

ACCESSIBLE TOURISM MARKET RESEARCH



**QUAD: Accessible Eco-Tourism Social Entrepreneurship
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Interreg-IPA Hungary-Serbia Cross-border Co-operation Program

Social Enterprise established and developed

Act. 2.1 In depth market research on accessible tourism

Prepared by the WIN Development Consultants

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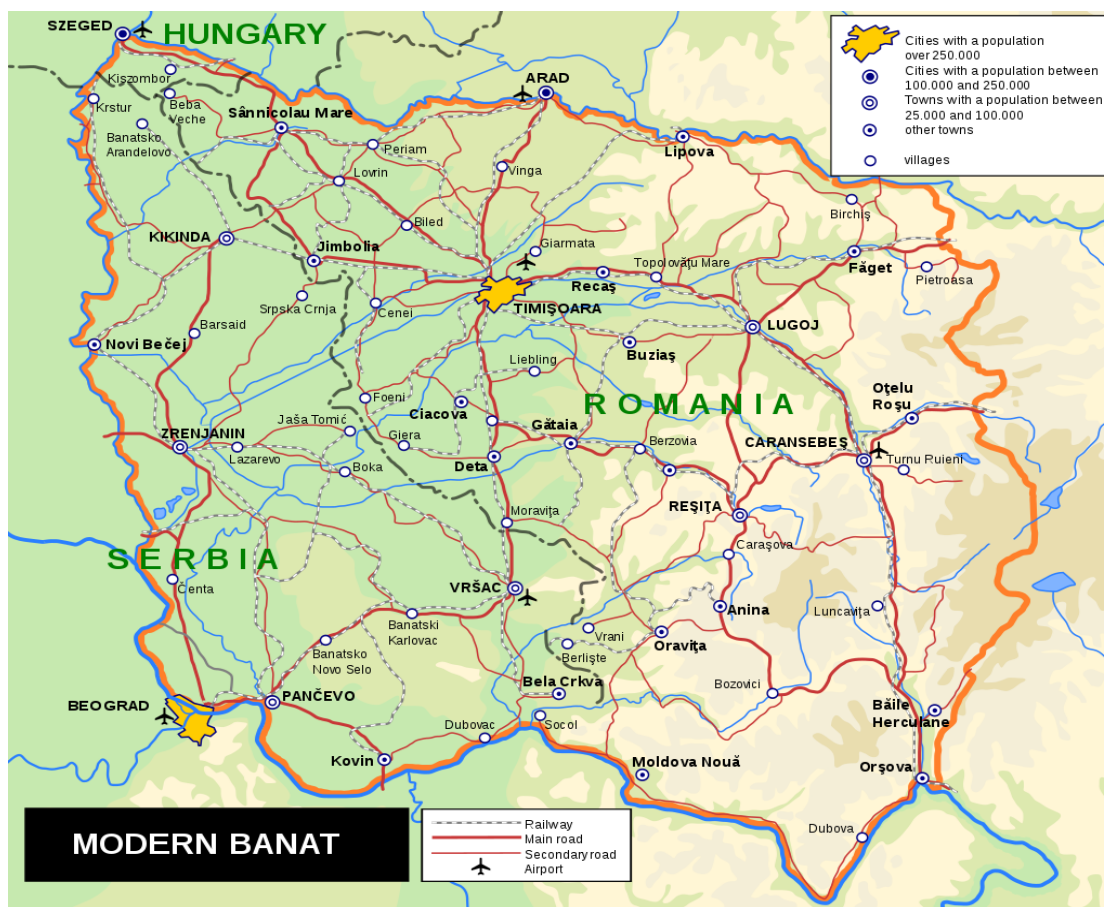


Part A – Market research/ analysis of the current situation

1. The region of Banat

1.1 General information

Banat is a geographical and historical region located in Central Europe. The region of Banat is shared among three countries; the eastern part lies in western Romania, the western part in northeastern Serbia, and a small northern part lies within southeastern Hungary.



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Serbian Banat extends to 3 regions; the Južobanatskaya oblast, the Severnobanatska oblast and the Srednjobanatska oblast with corresponding capital cities Kikinda, Zrenjanin and Pančevo.

Country	NUTS 3 units:	Administrative status	Capital city/ Seats of district
Republic of Serbia	Severno-Banatski	Severno Banatski (part of Vojvodina Autonomous Province, NUTS2)	Kikinda
	Srednje-Banatski	Srednje Banatski (part of Vojvodina Autonomous Province NUTS2)	Zrenjanin
	Južno-Banatski	Južno Banatski (part of Vojvodina Autonomous Province NUTS2)	Pančevo

Source: "Technical assistance for multi-annual programming of future cross border cooperation programme in the Romania-Serbia cooperation area", Regional Office for Cross Border Cooperation Timișoara, Romania-Serbia IPA CBC Programme 2014 - 2020

The Serbian Banat region covers a total area of 9,831 km. The Južnobanatska oblast occupies 4.246 km, the Severnobanatska oblast covers 2.328 km and the Srednjobanatska oblast covers 3.257 km. The largest municipality in the Južnobanatska oblast is Vršac, which has 24 settlements and its population is 49,704 inhabitants. The largest municipality in the Severnobanatska oblast is Kanjiža,



which has 13 settlements and its population is 23,992. The largest municipality in the Srednjobanatska region is Zrenjanin which has 22 settlements and its population stands at 117,735 inhabitants.

General Data for Serbian Banat			
City-Municipality	Area (km)	Number of settlements	Population
REPUBLIC OF SERBIA	88499	6158	7020858
Južnobanatska oblast	4246	94	281203
<i>Pančevo</i>	<i>756</i>	<i>10</i>	<i>120361</i>
Alibunar	602	10	18771
Bela Crkva	353	14	16297
Vršac	800	24	49704
Kovačica	419	8	24054
Kovin	730	10	31761
Opovo	203	4	9826
Plandište	383	14	10429
Severnobanatska oblast	2328	50	138371
<i>Kikinda</i>	<i>783</i>	<i>10</i>	<i>55318</i>
Ada	227	5	16093
Kanjiža	399	13	23992
Novi Kneževac	305	9	10461
Senta	293	5	22100
Čoka	321	8	10407
Srednjobanatska oblast	3257	55	177308
<i>Zrenjanin</i>	<i>1327</i>	<i>22</i>	<i>117735</i>
Žitište	525	12	15369
Nova Crnja	273	6	9421
Novi Bečej	609	4	22762
Sečanj	523	11	12021
TOTAL	9831	199	596882

Source: Statistical Office of the Republic of Serbia

The Serbian Banat region is now inhabited by Serbs, Hungarians, Romanians, Slovaks, Macedonians, Croats, Yugoslavs, Montenegrins, Bulgarians, Muslims, Germans and Albanians. The larger population groups are the following;

- Serbs; 405,773
- Hungarians; 105.659
- Romanians; 22.635
- Roma; 20.061
- Slovaks; 16119

Most Serbs gather in the Južnobanatska oblast (208,462 inhabitants) and in the Srednjobanatska oblast (134,264 inhabitants).



Popoulation by ethnicity (2017)

Region-Area	Total	Serbs	Hungarians	Romanians	Romapeople	Slovaks	Macedonians	Croats	Yugoslavs	Montenegrins	Bulgarians	Muslims	Germans	Albanians	Others *
REPUBLIC OF SERBIA	7186862	5988150	253899	29332	147604	52750	22755	57900	23303	38527	18543	22301	4064	5809	521925
Južnbanatska oblast	293730	208462	13194	18000	8025	13777	6548	1512	1178	921	757	586	472	250	20048
<i>Pančevo</i>	<i>123414</i>	<i>97499</i>	<i>3422</i>	<i>3173</i>	<i>2118</i>	<i>1411</i>	<i>4558</i>	<i>880</i>	<i>586</i>	<i>529</i>	<i>501</i>	<i>414</i>	<i>196</i>	<i>68</i>	<i>8059</i>
Alibunar	20151	12234	227	4870	833	965	115	43	47	37	12	17	17	7	727
Bela Crkva	17367	12715	425	842	791	16	97	61	52	66	13	23	59	11	2196
Vršac	52026	37595	2263	5420	1368	147	472	214	302	139	79	41	95	73	3818
Kovačica	25274	8407	2522	1543	806	10577	74	48	62	34	10	10	14	59	1108
Kovin	33722	25150	3001	1170	1516	14	128	65	84	92	121	69	47	19	2246
Opovo	10440	8994	54	198	312	31	62	167	29	12	5	5	18	8	545
Plandište	11336	5868	1280	784	281	616	1042	34	16	12	16	7	26	5	1349
Severnbanatska oblast	147770	63047	68915	421	4769	207	198	530	665	247	20	135	137	264	8215
<i>Kikinda</i>	<i>59453</i>	<i>44846</i>	<i>7270</i>	<i>95</i>	<i>1981</i>	<i>45</i>	<i>126</i>	<i>204</i>	<i>331</i>	<i>99</i>	<i>18</i>	<i>74</i>	<i>87</i>	<i>75</i>	<i>4202</i>
Ada	16991	2956	12750	11	323	18	-	50	74	8	-	13	11	25	752
Kanjiža	25343	1830	21576	268	596	7	4	67	51	33	-	9	9	79	814



Novi Kneževac	11269	6445	3217	2	923	10	21	64	47	40	1	6	10	13	470
Senta	23316	2533	18441	3	595	31	27	84	107	48	1	13	13	62	1358
Čoka	11398	4437	5661	42	351	96	20	61	55	19	-	20	7	10	619
Srednjobanatska oblast	187667	134264	23550	4214	7267	2135	521	796	769	378	298	116	219	194	12946
<i>Zrenjanin</i>	<i>123362</i>	<i>91579</i>	<i>12350</i>	<i>2161</i>	<i>3410</i>	<i>2062</i>	<i>412</i>	<i>527</i>	<i>592</i>	<i>280</i>	<i>184</i>	<i>86</i>	<i>139</i>	<i>110</i>	<i>9470</i>
Žitište	16841	10436	3371	1412	832	5	8	63	38	22	17	4	13	6	614
Nova Crnja	10272	6922	1819	16	1016	1	20	27	6	25	6	4	14	2	394
Novi Bečej	23925	16132	4319	59	1295	15	42	66	83	27	4	11	14	72	1786
Sečanj	13267	9195	1691	566	714	52	39	113	50	24	87	11	39	4	682
TOTAL	629167	405773	105659	22635	20061	16119	7267	2838	2612	1546	1075	837	828	708	41209

Source: Statistical Office of the Republic of Serbia

* including Slovenians, Russians, Bosniaks, Ukrainians, Goranci, Bumjevcji, Vlachs, Ruthenians, Did not declare, Regional affiliation, Unknown



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1.2 History

First occupied in prehistoric times, Banat was later controlled by the Romans, Goths, Gepidae, Huns, and Avars. The Slavs settled there in the 5th century AD, and after the Magyars displaced them (9th century), the area became an integral part of Hungary and was organized as Banat of Severin (Terra de Zevrino) by King Andrew II in 1233. In the 14th and 15th centuries many Serbs settled there; in the mid 16th century it was conquered by the Ottoman Turks, who retained it until 1718, when Austria acquired it (Treaty of Passarowitz).

Under Austrian military rule, the region was organized as the Temeser Banat (or Banat of Temesvár). Later on, a civil administration took control of the northern part of the area, and the Austrian rulers encouraged the settlement of colonists from the Rhineland, Lorraine, and Luxembourg. For most of the period from 1779 to 1920, Banat was attached to Hungary. After World War I, the victorious Allies divided it by the Treaty of Trianon (June 4, 1920). Hungary retained the district of Szeged, Romania acquired the large eastern section, and the remainder (largely part of the province of Vojvodina in present-day Serbia) went to Yugoslavia.

1.3 Geographical area description

Banat is defined as the part of the Pannonian Basin bordered by the River Danube to the south, the River Tisa to the west, the River Mureş to the north, and the Southern Carpathian Mountains to the east. Its historical capital was Timișoara, now in Timiș County in Romania. The territory of the Banat is presently part of the Romanian counties Timiș, Caraș-Severin, Arad and Mehedinți; the Serbian autonomous province of Vojvodina and Belgrade City District; and the Hungarian Csongrád County.

The Romanian Banat is mountainous in the south and southeast part, while at the north, west and south-west it is flat and in some places marshy. The climate, except from the marshy parts, is generally healthy. Wheat, barley, oats, rye, maize, flax, hemp and tobacco are grown in large quantities, and the products of the vineyards are of a good quality. The mineral wealth is great, including copper, tin, lead, zinc, iron and especially coal. Amongst its numerous mineral springs, the most important ones are those of Mehadia, with sulphurous waters, which were already known in the Roman period as the *Termae Herculis (Băile Herculană)*. The present "Banat Region" of Romania includes some areas that are mountainous and were not part of the historical Banat or of the Pannonian plain. In Serbia, the Banat is mostly plains. Wheat, barley, oats, rye, maize, hemp and sunflower are grown, and mineral wealth consists of oil and natural gas.

1.4 The Economic sectors of the region

- Agriculture presents a very dualistic quality and quantity distribution of resources, and levels of productivity, between the planes of Banat and Timiș and Carpathian Mountains area;
- Mining: in metals, oil represents an historical specialization in the area, it experienced a sharp decline in the last decades because of structural factors, quality and quantity of reserves, and international competition of new producers;



- Energy: very large hydro electrical power capacity on the Danube central, and some small plants in the other rivers, some potential of development in renewable resources, in particular biomass in the central and south eastern areas.
- Manufactures: traditional productions in large part of the eligible area; Strong growth of innovative sectors in recent years, due also to strong FDI flows in the Republic of Serbia.
- Services: Basic services in health, education, utilities commerce, transport, present in the area. Advanced services strongly concentrated in the urban poles.¹

Agriculture

The agricultural sector and the activities connected to agriculture in the rural areas represent a major component of the local economy. There is a strong dualism between the plains in the North West, that hold a strong productive potential in intensive cultivations, and the mountains in the South East, with a minor share of cultivated land in extensive agricultural productions, and forestry. Agricultural land occupies the largest share of the surface in the North.

Agricultural land use 2011 NIS Serbia, census	total land (ha)	Arable / total	Cereals, industrial, vegetables	Fodder crops	Orchards	Vineyards	Meadows, pastures
Severno-Banatski	207.806	85%	76%	6%	1%	0,50%	11%
Srednje-Banatski	283.975	80%	74%	5%	1%	0,20%	15%
Južno-Banatski	342.020	88%	84%	3%	1%	1%	9%
SERBIA	5.096.267	65%	51%	9%	5%	1%	29%

Source: "Technical assistance for multi-annual programming of future cross border cooperation programme in the Romania-Serbia cooperation area", Regional Office for Cross Border Cooperation Timișoara, Romania-Serbia IPA CBC Programme 2014 - 2020

Commodities (wheat, corn, soya and sunflower) represent the main specialization, and food industries, wine, beer are connected to the agricultural activities. Forestry and pasture occupy the largest share of the area on the mountains in the south and east. Vegetable and industrial crops and in general commodities are typical productions of the agriculture of the Banat's districts, whilst in the Centre and the South, meadows and pastures occupy a large portion of the territory. Livestock productions experience a very strong structural adjustment in the last decade, with decline in some areas, and large investments in new technologies.

Mining Industries

¹ "Technical assistance for multi-annual programming of future cross border cooperation programme in the Romania-Serbia cooperation area", Regional Office for Cross Border Cooperation Timișoara, Romania-Serbia IPA CBC Programme 2014 - 2020



In Serbia, exploitation of the underground resources including ores (iron, copper, zinc, lead, uranium), precious metals gold and silver, and also construction materials (sand, granite, clay and marble) led to the growth of tradable products sectors since the beginning of the last century, integrating the local economy in the international markets. The area received considerable attention due to its mining industry. In the nineteenth century, the entire Banat area, with its supplies of mineral deposits and timber, was the object of investment by international companies.

In more recent times, the development has been supported by important public investments in state-owned companies. The increased costs of the factors of production caused the closure of several exploitations in the 90's, in both countries, with severe social consequences on the labour market and environmental risks, still waiting to be afforded with a comprehensive approach.

Oil reserves were strategically important during the first half of the XX Century in both countries, and their extraction still plays a potential role, however marginal in the local economy, in spite of dramatic reduction of reserves and increased costs of extraction, due to new technologies of extraction.

Industrial sectors

On the Serbian side of the border the major industrial concentrations by sectors are in the chemical industry sector, food, in pharmaceutical - cosmetic sector and in the non-metallic processing sector as the glass industry. In addition, there is considerable activity in the metal processing and foundry sector and factory producing agricultural machinery and equipment, railway wagons.

Energy

Serbian Banat produces a valuable production from renewable sources, and of the total electricity production.

Industrial infrastructures

In Serbian districts a dense network of industrial areas can be observed, both in green field and brown field. Among the most relevant can be mentioned the Industrial Zone in Zrenjanin free zone, the Technology Park in Vršac, the industrial areas in Kanjiža, Kikinda, Pančevo.

SMEs

SMEs occupy a prominent role in the economy. In Serbia almost all SMEs are concentrated in the class "Micro"

	Number of SME / Total (classified per number of employee)		
	Micro <9	Small >10 < 50	Medium > 51 <250
Severno-Banatski	96%	3%	1%



Srednje-Banatski	96%	3%	1%
Južno-Banatski	97%	2%	1%
SERBIA	96%	3%	1%

Source: "Technical assistance for multi-annual programming of future cross border cooperation programme in the Romania-Serbia cooperation area", Regional Office for Cross Border Cooperation Timișoara, Romania-Serbia IPA CBC Programme 2014 - 2020

The class of micro enterprises, includes companies with very limited managerial structures, limited or no capacity to operate actively on the final markets, usually no capacity of endogenous generation of innovation, a part special cases of start ups in innovative sectors.

1.5 Natural Reserves

1.5.1 Deliblato Sands (Deliblatska peščara)

Location and Geomorphology

In the southeastern part of the Pannonian Plain, in the southern Banat, between the Tamiška, Vršačka and the Danube valleys. It overlooks the surrounding terrain and is distinguished by the woody and sandy geological composition. The largest European continental sandstone, which is in an elliptical shape measuring 35 with 20 km lays at its southeastern part. Most of this area is covered by Special Nature Reserves "Deliblatska peščara". SNR 'Deliblatska peščara', (Deliblato sands) covers nearly 35,000 hectares. The Deliblato sands were formed from silicate-carbon sand, the sediment of the Banat rivers and the Danube deposits. It is of elliptical shape and extends from south-east to north-west. It was formed during the Ice Age from the vast layers of silica-carbon sand. In the Modern Age, the east wind called "košava" formed a clear dune relief, rising between 70 and 200 meters above sea level. The moderate continental climate, absence of surface water courses and sandy soil resulted in unique biocoenoses, located in a special vegetation-geographical area called Deliblatium.²

Title: *Deliblato Sands landscape*

² <http://www.deliblatskapescara.rs/>





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Source: Deliblatska Pescara Official Website (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019

Climate

The climate is moderate-continental (subhumidic moist type, expressed continentality, ie, low-noise forests close to the climate of the steppe) with a specific microclimate characterized by early and late frosts and high temperature fluctuations of air between -25 and +45 degrees S. U During the winter, the wind "Košava" blows, which strikes up to 140 km / h. Although it receives about 630 mm of precipitation during the year, the area is without surface watercourses, because they are being traced through the underground in the direction of the Danube. The underground waters of the peripheral part of the Deliblatska pešćara are at 30 m, while in the central part of the arterial is located at a depth of 200 m.

