountains and forests we host obligatory training sessions of the local population. This training aims to teach locals on how to preserve their region but also to realize the importance of maintaining a serene ambient due to the business it provides for the local population. Without the willingness of the local population to participate in maintaining a preserved and sustainable image their businesses could eventually suffer.’

5. Balkan Region

With this in mind the search diverges into three countries, Serbia, Montenegro and Croatia. The aim is to understand the offers each country has and considering their bordering geographic location and overlapping cultures it would add value if there is a Balkan regional offer in terms of rural and cultural tourism. The notion behind focusing on the three countries exhibits the idea that the three are still considered undiscovered destinations. While popular destinations such as Hvar and Dubrovnik have become idyllic hotspots there is still far more to discover, particularly on the rural and cultural aspect which is sometimes put aside.



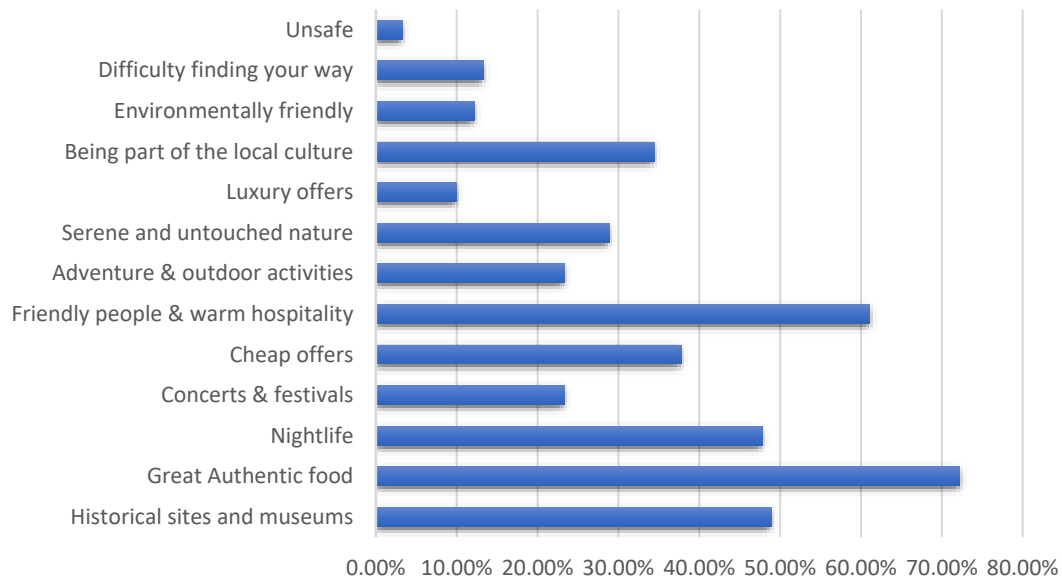
While the preferences are similar, Croatia leads the list at 62%. Let us see how respondents associated each of the three Balkan countries.

Full of hiking trails and wild animals that
calls this home ? Can you guess the name of
this mountain?

Serbia

Tara National Park & Lake Perućac

Q. Top Associations with Serbia



The top 3 associations respondents have with Serbia are 'Great Authentic Food' at 72%, 'Friendly people & Warm Hospitality' at 62% and 'Historical Sites & Museums' at 49%.



Golubac Fortress where the Danube river is at its widest, 5.5km

What is interesting and motivating for the culinary segment in Serbia is that **36% of the respondents that seek 'Local food experience' for their next trip already associate Serbia as a place with 'Great Authentic Food'**. Considering gastronomy is used as a means to preserve culture and tradition, this should be a sign to hotels, restaurants, DMCs and other travel providers how and where to place emphasis on their marketing campaigns.

While the remaining top 2 associations (Friendly People & Warm Hospitality and Historical Sites & Museums) are a positive gesture towards the cultural and rural offers in Serbia, aspects such as 'Outdoor/Adventure activities' at 23% and 'Serene & Untouched nature' at 29% show moderate results.

Nightlife and cheap offers remain ahead of these other two segments and while nightlife and cheap offers might not be a negative connotation these figures portray that work is needed in changing the mindset of foreigners. Especially when we consider the number of national parks, adventure activities and outdoor tours that Serbia has to offer and has been developing in the last couple of years.

From rafting and hiking in the Tara National Park or Djerdap National Park, to the Via Ferrata and mountain climbing at the Ovčar Kablar Gorge, mountain climbing or hiking at Stara Planina or skiing at Kopaonik. Certain regions market their offers slightly better, particularly in Western Serbia where the top reasons that tourists (foreign and local) come to the region are 'Culture, Sport/Outdoor recreation, Gastronomy and history'.

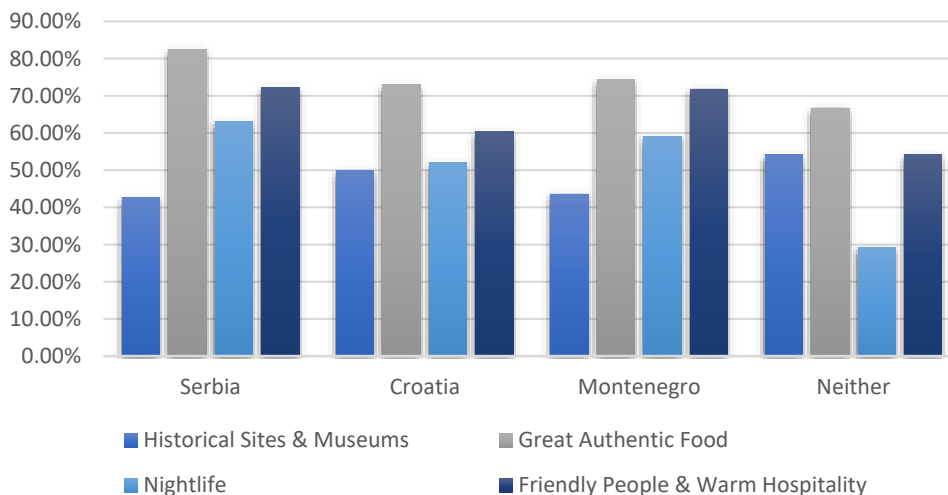
**Via Ferrata, Ovčar-Kablar Gorge,
Western Morava River**



Stara Planina, Eastern Serbia



Top Associations with Serbia



The results above represent the top four associations based on people who travelled to Serbia, only Croatia, only Montenegro or neither of the three countries.

