

ADVENTURE TOURISM INDUSTRY ASSESSMENT

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Foreword

The initial assessment is prepared by Mr. Aleksandar Donev, contracted as a short-term Industry Expert by the Regional Cooperation Council Secretariat to carry out the Adventure Tourism Industry Assessment that will serve as the basis for the project intervention planning and delivery within the Triple P Tourism: Promotion, Policy and Pilots for the IPA economies of Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, and The Former Yugoslav Republic of Macedonia (the Western Balkans Six – WB6).

The initial assessment was prepared with the support and guidance of Ms. Snježana Derviškadić, Team Leader of the Triple P Tourism in SEE project and Mr. Alban Rafuna, Adventure Tourism Expert on the Triple P Tourism project.

** This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence*

Summary

Tourism is defined as one of the priority sectors in the SEE 2020 Strategy due to its importance for the overall economic growth. As direct and indirect contributor to GDP tourism holds a significant potential for regional cooperation. Although tourism is the largest contributor to the export of services in the SEE, it is still faced with many challenges and even barriers that hinder its growth and prevent it from achieving the economic potential it holds.

Recognizing the potential tourism carries, the SEE economies have all awarded tourism with the status of a priority sector for development, and, furthermore, recognized and acted upon the opportunity to address tourism development through regional action. This puts forward the ability of tourism to contribute horizontally towards an overall economic development and competitiveness of the region. An important feature of tourism is also its ability to, differently to most industries that have their focus mostly on larger regional centres, create employment at the place of living – thus generating growth in smaller and rural, underdeveloped regions.

The EU funded and Regional Cooperation council (RCC) implemented Tourism Development and Promotion project (Triple P Tourism project) works to create joint and internationally competitive cultural and adventure tourism offer in the WB6 economies through development of regional routes that will attract more tourists to the region, lengthen their stay, increase revenues from tourism and contribute to growth and employment.

The approach to the implementation of the project is focused on improving quality of tourism offer by creating joint offer/product(s) to foster regional integration in tourism sector and the joint global promotion of such products. Further, the project will seek to identify and alleviate policy barriers and ease administrative procedures to development of sustainable tourism industry; look to improve the level of service, including addressing skills gaps and capacity of the industry; and support small-scale infrastructure projects to facilitate development of regional tourism offer/product(s).

This Adventure Tourism Industry Assessment aims to assess the current state of play in the product on the ground, identify key gaps and constraints, and develop recommendations on how to address the identified. The assessment will serve as a form of baseline for development of project interventions and actions.

The research conducted under the assessment has indicated a significant number of adventure travel initiatives across the region. However, most of those are of limited scope and focused on specific locations and sites. There is a small number of initiatives, primarily delivered through donor support (EU, CBC, GIZ) that have been developing adventure tourism products that include territories of two or more economies. As already recognised by the SEEIC Tourism Expert Group (TEG), coordinated by RCC, one initiative stands out as a concept that links the region in one route – the Via Dinarica Mega Trail. In the last year this concept has

seen a birth of a sister initiative of Trans Dinarica that seeks to develop bicycle routes along Via Dinarica corridor.

According to the research done as part of the assessment and confirmed at the industry focus group sessions, the following gaps and constraints have been identified in regional adventure tourism routes development and industry capacity:

- Gap 1: Lack of coordination and communication between stakeholders;
- Gap 2: Lack of awareness and recognition in the local communities and the public sector;
- Gap 3: Lack of unified information and market identity;
- Gap 4: Lack of quality control across operators;
- Gap 5: Lack of guiding capacity and staff skills to correspond the market expectations;
- Gap 6: Burdensome administrative procedures and relatively low level of services related to tourism;
- Gap 7: Underdeveloped tourism infrastructure; and
- Gap 8: Nature conservation and waste management.

Identified barriers are often closely linked with the existing gaps, such as complexity of border crossing as a burdensome administrative procedure. Additionally, barriers also lie in underdeveloped public infrastructure and tourism products and services, as well as limited funding resources and underdeveloped management mechanisms to secure needed and reliable specific infrastructure on the ground. Stemming on the above, the following recommendations are being put forward:

- Recommendation 1: Regional coordination and structure;
- Recommendation 2: Marketing strategy;
- Recommendation 3: Internal quality guidelines;
- Recommendation 4: Capacity building;
- Recommendation 5: Business environment; and
- Recommendation 6: Public infrastructure and services.

Within the above recommendations individual actions are allocated specific priority as either immediate or mid-term (for implementation over the period of up to 3 years).

Introduction

This Adventure Tourism Industry Assessment (the Assessment) aims to provide a baseline for project intervention planning and delivery within the Tourism Development and Promotion project (Triple P Tourism project) implemented by RCC. The project is focused on the creation of joint regional tourism routes as a tool to foster development of regional tourism, with special attention given to adventure and historical/cultural routes in the WB6. The Assessment includes revision of the existing information and material, where possible identification of strategic orientation in six economies for development of adventure tourism, findings from conducted interviews and inputs from the focus group meeting held in Skopje on 12 June 2018.

Adventure travel as a global phenomenon is recognised as the fastest growing market segment. In 2015 the market size was USD 263 billion, with the rate of 65% of every dollar spent staying in the destination. As per ATTA Adventure Travel Market Snapshot this percentage has grown to 67% in 2017, with hiking and mountain biking among the leading activities (see Attachment 1 for more on the adventure travel). The relevance of the WB6 region is confirmed with the data that Albania is the fifth most booked destination for European adventure travellers.

Adventure travel has been on the rise in the WB6 for the period of past 10 years. This is in particular visible both locally and internationally over the past 2.5 years. The awareness of the potential it holds as an economic generator, and especially in rural and remote parts, is growing in all six economies, among general population and within the public sector. All six economies have recognised tourism as a strategic industry, and adventure travel is included in this recognition. This also means that adventure tourism is burdened with most of the obstacles and barriers to growth that face tourism development in the region, in addition to having some specific concerns.

As the adventure travel is a relatively young niche, and especially in the target region, the support systems as well as regulatory framework are still very much undefined across the economies of the region. Although both recognition and the support are growing the economies have yet to establish adventure travel in its full capacity.

The Assessment conducted here has looked at the current state of play in the WB6 economies, seeking to identify concrete gaps and needs and develop recommendations for improvement in the area of adventure tourism in the WB6 economies. The Assessment has included the

- updated information on ongoing adventure tourism projects with regional prefix active in 6 economies in question;
- revision of the existing activities on the development and promotion of the Via Dinarica and Trans Dinarica products;

- recommendations on the routes development for the three years period;
- identification of the main stakeholders on national, regional and international level involved in adventure routes development and promotion; and
- Identification of possible obstacles and constraints and proposals for their elimination.