Flora and vegetation

The specificity of the Deliblatska pešćara is its forest-step vegetation, which is mosaically arranged in the expressive relief that is unique in the Pannonian Plain. The wildlife of Deliblato sands is characterized by: pešćara, steppe, forest, wetland and water communities. More than half of the Deliblato Sand surface is nowadays overgrown with planted forests of acacia, black and white pine trees.

Forest vegetation

The most important sites of the central Sands: Rosiana and Crni vrh, were protected in 1912 as Natural Monuments. They represent the predecessors of the entire preserved primordial characteristic elements of the succession of vegetation of the Deliblatska sands. Forest communities Rhamno - Quercetum virgiliana, on dried habitats, Quercus virgiliana - virgin oak with Tilia tomentosa - lime and populus groups Populus sp. - poplar, in mosaic arrangement with mixed shrub formations: Cotinus coggygria -



ruja, *Crataegus monogyna* - haw and *Juniperus communis* - grass and grass communities of *Chrysopogonietum pannonicum* - dipovina and *Festuceto - Potentilletum arenariae* - horn, represent the last remnants of indigenous vegetation of the Pannonian plain. The most important plant species are protected natural rarities: *Fritillaria degeniana*, *Anemone silvestris* as well as all kinds of orchids *Orchis* sp. *Geranium sanguineum*.



Source: *Deliblatska Pescara Official Website* (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019

Steppe vegetation

In the center of former pastures of the Deliblatska sands, between Devojacki well and Rosiana, there is the Korn site. The steppe vegetation of this area, which has been formed and maintained by grazing and mowing, is a community of *Festuceto-Potentilletum arenariae*. There are protected species: *Pulsatilla vulgaris* subsp. *grandis*, *Paeonia tenuifolia*, *Rindera umbellate* and *Colchicum arenarium*. Nearby is the only micro-habitat *Paeonia officinalis* ssp. *banatica*.

Most of the surfaces of the Zagajički hills cover the steppe grasslands of the *Festuceto-Potentilletum arenariae* - *Vijka* and *Botriochloeto-Euphorbiaetum glareosae*. Special floristic value is given to the densely populated *Adonis vernalis*. Flora is characterized by a common presence of steppe and forest species, which form a series of passages from steppe to forest vegetation. The forest community of *Querceto-Tilietum tomentosae staphylletosum pinnatae* - oak and linden with locust, at the location of Dumača, represents the last remnants of forest-steppe communities on wood, the southern part of the Pannonian Plain.

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Source: Deliblatska Pescara Official Website (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019



Source: Deliblatska Pescara Official Website (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019



Wetland vegetation

Locations of Deliblatska sands near the Danube: pastures of the coastal area: Lawn and Stevan plains, shallows: Đurica, Labudovo window and Dubovački rit and Ade Čibuklija and Žilova, represent the remains of preserved communities of steppe, forest of willow and poplar, swamp and waters of southern Pannonia. Extremely floral richness is characterized by natural rarities: *Nymphaea alba* - white and *Nuphar luteum* - yellow lagoon, *Trapa natans* - a waterless nurse, along with the characteristic species of the *Molinietum caeruleae* communities - bunches and *Salicetum rosmarinifoliae* - rosemary of the willow.



Source: *Deliblatska Pescara Official Website* (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019

Fauna

The wildlife of the Deliblatska sands is characterized by peony insects and types of steppe habitats: eagle krstaš, steppe falcon, and fluid, blind house and steppe jumping. In forest habitats, there is a significant presence of wolves, deer and wild boars. The aquatic ecosystems of the coast and the island of Danube are breeding grounds for wetland birds and temporary migratory bird migration sites, while the surface of the undisturbed Danube is the massive wintering of wild ducks and geese.



The communities of the Special Nature Reserve "Deliblatska peščara" are separated into a special plant-geographical area - Deliblatikum. Internationally, the Reserve represents the center of biodiversity: one of the most important habitats of birds and plants in Europe, while the moist area of the Danube is protected by the Ramsar Convention. The reservoir is located in the European Green Belt, the future area of Natura 2000 and is proposed for the Biosphere Reservoir under the UNESCO MaB project.

Tentria (Tentyria frywaldzkyi), an endemic species of insect, only the peaks and steppe communities of Deliblatska sands are inhabited in the world.



Source: Deliblatska Pescara Official Website (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019

The steppe communities of peripheral areas are the habitats of numerous rodents: the only species of *Sicista subtilis* - steppe jump in Serbia, and *Spermophilum citellus* - field mouse that represents the basic food of predators, among which are the richest bird of the Reserve, *Aquila heliaca* - Eagle and *Falco tinnunculus* - steppe falcon. The most important sites of the central Sands are inhabited by very rare blind mice of Chiroptera, from the Red List of Endangered Species of the World: *Myotis emarginatus* - tricolored bat, *Myotis nattereri* - hard bats and *Plecotus auritus* - brown long-eared. Deliblato sands are the only remaining *Canis lupus* habitat in the Pannonian Plain.

Locality of the Zagajički hills is the most important habitat and reproductive center for *Spalax leucodon* - a blind mole in the Reserve and the Pannonian Plain. The small-sized land in all types of steppe communities inhabiting, point to its underground activity. This rodent is on the Red List of endangered species of the world. The area is nestled by internationally important migratory birds: *Pernis ptilorhynchus* - a falconer and *Falco subbuteo* - Falconer, while *Merops apiaster* - beekeeper, lives colonial in wood and sandy sections.

The stern sections of the Danube coast are the largest colonies of the *Riparia riparia* - the last bregunica in Central Europe. Dubovački rit is the largest colony of *Egretta garzetta* - small white herons and *Ardeola ralloides* - the country's yellow herons, the only stable nesting site of *Phalacrocorax pygmaeus* - a small cormorant, the world-endangered species and natural rarities of *Plegadis falcinellus* - black ibis and *Aythya nyroca* - the black duck. The Danube area in terms of the number of species and individuals gathered, represent the largest migratory birdwatch station in Serbia. The abundance of many species of fish, reptiles, amphibians, mollusks and plants provides them with a stable feeding habit during their stay. The area is one of the last inhabitants of the living world of the autochthonous aquatic ecosystems of the Pannonian region, and is therefore proclaimed the IBA and the Ramsar region of Labudovo okno of international significance.



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Source: Deliblatska Pescara Official Website (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019

Forestry

In order to prevent the blasting of sand from the sandy areas of Sandstone and the protection of the surrounding agricultural land from flooding, from 1818 to 1907, half of its surface was planted. The first device study of 1912 forests has an economic significance, and the masonry determined for 25 years. Nowadays, the stands of bakers occupy a third of the surface of the Reserve. Black pine used since the beginning of afforestation, in 1953, became the leading species. The catastrophic forest fire in 1996 ended this period. The sandstone is being redirected to the melioration of degraded acacia monocultures, the reconstruction of existing pine stands and the raising of indigenous forests.

Hunting and fishing

Within the forest farm "Banat" there are four hunting grounds, each of which possesses representative facilities for accommodation. The Deliblatska pešćara hunting ground is deer, wild boar and roe deer, and the most numerous are in the Lovački center Dragičev hat. Hunting on a high game with a check and drive is organized. Hunting and fishing center Labudovo okno, known for wild fern, while in the fishing area of the Danube III, fishing and recreational fishing is done on carp, sloth, catfish and white fish.

Livestock breeding

In the Reserve, about 700 heads of sheep and cattle are attacked in a traditional way, which ensures the preservation of autochthonous breeds and biodiversity of steppe habitats, which contributes to the development of tourism.

Beekeeping is based on acacia and meadow honey. Sometimes significant collection and cultivation of medicinal plants today has only a symbolic significance.

At the sites of the former vineyards of Pešćara, today's weekend settlements have been built, of which the Devojački well is the most visited, where art colonies are held. Traditional cultivation of autochthonous vine varieties and the production of wine and brandy became enthusiastic.

Educational Center "Cardak"

Educational center "Čardak", in SRP "Deliblatska pešćara", is located near the village of Deliblato, 60 km from Belgrade. The capacity of the Center consists of: 3 ground-floor houses total area of 400 m², which include: reception office, two meeting rooms with capacity of 20 and 30 seats, wet nook, kitchen (menu by order) and wine cellar, and in the attic of two and three-bed rooms each with t / wc, cg) of total capacity of 18 bearings. In the courtyard of 40 acres there are two canopies with a capacity of 100 people, a botanical garden with a museum setting of the tool is in the foundation. The center in the wooded area is surrounded by educational trails with rest areas and observation points.



It represents the destination of pupils' and student excursions, the place of workshops and meetings of the researchers of Pešćara. The Center has a manager, auxiliary and professional work is performed by trained workers. Employees speak Serbian and English, local Romanian and Hungarian, and hire translators for German and Italian. Here you can get information and seek help, take promotional material and buy authentic souvenirs.

School and recreation center "Čardak",

School and recreation center "Čardak", surrounded by pine forest, is located 65 km from Belgrade, in SRP "Deliblatska pešćara". It is suitable for children of school age and athletes. It includes a central building, a classroom and a smaller sports hall, a restaurant (classic menu) with capacity of up to 400 people and seven pavilions, two of which are in the tourist offer. Pavilions "Nera" and "Brzava" with capacity of 130 beds are intended for pupils and sports and recreational tourism (12 4-bed and 12 6-bed rooms on two floors with floor bath and toilet, as well as 6 1-bed and 2 2-bed rooms with own bathroom and toilet). On both floors of the pavilion there are rooms for living room with TV. Around the facilities there are outdoor sports fields for small football, basketball, handball and volleyball, as well as hiking trails with information boards. The program of accommodation includes: walking tours through the forest, introduction of flora and fauna, eco-workshops, sporting events, cultural and entertainment events. In the winter, the dine relief provides ideal conditions for sledding and snow games. Specialists are provided: a doctor, an expert companion and a guide.

Tourist information can also be obtained at School-Recreation Center "Čardak", Information Center "Šušara" and info-points "Devojački well" and "Stara palanka".

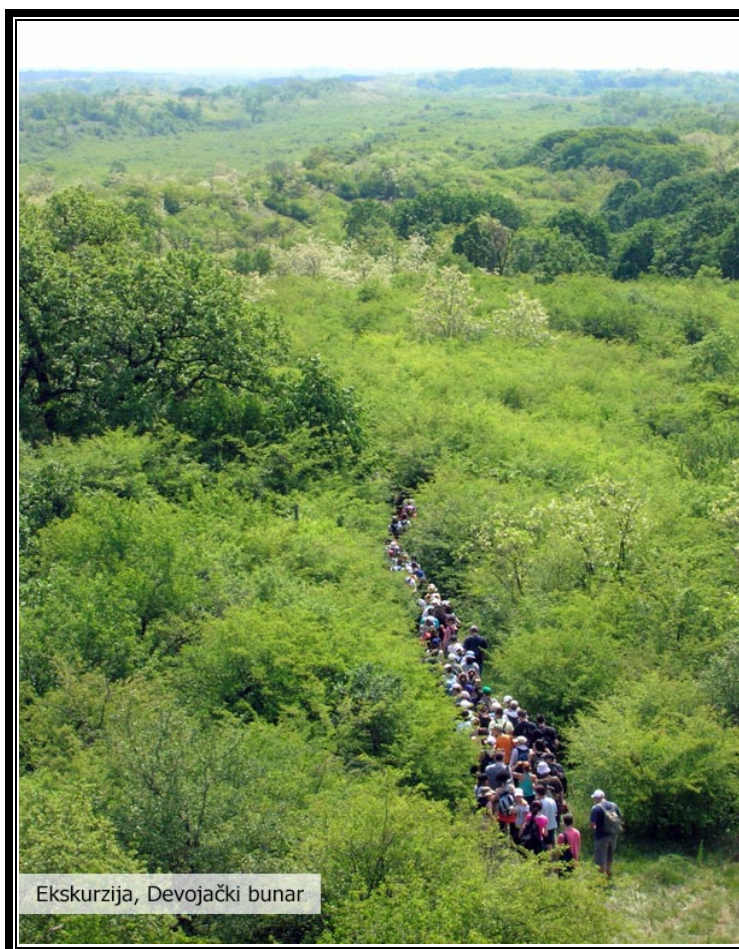
Excursions

Excursion sites: Girls' well (9 fireplaces) and Čardak with 6 hiking trails with a total length of 45 km (individually from 3 to 15 km). The reserve is marked with numerous educational, informative and signboards. Five observation posts of 20 m height and 50 m from 5 m were built, as well as numerous viewing points and 6 canopies.

Countryside tourism

Rural tourism in the settlements of Skorenovac and Šušar includes the offer of private accommodation and traditional Hungarian specialties. The cafes and restaurants in the surrounding area are the most numerous in the Devojački well and Bela Crkva.





Source: Deliblatska Pescara Official Website (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019



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Source: Deliblatska Pescara Official Website (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019



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Source: Deliblatska Pescara Official Website (<http://www.deliblatskapescara.rs/>), Accessed on 2 May 2019

2. Tourism in the Banat region

2.1. Key attractions and activities

South Banat is one of 29 districts in Serbia. With an area of 4248 km², it is the second largest district in the Republic of Serbia, after the Zlatibor district. At the same time, it is both a border district and the district closest to the Belgrade, the capital city of Serbia. This location is ideal from the perspective of the tourism industry. Proximity to the capital city enables the use of its infrastructure, meaning primarily its airport and road network, which facilitates foreign tourist arrivals. Additionally, the city of Belgrade is



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the largest tourist-emitting market in the country and therefore its proximity is a significant competitive advantage for the district.

The district also has very long industrial and agricultural tradition, with two industrially significant municipalities, *Pancevo and Vrsac*. Due to the country's recent social changes, the local economy has begun a transition towards a market economy, thus giving increasing attention to the tourism industry. *The history of tourism development in the district started in the 19th century by organizing carnivals and picnics*. However, during the 1980s and the 1990s growth of tourist movement towards the sea reduced the number of visitors to local tourism destinations. *The most important natural attractions are the Deliblato Sands, Bela Crkva lakes, and the Danube River, while the most alluring cultural attractions are events in Vrsac and Pancevo, as well as the art gallery in Kovacica*. Although tourist attractions in the region are not fully exploited, local government and stakeholders have been working intensively to change this.

Banat offers a varied tourism offer in a relatively small area, based on the heterogeneity of available tourist resources and attractive locations. Here visitors can enjoy ethno tourism, but also get acquainted with numerous resorts, monasteries, castles, wine trails, biodiversity of flora and fauna. Visitors can also participate in plenty of traditional events, which reflect the cultural diversity of this region. Archaeological sites, thermal and mineral water springs, hunting grounds, are, also, just some of touristic attractions in this region. The wide Banat plain, sprinkled with numerous rivers and canals, bogs and lakes, sandstones, arable land and hills, abounds in natural beauties. There are several land and water surfaces under special protection, some of which are of international significance. Many rare species can be found in Banat's nature reserves.

In the table below the main attractions of Serbian Banat are enlisted;

Main attractions

Country	District	Natural Protected Areas	Main Cultural and historical Attractions
Serbia	Severno-Banatski	Great Bustard Pastures	"Kika" mammoth in Kikinda; The Treadmill or "Suvaca" – mill that works on horse power, from the mid 19th century; one of the only two left in Europe; - The special nature reserves „Karadjordjevo“
	Srednje-Banatski	Slano Kopovo salt marshes, Rusanda Wetlands, Special Nature Reserve Stari BegejCarska Bara	Dundjerski (Fantast) Castle, near Bečej Ecka Castle, near the city of Zrenjanin, Zrenjanin National Museum
	Južno-Banatski	Sokolac Park, Nature parks Ponjavica, Deliblatska peščara, Vršачke planine, Uzdinska forest and Hajdučki	Vršac Castle and town Mesić Monastery



park

Source: "Technical assistance for multi-annual programming of future cross border cooperation programme in the Romania-Serbia cooperation area", Regional Office for Cross Border Cooperation Timișoara, Romania-Serbia IPA CBC Programme 2014 - 2020

In detail;

Locations and Resorts

On the territory of Banat, among the natural-geographic resources that represent important tourist destinations, according to du Cros evaluation model, stand out: ***Vršac Mountains, Delibato sands, Slano Kopovo, Stari Begej-Carska Bara, lakes Okanj and Rusanda, and Tisa River.***³



Deliblato Sands

³ Ž. Bjeljic, A. Terzić, T. Lukić (2014), Tourist events in Serbian part of Banat, *Forum geografic. Studii și cercetări de geografie și protecția mediului*, 8(1), 111-118





River Tisza



Carshka Bog





Resort Rusanda

Among anthropogenic tourist values most attractive are:

- *old town nucleus of Vršac;*
- *Pančevo;*
- *Zrenjanin and Kikinda;*
- *the remains of medieval monument such as a Chatedral in Arača;*
- *Vršac tower;*
- *monasteries Mesić and Vojlovica;*
- *villas "castles" in Ečka;*
- *Srpska Crnja;*
- *Plandište;*
- *old mills, windmills, watermills and farms "salaš";*
- *artificial lakes in Bela Crkva, etc. In Belo Blato village (Zrenjanin);*

In the village of *Torak (Žitište)* there is an ethno-house representing folk architecture of the Romanian minority. In *Kovačica village* there is also an ethno-house, representing the folk architecture of Slovak nation of Vojvodina. Moreover, *local Slovaks from Kovačica* have achieved the world fame with their tradition of naive painting. On these locations, that have certain attractive assets. In line with these criteria, there is also the accessibility and traffic connectivity of the location to the main tourist distribution centers. If we consider Novi Sad, Subotica, Szeged and Timisoara, as a main distribution centers in this region, it can be stated that the Serbian part of Banat is in half-day and one-day gravitation zone, which is considered to be a positive aspect.





Salash



Castle Echka

Events



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In the area of the Banat there stand out: 132 artistic (31.50%), 67 economic (15.99%), 31 ethnographic (7.40%), 52 entertaining (12.41%), 62 sport (14.80%), 22 religious (5.25%), 12 political historical (2.86%), 34 children's (8.11%), 4 scientific (0.95%) and 3 tourism promoting events (0.73%).

The oldest events in Banat

Event	Place	years
Flower festival	Bela Crkva	103
Festival of the professional theaters in Vojvodina	Zrenjanin	63
Kovačica's October"	Kovačica	60
Artistic Colony	Ečka	57
Festival of Romanian music and folklore in Vojvodina,	Uzdin ¹	53
Lipar evenings – Đura Jakšić Days	Srpska Crnja	53
Grape Harvest	Vršac	53
Music festival of Vojvodina's children	Novi Bečej	52
Festival of Romanian poetry "Roads of Spice "	Uzdin	51
International art colony of scout painters "Palette	Uzdin	46
Artistic colony "Delibato sand"	Deliblato, Pančevo	45
Fishing contest "Tamiš"	Pančevo	
Regional contest of orators "Poet of my nation"	Sečanj	45
Festival of documentary films „Village life“, ŽISEL	Omoljica	43
Theatre days of Romanians in Vojvodina ²		43
Artistic Salon	Pančevo	42
Parliament of the beekeepers "Delibato sand"	Deliblato	42

Source: Bjeljac (2010); www.vojvodinaonline.com





Lipar Evenings-Literary Event

In the Banat area, the events can be classified as local, regional (zonal), national and international. Regarding the criteria for determining the rank, the geographical origin and number of visitors and participants was considered ; there predominate events of local rank (181 events or 43.20%), then regional (164, or 39.14%), national (52, or 12.41%) and international (22 events or 5.25%).