Those who have travelled to Serbia (Serbian citizens and foreigners) the food aspect increases to 82% compared to 66% for those that did not travel to either country. The two major increases between 'Neither' and 'Serbia' are 'Nightlife' and 'Friendly People & Warm Hospitality' which skyrockets by approximately 30%. However, in this case **the 'Historical Sites & Museums' choice decreases**. Perhaps this might be a signal to Serbia's tourism authorities to emphasize Serbia's historical and cultural sites which it surely has an abundance across the country but are not as exponential as Serbia's gastronomic and nightlife offer. We could also assume that the reason 'Nightlife' has such a massive increase is that the predominant number of visitors stay between Belgrade and Novi Sad which are the major nightlife hubs of Serbia. Hence, there needs to be an emphasis on exploring the rest of the country with the provided tours, infrastructure and so forth.

Monastery Manasija, founded in the 15th Century by Despot Stefan Lazarević, Serbian Ruler, Knight of the Order of the Dragon



‘Many of these destinations and activities in Serbia are still ‘untouched’ and serene even to local tourists who usually travel outside of Serbia during the summer months’

The above comment was stated by **Mirijana Knežević the Managing Director of Lazena Tours**. In the summer of 2020, the majority of Serbian citizens decided to explore their country due to COVID-19 complications of traveling abroad. **Miroslav Radjen, the Managing Director of the Tourism Organization of Western Serbia** said that the Tara National Park and Western Serbia in general;

‘Witnessed a 35% occupancy jump compared to 2019 and accommodation was fully booked for the months of July, August and even parts of September.’

While it is unclear if this trend with local tourists in Serbia will continue summer 2021, the evidence shows that there is potential. While there are tours and numerous adventure options, there is a lack of restaurants and accommodation in some of these popular regions in Serbia. Lake Zaovine or Lake Perucac have only one restaurant that is within a 10km proximity and during peak months these are, as expected at full capacity with plenty of visitors having to wait or refused a table.

In 2018 Serbia had 1.7 million tourist arrivals and there has been steady growth, [particularly from 2015 onward](#). Naturally a decrease in foreign tourists is expected for 2020 but the recent data on local tourists and with a potential easing of the virus in 2021 there is plenty to look forward to as a rebound.

5.1 Travel Assumption Affected by visiting Neighboring Countries

It is interesting to note when we view the bar graph on the previous page, for those that visited Montenegro or Croatia the results slightly begin to take shape to match the results for those who have visited Serbia. From what they witness in either Montenegro or Croatia they begin to anticipate what the travel package will be in Serbia, contrast to a foreigner who has not visited either country. Of course, the respondents who visited Croatia and Montenegro also includes Serbian citizens but when we consider that 71% of respondents are foreigners, we can still support this fact on ‘forming an assumption of the neighboring country’.



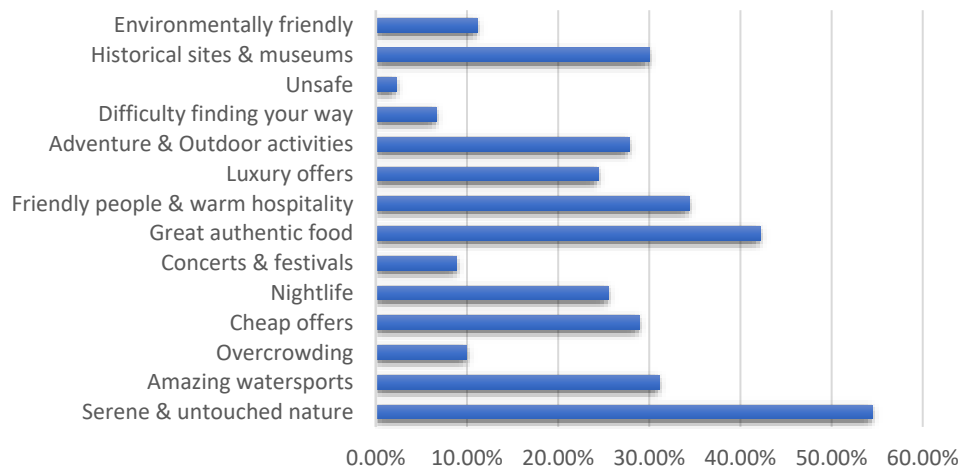
Montenegro

Our Lady of the Rocks &

St. George's church, Bay of Kotor

One of these islands is manmade
Can you guess which one?