The recommendations developed and the interventions proposed reflect the priority needs for development of sustainable regional adventure tourism routes. Key needs are in the area of effective communication and coordination between and among different stakeholders from the included economies; increasing the capacity of the service providers throughout the value chain, further development of the product and the development of the service quality platform. The region as an adventure travel destination further needs a unified brand and coordinated promotion and communication strategy. Improvements are needed in the sphere of effective business environment, especially when it comes to resolving the ease of cross border travel, and then areas of support services to adventure travel such as rescue, insurance, health services, or related fields such as environment, infrastructure and similar.

Methodological approach used during the Assessment is presented in the

Exhibit I

Exhibit 1: Overall approach and methodology

Stage / Task	Methodological tool
Stage 1: Initial Assessment of the adventure tourism in the WB6 economies	
Task 1.1: Review of existing material and information on adventure tourism	<ul style="list-style-type: none"> • desk research • meetings and interviews with stakeholders
Task 1.2: Identification of gaps and constraints	<ul style="list-style-type: none"> • desk research • meetings and interviews with stakeholders • expert analysis
Task 1.3: Recommendations for overcoming the identified gaps and constraints	<ul style="list-style-type: none"> • focus group findings • expert analysis

The Adventure Tourism Industry Assessment report is structured as follows:

Section 1 provides an overview of existing regional adventure routes and adventure tourism products and initiatives in WB6 economies.

Section 2 presents the main gaps and constraints which hinder the cooperation and development of regional adventure tourism routes and adventure tourism products.

Section 3 presents an overview of the recommendations for specific actions and interventions for overcoming the identified gaps and constraints towards a sustainable regional adventure tourism route development and improved industry capacity to provide a competitive product to the international markets.

1. Review of adventure routes and adventure tourism initiatives in WB6 economies

This section aims to provide an overview of the existing adventure product development in the WB6 economies, with a special attention to regional initiatives. The desk research conducted indicated that there is a number of adventure tourism product development initiatives in most of the economies, in most cases focused on development of a specific offer or location in a single economy. Such initiatives are often supported by donor funds, although there are some that are initiated and implemented by local community and internally available funds. Several of the initiatives have clearly communicated regional note and the section 1.1 below provides an overview of those initiatives.

1.1. Overview of regional adventure routes in WB6 economies

During the research phase of the assignment it was noted that there had been many initiatives and projects that were active and contributed significantly to the enrichment of the adventure tourism offer across the region. Each of those has contributed to rise in awareness of the potential held by the adventure tourism, and planting stepping stones for a more coordinated development. Several of the researched initiatives have embarked on development of the mini regional adventure product links. The strongest among the identified ones are:

1.1.1. Establishing Via Dinarica – A Preface to Regional Cooperation Platform

The project was implemented 2009-2010, funded by EU through the Bosnia and Herzegovina – Montenegro CBC programme.

The main aim of the project was to initiate a number of activities that would mobilize citizens from both sides of the border, to work together and join forces for developing and promoting the regional tourism offer. The goal of the project was to diversify the local economic alternatives by using sustainable and integral model of development that integrated valorisation of local productive resources (services, landscapes, historical and cultural resources) in accordance with the national rural development and tourism strategies. It initiated economic and integrated rural development by linking small town and rural communities, creating joint tourism offer that relies on natural attractions, in addition to creating links among stakeholders and local and national authorities in the two economies. All the actions aimed at creating employment and thus fighting poverty in rural communities.

The main goal of the project was to enhance valorisation of resources through tourism and rural development of the trans-boundary region, economic diversification and revitalization, as well as social cohesion in the communities along the initial Via Dinarica route. It resulted in:

- New cross-border tourism offer that links small towns and rural communities;
- Linkages and exchange of experiences among stakeholders, improved knowledge and service providers' standards and raised awareness on environmental issues;
- Promotion of the new tourism offer, thus strengthening the visibility of the region.

The project established the first ever section of the Via Dinarica trail.

1.1.2. Peaks of the Balkans

The project was funded by the German Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by GIZ, who developed and implemented the project in cooperation with the municipalities, associations and responsible ministries. The Peaks of the Balkans Trail links three of the South-East Europe's national parks in Montenegro, Albania and Kosovo*. Above all, the project aimed to help overcome political barriers and encourage former adversaries to work together in the interest of regional development. In addition to the cooperating partners the project mobilized a high number of various stakeholders from all three economies. This was among the first efforts in the region to build a regional programme.

The obstacles that the Peaks of the Balkans project addressed, among others, were lack of signage and information, lack of accommodation, issues related to ease of border crossing procedures and promotion. The result was an internationally recognized regional brand that above all promoted adventure travel in the region and raised its public profile which resulted in an increase in visitor numbers.

1.1.3. Via Peaks of Dinarica Alps.

The ViP Dinarica (Via Peaks of Dinarica Alps) is an EU funded project, delivered through the IPA Cross-Border Programme Montenegro – Kosovo*.

Numerous small businesses in the field of hospitality, tourism, agriculture and cultural heritage are developed and promoted along the trail going through Kosovo* and Montenegro, while the connection with the previously developed trail section in Bosnia and Herzegovina (through National Park Sutjeska) is also maintained. Project implementation started in March 2016 and lasted for 18 months. The objectives of the project are to enhance cross-border economic activities through unique sustainable tourism models based on natural, traditional and cultural values and to bring forth common characteristics of the region. Some of the specific objectives that were addressed in this project were to develop the trail and tourism package that links mountain communities and tourism stakeholders and to raise awareness on economic, environmental and social benefits of long distance trails, increase attractiveness and competitiveness of the tourist offers in the region. The core project activities done during the project include: improvement and upgrading of small scale tourism infrastructure, mapping and agreements with existing touristic vendors and service providers; development of touristic offer; mapping and GPS tracking of the routes in the cross border region; joint market access program; building capacities of mountaineering clubs; and promoting, awareness raising and marketing.

1.1.4. Via Dinarica Bosnia and Herzegovina

The Via Dinarica Bosnia and Herzegovina project was funded by USAID and UNDP and implemented by NGO Terra Dinarica between 2014-2017. The project focused on the development of the white trail in Bosnia and Herzegovina including marking and fixing the trails, improving tourism infrastructure including accommodation such as mountain huts and small B&Bs, as well as other services along the trail. Finally, the project developed a set of guidelines and quality criteria for accommodation facilities and other service providers on the trail.