Among international events in this region stand out:

- *Festival of popular music "The youth sings";*
- *"Roads of Spice" ("Drumuri de spice");*
- *International Symposium "Famous Banat people – A step towards Europe" (Uzdin);*
- *Carnival;*
- *Festival of author comic-book "Grr";*
- *Artistic colony "Delibato sand";*
- *Competition of chamber ensembles of wind instruments;*
- *Festival of under-water movie and photography (Pančevo);*
- *Artistic colony (Ečka);*
- *Folklore festival "Vršачki venac";*
- *Chest tournament "Memorial of Bora Kostić" (Vršac);*
- *Symposium of sculpture "Terra";*
- *Festival of national orchestra "Fenok" (Kikinda);*
- *"Strongman" wrestling contest (Novi Kozarci);*
- *Festival of accordionists (Novi Kneževac);*



- *Meetings of the writers from the border in Sečanj and Timisoara;*
- *Festival of the chorus "Cantemus";*
- *Junior tournament in wrestling "Darko Nišavić" (Zrenjanin), etc.*

Some *events of regional rank* are also very important. In particular, it is about events organized by Romanian, Czech and Slovak minorities that live in this part of Serbian Banat. As participants or guests to these events, a great number of people from Romania, Slovakia, Czech Republic, Bulgaria etc., gather here. *Such events are:*

- *Days of Vasko Popa;*
- *Children's festival of Romanian folk music and folklore in Vršac;*
- *Translation workshop "Zoltan Čuka" in Plandište;*
- *Romanian Days in Kovin;*
- *"Kovačica's October";*
- *"Maško's Days";*
- *Festival of Slovak theaters of Vojvodina in Kovačica;*
- *Festival of Vojvodina Romanian's music and folklore;*
- *Theater Days of Vojvodina Romanians;*
- *Orator contest "Buna Vestire" Uzdin (Kovačica);*
- *Festival of humor and satire;*
- *Winter Christmas customs "Torak" (Žitište);*
- *Symposium ;*
- *Banat history and multiculturalism" in Rešita (Romania) and Zrenjanin (Serbia).*

Duration of the event is usually from one to three days, but there are also events that last for a week, a month or during the whole year. Time and place of the events are usually interconnected. It is of crucial importance to determinate the part of the year in which it takes place – main season, pre-season, post-season or a holiday time, especially if they take place in tourist attractive destinations. Events are held throughout the year, but mostly in summertime (164, or 39.14%) and springtime (137, or 32.70%).

Number of visitors and participants is the criteria appropriated for showing the visitation extent and use of tourist offer programs. This criterion is also in causal connection with the rating of the event, the time and location on which it is held. Type of people, target market, is another factor that has an influence on the event.



Number of visitors

Event	Place	Number
Bear Days	Zrenjanin	300,000
Bacon fest	Kačarevo	150,000
The Assumption Days	Novi Bečej	100,000
Grape Harvest festival	Vršac	80,000
International Carnival	Pančevo	50,000
Pumpkin Days	Kikinda	20,000
Folklore festival „Vršачki venac“	Vršac	15,000

Source: Data from tourist organizations

Canemus International chorus festival, Bear days in Zrenjanin, “Kovačica's October”, “Lipar Days”, Days of Miroslav Antić and Theatre festival ŽISEL gather several thousands of visitors each year. Festival of the professional theaters in Vojvodina, International Carnival (Pančevo), Vršачki venac 'Folklore festival , Grape harvest (Vršac), Festival of Slovak theaters of Vojvodina (Kovačica), Festival of Vojvodina Romanians' music and folklore and Theater Days of Vojvodina Romanian's, have several hundred to several thousand participants.



Days of Beer

Products of the Banat region

The greatest advantage of Banat is reflected in the specifics of socio-cultural characteristics, which can be regarded as "the synthesis of Europe," since Banat is a region that unites, in a relatively small area, various ethnic, cultural, religious, characteristics with different lifestyles. This is a place where Serbs, Hungarians, Germans, Croats, Slovaks, Romanians, Ruthenians, Macedonians, Bunjevci, Czechs,



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*Good neighbours
creating
common future*

Bulgarians, Slovenians, Shocks, Roma, Greeks, Albanians, Poles, Russians and Ukrainians coexist and live together for centuries. This enables the offer of autochthonous products and the promotion of the style of life characteristic of Banat (multiculturality of the community, hospitality and local cuisine), in addition to preserved natural resources.⁴



People in this areas produce various food products for own purpose, and those products are increasingly being recognized on the market as a high-quality products with special characteristics. Proofs that this opinion is correct are various studies which state that the local products are high quality products because of the closed production process. These products are often made according to old recipes that passed down from generation to generation, hence the term traditionalism. Each area, region or nation has its own agro food products that they see as a typical products, deeply woven into the identity of these areas and / or nations. ***The Banat region is known for its high quality honey, wine, tea and sour cherry juice (Zimnica) production.***



⁴ <http://www.mdfa.rs/quadse/>



In the Banat region coexist the tradition of three national cuisines; Serbian, Romanian, Slovak. There is a variety of traditional dishes everyone can taste. Some of the traditional Serbian dishes are the followings; **Tomato soup, Beans, Cooked cabbage, Kavurma, Rinflajš (Rindfleisch), Breaded chicken, Gibanica (gheebanitsa), Paorske savijače with cheese (Pie with cheese), Valjuške (dumplings), Dill sauce (white sauce), Vojvodina' tomato sauce, Sour cherry slatko (slatko means "sweet"), Sour cherry Kompot, Dumplings with sour cherry / pluma and Lenja pita with sour cherries.**

White Broth (Ciorba de Burt), Soup with meatballs (Ciorba de perisoare), Sarma with vine leaves (Sarmalute in foi de vita), Polenta (Mămăligă), Uštipci with Turks cheese (doughnut-like balls), Mititei, Cheese Sauce, Eggplant Salad (Salata de Vinetu), Walnut and Raisin Strudel, Cake with apples, Sweet cheese donuts (I papanasi Branza) are traditional Romanian dishes.

Homemade chicken clear soup (Rezancová), Caraway soup, Dumpling with liver (plnanina), Pan roasted potatoes with homemade sausage and bacon (kromplena tapši), Homemade wide noodles with cheese and bacon (Široké rezance s tvarohom a slaninou), Kapustnica (Kapušnjike), Dumplings with goat cheese (Bryndza halušky), Sauce compote, Opekance (Bobalky), Herovke, Pierogi (Pirohi), Buchty (Baked Buns), Sweet Kapustnica are traditional Slovak dishes.⁵

Outdoor Activities

There is a variety of outdoor activities everyone can join in. Outdoor activities are also possible for disabled individuals with a little creative thinking, preparation and knowledge. We have some suggestions;⁶

- Local parks and beaches
- Paddling
- Camping
- Fishing
- Wheelchair
- Hiking
- Exploring
- Kayaking
- Archery

⁵ <http://www.alibunar.org.rs/fsdp/en>

⁶ <http://www.mdfa.rs/quadse/>







2.2 Incoming tourism

2.2.1 Incoming tourism in the Republic of Serbia

When compared to 2016, the total number of tourists in 2017 amounted to 3086 thousand, while the number of domestic tourists was 1589 thousand (7.9% increase), and the number of foreign tourists who visited the country amounted to 1497 thousand, presenting an increase of 16.8%.

The realized number of all tourists' overnight stays who were using the accommodation facilities was 8 325 thousand, which was a 10.5% increase compared to the previous year. There were 5 150 thousand nights spent by domestic tourists (increase of 7.4% compared to 2016), while the number of overnight stays of foreign tourists was by 15.9% higher than in 2016 and it amounted to 3 175 thousand of nights.⁷

TOURISTS' ARRIVALS AND OVERNIGHT STAYS, 2013–2017

Years	Arrivals		Nights	
	Total	Region Vojvodine	Total	Region Vojvodine
2013	2192435	347138	6567460	928606
2014	2192268	371490	6086275	929604

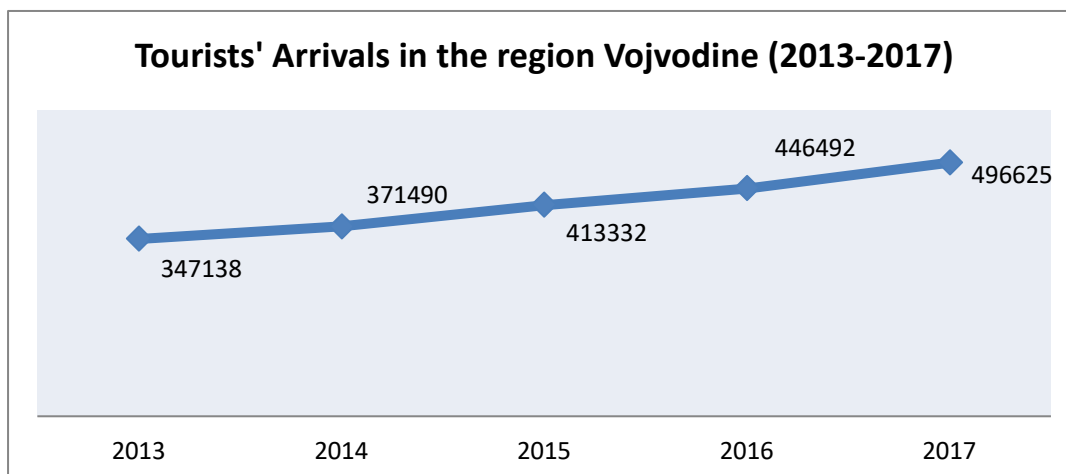
⁷ <http://www.stat.gov.rs/en-US>



2015	2437165	413332	6651852	994314
2016	2753591	446492	7533739	1123923
2017	3085866	496625	8325144	1159845

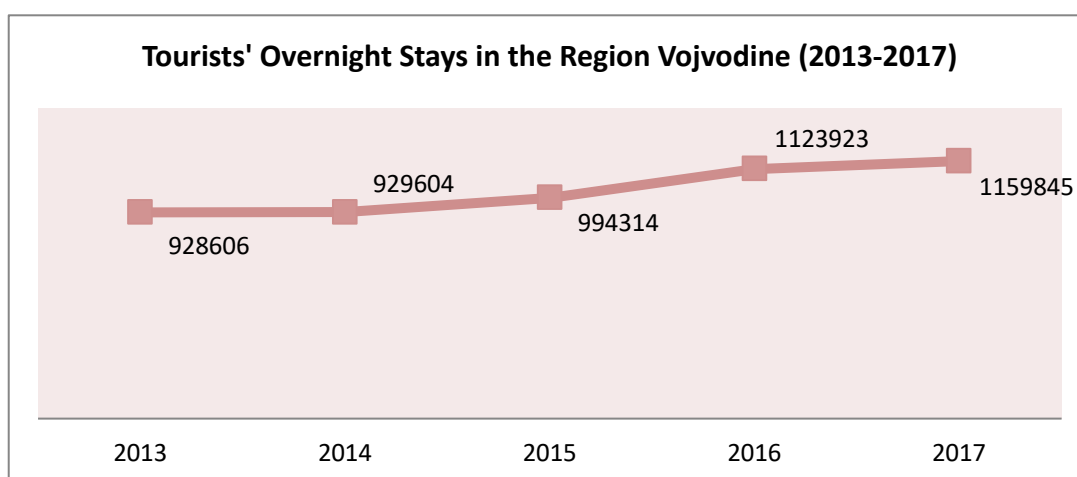
Source: Statistical Office of the republic of Serbia

The total number of visitors in the Vojvodine region amounted to 496.625 tourists (an increase of 11% compared to 2016). The Vojvodine region is located in the north-eastern part of the republic of Serbia, which includes the area under consideration (Banat).



Source: Statistical Office of the republic of Serbia

The number of overnight stays in the same period (2017) amounted to 8,325,144 for the Republic of Serbia (an increase of 11% compared to 2016), while in the Vojvodine region the number of overnight stays was 1,159,845 (an increase of 3% compared to in 2016).



Source: Statistical Office of the republic of Serbia

The number of overnight stays in the Republic of Serbia based on accommodation type is as follows;



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3.938.449 hotels, 695.725 hotels in garni, 135.604 in apart hotels, 31,862 in boarding houses, 37,616 in motels, 45,519 in tourist settlements, 225,988 in apartments, 8,835 in camp sites, 29,798 in camping grounds, 452,811 in private rooms, 428,804 private homes, 318 in hunting lodges and cottages, 92,473 in Inns with overnight stays , 210,837 in hostels, 597,386 in spa cures, 213,651 in climatic cures, 37,954 in mountain shelters, 80,971 in workers' resorts, 493,301 in youth and children's resorts, 10,478 in dining and sleeping cars, 16,040 in rural tourist homes, 2,593 in other catering trade accommodation facilities.

TOURISTS' OVERNIGHT STAYS BY TYPE OF ACCOMMODATION ESTABLISHMENTS, 2017

Hotels – all	3938449
5-star hotels	308524
4-star hotels	1625263
3-star hotels	1267507
2-star hotels	565645
1-star hotels	171510
Garni hotels – all	695725
5-star garni hotels	4488
4-star garni hotels	264414
3-star garni hotels	337140
2-star garni hotels	82500
1-star garni hotels	7183
Apart hotels – all	135604
5-star apart hotels	10660
4-star apart hotels	11990
3-star apart hotels	19745
2-star apart hotels	93209
Boarding houses – all	31862
3-star boarding houses	11954
1-star boarding houses	19908
Motels – all	37616
4-star motels	1938
3-star motels	14448
2-star motels	9173
1-star motels	12057
Tourist settlements – all	45519
4-star tourist settlements	33421
3-star tourist settlements	10254
2-star tourist settlements	1844
Apartments – all	225988



4-star apartments	81248
3-star apartments	55028
2-star apartments	74865
1-star apartments	14847
Camp sites – all	8835
3-star camp sites	2154
2-star camp sites	6376
1-star camp sites	305
Camping grounds	29798
Private rooms – all	452811
3-star private rooms	169230
2-star private rooms	205444
1-star private rooms	78137
Private houses – all	428804
4-star private house	16300
3-star private house	411839
2-star private house	665
Hunting lodges and cottages	318
Hunting cottages	318
Inns with overnight stays	92473
Overnight stays	538131
Hostels	210837
Spa cures	597386
Climatic cures	213651
Mountain shelters	37954
Workers' resorts	80971
Youth and children's resorts	493301
Dining and sleeping cars	10478
Rural tourist households – all	16040
4-star rural tourist households	5306
3- star rural tourist households	7949
2-star rural tourist households	2785
Other catering trade accommodation facilities	2593

Source: Statistical Office of the republic of Serbia

The largest number of foreign tourists who visited the Republic of Serbia in 2017 were tourists from Bosnia and Herzegovina (108 thousand arrivals, 235 thousand overnight stays), Turkey (99 thousand arrivals, 163 thousand overnight stays), Bulgaria (91 thousand arrivals, 149 thousand overnight stays), Croatia (83 thousand arrivals, 153 thousand overnight stays) and Montenegro (79 thousand arrivals, 198 thousand overnight stays).



**TOURISTS' ARRIVALS BY COUNTRY OF
ORIGIN, 2017**

Domestic	1588693
Foreign	1497173
Bosnia and Herzegovina	108058
Turkey	99500
Bulgaria	91233
Croatia	83499
Montenegro	79326
Slovenia	78486
Germany	78211
Greece	67395
Romania	66747
Macedonia	60564
Other non-European countries	52227
China	51691
Russian Federation	49857
Italy	49533
Poland	45309
Israel	40942
Hungary	34671
United States of America	34169
Austria	32889
Great Britain	31658
Other European countries	31209
France	29224
Switzerland and Liechtenstein	25656
Sweden	22107
Netherlands	20920
Czech Republic	15319
Australia	13559
Slovakia	13459
Belgium	12157
Spain	11120
Ukraine	10442
Canada	9357
South Korea	7520
Denmark	6610
Norway	6601
Japan	5769



Cyprus	5306
Portugal	3438
Finland	3268
Ireland	2977
Brazil	2192
New Zealand	1220
Iceland	1148
Luxembourg	630
Source: Statistical Office of the republic of Serbia	

Out of the total number of tourists' overnight stays (8 325 thousand), 26.8% (2 228 thousand) were recorded in spas and 25.0% (2079 thousand) in mountain resorts.

The structure of domestic tourists' nights shows that 38.0% was spent in spas (1 957 thousand) and 34.1% (1 757 thousand) in mountain resorts, out of the total number of domestic tourists' overnight stays (5 150 thousand).

The structure of foreign tourists' overnight stays shows that there were 53.3% (1 692 thousand) tourists' nights spent in Grad Beograd, 7.3% (231 thousand) in Grad Novi Sad, 8.5% (271 thousand) in spas and 10.1% (321 thousand) in mountain resorts, out of the total number of foreign tourists' overnight stays (3175).

TOURISTS' OVERNIGHT STAYS BY TYPE OF TOURIST RESORTS AND ACCOMMODATION ESTABLISHMENTS, 2017

	Total	Spas	Mountain resorts	Other tourists' resorts	Other resorts
TOTAL	8325144	2227945	2078690	1380257	300980
Hotels	3938449	616026	928078	711201	137563
Motels	37616	823	2754	28381	5658
Apartments	225988	25449	146179	12693	853
Tourist settlements	45519	–	21431	10254	1844
Boarding houses	31862	4007	26856	–	999
Overnight stays	538131	75544	142530	178200	70318
Inns	92473	17165	7541	53975	13437
Garni hotels	695725	36091	24497	158744	12086
Apart hotels	135604	25151	98903	–	–
Spa cures	597386	593272	–	4114	–
Climatic cures	213651	109781	103870	–	–
Mountain shelters and huts	37954	–	37243	83	134
Workers' resorts	80971	18053	62918	–	–
Youth and	493301	39471	414434	26849	12547

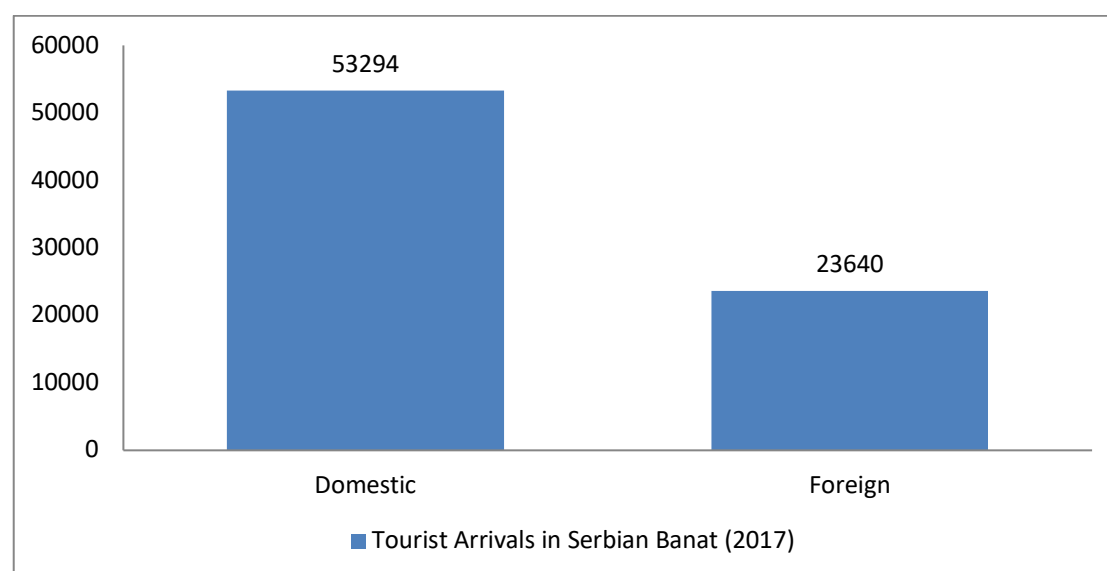


children's resorts					
Hostels	210837	3426	24877	54793	–
Camp sites	8835	–	2062	92	305
Camping grounds	29798	–	56	20794	1512
Private rooms	452811	264335	28903	88322	35310
Private houses	428804	398107	891	23342	3794
Rural Tourist household	16040	1181	4667	7104	3088
Dining and sleeping cars	10478	–	–	–	–
Hunting lodges and cottages	318	63	–	–	255
Other	2593	–	–	1316	1277

Source: Statistical Office of the republic of Serbia

2.2.2 Incoming tourism in Serbian Banat

During the period from 2003 to 2012, the number of tourists ranged from 22,000 to 27,000. These numbers represent between 7.4% and 9.9% of the total number of tourists in the northern province of Vojvodina, where South Banat is situated. International sports events such as the European Basketball Championship in 2005 and the Universiade in 2009 had the biggest impact on tourist arrivals. In 2017 the number of tourists' arrivals in the Serbian Banat rose to 82,396, of which 69% were domestic and 69% foreign.⁸ Most tourists are business people, hunters, and visitors to the various events.