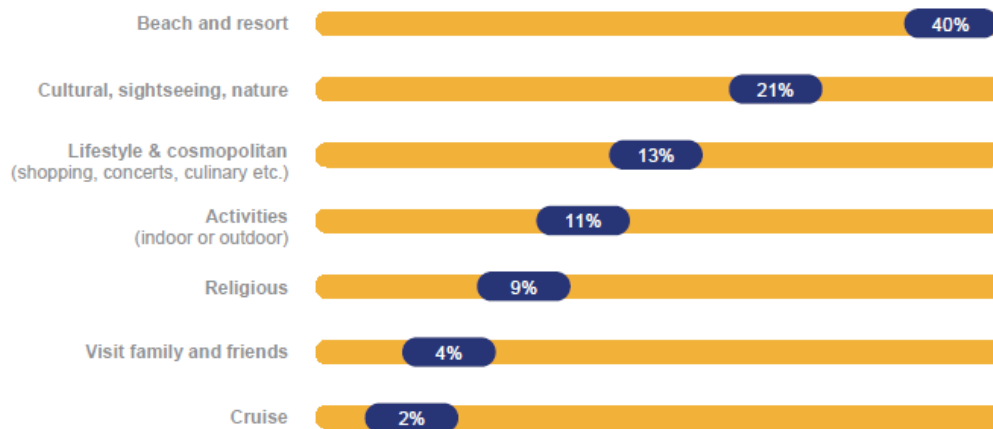
Top Associations with Montenegro



54% of respondents associate Montenegro with 'Serene and Untouched Nature' followed in second place at 42% is 'Great Authentic food'. Completing the top 3 at 34% is 'Friendly people and Warm Hospitality'. It is worth mentioning 'Amazing watersports' as the fourth association at 31% considering that the coastline on the Adriatic Sea is Montenegro's major tourist attraction. Similar to Serbia there is this perception of food and friendly hospitality which will be noticed in Croatia's results as well. It might even come as a surprise that it leads over 'Amazing Watersports'. Yet if we look at the image that [Montenegro's Tourism Organization](#) broadcasts it includes images of gastronomy, adventure and an abundance of 'Serene and Untouched Nature'.

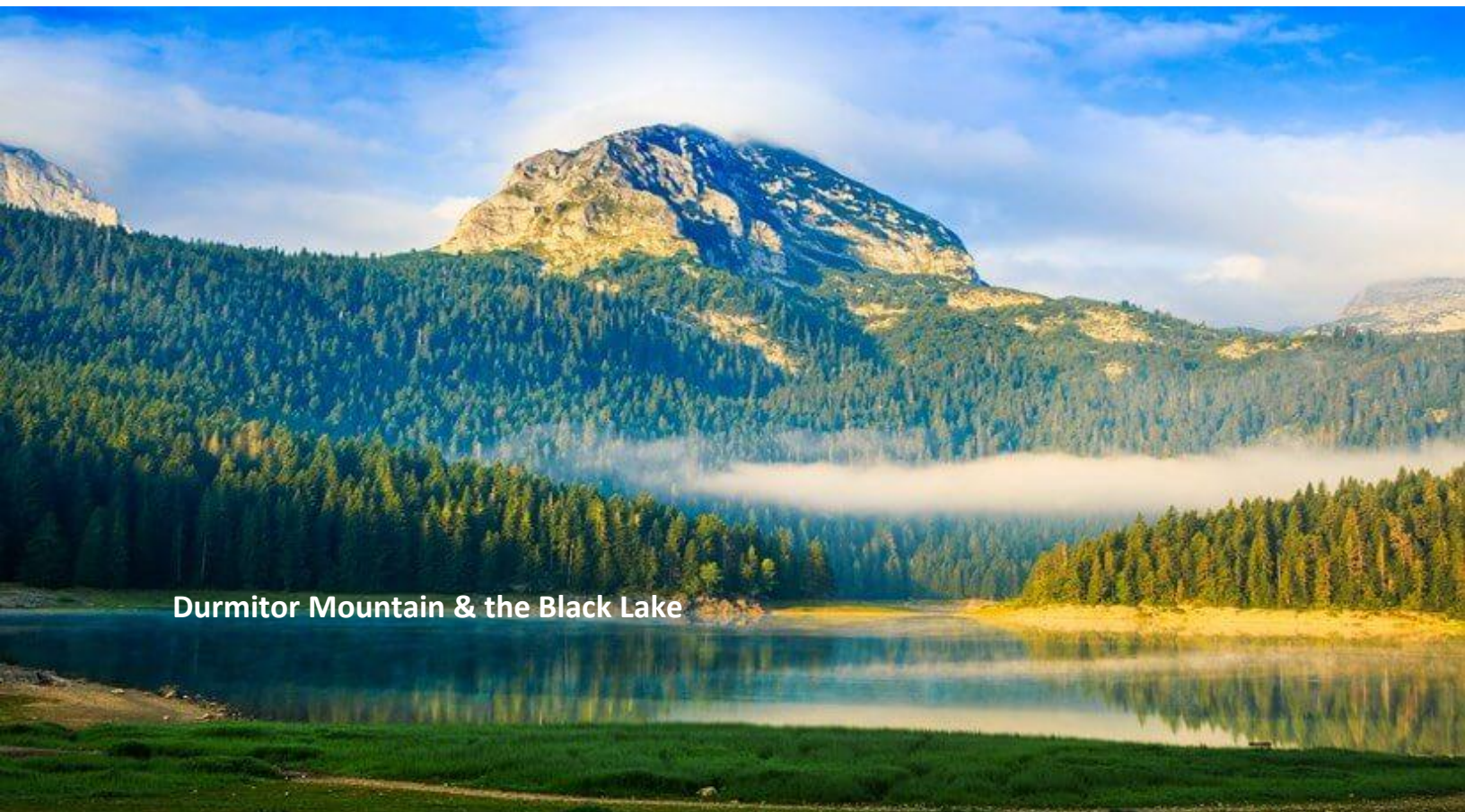
After all, Montenegro's phrase is 'Wild Beauty' which in ways paraphrases 'Serene and Untouched Nature'. This message has enabled to witness consistent growth, with approximately [2 million visitors in 2018](#).

This notion of untouched nature gives Montenegro's tourism board an edge in regards to the Coronavirus pandemic. Considering the preference to avoid crowds and the lockdown restrictions, the idea of trekking through the Tara Canyon, Durmitor Mountain, Skadar Lake or the beach at Ada Bojana does provide the visitor with an abundance of 'freedom' and 'safety'. Additionally, there is the added value of potential recreational activities and witnessing an active lifestyle that in parallel boosts the immune system. While this report does not study directly the perception of the Coronavirus in relation to travel, we can see from other reports and their findings that support this evident preference towards outdoor activities in natural and crowd-free areas. Insight Out Consultancy's (2020) report that was released in May 2020 evaluating traveler's perception post-lockdown measures, found that 20% of respondents would choose 'Cultural, sightseeing & Nature' as their first trip.