As far as promotion and marketing efforts, the project developed the new, now widely accepted visual identity for Via Dinarica, and conducted a series of promotional actions such as visits by travel bloggers and media, and a series of events on the trail itself to raise awareness and support of the local communities and population. As a permanent communication platform the project established Via Dinarica on the Outdoor Active platform (www.outdooractive.com).

1.1.5. Via Dinarica

The Via Dinarica Mega Trail is a long distance hiking trail that stretches nearly 2,000 kilometres and extends the entire length of the Dinaric Alps, connecting the Western Balkans' economies: Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, Kosovo* and Albania, with an initiative to also include the Sharr Mountain at the border between Kosovo* and The Former Yugoslav Republic of Macedonia.

The Via Dinarica corridor has three trails: the White, Green and Blue, each offering hikes of varying difficulty for nature lovers and adventurous minds. The Green trail passes through the forests and lower mountains of the Dinaric Alps, the Blue trail includes some of the best coastal and hinterland hiking, offering breath-taking views of the Adriatic Sea. The main, White trail includes all of the highest peaks and acts as a synapse between valleys, towns, and villages.



Map of Via Dinarica indicating the three different trails (White, Blue and Green Trail)

The genesis of the Via Dinarica dates to 2009-2010 when the pilot portion of the trail connected Sutjeska National Park in Bosnia and Herzegovina and Durmitor National Park in Montenegro. In 2013, the route was charted from Slovenia to the border of Kosovo*, Albania, and Montenegro. One wing of trail goes beyond the Dinaric Alps and on to the Sharr Mountain at the border between Albania and The Former Yugoslav Republic of Macedonia.

In 2014, American adventure magazine [Outside](#) named the Via Dinarica the world's best new hiking trail. In 2015, [Paste](#) magazine did the same. [Wanderlust](#) travel magazine and [The Guardian](#) shortlisted the trail as a must-do adventure stop for 2016. [National Geographic Traveler](#) magazine named the trekking route one of its "Best of the World" destinations for 2017. The Via Dinarica has also been covered by [Vogue](#) magazine, [Wizz](#) Airlines in-flight magazine, and [Lonely Planet](#) and more than 100 articles have been published in the travel media.

The current status of Via Dinarica development indicates high levels of organization and development in Slovenia and Croatia – at the northern end of the trail. Following the above mentioned USAD and UNDP funded project in Bosnia and Herzegovina, the infrastructure on the white trail in this WB6 economy has been sufficiently developed to enter the market with a more substantial outreach. The remaining sections of the trails within the Via Dinarica

corridor – the white trail beyond Bosnia and Herzegovina, the blue trail beyond Croatia, and the green trail in its full length – still need major development effort on the ground itself.

The Via Dinarica initiative has thus far propelled positive cross-border cooperation and joint marketing and promotion. Its aim is to create a tourism business engine while linking mountains, villages, travellers, and local enterprises. The purpose is to facilitate tourism success at the core of the economies' offerings while focusing on their strengths: tradition, landscape, gastronomy, and culture. This is in line with the basic tenets of proper, authentic, and sustainable tourism: use a locale's strength to promote what a destination does best—rather than bend to unnatural tourism offers that benefit neither the local population, the long-term economy, nor the traveller, who doesn't have the opportunity to enjoy the place properly.

1.1.6. Trans Dinarica

The first mountain bike trail to connect the Western Balkans, the Trans Dinarica is a continuation of the Via Dinarica concept and aims to expand the area's tourism product base. Trans Dinarica is created to address mountain bikers as a market segment tailored to their specific needs. The biking route will also traverse the eight economies of the region—Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, Albania, Serbia, Kosovo*, and The Former Yugoslav Republic of Macedonia—and will bring more small business-engine opportunities and capacity building to communities on the trail and in the vicinity.

1.1.7. Other initiatives

In addition to the above described, there are some small cross border initiatives on grass roots level where individuals (guides) and small businesses are connecting, sharing information and coordinating themselves. Trying to meet the demand that shows that adventure travellers want to visit more than one or two economies in the region and coming back again. They are exchanging information about the guests, developing products together and working on joint promotion for bigger recognition. These grass roots initiatives are mainly focused on activities that the region has endless opportunities for like ski touring, cat skiing and freeride skiing, mountain bike (MTB) trail riding, sport climbing etc.

Since Trans Dinarica and these other grass roots initiatives are on the Via Dinarica corridor, in future reference they will be considered as part of Via Dinarica assuming that all the analyses and interventions have direct influence on them as well.

2. Identification of gaps and constraints for adventure tourism regional route development

The objective of this chapter is to present the main barriers and constraints which hinder the cooperation and development of adventure tourism in WB6 and in particular the regional routes.

The gaps shown here have been identified through research and review of the available materials, as well as interviews with stakeholders actively involved in development and delivery of adventure product. Finally the gaps have been confirmed through the focus group discussion.

Across the six economies there are naturally gaps that are specific to one or two economies. However, the assessment here focused on those gaps and constraints that are present at regional level and that directly hinder development of regional routes. Their presence at regional level suggests that the solution might be better and more sustainable if sought at regional level.

2.1. Gap/Constraint 1: Lack of coordination and communication between stakeholders

The coordination of development and promotion activities is often not adequate between the public and private sectors even at national level, Such coordination and joint effort at regional level is that many times more complex and thus, at this point in time, is more conducted on a case by case basis, rather than having any systematic framework.

Continuous efforts are being made to improve the communication and cooperation; however the complexity of six different internal structures of the tourism industry and the difference in decision making processes makes the process slow. This is a major gap when considering establishment of a regional product that is still under development.

A regional route requires a well-positioned and balanced coordination in order to secure its ability to deliver a steady quality product over a long period of time. A large number of stakeholders need to maintain a steady standard of service. Additionally, the resources used in the nature, i.e. trails need to be regularly maintained and managed in order to secure attractiveness and safety for visitors. Finally, coordination and collaboration is needed to secure funding for existing and new products as sustainable and competitive offer.

2.2. Gap/Constraint 2: Lack of awareness and recognition in the local communities and the public sector

A decade ago adventure tourism activities were, across the region, looked with a decent amount of distrust and lack of reliability. Major improvements have been achieved regarding the awareness of adventure tourism as a reliable and economically viable activity, especially in communities that already receive visitors. However, the awareness is still not as wide as needed for the full sustainability of the product, especially when it comes to raising the

capacity of the local community to take ownership and responsibility for maintenance of the resources utilized.