⁸ <http://www.stat.gov.rs/en-US>



Source: Statistical Office of the republic of Serbia

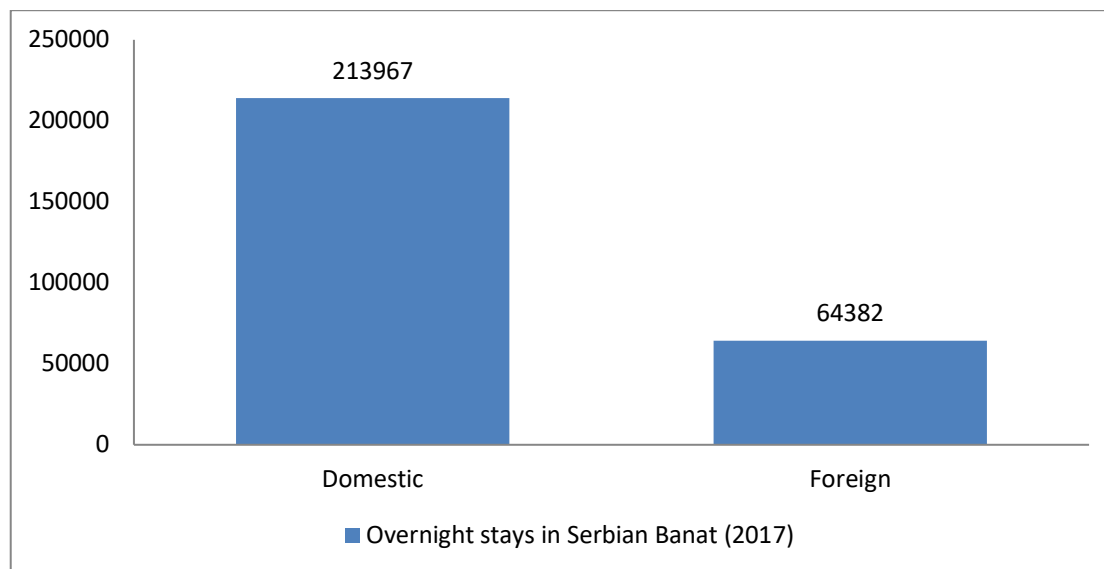
As shown in the table below, the number of arrivals in the Južnbanatska oblast is 31.365, in the Severnbanatska oblast at 28.429 and in the Srednjobanatska oblast at 22.602. The cities of Banat that gathered most tourists are the following:

- Vršac; 16.223
- Zrenjanin; 15.957
- Kanjiža; 12.073
- Kikinda; 7.812
- Senta; 6.538
- Bela Crkva; 3.093
- Pančevo; 2.666

The most visited destination in South Banat is the city and municipality of Vrsac, which absorbs 50–70% of tourists per year. At the same time tourism makes up only 1% of its gross domestic product.

Regarding the number of overnight stays in the area, the following are observed:

- Altogether, 278,349 of them were recorded in the Banat region, 77% of which were from domestic tourists, while 23% were foreigners.
- The average length of stay of just 2.5 days.



Source: Statistical Office of the republic of Serbia

- In the Južnbanatska area 88,288 overnight stays were recorded, of which 35,355 were made in Vršac, 12,389 in Bela Crkva, 11,240 in Kovačica, 10,133 in Kovin, 9,541 in Alibunar.



- Severinobanatska area recorded 122,264 overnight stays, of which 50,477 were in Kanjiža, 38,834 were in Kikinda, 23,481 in Senta.
- 67,797 overnight stays were recorded in the Srednjobanatska area, of which 45,491 were in Zrenjanin, 9,286 in Novi Bečej, 8,632 in Sečanj and 4,336 in Žitište.

Tourism in Banat (2017)

Region-Area	Arrivals			Overnight stays			Average number of overnight stays	
	All	Domestic	Foreign	All	Domestic	Foreign	Domestic	Foreign
REPUBLIC OF SERBIA	3085866	1588693	1497173	8325144	5150017	3175127	3.2	2.1
Južnobanatska oblast	31365	22967	8398	88288	67510	20778	2,9	2,5
<i>Pančevo</i>	<i>2666</i>	<i>1306</i>	<i>1360</i>	<i>5372</i>	<i>2109</i>	<i>3263</i>	<i>1,6</i>	<i>2,4</i>
Alibunar	1658	1563	95	9541	8489	1052	5,4	11,1
Bela Crkva	3093	3053	40	12389	12327	62	4	1,6
Vršac	16223	10567	5656	35355	22866	12489	2,2	2,2
Kovačica	4195	3330	865	11240	9473	1767	2,8	2
Kovin	2427	2151	276	10113	8232	1881	3,8	6,8
Opovo	741	635	106	2077	1813	264	2,9	2,5
Plandište	362	362	-	2201	2201	-	6,1	-
Severnobanatska oblast	28429	20772	7657	122264	99412	22852	4,8	3
<i>Kikinda</i>	<i>7812</i>	<i>6877</i>	<i>935</i>	<i>38834</i>	<i>35263</i>	<i>3571</i>	<i>5,1</i>	<i>3,8</i>
Ada	1084	398	686	2582	926	1656	2,3	2,4
Kanjiža	12073	8207	3866	50477	38179	12298	4,7	3,2
Novi Kneževac	231	230	1	4027	4026	1	17,5	1
Senta	6538	4408	2130	23481	18238	5243	4,1	2,5
Čoka	691	652	39	2863	2780	83	4,3	2,1
Srednjobanatska oblast	22602	15017	7585	67797	47045	20752	3,1	2,7
<i>Zrenjanin</i>	<i>15957</i>	<i>9555</i>	<i>6402</i>	<i>45491</i>	<i>27844</i>	<i>17647</i>	<i>2,9</i>	<i>2,8</i>
Žitište	707	543	164	4336	3977	359	7,3	2,2



Nova Crnja	46	17	29	52	17	35	1	1,2
Novi Bečej	3834	2927	907	9286	6794	2492	2,3	2,7
Sečanj	2058	1975	83	8632	8413	219	4,3	2,6
TOTAL	82396	53294	23640	278349	213967	64382	3,6	2,7

Source: Statistical Office of the republic of Serbia

2.3 Types of Banat tourism

The various types of tourism are classified: ⁹

- **Urban tourism:** the city as a starting point or with its own attractions, having in some cases an urban center for visitors' information;
- **Ecological tourism, ecotourism:** tourism that highlight the environmental protection and education in this spirit;
- **Thematic tourism:** exploiting a certain niche, from natural attractions to local specificity;
Adventure tourism: the tourist is very involved in physical activities especially: cycling, canoeing, escalations, etc.;
- **Rural tourism:** getting in touch with the rural community;
- **Tourism at farms and plantations:** accommodation at farm and plantations and participation in specific activities;
- **River tourism:** cruises on rivers, artificial canals **Cruise tourism and with yacht:** made on the great lakes, oceans and seas, some having own themes
- **Road tourism** often made with own (or rented) car involves a road trip during which the main tourism spots of the regions are visited;
- **Residential tourism:** is made in homes from less frequented areas. It can grow if it connected with a specific event from the region;
- **Rail tourism,** especially when trains are involved and routes with tradition: Orient-Express, Trans- Siberian, etc.;
- **Camping and caravan tourism** require camping sites or specially designed motorized vehicles with accommodation facilities

The rich range of tourism resources in Banat can generate a multitude of forms of tourism:

1. **Travelling tourism:** It is possible to be realized on the main roads a transit tourism through the Mures corridor, the Timis-Cerna corridor, the Danube Gorge, through the Transylvanian Iron Gate, on the Crisul Alb Valley, through Banat Mountains, or through an itinerant tourism for visiting tourist objectives'. Within the Banat Mountains, the Poiana Rusca Mountains, the

⁹ D. Chirilă , M. Chirilă , C. Sîrbulescu (2018), Study Regarding the Types of Banat Tourism, *Scientific Papers: Animal Science and Biotechnologies*, 51 (2), 134-137



Zarand Mountains and the Metaliferi Mountains, have been formed tourist circles with themes, depending on the categories of attractive tourist resources.

2. **Thermal and spa tourism:** It is a point of interest through the springs of mineral and thermal waters, whose curative qualities are valorized through a satisfactory network of spa resorts. Among them, Baile Herculane ranks on the first place, as a resort with international recognition, following the resorts of regional interest - Moneasa, Lipova, Buzias and resorts of local interest, such as Calacea.
3. **Rest and recreation tourism:** It is practiced in all tourist resorts, in localities with recreational facilities, on the banks of the water, at the edge or in the forests, on weekends or on holidays, vacations. The Surduc reservoir, located on the administrative territory of the Fardea commune, extends between Fardea, Mitnicul Mic, Gladna and Surducul Mic. The construction of the dam began in 1972, and the accumulation reached nearly 25 million cubic meters in 1977 and an area of 362 hectares. The second construction stage began in 1988 and is designed to accumulate 51 million cubic meters on an area of 538 hectares. The main purpose of the reservoir lake is to provide drinking water to the Timisoara area, through Bega Canal, flood defense and, of course, for fishing and hunting tourism purpose. The lake is mostly surrounded by deciduous forests and meadows and has numerous holiday houses (over 270) on the banks. In the area, the fauna is particularly rich, making the hunting attraction to be particularly great. The animals most commonly encountered are poppy, rabbit, ferret, pheasant, wolf, fox, boar, deer or even bear. Besides the lake, or in the neighboring villages, the owners of holiday homes or houses from the village, offer accommodation and food to tourists eager to benefit from these facilities.
4. **Business tourism:** The area of the three counties represents a good land for businessmen, for foreign investors, both through the existing economic traditions and by the possibilities to exploit the tourist potential of the disadvantaged areas. Moldova Noua-Pescari, Anina, Sasca Montana, Rusca Montana-Ruschita, Ocna de Fier- Dognecea, Mehadia, Secu, Doman or mono- industrial areas proposed to receive the status of a disadvantaged area: Nadrag, Tomesti, Margina or assisted areas: Jimbolia.
5. **Cultural-historical tourism:** It is developed due to a rich network of historical and archaeological sites, historical and architectural monuments and museums, facilitates the practice of cultural tourism but also of the urban and weekend one. Historical landmarks include: the medieval fortresses of Arad, Timisoara and Resita; the numerous medieval castles, from which the Huniazi Castle - Timisoara, castles from Macea, Curtici, Sofronea, Manastur, Siria, Pancota, Conop, Savirsin, Birchis, Mintia, Santamaria Orlea, Banloc, Ciocova; monasteries and churches of stone and/or wood with an impressive age, attesting even the very beginning of Christianity in Romania.
6. **Mountain tourism** is practiced by mountain hiking, favored by the mountains: Zarand, Codru Moma, Banat, Poiana Ruscai, Tarcu, or Depressions: Almaj, Brebu Nou-Garana.



7. **Speotourism:** The existence of many caves in the area, with some of the most peculiar formations or some of them crossed by underground courses attracts a significant number of tourists.
8. **Sports tourism:** The mountain frame is especially favorable for practicing winter sports. The mountain resorts Semenik and Muntele Mic are distinguished by a relatively developed accommodation base (more quantitative than qualitative), as well, important points of attraction for winter sports from Parang Mountains, Valcan, Retezat. From the experience of developing the activities of, sporting and adventure tourism listed above has result the need to create an organization of local relevance. Following the initiative of the six communes Slatina Timis, Armenis and Teregova and the city of Caransebes, which together covers the territory of the area Tarcu-Muntele Mic Mountain, was born at the end of 2000, the Tourist Promotion Association of Tarcu-Muntele Mic- PROMOTOUR.
9. **Hunting tourism and sport fishing tourism:** The region is known for its excellent hunting possibilities. Although the wealth of quality fish in the Danube is notorious, the commercial offer of fish preparations is almost non-existent and what exist does not correspond to quality demands. This objection goes beyond the field of sport fishing, instilling rather the field of food. However, it is worth mentioning trout offers from the few trout's from the region, which often buy raw materials from other places because their own production is deficient.
10. **Tourism for young peoples, capitalized through:** Nadrag Camp: Located in the Poiana Rusca Mountains at an altitude of 350 m, with an area of 0.4 ha, the camp has 120 seats, the accommodation being made in two villas with 24 rooms each. The camp has a place for food, showers, football and handball ground, chess tables and table tennis; -Poieni Village Camp: It is located in Poiana Ruscă Mountains at an altitude of 312 m, near Pietroasa and has an area of 2 ha. The camp has 250 accommodation places in villas of 27 rooms. The camp has all the facilities but needs capital repairs, and is currently decommissioned; -Poieni Strambu Camp: it is located in the vicinity of the Poieni Sat Camp, in the area of Pietroasa commune, at an altitude of 382 m. It has 140 accommodation places in two villas and a cottage. The camp has additional facilities such as: kitchen block, protocol room, showers, thermal station, sports ground, disco.
11. **Other types of tourism** that can be practiced in this area, some of which are alternatives for the revival and development of disadvantaged areas: **Religious, ecumenical tourism, Cruise tourism:** in the Danube Delta and throughout the middle Danube basin, The Bega Canal; **Urban tourism:** There are 36 cities in this region, preserving a valuable architectural heritage, museums in various fields: history, archeology, art, natural sciences, mineralogy, ethnography, technical, some and outdoors; **Intercultural tourism** in the D.C.M.T. (Danube-Kris-Mures-Tisa) Euroregion; **Local gourmet tourism; Classical tourism organized in hotels, motels, cottages and camping:** the area's accommodation network is particularly diverse, including hotels in the area's cities, such as Padesul Hotel in Faget. Also in Tomesti is Liman Valley



Motel with 53 seats in motel and 60 seats in camping. Near the town of Nadrag locality there is Capriorul Cottage with 44 accommodation places in the cottage and 20 in small houses

Tourism in the Banat area is represented by a diversified natural potential, from the peaks of the mountains to the plain, through the variety of fauna and flora, as well as by the climate elements and a representative hydrographic network, all constitute tourist attractions of great attractiveness.

Tourism represents a vast field, often with complex problems. It is of great importance, because it can generate new jobs, attract investments and investors, and implicitly can lead to higher income and higher living standards for the population

3. Tourism destination competitiveness

3.1 Banat competitiveness as a tourism destination

Ritchie and Crouch's (2003) model of tourism destination competitiveness includes five key determinants:



Core resources and attractors include *physiography (landscape and climate), culture and history, market ties (linkages with the residents of tourism originating regions), activities, special events, and the tourism suprastructure (primarily accommodation facilities, food services, transportation facilities, and major attractions).*

Supporting factors and resources consist of *accessibility, entrepreneurship, communications infrastructure, local transportation infrastructure and other inputs provided by public services, institutions (financial, education, and research), and the principal factors of production.*



Qualifying and amplifying determinants include *safety, location, interdependencies within and between destinations, and cost (in a broad sense includes interdestination travel, local living costs, and exchange rate effects).*

Destination management embraces *destination promotion, service levels, information systems, the organization of destination management activities, and sustainable resource stewardship.*

Finally, destination policy, planning, and development determinant consist of *system definition, philosophy, vision, audit, positioning, development, competitive/collaborative analysis, monitoring, and evaluation.*

Core resources and attractors;

Concerning the first factor, core resources and attractors, gastronomy, multicultural communities, and richness of cultural and historical heritage are among the most important drivers to destination competitiveness. South Banat is the most heterogeneous region in Vojvodina and Serbia in terms of its ethnic makeup. There are more than 25 ethnic groups in South Banat. Most of them have preserved their traditions, customs and gastronomy. This variety is also present on the tourist market through a few museums that are the oldest in Vojvodina (in Bela Crkva, Vrsac and Pancevo), the world famous naive art gallery in Kovacica, various cultural heritage venues (from castles to religious structures), historic monuments, festivals, and events. Numerous festivals devoted to traditional food, music, dance, customs or language are held throughout the year. Most of the settlements, even the smallest ones, express their love of food, drink, and music through multi-day celebrations. Events dedicated to local food are accompanied by appropriate musical entertainment, which would suggest that the two go hand in hand. The average resident is a passionate beer or wine lover, and food lover. The tradition of wine-making dates back nearly six centuries, with its golden age in the 19th century. South Banat also has a three hundred year old tradition of brewing, with the oldest brewery in this part of Europe located in Pancevo. This is an excellent opportunity for establishing gastronomic routes such as the tours for food lovers in Barcelona. South Banat's cuisine is a mixture of Serbian, German, Hungarian, Romanian and Slovak cuisines, and offers the food lover a feast of textures and flavors. Almost every dish contains meat or products derived from it, and bread is an essential part of every meal. Bela Crkva's carnival, held in South Banat, is one of three oldest carnivals in Europe with those held in Cannes and Monte Carlo being the only older ones. The carnival is dedicated to flowers. During the festival the entire city is involved in festive activities. The festival includes several events, culminating on the final Sunday with a masked procession led by majorettes.

In 2014, Kovacica was chosen as one of five destinations for the national competition for European Destinations of Excellence – EDEN. The competition was part of an almost decade-long project promoting sustainable tourism development models across the European Union. This result additionally confirms the richness of cultural heritage in South Banat. The EDEN theme in 2014 was Tourism and Local Intangible Heritage. In South Banat, attributes such as the multicultural ambience, rich heritage and local gastronomy are not just factors contributing to destination attractiveness—they are the main motivations behind tourists visiting the region.



Natural aspects of the destination (climate, opportunities for outdoor recreation and preserved nature, and beautiful scenery) are also important factors indicating the competitiveness of the destination. South Banat's climate enables the existence of two air spas, in Deliblato Sand and the Vrsac Mountains, numerous nature reserves under international protection, rich biodiversity and plenty of adventure opportunities (paragliding, free climbing, hiking and trekking). It should be noted that, despite awareness of the beautiful nature surrounding them, local residents rarely actively participate in outdoor recreational activities. This is the main reason why the infrastructure for this kind of activities is severely undeveloped. This has changed only recently with increased investments into the tourism industry.