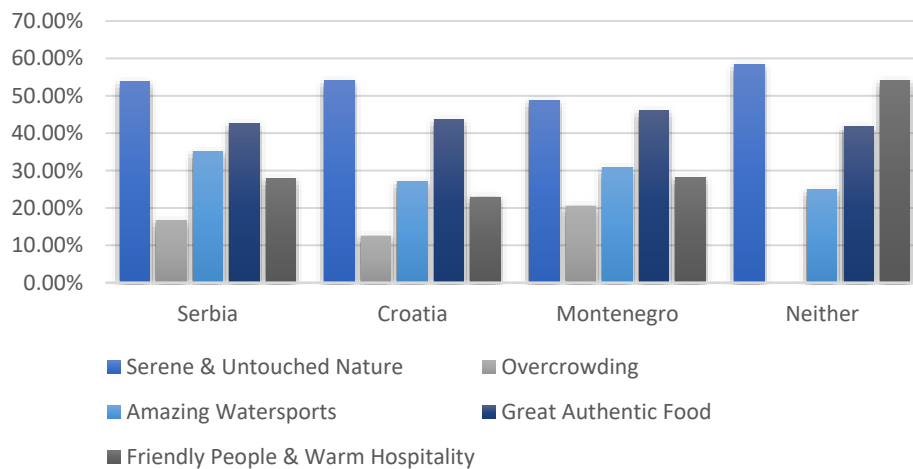
*Insight Out
Consultancy, 2020*

Durmitor Mountain & the Black Lake



Of course, the first option of the Insight Out report was ‘beach and resort’ another predominant offer in Montenegro. The 2,700 respondents from the Insight Out Consultancy report ranged between Europe but mostly from the Middle East. The Rural & Cultural report evaluated travel perceptions of Serbia, Montenegro and Croatia consisted of 34% of respondents from the Middle East which indicates a potential segment of travelers’ worth connecting with, especially considering the flights that are still available with FlyDubai. **After all, 41% of respondents who would choose ‘Outdoor activities’ for their next trip, would also choose Montenegro as their next destination.**

Top Associations with Montenegro



The results above represent the top associations (except for Overcrowding) based on people who travelled to Montenegro, only Croatia, only Serbia or neither of the three countries.

The points above show an interesting correlation between those that visited Montenegro and those that visited neither country, particularly, the 10% drop in ‘Serene & Untouched Nature’. While ‘Overcrowding’ is not one of the top associations with Montenegro it was mentioned here because of the spike from 0% to 20% between those that visited neither country and the respondents that visited Montenegro. This spike in ‘Overcrowding’ leads us to ask where the respondents stayed during their vacation in Montenegro. Budva is the usual hotspot but further evaluation is recommended to understand how many tourists who visited Montenegro actually traveled to the more ‘Serene’ destinations such as Durmitor, Skadar Lake and how can they be educated and encouraged to visit these areas. This parallel can be compared to Serbia’s example of the drop with ‘Historical sites & museums’.

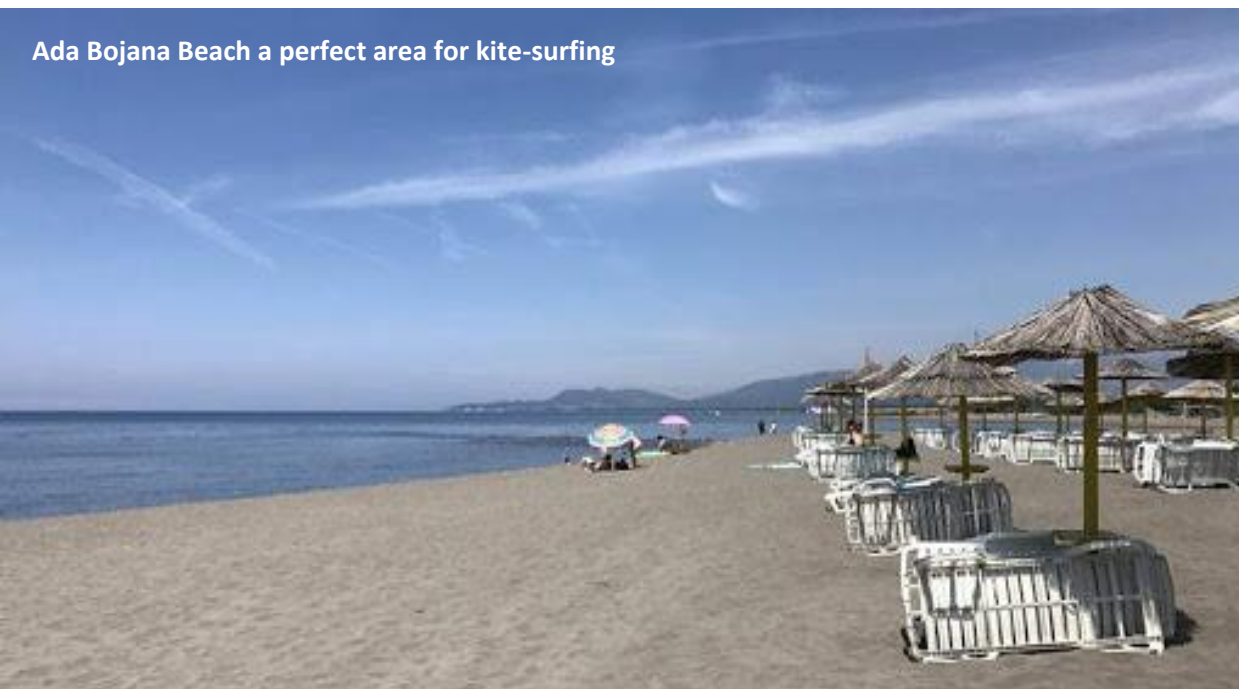


Lake Skadar, largest lake in Southern Europe



Herceg Novi, located at the entrance of the Bay of Kotor

When experiencing a destination's hospitality sector, the main association comes from hotels and F&B outlets. Various sorts of training are always required amongst certain segments which would need to be further evaluated.