When we talk about the adventure tourism, we talk about community tourism where the local communities are, or should be in the core of the tourist products, ensuring sustainability. Being one of the main strengths of the region, local communities need to be informed, educated and included, so the cultural and natural heritage is preserved. This way, the authenticity and the uniqueness of the region is protected, adding value on many different levels.

The importance of the (adventure) tourism sector is emphasized in national and regional strategies, yet there is a need for better dialogue, capacity building and public sector coordination in implementation. Across the region there is awareness of the existence of the Via Dinarica, Trans Dinarica and locally of the smaller adventure tourism initiatives, however the understanding how they can contribute horizontally to the overall economic development and competitiveness of the region, SME growth and sustainable development is extremely limited.

In those economies where the development of the Mega Trail has not yet seen a major coordinated effort, the lack of structures makes it difficult for organizations such as hiking clubs, mountain or cycling clubs, even national parks or educational institutions to contribute and get involved with the trail development and delivery.

2.3. Gap/Constraint 3: Lack of unified information and market identity

The regional initiatives mentioned above have each developed their own communication tools, including web presence. However, these are not in any way coordinated as for the message they send which are often mutually confusing, resulting in a counterproductive messages to visitors that are considering the region as their next travel destination.

This was most recently visible through the use of different visual identity for Via Dinarica activities, primarily two developed through separate projects. The resulting confusion in the market was a strong incentive to start coordination organically by the private sector alliance (Via Dinarica Alliance) selling the Via Dinarica product, and Terra Dinarica leading the active project in Bosnia and Herzegovina. Though it may seem strange, even people that are actively involved in different activities contributing in the development and promotion of the corridor are puzzled. And, the further one goes from the current hub of the corridor development (Bosnia and Herzegovina) this confusion grows (i.e. Kosovo* and The Former Yugoslav Republic of Macedonia).

There remains an acute need for a more uniform message from the region as a whole and for any regional routes developed it is of crucial importance that their identity and information made available are streamlined and communicate the message that supports the vision and market proposition of the route. This would concern key online communication tools, as well as standardised models to present different service providers along the corridor.

2.4. Gap/Constraint 4: Lack of quality control across operators

Adventure travel includes a wide array of services. With its high demand that as many services as possible are procured locally; it mobilizes a much wider range of service providers than some traditional forms of tourism. This results in facilities of different size and capacities opening their doors to international visitors (B&Bs, home stays, bike repair shops, local shops and cafes in remote villages, mountain huts, etc.). As such facilities are also located in rural and/or remote areas that in the past have not been exposed to international visitors; they are often unfamiliar with the customer service practices. At the same time their intrinsic hospitality is one of the characteristics visitors appreciate the most.

In this environment it is crucial for the long-term recognition of the regional product to establish model quality practices that would maintain the native hospitality while introducing the common standard of services across the regional route thus providing visitors with a reliable product and feeling that they know what to expect when they get to the location.

For a regional route, due to the large geographic distances, but also to differences in mentality and traditions between individual locations it is of high importance to establish common grounds and also to maintain some kind of a monitoring scheme.

2.5. Gap/Constraint 5: Lack of guiding capacity and staff skills to correspond the market expectations

For tour operators from office staff and guides are the most important staff members as they are often the only “faces” their guests get to see and meet. The same would expand to a destination, and consequently to a joint regional offer too. Thus the service quality offered by these staff members needs to be of the highest level if a designation is to be a successful one.

With adventure travel programs the requirements put forward to guides have an additional layer of technical skill based on the outdoor activity they guide and adequate safety awareness and ability to respond. Currently, each economy in WB6 faces a lack of properly trained and skilled guides, although the needs are not exactly the same for all – they differ by type of activity (i.e. most have some mechanisms for hiking guides) or specific skill, but looking at the array of adventure tourism activities all of the economies need more structure and better quality training and certification programs for the guides. One area where the need for additional training is present with all, is the area of the soft guiding skills such as group management, interpretation and similar. Also, there is a limited number of guides that possess adequate language skills, and with new markets that are being opened these requirements expand as well.

The overall experience and impression of the tourists strongly corresponds with the quality of guidance provided, and that is why this is an issue that needs to be addressed systematically.

As an illustration, below are several quotes extracted from the reports and feedback forms provided by the Adventure Travel Trade Association (ATTA) following the Adventure Week and the Adventure Next Balkans. The comments highlight the need for significant improvement and the importance of soft skills when striving to achieve high quality:

- *"Our guide was not good at all. He is lacking some of the basics regarding guiding people. I had hard times to hear and understand his worlds".*

- *"His voice was monotone; he didn't engage the group but rather just recited a script that didn't even go in one ear. He'd be much more effective if he told stories to capture our attention".*
- *"They need to be on time and smoke less. Guides should dig deeper to find engaging stories about places not just rattle off facts"*
- *"The key is the guide. The guide needs to work on his guide/people skills".*

Challenges that confront the efforts to improve the staff and guide training and certification efforts, and that are relevant for all economies included in the Triple P Tourism project support include:

- Lack of adequate guide training and certification programs, in particular when it comes to different adventure tourism programs
- Need for strong soft skills training for different guides
- For some activities lack of uniform international standards and/or guidelines for guides;
- Perception of guiding as a temporary/student job, not as a reliable income generating activity.

Some of the above challenges can be addressed through strong regional cooperation and creation of platform that would allow more streamlined training and certification programs making them more available and also applicable (ability to seek employment in more than one location).

2.6. Gap/Constraint 6: Burdensome administrative procedures and relatively low level of services related to tourism

National institutions play a major role in creating the business environment in tourism. This is especially important when we are considering the regional routes as they, in order to maintain service quality, require significant coordination and compatibility of the relevant industry regulatory framework and development and promotional efforts. Additional area of focus is also the fact that regional routes cross from one economy to the next, highlighting the ease of border crossing as an important aspect of high quality delivery of the tourism product. With adventure travel, and in particular hiking and mountain biking activities as they happen in remote areas, the trail often crosses more than one border or crosses the same border back and forth as it follows the natural configuration of the terrain.

Thus, administrative procedures can seriously affect the quality of the tourism products. In most of the cases when it comes to cross border adventure products, where the main idea is to connect more economies while practicing certain outdoor activity, creating such a product is not even a possibility. However, the Peaks of the Balkans initiative has initiated a solution that is currently applied in the participating economies (Albania, Kosovo* and Montenegro) of a special procedures for border crossing that can serve as a best practice when approaching this obstacle.