The availability of five- and four-star hotels is low. In the context of a tourism destination, very limited availability of accommodation facilities and their low quality indicates a low level of tourism development. However, some improvements have been made in last few years. Several new facilities have opened, and the existing facilities renovated (e.g. Villa Breg and the Hotel Serbia in Vrsac, Relax Tourist Resort in Kovacica and numerous villas in Bela Crkva near lakes). The most common types of accommodations are guesthouses, private apartments and rooms. Since the Villa Breg hotel lost one star in 2014, there are currently no five-star hotels in South Banat. The owners of guesthouses and private apartments are very friendly and helpful. This is very useful because the information on the web sites is often outdated.

Concerning accommodation facilities are provided the following data by Statistical Office of the Republic of Serbia;

The number of rooms remains constant with some fluctuations in the period 2013-2017. Specifically, in 2013 43,657 rooms were recorded in all of Serbia, and in 2017 their number stood at 44,813. A similar situation is observed in the number of beds, which shows a slight decrease in the period 2013-2017. In 2013 the number of beds reached at 107.256 and in 2017 the number reached at 106.029 beds.¹⁰

ACCOMMODATION FACILITIES, 2013–2017

Year	Rooms	Beds
2013	43657	107256
2014	43603	102940
2015	45396	106102
2016	46362	109469
2017	44813	106029

Source: Statistical Office of the republic of Serbia

The number of rooms in the Republic of Serbia by type of accommodation is as follows:

¹⁰ <http://www.stat.gov.rs/en-US>



- Hotels; 15.889
- Motels; 374
- Apartments; 1.318
- Tourist settlements; 209
- Boarding houses; 90
- Overnight stays; 3.609
- Inns; 809
- Garni hotels; 2.740
- Apart hotels; 467
- Spa cures; 1,966
- Climatic Cure; 688
- Mountain shelters and huts; 228
- Workers' resorts; 301
- Youth and children's resorts; 1.080
- Hostels; 2.323
- Camp sites; 294
- Camping grounds; 2.289
- Private rooms; 7.778
- Private houses; 1.587
- Rural Tourist household; 675
- Dining and sleeping cars; 40
- Hunting lodges and cottages; 30
- Other; 29

**ACCOMMODATION FACILITIES BY TYPE OF TOURIST RESORTS
AND FACILITIES, 2017**

	Rooms				
	Total	<i>Spas</i>	<i>Mountain resorts</i>	<i>Other tourists' resorts</i>	<i>Other resorts</i>
TOTAL	44813	11211	7686	10355	4137
Hotels	15889	2134	2830	4029	862
Motels	374	10	17	214	133
Apartments	1318	102	909	169	11
Tourist settlements	209	–	77	48	26
Boarding houses	90	16	66	–	8
Overnight stays	3609	436	688	1286	807
Inns	809	119	44	471	156
Garni hotels	2740	222	88	959	43
Apart hotels	467	91	337	–	–
Spa cures	1966	1886	–	80	–
Climatic cures	688	377	311	–	–



Mountain shelters and huts	228	–	181	14	9
Workers' resorts	301	98	203	–	–
Youth and children's resorts	1080	75	779	169	57
Hostels	2323	66	109	777	–
Camp sites	294	–	72	42	153
Camping grounds	2289	–	30	342	417
Private rooms	7778	4417	652	1093	1260
Private houses	1587	1053	173	251	101
Rural Tourist household	675	104	120	390	61
Dining and sleeping cars	40	–	–	–	–
Hunting lodges and cottages	30	5	–	–	25
Other	29	–	–	21	8

Source: Statistical Office of the republic of Serbia

The number of beds in the Republic of Serbia by type of accommodation is as follows:

- Hotels; 32.175
- Motels; 883
- Apartments; 3.902
- Tourist settlements; 392
- Boarding houses; 221
- Overnight stays; 8.879
- Inns; 2.023
- Garni hotels; 5.748
- Apart hotels; 1.538
- Spa cures; 4.130
- Climatic Cure; 1.817
- Mountain shelters and huts; 834
- Workers' resorts; 801
- Youth and children's resorts; 4.478
- Hostels; 6.854
- Camp sites; 980
- Camping grounds; 5.333
- Private rooms; 20.245
- Private houses; 2.725
- Rural Tourist household; 1.723
- Dining and sleeping cars; 175
- Hunting lodges and cottages; 61



The project is co-financed by the European Union

- Other; 112

**ACCOMMODATION FACILITIES BY TYPE OF TOURIST RESORTS
AND FACILITIES, 2017**

	Beds				
	Total	Spas	Mountain resorts	Other tourists' resorts	Other resorts
TOTAL	106029	25207	22604	24459	11111
Hotels	32175	4460	7466	8263	1887
Motels	883	25	33	530	295
Apartments	3902	302	2776	455	37
Tourist settlements	392	–	116	110	50
Boarding houses	221	32	171	–	18
Overnight stays	8879	1069	1963	3046	1944
Inns	2023	324	137	1160	354
Garni hotels	5748	531	252	2107	108
Apartment hotels	1538	190	1242	–	–
Spa cures	4130	3950	–	180	–
Climatic cures	1817	1167	650	–	–
Mountain shelters and huts	834	–	655	75	50
Workers' resorts	801	268	533	–	–
Youth and children's resorts	4478	309	3119	796	254
Hostels	6854	140	206	2279	–
Camp sites	980	–	288	168	462
Camping grounds	5333	–	75	1016	1242
Private rooms	20245	10569	2262	2660	3958
Private houses	2725	1541	353	584	223
Rural Tourist household	1723	320	307	941	155
Dining and sleeping cars	175	–	–	–	–
Hunting lodges and cottages	61	10	–	–	51
Other	112	–	–	89	23

Source: Statistical Office of the republic of Serbia

Supporting factors and resources;

Hospitality of the local population, connectivity to European destinations and quality of public transport and taxi services are among the most competitive elements for South Banat. The local population is well known for its stress-free lifestyle and gastronomic indulgence. This feature is frequently remarked upon as a big destination advantage by foreign tourists. The destination's good



accessibility is a result of excellent connections from local roads, the international E-road network, and Pan-European transport corridors.

According to the Statistical Office of the Republic of Serbia the following data are presented;

The length of public roads is 2.315,217 km (of which 1.296,5 km are national roads and 1.018,7 km are municipal roads).

Region Area	LENGTH OF ROADS (km), 2017
City - Municipality	
Južnobanatska oblast	919.898
<i>Pančevo</i>	<i>140.795</i>
Alibunar	102.441
Bela Crkva	86.277
Vršac	172.709
Kovačica	81.257
Kovin	128.238
Opovo	44.8
Plandište	163.37
Severnobanatska oblast	623.159
<i>Kikinda</i>	<i>212.1</i>
Ada	100.14
Kanjiža	125.446
Novi Kneževac	51.028
Senta	67.519
Čoka	66.926
Srednjobanatska oblast	772.16
<i>Zrenjanin</i>	<i>411.535</i>
Žitište	125.289
Nova Crnja	55.587
Novi Bečej	70.192
Sečanj	109.557

Source: Statistical Office of the republic of Serbia



In the table below, the travelling times were estimated for public transport services, that in most cases need a combination of trains and buses. Most of the travelling distances between the main towns are about 1-2 hours.

Public transport traveling time among main towns in the eligible area (hours) (Bus or Train + Bus)			
	Kikinda	Zrenjanin	Pancevo
Kikinda	-	1.07	3.4
Zrenjanin	1.07	-	1.2
Pancevo	3.4	1.2	-

Source: "Technical assistance for multi-annual programming of future cross border cooperation programme in the Romania-Serbia cooperation area", Regional Office for Cross Border Cooperation Timișoara, Romania-Serbia IPA CBC Programme 2014 - 2020

The low presence of foreign companies in the economy, and foreign investment in the tourism sector, are seen as disadvantages for the South Banat tourism industry. This low presence of foreign investments is a serious shortcoming, since tourism is a private-sector dominated industry and the local business community has extremely low liquidity.

The table below shows the investments made in fixed assets in the Serbian Banat. The table shows some basic categories that affect the tourism sector. These are investments in housing and catering facilities, transportation, administration, public administration and security, entertainment and information and communication. In addition to these categories, investments were also made in health, construction, agriculture, electricity and water supply etc.

As can be seen, the area with the largest number of investments is the Južnobanatska oblast. Investments in the Banat region show its growth potential.



Realized investments in fixed assets, 2017

	Accommodation and food service activities	Transportation and storage	Administrative and support service activities	Public administration and defence; compulsory social security	Arts, entertainment and recreation	Information and communication
Južnobanatska oblast	9101	346367	79175	950746	47160	64603
<i>Pančevo</i>	<i>2500</i>	<i>287452</i>	<i>57965</i>	<i>379754</i>	<i>22660</i>	<i>46412</i>
Alibunar	-	-	-	-	57	-
Bela Crkva	-	-	110	84137	4747	-
Vršac	1084	58258	18850	252406	2337	17735
Kovačica	-	-	-	94003	14630	87
Kovin	-	-	2250	62240	1599	-
Opovo	5517	657	-	54509	931	369
Plandište	-	-	-	23697	199	-
Severnobanatska oblast	2204	68722	9096	504815	36126	17965
<i>Kikinda</i>	<i>2204</i>	<i>580</i>	<i>4405</i>	<i>241710</i>	<i>15422</i>	<i>17965</i>
Ada	-	-	3911	68204	972	-
Kanjiža	-	58832	-	4866	9159	-
Novi Kneževac	-	-	-	133883	375	-
Senta	-	9310	780	11942	10198	-
Čoka	-	-	-	44210	-	-
Srednjobanatska oblast	844	185665	62636	107876	13850	54586
<i>Zrenjanin</i>	<i>844</i>	<i>185665</i>	<i>60280</i>	<i>27620</i>	<i>11290</i>	<i>54387</i>
Žitište	-	-	71	1124	347	87
Nova Crnja	-	-	-	32919	507	-
Novi Bečej	-	-	2285	44924	1706	112
Sečanj	-	-	-	1289	-	-

Source: Statistical Office of the republic of Serbia



The project is co-financed by the European Union

Qualifying and amplifying determinants;

Geographical location, safety at destination, and cleanness and tidiness are among the main strengths of Banat competitiveness. Banat is in good accessibility from and proximity to Belgrade. The fact that Belgrade is the largest outbound tourism market and the most important traffic hub in the county makes Banat ideal for day trips. This opportunity is not being fully exploited.

The price-to-quality ratio, hotel prices, online booking of accommodation, and economic development are seen as disadvantages of the South Banat tourism industry. Low salaries in small and medium size enterprises lead to unmotivated employees, who consequently give little attention to quality, which then leads to poor price/quality ratio. The situation is substantially different in micro enterprises, which are family owned businesses employing one or two workers. Analysis of positive online reviews shows that a personalized and dedicated relationship towards tourists by micro enterprises (entrepreneurs) is one of the competitive advantages. This is very important when bearing in mind that reviews and online opinions have a major impact on consumers, and are essential part of the modern travel-planning process.

Destination management;

Tourism signing, knowledge of foreign languages by employees in the tourism sector, existence of tours, availability of tourism promotional materials in foreign languages, and opportunities for education in tourism are the main disadvantages of Banat competitiveness. Excluding the city of Vrsac, which absorbs the highest number of tourist arrivals, the number of guided tours available in South Banat is very low. As expected, low availability of guided tours indicates an underdeveloped tourism industry, and is one of the reasons why South Banat was selected for this study. In the past few years, the number of tourist signposts has increased, and, as this research shows, has reached the same level as the direct competition. Current signposts have been placed for a wine route (several local winemakers who are the ambassadors of local traditions), a cycling route (Danube Bike Trail) and a few heritage attractions, which are mainly in cities.

Human resources are a very important determinant of tourism development and competitiveness. In the contemporary business environment it is crucial to develop a highly qualified workforce. Unfortunately, the tourism sector in Serbia currently functions without an adequately educated and trained workforce. The low number of English speaking employees, who mostly work in local tourism organizations and city hotels, and poor availability of multilingual promotional materials, are limiting the development of international tourism. If managers succeed in overcoming these problems, South Banat could take advantage of current trends in tourism. Some of the trends that can be exploited are: a 15% growth in Chinese inbound travel to Europe's lesser-known destinations (Serbia, Latvia, Estonia and the Czech Republic) in 2014 a registered rise in number of foreign tourists in Serbia last few years, Serbia's increased appearances on must-see lists among world renowned destination travel blogs and guides,



and the rise of social media in many different forms: blogs and micro blogs (twitter), content communities (YouTube) and social networking sites (Facebook).

Destination policy, planning and development determinants;

Awareness of the South Banat district in foreign countries is extremely low, and therefore South Banat as a brand virtually does not exist. Most incoming tourists are business travelers to Vrsac (pharmaceutical and chemical industries, SMATSA Aviation Academy) and Pancevo (petrochemical industry). Business environment and prioritization of travel and tourism are very poor indicators in most of the studies dealing with the Serbian economy. The poor business climate has led to low brand identity and has kept foreign investments to a minimum. This is a serious shortcoming, considering that tourism is a private-sector dominated industry and the local business community has extremely low liquidity. Current central government budget expenditures for tourism are limited. However, companies in the South Banat district have the advantage that incentives come from three levels (the Republic of Serbia's central government, the Autonomous Province of Vojvodina and the municipalities). ***Cross-border cooperation is well developed and access to the EU funds is freely available.*** Local authorities have indicated in numerous planning documents, such as strategies and master plans, that they are very willing to improve the tourism industry through investments. Therefore, the incentives for tourism development in South Banat region are very low in spite of the fact that strategic documents recognize the importance of travel and tourism as a driving force for job generation, economic growth and recovery. A rare, positive example is the municipality of Vrsac, with its strong financial investment in roads, cultural institutions, environmental protection and tourism industry marketing.

In the Travel & Tourism Competitiveness Report 2015 some disadvantages remarked. In this edition of the Report, Serbia is ranked very low, 95th in the world (95/141) and 35th in Europe (35/37). Some of the low ranked pillars are business environment, quality of ground transport infrastructure, prioritization of travel and tourism, human resources, and the labor market (World Economic Forum, 2015). The same pillars are also weak in the South Banat region and have a negative influence on the competitiveness of its tourism.

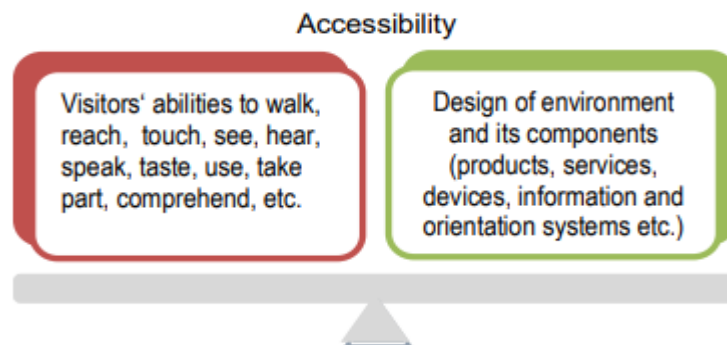
Part B – Accessible Tourism in Banat

5. Definition of accessible tourism

Accessible Tourism (also called Tourism for All or Inclusive Tourism) is complex of products, processes and services that are designed, promoted, distributed and provided to meet specific access needs and requirements of visitors regardless of their age or abilities.¹¹

¹¹ Accessible Tourism Guide, Part 1 – Visitors, Elevator (https://www.accessibletourism.org/resources/io3_1_visitors-en-final.pdf)

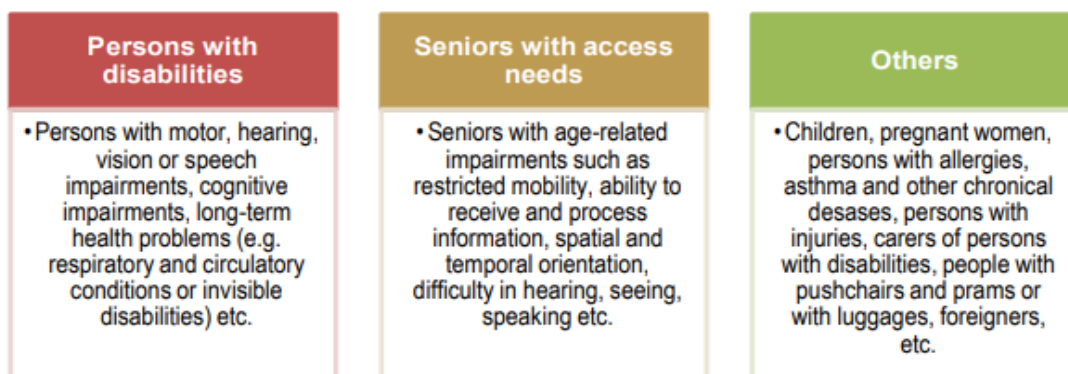




Source: Accessible Tourism Guide, Part 1 – Visitors, Elevator

Although persons with disabilities have the greatest need of accessibility, accessible tourism covers the needs of a variety of customers with different access needs (not always visible) which can be caused by impairment, illness, injury, age, stature, foreign language proficiency or culture. Any person, who faces some difficulties in accessing, using or enjoying tourism services and facilities fully, comfortably, safely and independently, will prioritise accessible places.

Main Beneficiaries of Accessible Tourism



Source: Accessible Tourism Guide, Part 1 – Visitors, Elevator

Accessible tourism is a growing market which brings competitive advantage and new opportunities to businesses. Accessible services have the potential to attract more potential customers, increase service quality and strengthen the image.

Basic facts about the accessible tourism market in EU



Source: European Commission (2014), *Economic Impact and Travel Patterns of Accessible Travel in Europe – Final Report*,

Taking into account who is behind the term “person with access needs”, we cannot talk about a small market segment. Moreover, it is a loyal, growing market which brings competitive advantage and new opportunities to businesses. Accessible services have the potential to attract more potential customers, increase service quality and strengthen the image.

Number of people with disabilities

The World Health Organization has been reporting a continuous growth in the number of people with disabilities in recent years as seen in the table below:¹²

People with disabilities in the world in 2006, 2007 and 2011 (millions)	
2006	500
2007	650
2011	1,000

The World Health Organization reported in 2006 that the disabled population in the world totalled 500 million. In 2011 the figure was already in excess of one billion people with disabilities in the world, approximately 15% of the total population.

A research study carried out by TRANSED in 2010⁶ presented a comparison of the population with disabilities in different countries in the world on the basis of an estimated total of 650 million people with disabilities in the world in 2007. In addition to giving the number of people with disabilities as a ratio of the total population for several countries, the study highlights the fact that in the more developed countries there is a large number of people with disabilities who are users of Accessible Tourism services.

¹² https://www.accessibletourism.org/resources/2015-04-02-eu-supply-study-final_report.pdf



Although not all people with disabilities use tourism resources, many of them could if they had the means they require to do so. Simply by way of indication of the potential number of people with disabilities who could participate in tourism if they had the appropriate means to do so, a few figures are given below:

- European Union: 80 million people with disabilities;
- United States of America: 54 million people with disabilities;
- Asia-Pacific: > 400 million people with disabilities; and
- Latin America: 85 million people with disabilities.

All in all, these data underscore the huge existing economic potential when considering the segment of persons with disabilities as target customers in the market.