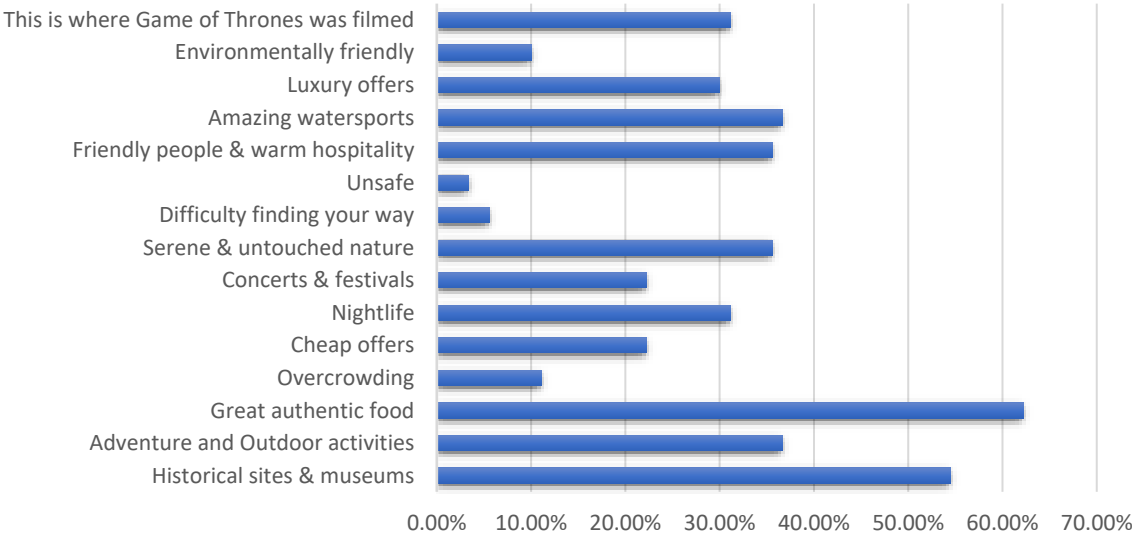


Ada Bojana Beach a perfect area for kite-surfing

Island of Vis, only opened to foreigners in 1989 and was the venue for a recent Hollywood movie, can you guess which one?



Top Associations with Croatia

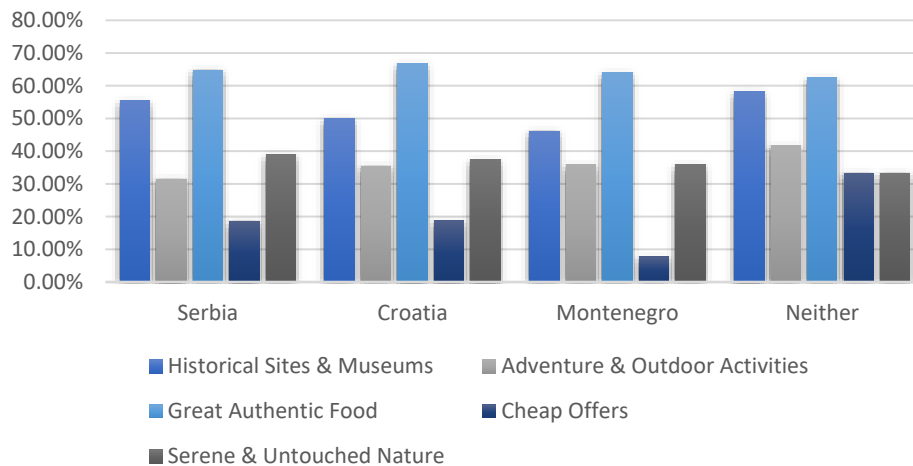


The authentic food experience is at the top for Croatia at 62%, followed by 'Historical sites & Museums' at 54%. Tied in third at both 37% are 'Amazing watersports' and 'Adventure & Outdoor Activities'. The first three should not come as a surprise, particularly the top association which is due to Croatia's extensive coastline on the Adriatic that offers a plethora of seafood specialties but also a reoccurring trend in the Balkan region, which can be witnessed with both Montenegro and Serbia.

For travelers that did visit Croatia this association to food increases to 66%, taking away points from the 'Historical sites & Museums' which come at 50%. For the sake of the report this figure does not take away from Croatia's historical sites but instead proves the emphasis and impact the culinary sector has on travelers who have already visited the country. **Another reoccurring trend in the Balkan region is 'Friendly people and warm Hospitality' which is also high at 35% for Croatia.**

There is one highlighted point where Croatia stands out compared to Serbia and Montenegro and that is the 'Luxury offers' at 30%. Montenegro's luxury association comes at 24% whereas Serbia was far off at 10%. Naturally this has to do also with the number of luxury hotels the country boasts, with 16 5-star hotels in Serbia, 26 in Montenegro and 190 in Croatia. This also corresponds with the fact that Croatia boasts one of the region's largest tourism figures [with 17.4 million tourist arrivals in 2017](#). This year, while shy of recent years, [Croatia still managed to receive 6.8 million tourists](#), with Istria being the most popular destination with 11.9 million overnight stays.

Top Associations with Croatia



The results above represent the top associations (except for Cheap offers) based on people who travelled to Croatia, only Montenegro, only Serbia or neither of the three countries.

One of the main noticeable differences between 'Neither' and travelers that visited Croatia is the 'Cheap Offers' association, from 33% at 'Neither' down to 18.75% who visited Croatia. There are a number of factors that lead to these assumptions.

For one, the majority of foreign tourists visit Hvar and Dubrovnik which could be overall pricier than initially anticipated or even a general assumption that tourists have when traveling across South East Europe.

The gastronomic aspect and serene nature increases for tourists who have visited Croatia, compared to those who have not. Again, this mirrors Montenegro and Serbia but what also mirrors Serbia is the decrease in the 'Historical sites & museums' factor. While it is only an 8% drop (50% of visitors to Croatia associate Croatia for history & museums, 58% who have not visited either country associate Croatia for history & museums) it is worth mentioning this observation. Again, this is a general consensus and not specific to any particular destination in Croatia. As mentioned by **Sandra Jurić the Director of Sales & Marketing at the Meneghetti Wine Hotel & Winery located in Istria,**

'In Istria, visitors are becoming more demanding when it comes to gastronomy, especially towards locally sourced produce but they are also pleasantly surprised by the wealth of cultural and rural offers such as truffle picking, extensive bike baths and tours to local towns such as Poreč and Pula.'