Throughout the research and the focus group it was also noted that the level of other services, such as rescue, insurance or health services are in many locations insufficient and thus hinder the ability of the private sector to pursue the product options and capacity to the level of market interest.

2.7. Gap/Constraint 7: Underdeveloped tourism infrastructure

The level of tourism infrastructure such as signage, both on main roads and at sites and locations, interpretation signage, information availability differs significantly among the economies and often even between certain sub regions or micro locations within the same economy. Roadside information, signage and info boards in English that enable travellers to navigate the region, especially the access points of different trails in the rural areas need to be improved. Further, signage at trails needs to be standardised.

What is, to an extent, even more important is the understanding that most of the adventure activities are executed in nature and at locations that are exposed to severe weather conditions, resulting in trails often being damaged or even destroyed after winter period or major storms. There is an open need to establish models for maintenance and management of trails in order to secure their availability and safety of those who use them.

The lack of signage makes it difficult to access sites that visitors (whether domestic or international) they anticipated to visit. It completely prevents any visitors without strictly structured itinerary to spontaneously visit different sites. It can contribute to the frustration and diminish the visitor experience. This in turn often results in a negative feedback most frequently delivered through social media platforms, thus tarring the image of the destination and its attractiveness to potential visitors.

The second aspect of infrastructure that is currently lacking be it in quality or number, along the adventure routes is the accommodation infrastructure. Depending on the activity and difficulty levels this would range from small hotels, to B&Bs, home stays, camp sites, mountain huts, shelters or even sites designated for setting up own overnight camp. Interventions are needed in the area of upgrading current facilities or establishing new ones at specific distance markets along the regional route – to correspond daily mileage (distance) that is covered by specific type of adventure activity (there are requirements based on the activity how frequent in distance shelter, accommodation with shower, and similar need to be).

The same applies to specialised services such as bike repair and supplies and similar.

2.8. Gap/Constraint 8: Nature conservation and waste management

The quality of the environment, both natural and man-made, is essential to tourism. Tourism's relationship with the environment involves many activities that can adversely alter the environment. It can gradually or rapidly destroy the very resources on which it depends.

Most of the economies involved in the Triple P project are still actively developing its environmental protection systems, although there are differences among them too. Further, most of the economies have also inherited environmental issues such as those linked with waste management and existence wild dumping sites usually located at the outskirts of settlements, the more remote the location the more likely it is to have such a site.

As an illustration – here is some feedback received from an inbound tour operator and international visitor:

“In some areas there is so much trash, that it becomes embarrassing. It does not fit with the image of a region which should be known for its natural attractions” (operator).

“The great pity is that there are piles of rubbish everywhere despite large prominent signs warning everyone to take care of the environment” (visitor).

Additionally, the reality is that communities, and their history of dependence upon the extraction of natural resources to make a living, are often at the centre of direct and indirect conservation treats. Tourism, if developed responsibly can offer economic alternatives to offset, even if partially in some cases, the negative impact on natural and cultural resources. Illegal logging

3. Recommendations

Identified barriers and constraints reflect the main gaps and needs as priority interventions to be implemented in WB6 economies in order to create favourable conditions for faster development of adventure tourism as a competitive product in the region.

This chapter seeks to present a response to these gaps in the form of initial recommendations for actions and interventions that would facilitate closing the gaps and moving the industry towards more solid solutions for the identified barriers and constraints. The recommendations include actions that address needs in further development of a quality adventure product, increasing the capacity of the industry and local communities to absorb expected increase in the number of visitors.

Naturally, needs and gaps intertwine and any one recommended action often addresses more than one need or gap. The matrix below aims to show how those two categories: gaps/needs and recommendations, interact. The letter “A” in the matrix field indicates that the respective recommendation addresses the indicated gap directly, while a small letter “x” indicates that the recommendation also, indirectly, contributes to overcoming the respective gap, or is addressing the respective need.

Recommendation/ Gap	Regional coordination and structure	Marketing strategy	Internal quality guidelines	Capacity building	Improvements to business environment	Public infrastructure and services
Regional coordination	A			x	x	x
Awareness of local communities	x	x		x		
Uniform market identity and information	x	A	x	A		
Quality control among operators	x		A	A	x	
Staff skills and guiding capacity	x		A	A	x	
Administrative procedures	x		x	x	A	x
Tourism infrastructure	x			x	x	A
Nature conservation and waste management	x	x		x	A	A

However, before we embark on the discussion of individual recommendations, there is one general recommendation that aims to secure a framework for all other interventions. The Via Dinarica is the first grass roots initiative that has grown into a regional product with its development and market oriented structures. The product is far from fully developed, and especially in its section that travels through the WB6 economies. However, even with limited base on the ground the product is already receiving high recognition and attention in the international markets. As such, Via Dinarica has progressed well ahead of any other adventure tourism initiatives active in the region.

The potential Via Dinarica holds in its further development is another segment that sets it apart. When observed as a corridor rather than just a trail, where the trail is the identity building core, the Via Dinarica provides a flexible but unifying platform for development of complementary adventure products (i.e. Trans Dinarica as a product focused on biking and

mountain biking programs has already been initiated) or innovative experiential products based on living cultural heritage (i.e. culinary and gastronomy, music, crafts).

Based on the above, the framework recommendations is to pursue further development and strengthening of the Via Dinarica as the join regional adventure tourism product, with options to tailor interventions based on the current stage of development in each of the economies. Thus Via Dinarica becomes an identity building product for the Western Balkans Six, establishing the region as a quality adventure travel destination.

3.1. Recommendation 1: Reginal coordination and structure

As noted in the gaps section of this assessment, the current lack of coordination and uniform vision is hindering the market potential of the product as such. This has been recognised by the partners currently involved in the development and promotion of Via Dinarica Mega Trail. The first regional meeting was held in Starigrad Paklenica, 6-7 May 2017, which proposed a coordination mechanism/platform that foresees establishment of Via Dinarica Programme Country Lead Organizations in each of the economies of Via Dinarica corridor. The Country Lead Organizations would form the Regional Coordination of the Via Dinarica Programme (RCVDP) and be responsible for coordination of the development efforts, implementation of the vision and standards of Via Dinarica within the economies they cover.