5.1 Principal barriers to Accessible Tourism

These are the barriers existing between users/clients and the environment around them (transportation barriers, architectural barriers, communication barriers, among others). They hinder – and in many cases prevent – access to and enjoyment of tourism infrastructures and services. Noteworthy examples of the difficulties that can be found here are the following:¹³

Planning and booking	<ul style="list-style-type: none"> - Inaccessible websites; and - Travel agencies: inaccessible environments and untrained staff.
Transportation	<ul style="list-style-type: none"> - Transfer from home to the point of departure; - Access to transportation terminals: stations, airports; - Boarding means of transportation; and - Lack of adapted services: toilets, information systems, emergency systems.
Buildings	<ul style="list-style-type: none"> - Access to and interior of tourism establishments: rooms, common areas, toilets, leisure areas, sports facilities; and - Access to and interior of other tourism attractions.
Communication	<ul style="list-style-type: none"> - Appropriate signage; and - Alternative systems for conveying information.
Destination	<ul style="list-style-type: none"> - Moving around the urban and rural environment; - Access to tourism resources (natural and cultural attractions, among others) and to general resources (shops, supermarkets, pharmacies); and - Leisure and cultural activities.

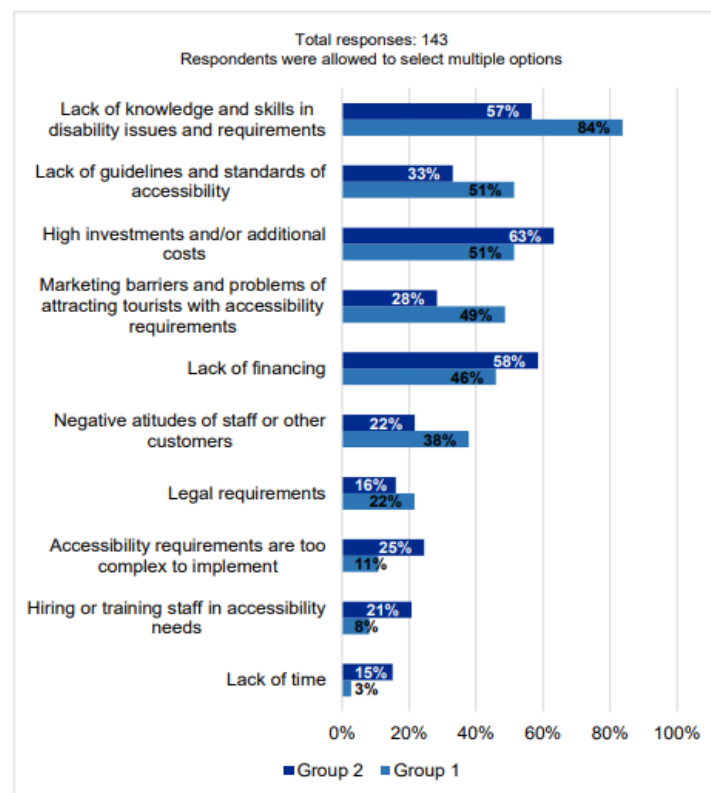
5.2 Main Difficulties and Barriers for Industry (including SMEs) in Providing Accessible Services

¹³ https://www.accessibletourism.org/resources/2015-04-02-eu-supply-study-final_report.pdf



This section looks at industry’s main difficulties and barriers in providing accessible tourism services. In particular, the focus is on better understanding the difficulties of SMEs in developing accessibility in their business operations. The analysis is based on an interview programme with national industry association representing businesses active in the tourism sector as well as an online survey directed to individual tourism businesses. ¹⁴

The figure below summarises the results of a survey of businesses that indicated the main barriers to providing accessible services for them. Specialised accessible providers saw the main barrier in provision of these services for themselves and other businesses in a lack of knowledge about accessibility and a lack of skills among staff. While knowledge and skills ranked highly for businesses with at least partial accessibility as well, it is noteworthy that for this group investment costs and lack of financing seemed to be a greater concern. There was also a large difference across the two types of businesses in the importance of marketing barriers with specialised providers (which engage in marketing directly to the accessible market) seeing this as a greater concern than other businesses which do not specifically market their services to the accessibility community. Finally, it is interesting that legal requirements, guidelines and regulation did not figure highly among the barriers to accessibility.



Note: Group 1 = businesses which cater exclusively or mostly to the accessibility market; Group 2 = businesses which cater to everyone including (some or complete) provisions for accessible tourism

Suppliers’ Perceptions of Barriers Inhibiting Accessible Tourism Services

¹⁴ https://www.accessibletourism.org/resources/2015-04-02-eu-supply-study-final_report.pdf



Despite the differences above across the two types of business, in general 3 key barriers were identified that prevent businesses to become increasingly accessible. These include:

- Infrastructure and physical barriers;
- Financial barriers and lack of a strong business case; and
- Knowledge and information barriers

5.3 Benefits of Accessible Tourism

Travel agencies and destination managers are aware that for tourism to survive and prosper it must continuously adapt its products and services. Tourism is constantly changing in order to get to know visitors' tastes, and to anticipate and adapt to sociological and geopolitical changes, technological innovation and new business opportunities.¹⁵

Tourists that wish and need accessibility when they travel are now beginning to be taken into account as a niche market that offers considerable benefits for destinations and businesses that are ready to cater to them. This market is not new, but it has been neglected for a long time. This is partly because the tourism industry did not consider it a market worth exploring, and because the sector did not know how to cater to the needs of these customers. However, the Accessible Tourism market offers many benefits:

- **Travel, both international and domestic, is rising steadily**, making the tourism sector one of the world's most important economic activities. The more people travel, the greater the demand for accessibility will necessarily be. In order to compete on the global market, tourism providers must respond to visitors' diverse needs at every link in the chain, offering accessible services for everyone;
- **Multiplication of customers**: studies conducted in different regions, particularly in Europe and Australia, support the general idea that people with disabilities are more likely to travel with companions. The multiplier effect of at least 0.5 times can be added to every trip by persons with disabilities. That should make this sector of society more attractive for the tourism industry. Moreover, the client base is usually broader than average, as it includes large families or multi-generational groups;
- **Reduction of the seasonality phenomenon**: attracting tourists with disabilities could help combat the seasonality phenomenon in certain destinations. A considerable number of persons with disabilities have no work responsibilities, and this is now starting to be taken into consideration by tourism providers in certain countries and destinations, who now offer special prices and promotions in the low season;
- **Accessibility must be part of all tourism products**: what began as a niche market will end up being mainstream through the provision of facilities and services with Universal Design. There will still be a need for specialized services for the small number of visitors with a severe disability or who are highly dependent. Here, there is a business opportunity for new tourism products with high levels of accessibility and/or assistance;

¹⁵ https://www.accessibletourism.org/resources/2015-04-02-eu-supply-study-final_report.pdf



- **Accessible destinations can contribute to improving the standard of living of their residents:** accessibility provides additional benefits for communities in terms of higher quality service, sustainability and social inclusion. Local non-governmental organizations are important actors that can play a key role in fostering and supporting Accessible Tourism initiatives;
- **Increased market share:** fostering and retaining the loyalty of this market segment will significantly raise the current market share, thus increasing the profitability and strengthening the financial base of tourism businesses and destinations; and
- **Enhanced corporate image:** in addition to the financial benefits and security, brand image is also enhanced, offering a differentiated image of destinations, businesses and services, which is so important for retaining customer loyalty and attracting new visitors.
- **It benefits the entire market and not only persons with disabilities;**
- **It increases the market opportunities of a tourism destination or business;**
- **It improves competitiveness and fosters market differentiation;**
- **It enhances the quality of the travel experience and the warmth of the welcome;**
- **It heightens the opportunities to create loyalty to the destination, and for it to be recommended;**
- **It consolidates the long-term viability and financial sustainability of businesses and destinations (in terms of work and revenue);**
- **It promotes an inclusive approach to development, reflecting social responsibility; and**
- **It contributes to the civic pride of the community living in the destination.**

5.4 Adopting a Universal Design

In the UN Convention on the Rights of Persons with Disabilities Universal Design is defined as *“The design of products, environments, programmes and services to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. “Universal Design” shall not exclude assistive devices for particular groups of persons with disabilities where this is needed.”*¹⁶

The aim of Universal Design is to simplify the lives of all people, making products, communications and the environment usable by the greatest number of people at the lowest possible economic cost. Universal Design benefits tourism in its entire extension and in all its phases. Universal Design is the way to reach the solution for creating comfortable, sustainable and safe environments, products and services for ALL.

This design philosophy was coined and defined by the US American architect from the Ronald L. Mace (1941–1998) and ratified and explained in greater depth in the 2004 Stockholm Declaration of the European Institute for Design and Disability. It is based on seven principles:

- **Equitable use:** the design is useful and marketable to people with diverse abilities. Tourism designed for all persons must provide the same means of use for all users and avoid

¹⁶ https://www.accessibletourism.org/resources/2015-04-02-eu-supply-study-final_report.pdf



segregating or stigmatizing any users. This principle highlights the need for environments to be safe and appealing, which in our case is important as it is applicable to all tourism resources;

- **Flexibility in use:** the design accommodates a wide range of individual preferences and abilities. Any resource, and most especially tourism resources, must provide the possibility of changes or variations depending on people's circumstances or needs. It must provide choice in methods of use and adapt to the user's pace;
- **Simple and intuitive use:** use of the design is easy to understand, regardless of the user's experience, knowledge, language skills, or current concentration level. This is an essential principle from a tourism standpoint. There cannot be any unnecessary complexity or confusing and insufficient information. Tourism design must accommodate a wide range of languages and cognitive abilities; therefore, achieving the greatest wealth of content with the greatest simplicity of use is the basis for all projects;
- **Perceptible information:** the design communicates necessary information effectively to the user, regardless of ambient conditions or the user's sensory abilities. A characteristic of tourism activities is that they are used by travellers most of whom do not know about their destination. Information provides tourists with knowledge of the environment chosen, and becomes the first point of contact with their destination. This principle activates the use of different presentation modes (pictorial, verbal, tactile), adequate contrast between essential information and its surroundings, the legibility of essential information, and compatibility with a variety of techniques or devices used by people with sensory disabilities;
- **Tolerance for error:** the design minimizes hazards and the adverse consequences of accidental or unintended actions. Elements must be arranged to minimize hazards and errors: the most used elements must be the most accessible, whereas hazardous elements must be eliminated, isolated, shielded or minimized. In this latter case, it will be necessary to provide warning of possible hazards;
- **Low physical effort:** the design can be used efficiently and comfortably and with a minimum of fatigue. In any type of tourism activity, users must maintain a neutral body position. It is necessary to minimize repetitive actions and the need for unreasonable operating forces in order to carry out different actions; and
- **Size and space for approach and use:** appropriate size and space is provided for approach, reach, manipulation, and use regardless of the user's body size, posture, or mobility. In tourism itineraries, it is necessary to provide a clear line of sight to important elements for any seated or standing user. Tourism destinations must be accessible and must provide adequate space for the use of assistive devices or personal assistance.

6. Accessible Tourism in Europe

Europe is the world's leading tourist destination with the tourism industry playing an important role in the European economy. It is estimated that tourism generates over 5% of EU-27 GDP, while employing 10% of the European workforce (including indirectly related jobs). In 2010, it was estimated that 3.4 million enterprises were active in sector which are predominately Small and Medium-sized



enterprises (SMEs). When related sectors are taken into account, the estimated contribution of tourism to GDP creation is much higher: tourism indirectly generates more than 10% of the EU's GDP. In 2013, Europe received 52% of all international tourists of which 39.8% visited a Member State in the EU-28 making it the most visited region in the world. ¹⁷

With the entry into force of the Lisbon Treaty, the European Union has powers "to support, coordinate and complement action by the Member States". Article 195 grants powers to the EU "to complement the action of the Member States in the tourism sector, in particular by promoting the competitiveness of Union undertakings in that sector". To that end EU action is aimed at:

- Promoting the competitiveness of undertakings in this sector and create an environment conducive to their development;
- Encouraging cooperation between the Member States, particularly through the exchange of good practice; and
- Developing an integrated approach to tourism, ensuring that the sector is taken into account in its other policies.

Leading from these new competences, the Commission Communication "**Europe, the world's N°1 tourist destination – a new political framework for tourism in Europe**" lays down an ambitious set of actions aiming at helping the European tourism industry to promote sustainable, responsible and high-quality tourism, to enhance its competitiveness and to consolidate the image and visibility of Europe and its destinations, as the main objectives of European tourism policy.

Tourism is, without doubt, one of the major industry sectors in the world economy today. The UN World Tourism Organization reports that:

"International tourist arrivals grew by 5% in 2013, reaching a record 1,087 million arrivals. Of all world regions, Europe led growth in absolute terms, welcoming an additional 29 million international tourist arrivals in 2013, raising the total to 563 million. Growth (+5%) exceeded the forecast for 2013 and is double the region's average for the period 2005-2012 (+2.5% a year). This is particularly remarkable in view of the regional economic situation and as it follows an already robust 2011 and 2012. By sub-region, Central and Eastern Europe (+7%) and Southern Mediterranean Europe (+6%) experienced the best results".

One of the tourism markets in Europe that still remains largely untapped is the accessible tourism market. This market constitutes one of the key areas where the tourism sector in Europe can increase its offerings of sustainable, higher quality products and services. This objective, when pursued effectively by destinations and businesses, can improve the European tourism sector's competitiveness and lead to increased market share. Far from being targeted only towards a supposed "niche" market of people with disabilities, accessible facilities and services can ensure comfortable and safe tourism experiences for the growing numbers of older travellers, people with long-term health conditions and families with small children.

¹⁷ https://www.accessibletourism.org/resources/2015-04-02-eu-supply-study-final_report.pdf



The introduction by the European Parliament of a budget line for an EU “Preparatory Action on Tourism Accessibility for All” in 2012 marked a significant step in the growing recognition of the economic value of this sector as well as a turning point in the thinking about the wide range of “visitors with disabilities and other access requirements” and their place as tourists in Europe.

For the first time the European Commission, acting on behalf of the Parliament, has embarked on a coordinated action, which gives accessible tourism its own focused programme of activities, while bringing it in touch with the other policy areas of the Commission Services.

Worldwide, it is estimated that there are over 1 billion people with disabilities, or one in seven of the world population. While far from all of these have the means and opportunity to travel today, this large segment represents a significant potential source of tourism business, which can benefit host countries and destinations if they take the necessary steps to improve their accessibility. Travelling for business or for pleasure is no less relevant for a citizen who has disabilities but the barriers are far greater. The list of difficulties is extensive and every part of the visitor’s journey can be affected.

A recent study by GfK and partners has shown that the market size for accessible tourism in Europe amounts to over 740 million trips per year (day trips and overnight trips combined) based on analyses of the travel propensity of disabled and elderly persons in the EU Member States. The direct economic contribution, in terms of gross turnover (output), of EU’s accessible tourism by people with access needs within EU was estimated as €351,936 million in 2012. From the input-output tables available from Eurostat, an EU-wide gross value added (GVA) rate for accessible tourism related products is calculated as 42.6%, which equates to a direct economic contribution, in terms of gross value added (GVA), of €149,947 million in 2012. The direct economic contribution, in terms of employment, is 4 249 000 persons.

From the needs expressed by tourists with disabilities and access requirements, there is a clear and growing demand for a greater range of offers and services. This fact is confirmed by a growing awareness on the part of some tourism operators who are increasingly attentive to the fact that all kinds of tourism offers - gastronomy, religious tourism, sport, adventure, heritage and cultural events, festivals, conferences, educational tours - and so on – have a greater appeal to a wider market if offers are able to cater for the diversity of potential customers.

In addition, the ageing population is becoming recognised as a powerful “driver” for the accessible tourism market. The population of Europe is rapidly changing towards a society with a higher proportion of older citizens. Demographic ageing is increasing in Europe and developed countries worldwide. Currently, more than 75 million people in Europe are over 65 years of age and the total number of elderly citizens is estimated to increase to nearly 35% by the end of 2025. This number has huge implications for every aspect of the tourism sector, not least regarding access issues. It is well known that the incidence of disability increases with age. At age 60 to 64, 60% of the population has some kind of permanent health problem or disabilities. As pointed out in the Commission’s communication, this demographic group encompasses individuals with greater than average purchasing power and available leisure time throughout the year. Increased marketing efforts to reach these global travellers should also be matched by improvements in the quality and accessibility of the tourism product if long-term growth is to be assured.

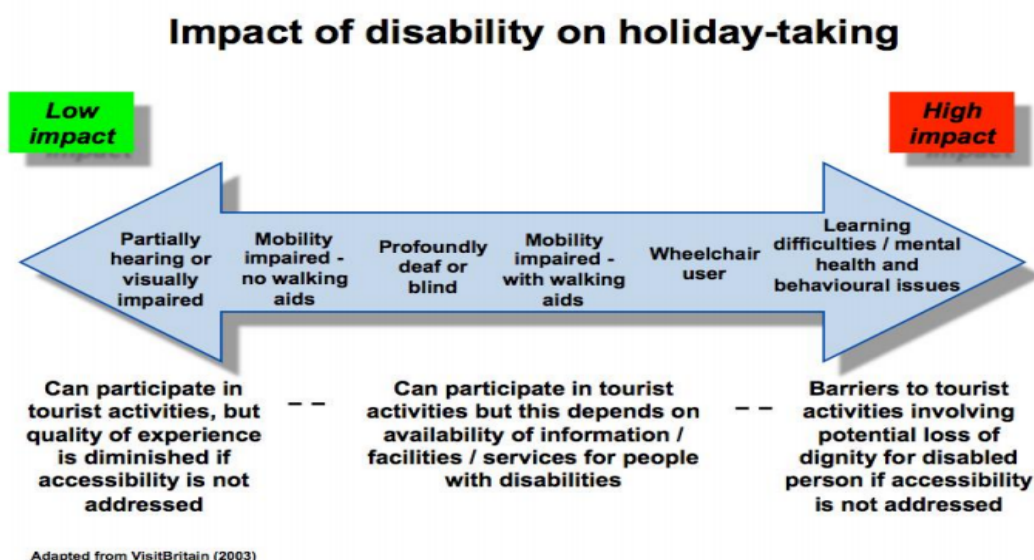


Accessible tourism policies and practices have the potential to contribute to every area of tourism. Bearing in mind that human diversity, an ageing population and accessibility for all are “horizontal” issues which must be considered in the design and delivery of all forms of services, policies for accessibility in tourism can play a leading role in helping to shape and guide the direction of EU tourism policies as a whole.

Understanding the different models of disability also helps to act as a lever for change. In the past disability has been viewed as people being disabled by their impairments or differences. This view is referred to as the ‘medical model of disability’, which looks at what is 'wrong' with the person and not what the person needs. The social model of disability however, says that disability is caused by the way society is organised, rather than by a person’s impairment or difference. It looks at ways of removing barriers that restrict life choices for disabled people. When barriers are removed, disabled people can be independent and equal in society, with choice and control over their own lives. When addressing the development of tourism policies in respect of disability it is within the framework of the Social Model, which requires removal of environmental and attitudinal barriers and applying appropriate support measures for visitors with access needs throughout their travel and stay at the destination.

Access requirements are very different for each individual, giving rise to different impacts on how people travel. Some access requirements may have a low impact on travelling, in that the person can take a holiday but access issues might affect the quality of the experience in some way, so addressing accessibility can help to improve that experience. Others, especially those with higher level access needs, are more likely to encounter gaps in the provision of services and facilities across the supply chain, which may prevent them taking a holiday or trip at all.