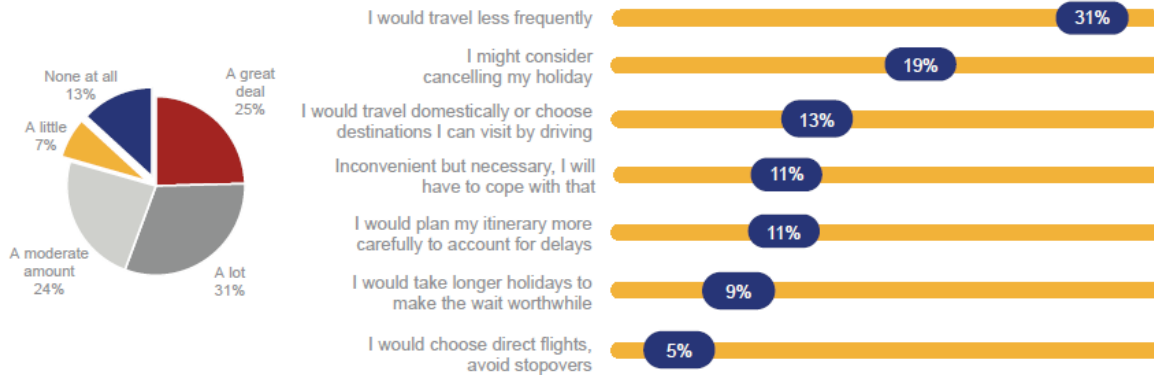


Poreč, one of the many picturesque towns in Istria

6. Inter-Regional Travel in the Balkans

During this pandemic there has been much talk on regional travel, partially due to travelers avoiding airports but also the option of traveling closer to home. The Inter-Regional Travel by Insight Out study on the Middle East showcased the worry that travelers had with airports. Fortunately, when in Europe one can reach many countries by car within a 4 – 5-hour drive. Neighboring countries must have regulated border crossings that can support regional travel, as is the case in the Balkans which will promote travel amongst locals and especially foreigners.

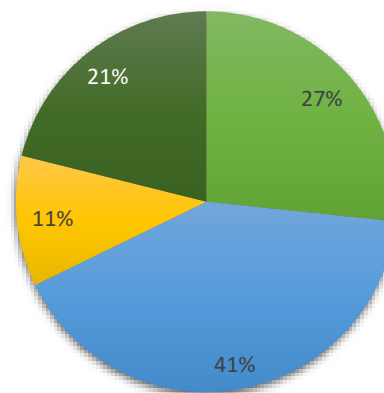
Q. How would the increased screening time at airports affect your travel planning?



Insight Out Consultancy, 2020

Q. If you anticipate to travel to either of the three countries, would you consider visiting 2 or more countries during your stay?

- I will only come for 3-4 days, so one will be enough
- Since I am already in the region it is worth allocating extra days to visit a second country
- I intend to take at least 2 weeks when I visit this region and will include all 3 countries
- Each country has so much to offer that 1-2 weeks is still not enough per country, will need to come back a second time



41% of foreign respondents (living outside Serbia, Croatia and Montenegro) would allocate a couple extra days to visit a second country in the Balkan region and we can state that approximately **73% of foreign respondents would either come back to this region a second time or extend their stay for a couple days to a full week.**

6.1 Similarities between the three countries

This report compared the top associations respondents have with each country and we can see the evident similarities. The top perceptions that were inclusive for all three countries include:

1. Great Authentic Food
2. Historic sites & Culture
3. Outdoor Activities/Serene & Untouched Nature (both sea and land)
4. Friendly people & Warm Hospitality



The first three perceptions are promoted by each country, whereas the fourth is a factor that can only be experienced firsthand and offers all three countries a positive feature to build upon. *'Visitors to Istria tend to be pleasantly surprised by the extensive offer but particularly the local hospitality'* (**Cristina Vojić Krajčar, Marketing Manager Tourism Organization of Istria**)

Tour operators or destination managers that aim to conduct a regional tour of the Balkans have a simpler task because if a traveler seeks the above-mentioned attributes, they will witness them in all three countries but also the entire region. Of course, each country adds their own flavor in terms of food, culture and natural abundance that elevates the traveler's journey and satisfies their reason for travel.

6.2 Reference to Cultural & Rural

The aspects of rural and cultural tourism are very much present in all four of the factors mentioned above. It coincides also with the response that 61% of respondents seek 'Local food experience' and 58% want to visit 'Cultural and historical sites' for their next travel. Another parallel that supports this is the 38% who view 'Cliché tourism' as a major turn off for any destination.

The ability to witness a unique destination, culture and nation is of high value for many travelers. The top four associations for all three countries prove that fact and should notify travel experts how to portray their destination.

Tourism organizations in Istria and Western Serbia are aware of their exclusive offers. Particularly Istria which has developed itself as a 'destination brand' of its own as a gastronomic, exclusive, serene and hedonic location where visitors can experience that 'recipe' only in that location and nowhere else.

'The rural & cultural segment has been in consistent growth for some time. Particularly summer 2020, many guests were seeking accommodation in rural parts of Istria, possibly due to lesser crowds compared to the coastline'