The RCVDP would be responsible for coordination at the regional level that would include and not be limited to development of common service guidelines and standards, joint marketing and promotion actions and advocacy for issues of importance for development of competitive product and successful market performance of the Via Dinarica with all its sub segments (i.e. Trans Dinarica and other future programs as they are being developed).

The RCVDP platform is of utmost importance for the sustainability of this successful regional initiative. Although the basic skeleton of the organisation has been drafted, the full model still needs to be developed including the full organizational structure, wider consultative models, resources needed for its operations, sources of funding and, at last but not least, the adequate registration that will enable it to fulfil the role it is envisioned for.

This recommendation foresees assistance to definition of the regional cooperation platform and support to establishment of the Country Lead Organizations in each of the economies. Out of the WB6 economies, this structure exists only in Bosnia and Herzegovina led by the NGO that actively pursues development of the trail partnered up with the Via Dinarica Alliance, the regional private sector initiative who are already placing the Via Dinarica products in the international markets.

The Via Dinarica alliance is, beyond Bosnia and Herzegovina, present in two more economies of the region: Montenegro and Albania, with intention to expand to all the WB6 economies

In conclusion, to secure that Via Dinarica becomes a development engine for the adventure tourism product of the region and ensure its long term success, a regional platform should be facilitated to establish and accelerate the coordination and communication between and stakeholders.

3.2. Recommendation 2: Marketing strategy

Via Dinarica already has a certain online presence. The website www.viadinarica.com has been established, currently offering information on the trail and development activities in those economies where there is an active Via Dinarica development effort. A partnership has been established with the Outdoor Active network (www.outdooractive.com), through which an App is also made available. However, it needs to be updated with additional information that provides presence of every economy in the WB6.

Further the Via Dinarica product is communicated through the Via Dinarica portal (www.via-dinarica.org) that among other information also offers defined tours and departure times. Market is further served with the Alliance Facebook and Instagram profiles.

However, the current presence online does not meet the needs not even of the current product base for full-blown promotion and marketing effort. In order to solidify the market position and launch, a marketing strategy as a permanent feature of the planning and implementation is necessary. The strategy is to define the target markets, marketing messages, marketing mix and guide production and placement of the same.

It is foreseen that the marketing strategy for the regional adventure route will observe presence at international markets, but also develop messages towards the regional market to facilitate awareness rising and also increase intraregional travel.

In order to achieve all of the above the marketing strategy will need to address the need for the production of high quality content, such as adventure videos, photography, and online blogs, but also rich product information that will be further communicated. There needs to be an ongoing and consistent flow of communication that maintains active awareness about the region and drives potential visitors.

The proposed marketing strategy would consider delivery of solid market research and identification of actions based on such collected information. For this, adequate resources need to be planned within the process of regional platform development. The marketing arm would then be responsible for:

- Development and management of unified regional brand
- Coordinated PR efforts as per plans developed
- Management of official web platform
- Promotional actions such as:
 - Presentations at trade fairs (i.e. ITB, World Travel Market)
 - Identification of and presentation at specialised trade events (i.e. Adventure Travel World Summit, cycling events)
 - Trade visits to target markets (educational road shows involving tour operators, travel agencies and media)
 - Fam trips for travel trade and media
 - Online webinars for international operators and media
 - Online marketing and social media

- Establishment of Via Dinarica events and/or participation in existing ones at local and regional levels
- Content production (photo, video, print)

3.3. Recommendation 3: Internal quality guidelines

Via Dinarica has been driven by the local enthusiasm which gives it special flair when it comes to market attractiveness as well as its own dedication to sustainability. However, Via Dinarica is also a trans-border corridor that is at risk of dilution and dispersion. Stakeholders that offer products and provide services are vastly different and of different backgrounds. Those differences can easily bring also dispersion in vision and understanding of the Via Dinarica.

It is of utmost importance to secure that common guidelines and even internal standards are established and maintained across the product base. As the product is required to primarily respect regulatory framework of home destinations, strong coordination is needed to establish common denominators and communicate those adequately to enable ground service providers to meet and successfully operate respecting both.

The system of common guidelines and standards should address the following, but not be limited to:

- Accommodation providers
- Guiding services for each activity group
- Equipment use and hire
- Interpretation at sites
- Maintenance of infrastructure (i.e. trails, signage, security)
- Risk and safety practices, including rescue services

Once developed such system would foresee development of:

- Guidelines and manuals
- Model for a cascading distribution through Country Lead Organizations or a similar model once it is fully agreed and enforced
- Development and regular delivery of training modules for initial adherence and maintenance of the agreed standards of service
- Establishment of a mentoring and monitoring system that would also include review processes

3.4. Recommendation 4: Capacity building

Responding to the current fragmentation of the offer and difference in backgrounds, existing requirements and frameworks within which the product is delivered, and the expected increase in providing new services and product elements, it is important to secure that industry has access to continuous capacity building programs. Further, at most sites and locations only very limited number of service providers are able to deliver services at the level requested by developed markets which can secure the desired outcome of higher customer spending and longer stay at the destination.

The proposed program of capacity building would aim to overcome the existing weaknesses. This program as such should be an integral part of the regional planning and coordination to best utilize share of skills and knowledge already present within the region, as well as best use of resources when it comes to reaching out to outlets for such knowledge that is not available within the region.

The capacity building program should also develop with time, meaning that as the product development and promotion activities are delivered new skills will be identified and needed. Well positioned capacity building programs would continuously review the needs of the industry and develop courses and actions to respond to the stakeholders' needs.

Finally, educational institutions and training centres should be invited to participate in development of the training programs, to best utilize development of the long term training and certification solutions. Close linkages between the industry and education will result in improvements to the existing curricula and solutions that permanently provide the industry with skilled workforce.

The most burning training need expressed by the adventure industry has been the guide training. As noted under the gaps section, for adventure guides this means a two layered training: technical skills and soft skills. To address this need a process needs to be initiated that would address the following:

- Develop an interim training program that can immediately address the key gaps and thus meet the needs imposed by the market
- Provide a schedule of guide training programs
- Advance the capacities of existing guides
- Develop a full guide training program and standards that would follow the recognised international guide training certification
- Pursue recognition of thus developed regional training and certification with relevant international certification bodies.

The capacity of different sport clubs and relevant sports associations in the economies should also be consulted when addressing the need of skilled guides and development of new standards, as through their membership they often hold adequate technical skills that usually take time to acquire. Even in interim period, those forces could, with additional tailor-made courses for improving their soft skills, compensate the lack of fully trained and certified skilled guides.