The diagram below, based on research undertaken by VisitBritain in 2003 reflects this spectrum of needs and the corresponding responses that are required by providers.



Impact of Disability on Taking Holidays



The project is co-financed by the European Union

*Good neighbours
creating
common future*

It is important to emphasise that by addressing access needs in the design of tourism products and services, tourism providers can deliver a quality service to customers with different access needs. Policies to encourage the integration of accessible services in tourism supply need to address how the supply chain can support suppliers in catering for both “low” and “high” level access requirements. Some suppliers may wish to specialise in serving those with high-end needs but, in general, accessible and inclusive tourism policies call for extending tourism offers to all those who are presently excluded, due to poor access conditions and the lack of accessible services and training.

“Mainstreaming” accessibility requirements across all areas of tourism policy, starting with raising awareness of the problem, needs to be built on the understanding that not all customers have high-level access needs, which may be difficult or expensive to solve. Since customers’ access requirements are different, there are opportunities for all suppliers to serve parts of this market, both in the short term and, with additional resources and training, also for the wider market over the medium and longer terms.

It is also important to recognise how accessible tourism can play a crucial part in supporting other EU policy aims. Social tourism, for example, whilst not adopted in every country in the EU, depends on having accessible offers for all target groups – not only for people with disabilities but also older people, youth and families. Access is a horizontal issue and must be present in all these venues and offers to ensure an inclusive product. Similarly, marketing Europe as a Senior Tourism destination depends greatly on destinations having genuinely accessible offers; otherwise a large part of the target market will be inconvenienced, given the prevalence of diverse age-related access requirements among the senior population.

7. Accessible tourism and Banat

7.1 Disability in Serbia

The number of persons with disabilities and the percentage they account for in relation to the total population vary not only by regions and parts of the world, but, and this is the case much more frequently, on account of the difference in the methodology that applies both to the manner of data collection and setting up of data (censuses, surveys) and to the definition/notion of disability that is used and applied for that purpose.¹⁸

Thus, for instance, the data of the *World Health Organization*, that is often taken as the relevant source of information in this regard, are set on the basis of observing disability ***as an interaction between the state of health and limitations linked to life activities and social inclusion.*** The similar situation is in the case of many other databases. The WHO assesses that ***currently there are over a billion people in the world with some form of disability, which accounts for around 15% of the total population.*** However, it is further estimated that between 110 and 190 million adult residents

¹⁸ <http://www.stat.gov.rs/en-US>



of the planet have serious problems in life functioning, which is between 2 and 3.5% of the people aged over 15 years.

The *Academic Network of European Disability Experts – ANED* has reported that the surveys have clearly shown different situations in the reporting of difficulties among the EU member states. However, despite that, the figures are stable and show occurrence of permanent difficulty with the average of 20--25% of the Union citizens aged over 15 years, with a higher prevalence among women than men. The ANED methodology is based on self-reported health, i.e., difficulty and it clearly marks a link between the rise in the incidence of difficulty and age, whereby disability occurs with age or the manifestation forms of difficulty multiply, as well as its seriousness.

Continuous databases that use fixed indicators and regularly monitor the trends and states in the questions related to the number, status, social position and social inclusion of persons with disabilities do not exist in the Republic of Serbia. Dealing with this group of population is sporadic and the relevant data are either not broadly available or do not exist at all. The particularly worrying fact is that the monitoring and data do not exist in continuity when it comes to the spheres of social life and activities, where there is a noticeably biggest marginalization and exclusion, including the health care system, education, employment and labour market, as well as the spheres that relate to the practice directly linked to the exercising of the rights on equal grounds -- deprivation of legal capacity, accessibility or social care context (social benefits, etc.). For this reasons the figures that exist in different national reports and policies fluctuate.

For instance, the *Special Report of the Commissioner for the protection of equality* dedicated to the monitoring of the discrimination against persons with disabilities in Serbia, which is guided by the assessment that *persons with disabilities account for around 10% of the total population in the Republic of Serbia (between 700 and 800 thousand people)*. In the general consideration of the prevalence of disability in the general population, the assessment that it is between 10% and 15% of the total population is usually employed. As it has already been said, the prevalence of disability in the population will vary through the degrees of development of the local setting, depending on the methodology, and even more narrowly -- through age groups of the population (directly proportionate to aging), among women and men, etc.

The census methodology for the *2011 Census* was guided by the approach of self-reported difficulty in functioning on account of a specific health problem, with certain instructions for the respondents and the figures that have been obtained can be deemed as partially deviating from the usual values when observing disability. Namely, the data show that *a total of 571.780 citizens reported a difficulty. In comparison to the total population of 7.186.862 citizens, that represents around 8% (7.96) of the total population.* However, it should be added that *the disability status is unknown for 119 482 citizens, which represents additional 1.66% of the total population. Out of the total number of persons with disabilities, more than 58% (58.2) are women, while a little less than 42% (41.8) are men.*

The total cluster of persons who reported difficulty or for whom difficulty was reported can be in the first step divided in terms of age into two basic categories -- under 15 years and 15 years and over. The use

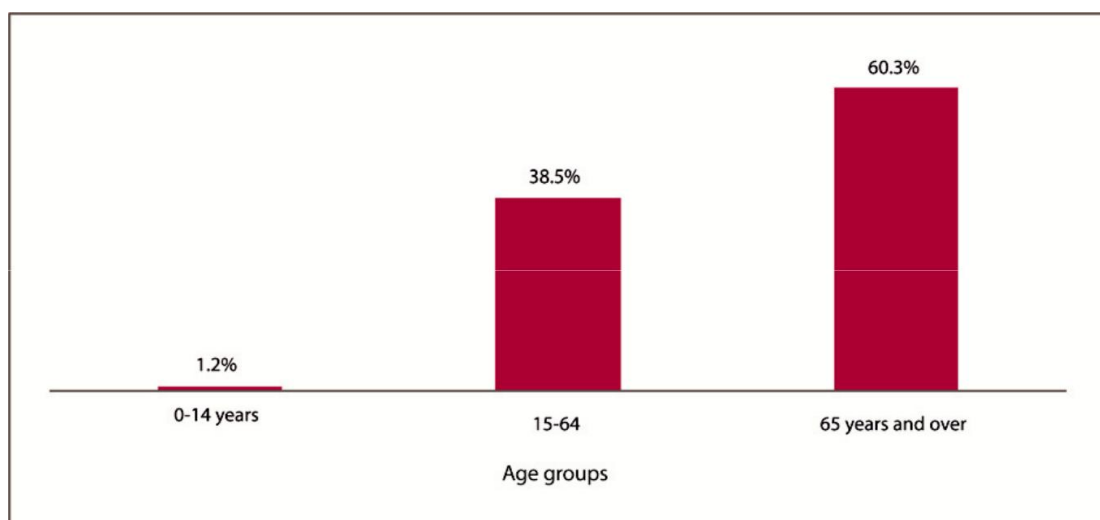


of that threshold is logical, since according to the census methodology this is precisely the age at which there is a difference as to who is going to provide answers to the given questions.

In the group of persons up to 15, it was reported that 6 924 persons have at least one of the stated difficulties in functioning, which accounts for 1.2% of the total population that reported a difficulty. At the same time, this number accounts for 0.7% of the total population up to 15 and 0.1% of the total enumerated population. The 1.2% share in the population with disabilities can be considered as very low. Here, for the first time in the study, we come to a conclusion which is broadly accepted and evident when observing disability in census surveys and concerns a low incidence of difficulties at a younger age, that is, to a direct link between the rise in the incidence of disability and aging, which will be even more obvious when observing the older age categories of the population.

Opposite to the presented data for the category of persons under 15 years, there is the category of persons aged 65 years and over. In this group, the total number of persons with reported difficulties in functioning amounts to 344 768, which represents 4.8% of the total population, and even more importantly 60.3% of the total population with reported difficulty in the Republic of Serbia, and 27.6% of the total population aged 65 years and over. These data point at the expectedly high incidence of persons of older age in the cluster of persons with disability and, in principle, confirms the knowledge about the increase in difficulties during the process of aging. The increase can also be noticed in the number of reported difficulties that is linked to the older age.

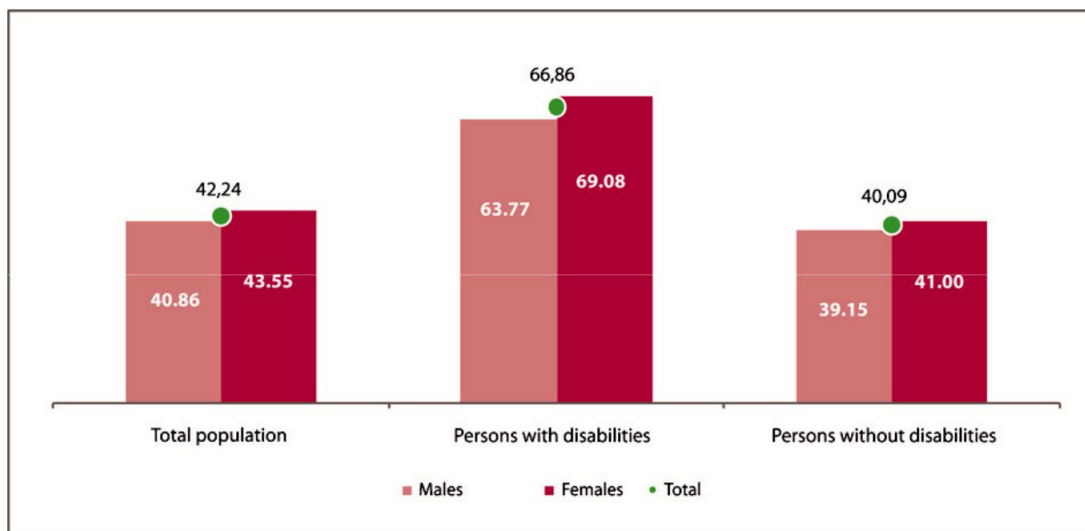
Persons with disabilities by broad age groups, Republic of Serbia, the 2011 Census



Source: Statistical Office of the republic of Serbia

The average age of the total population (which includes both persons with and persons without disabilities) is estimated at 42.2 years of age (in the case of men 40.9 and in the case of women 43.5). In the cluster of persons with disability, the average age amounts to as much as 66.9 years (63.8 in the case of men and as much as 69.1 in the case of women with disabilities). In order to complete this data, we are also going to set apart the average age for the population without disability, in which we removed from our scope of observation the population with disabilities, and there the average age is

40.1 years (39.1 for men and 41.0 for women). The average age for the cluster of persons whose disability status is unknown goes within the scope of the values similar to the average age of the total population and amounts to 41.4 years of life.



Source: Statistical Office of the republic of Serbia

When comparing these values, the average age of the general population, population with disabilities and population whose disability status is unknown, it can be concluded that the average age of persons with reported difficulty is higher by almost 25 years than the average age of the general population. On the basis of the stated, it is possible to say the following: persons aged 65 and over account for more than a half of the population with disabilities in the Republic of Serbia by far, with the share of over 60 percent; of the total number of persons aged 65 and over, less than one third reported difficulties in functioning according to the standards of the questionnaire used in the Census, that is, they can be considered to be persons with disability pursuant to the given methodology.

Such quality of the group of persons with disabilities in terms of the average age will also be potentially present when observing other characteristics of persons with disabilities in the Republic of Serbia, e.g., in the field of economic activity as a whole. Therefore, it is necessary for this reason to adhere, to the extent possible, to the comparison between certain age statuses and avoid comparison of total data wherever that is feasible and appropriate, that is, where the high age of this group can have a direct impact on the data and further comparisons.

Total population and persons with disabilities, by age and sex, Republic of Serbia, the 2011 Census

Age group	Total population			Persons with disabilities		
	Total	Male	Female	Total	Male	Female
REPUBLIC	7186862	3499176	3687686	571780	238940	332840



The project is co-financed by the European Union

Good neighbours
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common future

OF SERBIA	100%	(48.7%)	(51.3%)	-100%	(41.8%)	(58.2%)
Under 15 years	1025278	527308	497970	6924	4040	2884
15--19	401994	206968	195026	3928	2305	1623
20--29	920027	470142	449885	10319	6146	4173
30--49	1944210	973832	970378	49917	27649	22268
50--59	1116623	544074	572549	92754	45803	46951
60--64	528414	249785	278629	63170	29954	33216
65 years and over	1250316	527067	723249	344768	123043	221725

Source: Statistical Office of the republic of Serbia

Persons with disabilities by age groups and share in the age groups of the total population, Republic of Serbia, the 2011 Census

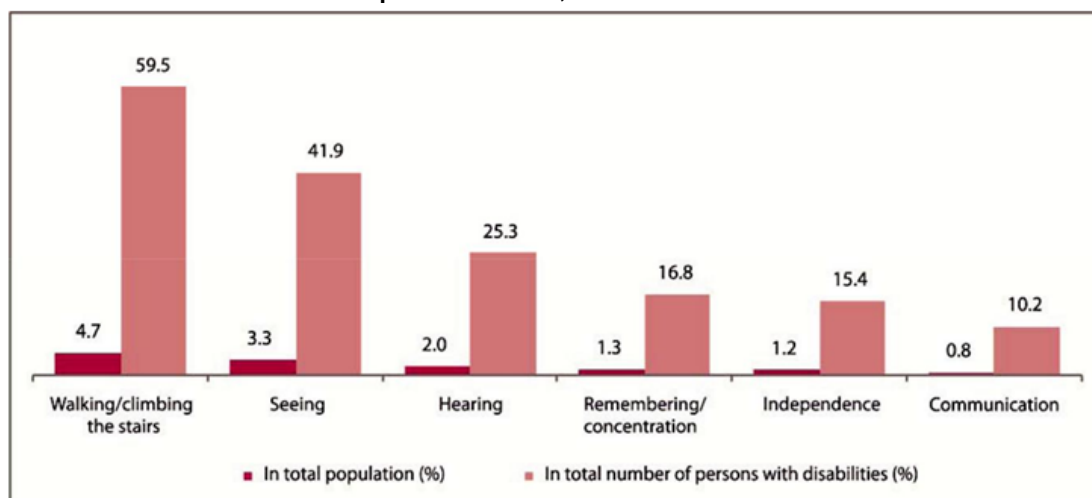
Age group	Persons with disabilities		Share in total population (%)
	Total	%	
REPUBLIC OF SERBIA	571780	100	8.0
Under 15 years	6924	1.2	0.7
15--19	3928	0.7	1.0
20--29	10319	1.8	1.1
30--49	49917	8.7	2.6
50--59	92754	16.2	8.3
60--64	63170	11.0	12.0
65 years and over	344768	60.3	27.6

Source: Statistical Office of the republic of Serbia

Concerning the type of problem in the population with disabilities out of the total number of persons with disabilities, most of them reported problem related to walking and climbing up the stairs, 59.5% of them (4.7% of the total population). The second problem by incidence is the one in connection with sight, reported by 41.9% of the total number with disabilities (3.3% of the total population). This is followed by problem with hearing, which is present in the case of 25.3% of the cluster of persons with disabilities (2.0% of the total population), and then problem with remembering and concentration at 16.8% (1.3% of the total population), with independence at 15.4% (1.3% of the total population) and with communication and understanding at 10.2% of the respondents with disabilities (0.8% of the total population).



Occurrence of the type of problem in the population with disabilities and the total population, Republic of Serbia, the 2011 Census



Source: Statistical Office of the republic of Serbia

7.2 Accessibility infrastructure

The accessibility of the local and long-distance transport, as well as tourism, of each EU Member State has been evaluated by the Directorate General for Internal Policies of the Union of the European Parliament. The relevant qualitatively assessed accessibility status of each Member State and the EU is graphically depicted below.¹⁹



¹⁹ https://www.accessibletourism.org/resources/2015-04-02-eu-supply-study-final_report.pdf

Since Banat lies in the cross-border area of three countries -Serbia, Hungary and Romania- and as shown by the Research for TRAN Committee - Transport and Tourism for Persons with Disabilities and Persons with Reduced Mobility conducted by the Directorate General for Internal Policies of the Union of the European Parliament, it is understood that there is a low level of accessibility for this area (the Banat region) in matters of international and local transport and tourism infrastructure.

The main issues identified per area are briefly summarized below:

Local Transport

- No information on accessibility of local transport in accessible format, that is concise and reliable;
- Low use of mobile apps and social media in the sector;
- Low accessibility in suburban and rural areas;
- Major access barriers in interchanges and intermodal hubs;
- Low number/frequency of accessible city buses;

Long-distance Transport

- Slow implementation of relevant regulations.
- Need for more mobile ramps at stations.
- Need for better accessible equipment maintenance and redundancy.
- Need for incentives and policies to push operators to go beyond minimum legal requirements.
- Staff training and behavioural issues constitute a barrier.
- Need for accessible infomobility service tools (including cross-border and multimodal transport).
- More emphasis on use of modern Information & Communication Technology (ICT) for accessible ticketing replacement.

Tourism

- Ensure overall accessibility at the destination, not only individual services.
- Successful accessible destinations have a clear “Top down” accessibility policy.
- Lack of strong business case remains a major barrier to business engagement.
- Individual Accessibility Information Schemes (AIS) lack harmonisation and often reliability.
- Staff knowledge and information is also an important barrier.
- Lack of accessible experiences, attractions and recreation opportunities.
- Inclusive conference organisation and events help promote accessibility in destinations.

7.3 SWOT Analysis

Strengths	Weaknesses
-existence of the mountainous area with a developed tourism potential; - richness and diversity of landscapes; protected	-poor development of accessibility infrastructure -high degree of pollution (ferrous metallurgy, thermal plants, gold and silver manufacturing)



<p>areas: natural parks and reservations, biodiversity and geodiversity;</p> <ul style="list-style-type: none"> - the presence of an extended forest area and a river network that offer many opportunities for leisure, recreation, hunting, fishing; -mountain treks and trails signaled with information and guiding signs; -existence of numerous gorges and caves; -promotion of tourism at international level; -existence of countless accommodations (bed and breakfast, hotels, cabins); -rural tourism and cuisine development; -countless (historic, cultural and folkloric) heritage objectives - good connection from the surroundings; - the conservation of an original material and spiritual culture (the layout of the rural household, popular clothing and songs, craftsmanship and occupations, popular architecture and technique, folklore events etc); local gastronomy; 	<p>centers);</p> <ul style="list-style-type: none"> -few waste collection centers; -lack of funds for reconditioning Culture and Community Centers and historical monuments; -tourist signs damage; -low tourist education regarding environmental protection; -insufficient knowledge of people working in tourism in relation to tourist resources, objectives but also notions necessary in the said field; - the uneven distribution of touristic resources; - low development of the transport and rural communication infrastructure; - deficient public services infrastructure in the rural Banat; - low array of touristic products promoted on the touristic markets; - low development of the tourism infrastructure (information centers and orientation panels, marked routes, maps, souvenir shops, specific products); - underdeveloped tourism services (guidance services on tourism routes).
Opportunities	Threats
<ul style="list-style-type: none"> -setting information and promotion campaigns for rural tourism and agritourism; -extending foreign investments for the tourism in the area; -growth potential of the market of persons with 	<ul style="list-style-type: none"> -monuments, museums and memorial houses damage; -existence of poorly informed investors with little knowledge of the tourism carried out in the area; -excessive deforestations may affect some tourist



<p>disabilities;</p> <ul style="list-style-type: none"> -growth potential of accessibility infrastructure through participation in European Cross-Border Programs; -promotion of specific products in the region; -training classes for employees from tourism field; -integrating the area in national and international travel circuits; -developing mountain and remote rural areas using European funds; -developing more trekking tours; - multiplying the fairs, festivals, special events; - organizing recreation and leisure activities in nature; - agricultural activities with educational role: assistance and participating in activities such as cattle raising, horse riding, apiculture, collecting fruits, collecting medicinal plants; experiencing cooking. 	<p>areas;</p> <ul style="list-style-type: none"> -low level of education in the rural area; -migration toward cities and sending traditions and customs into oblivion; -a threat may come from foreign neighbors who may offer travel services for tourists at affordable prices.
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8. Recommendations on tourism development and accessible tourism

The development of tourism in Banat primarily centers on the following notions:

- The existence of some functional touristic information centers/point/offices with specialized personnel able to provide the information needed by the tourists (accommodation, possibilities for leisure activities, etc);
- The promotion of Banat region in general and per specific areas with touristic interest;
- The inventory and reconditioning of the touristic objectives;



- The inventory, reconditioning and link between all touristic infrastructure elements (accommodation units, food units, transportation, leisure units, cultural institutions);
- The valuation of the existing cultural patrimony;
- The modernization of the health units for a better health tourism practice;
- The encouragement for practicing religious tourism,
- The support for practicing scientific and itinerant tourism by realizing partnerships with educational units.