Cristina Vojić Krajčar, Marketing Manager Tourism Organization of Istria

6.3 Lack of Negative Associations with each country

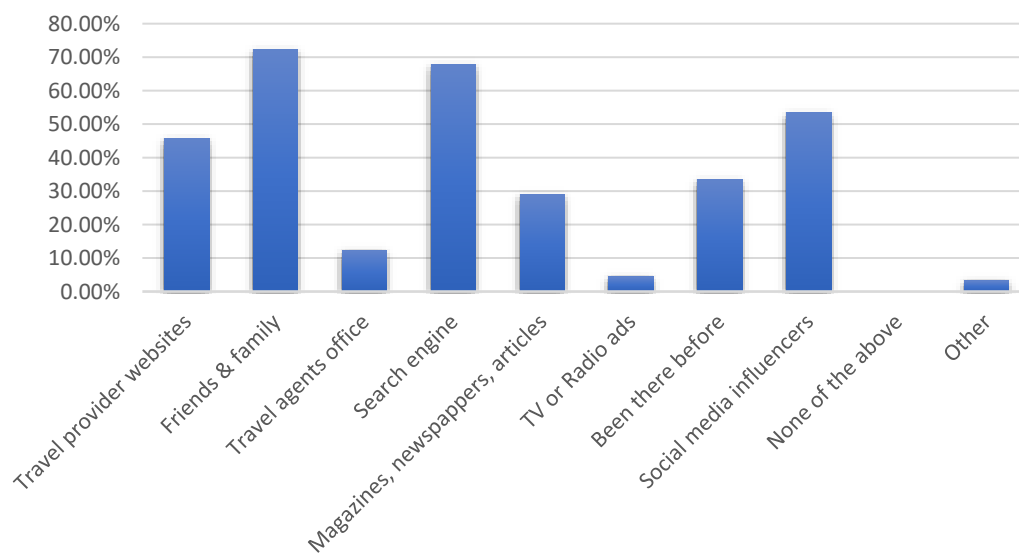
It is worth mentioning that all three countries scored very low in terms of any negative connotations. 'Unsafe' and 'Difficulty finding your way as a tourist' scored between 5 – 10% with **only 3% of respondents considering the three countries as 'Unsafe'**. We can partially explain these results by taking into account the historical context and the media image from the 1990s, although this type of response is triggered by ignorance and insufficient information. Each of these results can help create special and joint campaigns and activities to develop and improve the tourist offer and change the overall picture of the destination.

In Europe's crime index per city for 2018, we see the top 10 include Marseille, Naples, Catania along with other metropolitan cities such as Paris and Manchester. The top 20 further includes popular European destinations such as Brussels, Hamburg and London whereas Serbia's and Croatia's capitals and largest cities, Belgrade and Zagreb sit back at 64th and 91st [place out of a total of 109 cities](#).



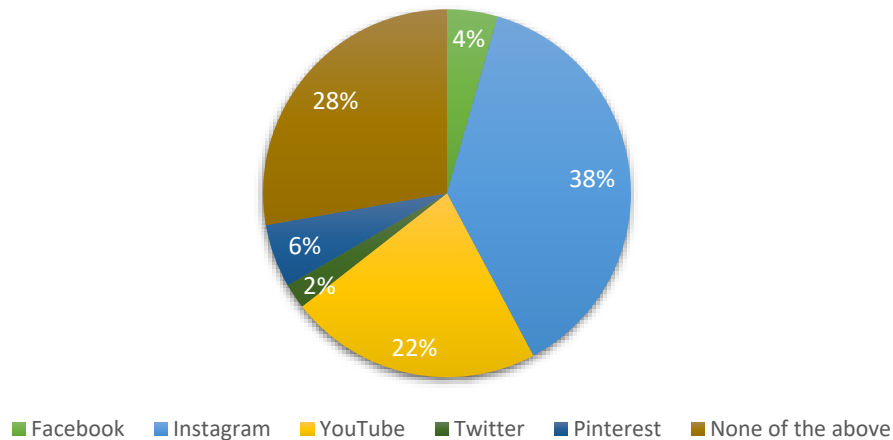
7. Capturing the Target Audience

Q. Which sources of information do you use to keep up to date with travel destinations



After establishing the associations for each country and the potential in regional tourism it is worth evaluating how to connect with the target audience which is becoming ever more complex. One of the main reasons for this complexity is that **72% of respondents refer to family and friends for sources of travel information**. Search engines and social media Influencers/YouTubers round up the top 3.

Q. Which social media platform provides the most reliable information

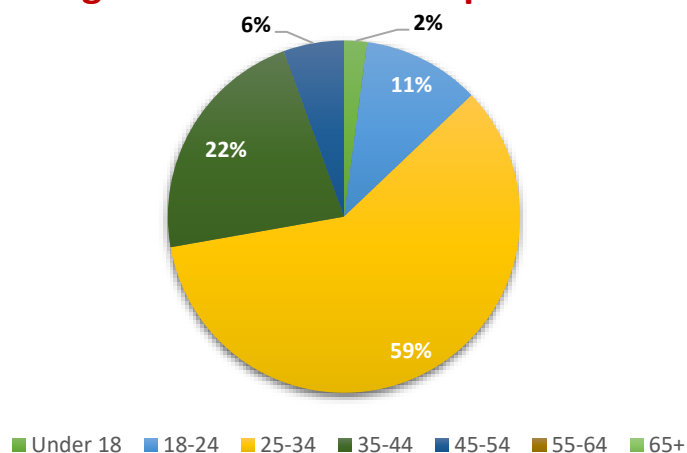


There is also a notable lack of trust in social media platforms. While Instagram at 38% is regarded to provide the most reliable information compared to other social media platforms, it is followed by 'None of the above' at 28%. Obviously the most reliable source of information is word of mouth. While this does not mean that destinations should not use any platforms at all, it showcases the more reliable platforms which are YouTube and Instagram. Part of the preference towards YouTube and Instagram are the viewers ability to see the destination from another traveler's perspective which gradually builds trust with the potential traveler and takes them through a story or journey. As for the word-of-mouth aspect, considering that the top 4 associations for all three countries was 'Friendly People & Warm Hospitality' then this organic promotion of each country should continue in a positive trend.