In addition to the industry itself, a special form of capacity building will be targeted towards the local communities. This capacity building is closely linked with awareness raising and intra-regional promotion activities. This arm would also enable continuous encouragement and mobilization of local entrepreneurs to come on board and their success to serve as a model to others.

3.5. Recommendation 5: Improvements to the business environment

Ultimately tourism development depends on political philosophies. The commitment to develop sustainable tourism is asking for engagement and involvement of different stakeholders, with the public sector often playing the leading role.

Tourism overall is faced with obstacles that hinder the sector development and that often have their roots in administrative and business environment policies. Many such barriers are present in more than one of the economies of the region. At the same time some of the economies have already initiated processes to overcome these barriers. The key barriers identified through the assessment are:

- Standardization of services and quality standards
- Ease of travel in the region, where three key segments have been identified:
 - Visa regime within the region
 - Visa regime, in particular for long haul destinations
 - Flow of traffic at border crossings
- Inadequate services or inadequately organized services, such as:
 - Rescue
 - Insurance
 - Health services

Standardization of services and quality standards would best be approached through a two tiered, well-coordinated approach of establishment of the Via Dinarica standards of services (as discussed under recommendation 3.3) and open dialogue among the participating economies towards a common basic denominator for national certification programs.

Ease of travel sees need for a well monitored visa regime both within the region and with third countries. Currently, visa regimes with long haul destinations are often an obstacle to travel because of which travellers decide to travel to a different destination. Seeking solutions that would promote a more customer friendly process would help meet the interest and ease the decision to embark on visa application and eventual travel to the WB6.

Travelling across the border is currently also, and especially during the high season periods or on special holidays, burdened with extremely long border waiting times. Industry has indicated that, on previous occasions, they were forced to cancel sections of planned tours due to long border lines, which in turn has negative consequences both on income locally created and on customer satisfaction levels.

Finally, adventure travel often needs to cross borders at points where there is no border crossing (i.e. hiking or mountain biking programs). A positive example of developing a solution for such travel already exists in the region – Albania, Kosovo* and Montenegro have developed a solution of a pre travel approval process that can serve as positive solution and the best practice for the region to further discuss and develop.

All three of the above would require a close cooperation with relevant security institutions in order to initiate bilateral, trilateral or regional solutions to secure easy and uninterrupted flow of visitors, enabling the industry to best respond to the market needs. Existing solutions should be taken into account, as well as other concepts in existence (i.e. tourism zones with special permits and similar).

Regional industry is also faced with limited supporting services such as: rescue services, insurance programmes for tour operators, adequate health services and similar. The recommended approach is to first initiate an in depth assessment that would precisely define the obstacles, then look at possible solutions available in the region and finally identify all institutions whose involvement is needed for each group of obstacles. Regional platform can

then lead and facilitate discussions that would lead to identification of the solution(s) and the relevant ratifications at all levels as needed.

Connected to the recommendation 3.4 the proposed cooperation platforms with the educational institutions can also be included here into the effort of improving the business environment for tourism.

Finally, adventure tourism industry is highly concerned with the management practices of protected areas and natural resources overall, as they form the core of their product platform. For this purpose, a closer communication needs to be established between the industry and the protection services.

Developing a tourism online platform, almost in a form of an intra-net, can be considered to serve the public private dialogue. A tool that would foster exchange of information on good practices, discussions on policy solutions, as well as facilitate much faster flow of product development information.

3.6. Recommendation 6: Public infrastructure and services

Tourism infrastructure on adventure sites is still very weak, often non-existent. There are both public and privately-owned sites along Via Dinarica that currently cannot be located by independent travellers – the signage to these sights has either never been placed or needs to be replaced. Similarly, any new products, trail segments that are prepared and opened for visitors need to be adequately signed. The recommendation is to, in parallel, take under consideration two main areas, and those are the initial signing of the trail or location/site and then the maintenance and management of the signage posted.

To start with, in order to communicate the common vision and standards of services, the signage needs to be standardised – both in visual as in meaning of each sign established. This refers to both directional signage as well as interpretative signage.

In addition to the signage itself, and particularly in remote areas, there is often lack of adequate infrastructure along the trail that would provide adequate and needed services – i.e. accommodation, bicycle servicing centres or spare part services, dry toilets, and similar. Close cooperation is needed to find solutions and resources to address specific needs, however common approach to address those solutions through practices of responsible tourism that causes minimum intervention into local environment, with full respect to existing traditional architecture and natural settings need to be agreed and pursued as a regional approach.

3.7. Matrix of recommendations structured by priority of implementation

The table below shows the proposed timeline for the recommendations provided. The timeline is organised in two main time frames – immediate and mid-term, primarily to indicate the starting point in addressing the recommendations.

INTERVENTION AREA/ TIMEFRAME	IMMEDIATE (before next season)	MID-TERM (up to 3 years)
COORDINATION	<ul style="list-style-type: none"> – Initiate regular regional communication and cooperation – Facilitate communication and identification of Country leads – Facilitate development of the regional coordination body and management structure 	<ul style="list-style-type: none"> – Establish the regional coordination platform – Develop communication models with other relevant sectors (i.e. security, education, etc.)
MARKEITNG STRATEGY	<ul style="list-style-type: none"> – Develop a joint marketing and promotion strategy including market outreach plan and awareness raising events – Create full brand guidelines – Initiate creation of high quality content – Conduct market research and develop market outreach campaign – Attend key trade events as per market outreach campaign – Execute media communication as per market outreach campaign – Execute awareness raising events as per marketing and promotion strategy 	<ul style="list-style-type: none"> – Develop and execute media and trade communication and event(s) as per market outreach plan(s) – Develop and execute awareness raising events and actions as planned – On annual basis review market outreach plan – On annual basis review awareness raising program
INTERNAL QUALITY GUIDELINES	<ul style="list-style-type: none"> – Identify all areas that need common quality guidelines – Develop a plan for development and establishment of the quality guidelines – As per plan initiate development of the guidelines for key services – Establish thematic communication platforms to facilitate close coordination between and among special technical skills communities (i.e. hiking, mountain biking, rock climbing, rafting, ...) towards coordinated training and certification programs 	<ul style="list-style-type: none"> – Produce standard manuals for each service group – Develop plan of delivery of established training and certification programs – Establish quality monitoring mechanisms – Open dialogue for institutional status of developed quality and training
CAPACITY BUILDING	<ul style="list-style-type: none"> – Map out training needs and existing relevant, official and unofficial training and certification programs relevant for adventure tourism – Establish thematic cooperation groups to identify common needs and solutions and facilitate their continuous dialogue – Support development of skills training programs with regional character 	<ul style="list-style-type: none"> – Deliver common training programs as per models developed for each – Establish quality communication with relevant international training and certification bodies – Open dialogue with relevant organizations and institutions for positive changes in relevant curricula – Open dialogue for institutional status