In order to bring Banat's tourism to a certain level planning, organization, coordination should be mainly involved and this means a better management.

Concerning the development of accessible tourism in the Banat region the following recommendations are proposed;

- ✓ Access to information, and especially Internet "connectivity": The Internet offers the opportunity to search for, find and book travel and tourism experiences, analysing the product information in detail and comparing prices. When tools like the Internet are used to plan a trip, most of the websites should be accessible, so as to book services properly;
- ✓ All tourism-oriented content and information, accessible on the Internet, shall also be available in English and shall incorporate features such as braille code so that it can be reached and utilized by people with disabilities;
- ✓ Translation of all available tourism content shall also be considered in the languages of the people that constitute the main tourism inflows into the region (e.g. Serbian, Hungarian etc).
- ✓ Development of transportation infrastructures such as stations or airports;
- ✓ Pavements, or cross streets with curb ramps;
- ✓ Sufficient lighting, resting areas, marked glass walls and slippery or shiny floors;
- ✓ Mobility changing rooms, waiting rooms or accessible toilets are necessary;
- ✓ Adapted local buses or taxis available for transfers to the tourism facilities;
- ✓ Local transportation options improvement;
- ✓ Trains and undergrounds accessible for wheelchair users who must inform the company 24 hours (or even 48 hours) in advance in order to provide an access ramp on the departure and arrival platforms;



- ✓ Accessible transportation system operating in parallel to the public transportation grid;
- ✓ Accessible buildings: Entrances to buildings, indoor areas, lifts and other facilities (hotels, restaurants or cafeterias etc.) should be complied with current laws on accessibility in force in many countries. That means:
 - properly designed washbasins and accessible toilets for all clients;
 - like vibrotactile or visual flashing alarm systems for deaf people;
 - shower chair and a non-slip bath;
 - use of the swimming pool or the hotel restaurant for everyone;
- ✓ Adequate signage system enabling all guests to find their way independently and safely;
- ✓ Sound-based communication systems, such as loudspeakers, alarms, bells, buzzers or audio guides especially for people with hearing impairments;
- ✓ Attractions and sightseeing activities (such as stadiums, museums, natural environments, theatres and cinemas) at tourist spots accessibility;

Part C – Case study of Accessible Tourism Destinations

9. Slovenia; A similar case study - Good practices and lessons learnt

9.1 Introduction

Slovenia stands at the crossroads between Italy, Austria, Hungary and Croatia. Despite its modest size (20,273 km²), it offers a wide variety of destinations, with landscapes as different as the Slovenian Alps, the Karst Plateau and the Adriatic Sea.²⁰

Selected indicators suggest that the general tourism business environment is improving over a number of dimensions. Compared to 2011, data from the World Economic Forum record an improvement in the perceived prioritization of travel and tourism within the country, with the country ranking 50th in 2013 versus an 80th place in 2011. In addition, the country moved forward to the 52th from the 61th place in the ranking assessing human cultural and natural resources. The share of the travel and tourism industry, currently 3.5% of the total domestic GDP (12.8% after accounting for all related activities), is expected to increase by nearly 3 percentage points between 2013 and 2022, with sector-specific employment increasing by about 0.5 percentage points over the same period.

A 2009 report published in the context of the MiT! (Make it Accessible!) project funded by the European Commission (DG Education and Culture) stated that “it is clear that Slovenia cannot be proclaimed as one of the better developed destinations for accessible tourism”. As it will be shown, this claim is still valid for a number of structural reasons. Nevertheless, a number of positive cases stand out for their relevance and effectiveness, may potentially contribute to the estimated figures above and set the

²⁰ <https://www.accessibletourism.org/resources/case-study-8-ec-slovenia.pdf>



ground for further future advancements. In particular, the role of government policy, with a focus on the recent pledges to make offer more attractive, the leading role of a few selected outstanding private initiatives (e.g. thermal sector) as well as social enterprises present considerable strengths.

9.2 Overview and background information

In 2012, the Ministry of economic development and Technology developed the “2012–2016 Slovenian Tourism Development Strategy”. The following three goals have been set out with a view to expanding the tourism sector:

- Encouraging enhanced competitiveness;
- Ensuring a favourable business environment;
- Efficient marketing and promotion of Slovenia.

In relation to the first goal, the document states that forming a strategic framework or scheme to develop socially responsible tourism and to improve the quality of the touristic offer can be achieved by encouraging the accommodation facilities and/or providers to “specialise”. This may indeed involve targeting special market groups, including elderly people and people with disabilities. It is therefore evident to policy makers that accessibility can impact the economic potential of Slovenia, which is highly dependent on tourism.

The heterogeneity of Slovenian tourism services despite the modest country area is evident from its geographical features. Although the market has not reached maturity, the opportunities for businesses are substantial. Not only Slovenia is easy to reach from neighbouring countries (Austria, Hungary, Germany and Italy), but has a sizable internal demand pool that adds to the presence of foreign tourists. It is estimated that

- 8 % of population has at least one disability;
- About 50% of their members travel every year.

(Švigelj and Cvetek, 2010: 4).

The table below maps the institutional environment and provides a review of the market conditions that characterize the area.

Figure 1: An overview of the main features of the environment for disability.

Tourism Sector in Slovenia- Disability Segment (2010)	
Institution responsible for support	Ministry of labour, social affairs and families (disability directorate) Ministry of Culture Ministry of economic development and technology
Main holiday destinations	Main cities: Pacug, Novi grad, Spa Catež, Bela Krajina, Ljubljana. Main accommodations: health and spa resorts, adapted 4 (or higher) star hotels.



Demand drivers	Quite weak economic status, high sensitivity to price. Main activities: socialising, sightseeing, activities in pools. Main accommodation type: hotels and spas with special equipment
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Adapted and updated from Švigelj and Cvetek (2010, 6-15)

Against the background of domestic economic conditions and policy environment, European policies and institutions have had a substantial stake in the development of accessible services (see table below). These have included training as well as other projects.

Figure 2: A selection of past European development projects in Slovenia.

Project	Aim
EVOcate (Leonardo da Vinci programme)	Incorporation of accessible tourism into the educational system.
Disability friendly plateau	Development of accessible tourism offer in Banjška and Trnovska planota.
TURAG4ALL	Training for working in travel agency.

Source: Premiki (2013)

9.3 The integration of the supply chain

In order for a tourism destination to be accessible, supply needs to be adapted at all levels. This requires the involvement of businesses and public authorities alike. In the section below the mapping and assessment of specific stages of the supply chain, including communication, travel agency services, transportation, public buildings and restaurants is presented.

Communication

Marketing activities pursued by the government sector, non-governmental organisations and businesses use the brand “I feel Slovenia” (Slovenijo čitim). This is present in most domestic destinations and is used for promotional activities abroad, among visitors and in the areas of culture and science. This is used in tourism, with the website slovenia.info being the main point of contact for tourists. Although this website contains information about accessible destinations, it is not optimised for disabled people and does not provide ad-hoc platforms.

Travel agency

Among other things, Premiki operates as a travel agency in its own right. Premiki provides a variety of holiday packages and services and tailor made programs for tourist groups. This service has been successful and has developed over time, despite the non-sizable absolute numbers. The number of guests has indeed increased since 2011, doubling the customer base in 2012 and recording a further 11% increase in 2013 relative to the previous year. Of these, an increasing number of services has



involved booking air tickets and travelling to domestic destination, and has served large groups of both regular and disabled people.

Transportation

Transportation services can impact the appeal that a destination has on disabled tourists. In this case there seems to be a gap between larger city centres and other minor destinations. From feedback received by stakeholders, the following cities appear to fare better than average (in alphabetical order): Ajdovščina, Ljubljana, Maribor, Murska Sobota, Nova Gorica, Ptuj, and Slovenjske Konjiceand.

Within Slovenia, trains are possess a number of accessibility features:

- On some Inter City trains, a portion of all available seats is reserved for people with disabilities.
- Trains that have carriages with special features for wheelchair users are advertised on publicly available schedules.
- Motorised lifting seats are available for wheelchair users on selected routes.
- Audio announcements for blind or partially sighted people (mostly in Ljubljana). Moreover, there exist discounted fares in a number of destinations and for a greater variety of needs:
- Blind people and people with muscular dystrophy and similar disabilities may receive (up to 75%) discounts on up to 12 trips per 13 year, with no charge for accompanying passengers (including guide dogs for the blind).

For other destinations, such as Ljubljana's castle, there exist targeted facilities, particularly for wheelchair users. In fact, the courtyard of the castle, which is one of the most visited area, is accessible through the Lapidarium for people with mobility impairments. A number of NGOs provide vans for disabled people for city tours in Ljubljana, as well as conferences and public events. However, this does not always satisfy demand due to tangible capacity problem. These vans are often too small and can only include 3 or 4 tourists. However, it is noted that many of the provisions focus on limited mobility.

Training

Although training is not directly enjoyed customers, it improves the quality of the services received. Premiki's main strength and tradition lies in this area. Their curricula have been adapted to the business needs of waiters as well as specific staff in accommodation structures. In the past, professional training was taken up by a number of enterprises that subsequently proved successful in addressing disability problems. According to a report published in 2009 by the MIT! project funded by the European Commission¹², all major health & spa resorts took part in training sessions of this type.

Public Buildings

Slovenian laws regulate the presence of accessible services. Thanks to this, parking spaces for disabled are generally available. However, other services in public building are less often adapted to



satisfactory levels (e.g. toilets), and architectural barriers for those with mobility impairments have not been addressed in various instances despite greater awareness.

Restaurants

From feedback available online and from one interview, restaurants are not seen as being fully integrated. The focus remains on wheelchair users and blind people, who occasionally benefit from menus in Braille.

Health Resorts

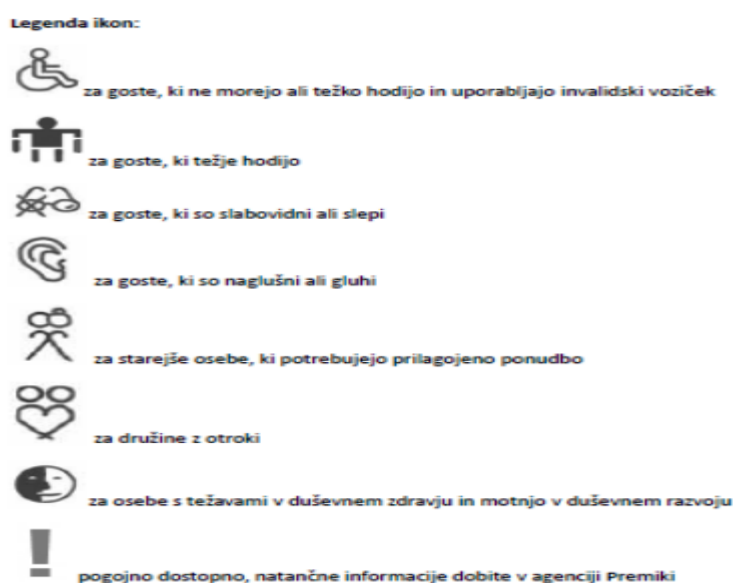
Slovenia has developed a market niche in providing such services that attracts tourists from abroad. The typical consumer has a higher than average age with correlates with the presence of physical difficulties that need to be addressed. For example, access to the pools is made easy (Terme Zreče, Rogaška Slatina) thanks to ad hoc machinery. A number of spa centres offer targeted medical programs for elderly people (e.g. Thermana, Laško). Moreover, large rooms are specially designed for mobility impairments and a number of useful tools are provided for people with hearing problems. On a more general level, special care is devoted to overcoming architectural barriers. Despite the success of health resorts in providing adapted services, it was argued that, occasionally, offer is still perceived too much as medical care rather than tourism.

9.4 Provisions for cross-impairments

The main weakness of Slovenian accessible tourism offer lies in the absence of structured planning. Even when tourism suppliers implement good practices, business do not always tend to have a holistic perspective. Anecdotal evidence suggests that suppliers tend to prioritise disabilities and cater for them in order. The prioritisation of disabilities can be due to two main factors. Providing certain services is not in the interest of suppliers, either because initial adaptation costs are too high or because the potential consumers benefitting from them are too low, thereby lowering the returns to investments. To be sure, the disabled friendly certificate encompasses all disability needs. In order to obtain recognition, which increases exposure and expected returns, demonstrable effort needs to be put into adapting all needs. Moreover, the labels used by Premiki (see below) advertise destinations based on specific disabilities. This could in principle motivate businesses to broaden the range of disabilities covered. However, the label system needs to be scaled up and advertised at a truly national level, in line with other successful European countries.



Figure 3: Disability friendly labels



Source: Premiki, 2014, "Izleti, potovanja, Počitnice, strokovne, ekskurzije".

9.5 Business approach – building a business case for accessibility

To be sure, a perceived weakness of accessible tourism in Slovenia lies in the limited awareness of its business potential. Accessibility is perceived by the majority of business providers as a social policy issue to be enforced through legislation or with the initiative of institutions. A selection of accessible tourism destinations is outlined below.

Figure 4: A selection of accessible tourism destinations

Destination	Accessible features
Postojna caves	Accessible transportation and routes
Thermana Lasko	Various measures for wheelchair users, blind and deaf people
Triglav National Park	Access ramps

First, natural caves have been claimed to be increasingly popular among disabled tourists. Postojna cave is in fact the most visited cave in Europe and has put in place several measures to make their offer more accessible. This was made possible by the presence of accessible transportation and staff instructed to help disabled people get off and on the train, with easy access in the other parts of the cave. Although it is not possible to quantify the impact that this has had on revenues and sales, all stakeholders interviewed recognise this as an example of an effective investment with a significant positive impact on the business.

Thermana Laško went through a number of big investments over the last years. This also included a number of accessibility enhancing measures, resulting in better access for people with mobility impairments, standards for the visually impaired (with better access to guide dogs) and mobile induction loops for hearing impaired.

Another important example is Triglav National Park. A system of ramps has been developed and has gained the attention of national experts in accessible tourism. Moreover, accommodations within the Park are easily accessible (for example, the Trenta Lodge), which render the destination more disabled friendly.

Another important Slovenian success case, already touched on in the previous sections, lies in the social entrepreneurship sector. In one instance, the organisation expanded from focussing on mental health exclusively to initiating comprehensive projects with important European stakeholders. The enterprise now revolves around three main pillars:

- Implementation of EU projects;
- Training provision to businesses;
- Information provision.

As a national destination, Slovenia has taken part in the European EDEN (European Destinations of Excellence) project since 2008. Within this project, destinations compete for an award: the EDEN recognition of excellence. This stands in a two way relationship with business:

- The city is given recognition as a quality destination that stands out for its offer of sustainable tourism. Accessibility related needs, including mobility, sensory, intellectual and psychological impairment have been the focus of the 2013 edition of the award;
- Upon selection, the city can enjoy numerous advantages both in promotional and development terms, which can foster the competitiveness.

Figure 5: Slovenian winners of the EDEN projects

Year	Destination
2008	Soča Valley
2009	Solčavsko region
2010	Kolpa river
2010	Idrija
2013	Laško

Source: Slovenia.info

With respect to accessible tourism, the 2013 winner, Laško, deserves special mention. In 2008, its municipality prepared a Strategic Development Plan for the Disabled, while in 2009, Thermana Laško d.d. – Zdravilišče Laško Hotel obtained the golden certificate 'Disabled-friendly company'.



In 2011, the Slovenian Association of Disabled Workers created an award entitled “disabled-friendly municipality” charter aimed at encouraging municipalities to cater for a more inclusive and accessible quality of life, which includes touristic initiatives.

Figure 6: Recipients of the “Disabled- Friendly Municipality” charter

Year	Municipality
2012	Municipality of Ptuj
	Municipality of Murska Sobota
	Municipality of Nova Gorica
2011	Municipality of Slovenske Konjice

Notwithstanding these important exceptions, feedback from one stakeholder suggests that the factor preventing higher entrepreneurial activity in accessibility does not lie in a lack of supply-side awareness, but in a number of more structural factors, including:

- Lack of sufficient training and qualified personnel in the industry
- Lack of information aimed at targeting potential customers.
- Lack of tourism infrastructure

9.6 Conclusions

In conclusion, Slovenia can be considered as a small territory where tourism, despite being an important source of business opportunities, does not excel in providing adequate services for disabled people.

The supply chain presents both strength and weaknesses. At the preliminary stages of people’s trips there are below average levels of information. Recent efforts have been made in providing more detailed information on specific needs with the support of non-for-profit organisations and tourism boards. In particular, these platforms need to be adapted for people with disabilities. Geographic accessibility presents mixed features. While public transport in the main cities and on selected means (e.g. trains) is adequate, the capacity of other services (e.g. buses to popular destination) needs to be scaled up in order to meet demand.

From a business perspective, it has been observed that businesses are generally reluctant to invest personal resources in accessibility enhancing investments. This has negative consequences both on the quality of staff and availability of adapted machinery and tools. However, there seems to be increasing awareness about the business potential of accessible tourism, since organisation providing training and ad-hoc certifications have been successful in delivering these services to enterprises.

9.7 Recommendations



The following recommendations draw on both the strengths and weaknesses of Slovenian accessible tourism offer. Such recommendations are particularly relevant to destinations that present a high degree of similarity with Slovenia:

- Social entrepreneurship must be promoted to foster and complement the activities pursued by private business. Not only can they compensate for the lack of adequate services at specific stages of the supply chain (e.g. communication, tour operator) and improve the offer of private suppliers (e.g. training), but they can operate themselves on a market basis by selling their products and services.
- Policy learning must be strengthened to facilitate the emergence of good practices. The concepts behind a number of existing initiatives (destination awards, the disability labels) have a common European root that has been acknowledged by interviewees.
- More information about the availability of accessible destinations could trigger a “virtuous cycle” for businesses. More information can lead to a higher number of tourists. This would in turn increase revenues and sales, thereby making a case for investments in accessibility.
- Geographic accessibility must be extended to non-major destinations. This will increase choice for customers, improve the reputation of the country as an accessible destinations and attract more customers, which eventually drives investments from the private sector.