7.1 Generation Z Perspective

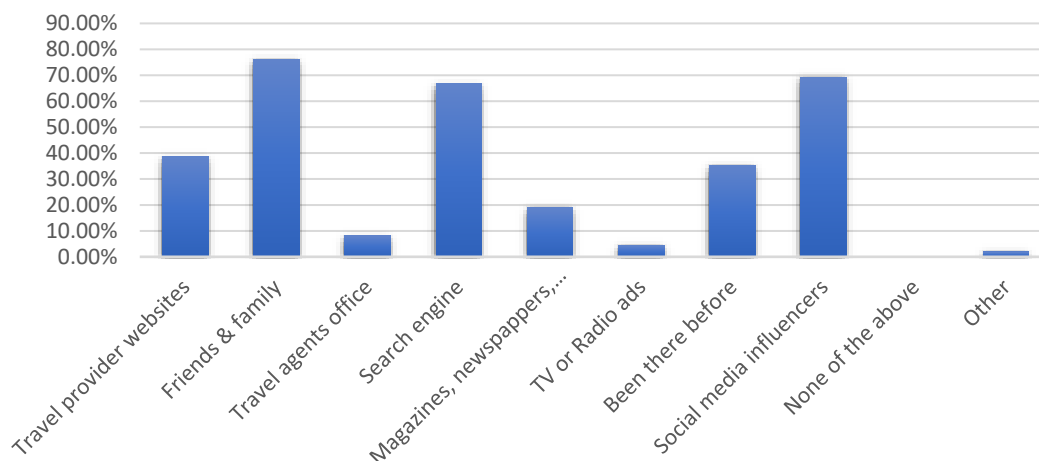
It is worth highlighting the connection Generation Z (born 1997-2012) have with social media and accessing travel information.

Age Distribution of Respondents



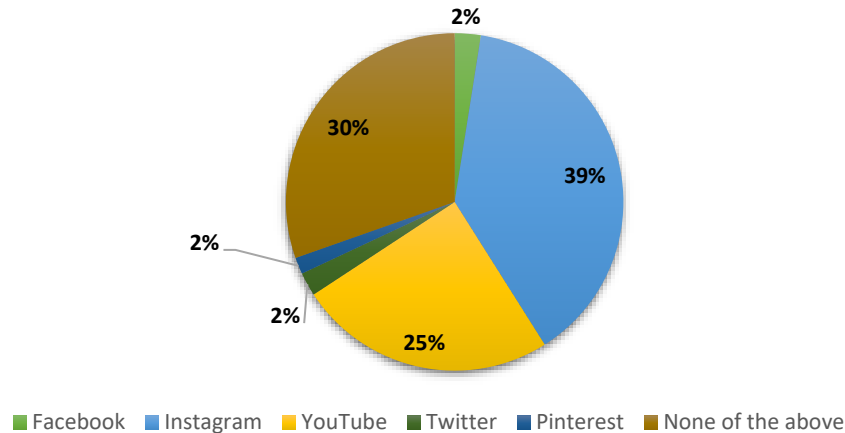
Approximately 13% of respondents were Generation Z, whereas the majority fit under the 'Millennial' bracket, those aged 1981-1996.

Q. Which social media platform provides the most reliable information (Generation Z)



The major differences and perhaps expected are the increase for 'Social Media Influencers' but also 'Friends & Family' and 'Been there before'. 'Travel agents office', 'TV/Radio ads' and even 'Search engines' had lower scores than the general population.

Q. Which social media platform provides the most reliable information (Generation Z)



The results are similar but there is a slight increase in 'None of the above' which can portray a continuous relationship that younger generations have with certain social media platforms. YouTube and Instagram still reign superior and this should be indicative for travel firms but the messaging and story need to be concise, relatable and trustworthy.

8. Moving Forward

While there are still many unknown factors that lie ahead, this research presented us with facts circulating how rural and cultural tourism could and should be regarded as a drive for destinations, with or without the Coronavirus. Croatia, Serbia and Montenegro have a sturdy and opulent array of cultural and rural offers that are unique to Europe and the world. What these findings presented was the preference for foreign travelers to engage with local culture, whether it is through gastronomy, vineyards or historical sites. These results are mirrored with the rural aspect that is entangled with a country's culture.

In terms of combining the cultural and rural facts with the findings on the Balkan regional potential the following can be summarized:

- Cultural and rural tourism has seen growth prior to the Coronavirus and will continue to grow.
- Sustainable tourism may not always be the highest priority for travelers but pollution and overcrowded destinations are obviously frowned upon.
- An emphasis on witnessing a unique experience and away from cliché tourism is noticeable.
- Historic sites and museums are of high interest for foreigners, predominantly in Serbia, but also Croatia and Montenegro, but not experienced as much as they could be. Specific regions in either of the three countries that boast these experiences need to meet their target market.
- Gastronomy is a key factor for all three countries, this needs to be maintained and where possible apply the local touch, that even local tourists want to witness.
- There are other overlapping factors such as warm-hospitality and outdoor activities between the three countries.

- Foreign travelers have shown keen interest to visit multiple countries in the Balkans and either extend their stay on multiple occasions. Hence, a regional drive to provide a 'safe' and friendly passage between the countries is of utmost importance.
- Safety is of the highest importance for travelers. All three countries have a very high-rating in terms of safety compared to other European tourist destinations. This should be advocated to foreigners.
- Word of mouth is the safest promotion but when it cannot be applied, YouTube and Instagram are your optimal social medias. This confirms that consumers seek 'visual' confirmation in order to make a decision. All regional destinations, that have not done so already are advised to connect with local and adequate social influencers, that add value to the destination.

This research focused on Montenegro, Serbia and Croatia but should not exclude other countries in the Balkans such as Bosnia & Herzegovina, Slovenia, Albania and North Macedonia that would add value to this regional offer. The 2021 season is upon us and with expected rebounds in terms of tourist figures, the Balkan region should develop their own hybrid tourist event in preparation for the summer season to showcase their safe and unique offers to local and foreign travelers. This cohesive structure will not cannibalize each other's offer but instead elevate it. The cross-border interaction that focuses on sustainable economic, socio-cultural and environmental pathways will create a long-term benefit to all key stakeholders in the region.

Further Connections – Let's work together!

This research is a sincere initiative but also allows itself for further development and progress. There are other niche markets in this region that are yet to be discovered but also realizations that can support the idea of an interconnected approach for 2021. For those that are keen on assisting with similar initiatives, please connect with me at:

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Otherwise, ye welcome to also connect with the team at NVOI Hospitality or Veselinov Tourism Consulting.