INTERVENTION AREA/ TIMEFRAME	IMMEDIATE (before next season)	MID-TERM (up to 3 years)
		of developed quality and training
BUSINESS ENVIRONEMNT	<ul style="list-style-type: none"> - Identify key policy barriers to adventure tourism development - Conduct assessment of existing policy solutions and identify opportunities for cross-learning within the region - Open dialogue platforms for policy issues identified as key priority - Facilitate open dialogue with institutions relevant for addressing the barriers identified – i.e. culture, environment, security - Initiate dialogue for introduction of responsible tourism development as the primary development principle 	<ul style="list-style-type: none"> - Facilitate transfer of knowledge relevant to removing barriers for to growth where solutions exist in the region - Facilitate joint identification of solutions for which there is no current best practices in the region - Continue responsible tourism development platform
PUBLIC INFRASTRUCUTURE	<ul style="list-style-type: none"> - Identify key infrastructure needs along the Via Dinarica corridor and classify as per type and resources needed - Establish existing programs and strategies that affect large infrastructure needs - Open communication and cooperation towards seeking adequate funding for the needed interventions - Where resources are available, secure adequate brand presence and adherence to the agreed quality standards (i.e. hiking trails, signage,) 	<ul style="list-style-type: none"> - Continue to actively seek and facilitate funding for the key infrastructure interventions - Facilitate joint infrastructure actions wherever applicable.

Conclusion

Adventure tourism has been growing exponentially over the past years with tourist visiting destinations previously undiscovered. This has led to new sites and destinations to be opened to the market, but also highlighted need for a coordinated and responsible development of these market segments. The draft assessment provided here indicated that there are numerous initiatives on the ground that look at and support adventure tourism development. One initiative that has been highlighted as already having a regional aspect is Via Dinarica.

The regional potential of Via Dinarica is easily visible. However, on the ground there are still extremely large differences as to the offer and services available to the visitors. Additionally, the identity of Via Dinarica is still not adequately developed and communicated. It is necessary to develop and communicate both of those aspects in order for Via Dinarica to reach its full potential. Via Dinarica, as a regional effort, can:

- Attract a high level of visitors and media, as engines to create economic benefit to local communities;
- Lower barriers and develop mutually beneficial tourism flows between and among neighbouring economies;
- Enable remote and rural areas to create attractions and products that would positively affect quality of living for local population; and
- Encourage the development of new skills among tourism operators, including at the grass roots level.

The draft assessment of adventure tourism industry provides only the first recommendations on priority actions and interventions, that would contribute to the elimination of identified barriers and constraints and thus to fostering of regional adventure tourism development. These recommendations will be further discussed with RCC TEG members.

Attachment 1: Adventure Tourism in the World

Tourism is one of the most rapidly growing sectors in the world, and adventure tourism is one of its fastest growing categories. Increasingly, countries in all stages of economic development are prioritizing adventure tourism for market growth, because they recognize its ecological, cultural, and economic value.

The Adventure Travel Trade Association (ATTA) defines adventure tourism as a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion. While the definition of adventure tourism only requires two of these components, trips incorporating all three tend to afford tourists the fullest adventure travel.

Adventure tourists are passionate and risk-taking. The AdventurePulse: USA Adventure Traveler Profiles indicates interest in destinations that have previously suffered significant commercial tourism setbacks due to natural and political events. The Adventure Travel Trade Association reports that adventure tourism operators routinely create and offer itineraries in destinations recovering from environmental and political stress, making these destinations accessible to travelers seeking off-the-beaten path and authentic travel experiences.

Adventure tourists are willing to pay a premium for exciting and authentic experiences. Adventure operators have reported an average of USD 3,000 spent per person, with an average trip length of eight days. Trip costs vary based on length, luxury and activity levels, destinations, and distance from a traveler's starting point to the trip destination.

The United Nations Environment Programme (UNEP) cites that in most all-inclusive mass tourism package tours, about 80% of travelers' expenditures go to the airlines, hotels, and other international companies (who often have their headquarters in the travelers' home countries), and not to local businesses or workers. Of each USD 100 spent on a vacation tour by a tourist from a developed country, only around USD 5 actually stays in a developing destination's economy. UNEP cites several studies that approximately tourism leakage to be up to 40% in India, 70% in Thailand, and 80% in Caribbean countries due to factors such as foreign-owned operators, airlines, hotels, and imported food and products. ATTA's adventure tour operators polled estimated that 65.6% of the total trip cost from an adventure package remains in the destination(s) visited.

Adventure tourism practitioners and policymakers adhere to sustainable environmental practices. This is because they know that without pristine natural environments and meaningful cultural experiences, their destination would lose its competitiveness, and tourists would go somewhere else. Both public and private sector stakeholders understand that adventure tourism is inextricably linked with human and nature capital. Protection and promotion of these resources is important, and the continued development of this sector must seek to protect these valuable assets.

Because of its documented benefits to the environment, local people, and local economies, governments are increasingly identifying adventure tourism as a tool for sustainable and responsible economic growth that delivers benefits to every level of society. In many destinations, adventure tourism has been developed without extensive new infrastructure. It

can also deliver benefits, from creating local jobs rapidly to relying on traditional knowledge of local people for guiding and interpretation.

Attachment 2: List of Abbreviations

ATTA	Adventure Travel Trade Association
B&B	Bed and breakfast
CBC	Cross Border Cooperation
EU	European Union
GDP	Gross Domestic Product
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GPS	Global Positioning System
IPA	Instrument for Pre-Accession Assistance
ITB	ITB Berlin, annual travel trade event
MTB	Mountain biking
NGO	Non-governmental organization
RCC	Regional Cooperation Council
RCVDP	Regional Coordination of the Via Dinarica Programme
SEE	South East Europe
SEEIC	South East European Investment Committee
TEG	Tourism Expert Group\
UNDP	United Nations Development Programme
UNEP	United Nations Environmental Programme
UNWTO	United Nations World Tourism Organization
USAID	United States Agency for International Development
WB6	Western Balkans Six (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Serbia, The Former Yugoslav Republic of Macedonia)

Attachment 3: List of References

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