

Situational analysis and analysis of prospects for the development of cultural, adventure and speleology tourism in the city of Niš



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1. Introduction:

The current analysis is developed in the framework of the project CB007.1.11.268 – Increasing the tourist information services in the CBC region under the Interreg-IPA Cross-border Cooperation Bulgaria-Serbia Programme, co-financed by the Instrument for Pre-Accession Assistance II (IPA II) of the European Union. The priority axis in which the project positions itself is PA1. Sustainable Tourism.

The general aim of the project is the establishment of relevant conditions for cultural exchange among people and functioning platforms for constructive dialogue between the relevant stakeholders, as well as enhancement of the potential of the region for sustainable and balanced socio-economic development.

It promotes the betterment of the niche tourism activities, exploiting various forms of practices and concepts in the utilization of natural values as a (i) generator of new products and employment possibilities, (ii) source of financial and non-financial benefits for the individual and the societies and contributor for more resiliency of the image of the border area as an international tourism destination.

Identified target groups:

- Touristic organizations;
- Institutions in the field of nature protection, culture and sustainable tourism;
- Local authorities;
- Rural development institutions/organizations
- Tourists, general citizens, vulnerable groups;

The definitive purpose of the current analysis is to provide detailed background about the speleology, adventure and cultural tourism in the territories of Nis, Sofia and Montana which will serve as a basis for the elaboration of a Common Strategy for the development of cultural, speleology and adventure tourism in the context of the project.

2. Overview of the tourism sector in the Republic of Serbia (incl. current tourist visits and interest to the sites, management, etc.)

2.1 Introduction:

The Republic of Serbia is part of Europe, one of the world's leading tourist destination. This fact, combined with Serbia's continental location and rich natural and cultural heritage, forms the very

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structure of the development of the tourism industry of the Republic and is of great assistance for its eventual positioning as a main touristic destination in the international reality.

Nevertheless, there are some factors, which obstruct the potential of the country from its full realization: social, political and economy related.

Firstly, in the past the Republic of Serbia has not been a predominantly tourist-oriented county, with the development of tourism only starting after World War II, mostly for business travel and health tourism, which implicates lack of experience, resulting in relatively slow rates of validation as a major tourist destination on the market.

Secondly, Serbia was part of the Federal People's Republic of Yugoslavia, proclaimed in November 1945 under the governing of Josip Tito – the first president of the new—socialist—Yugoslavia. Once a predominantly agricultural country, Yugoslavia was transformed into a mid-range industrial country, and acquired an international political reputation by supporting the decolonization process. During these years a different logic of development was followed, which inevitably affected the tourism in the country and differed the approach in comparison with other countries. After the disruption of the regime, the organizational deficits became evident and consequently led to a state rather unfavourable when it comes to the tourism sector and respectively rates.

Facts and figures: **Serbia - Tourism Development 1989-2000**

- Decrease of total tourism arrivals 47.9%, domestic 37.8%, foreign 82.4%,
- Decrease of foreign currency income 93.6%
- Fall of the share in total investments (from 2.3% to 0.5%),
- Fall of the share in total foreign currency income from 5.8% to 1.7%
- Average use of the total accommodation capacities 24.8%

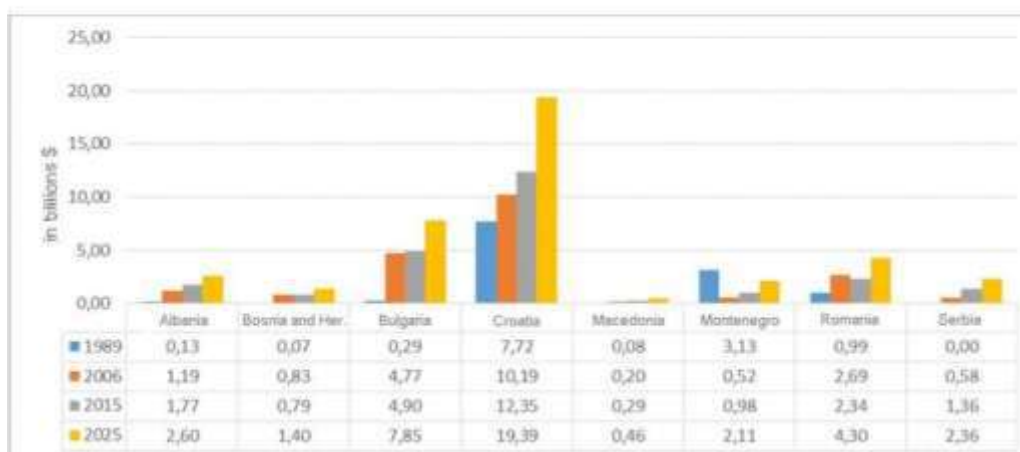
The reasons for stagnation, i.e. great lag in tourism turnover growth and average foreign currency income per overnight stay of foreign tourists should be sought in a very unfavourable structure of tourism offer, in shortcomings in quality and contents of the existing tourism offer, inadequate assortment, quality, scope and structure of consumer goods that do not encourage the increase of foreign tourist consumption (Oppermann 1997).

Thirdly, at the current moment Serbia is not a member of the European Union, which has a very strong position regarding the importance of tourism as a meeting point of the different cultures within Europe and in that sense has built over the years a comprehensive policy regarding its sustainable development; furthermore it dedicates many operational and financial resources with the aim to achieve a balanced and symmetric general condition of the tourism industry in its member countries. This creates premises for differences in the industries of neighbouring areas, which is the case of Bulgaria and Serbia; after 2007 the tourism influx in Bulgaria has experienced significant increase due to mitigation of rules and regulations and the free movement principle in the EU. Nevertheless, the Union supports the integration and development of non-member countries and countries with a strong perspective of joining such as

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Serbia with the general goal of i) eliminating disparities within the territory of Europe and the specific one ii) better preparation for actual membership. Evidence of which is the current project and many others, supported by the different programmes launched by the Community.

Figure 4. Expenditure of Foreign Tourists in the Republic of Serbia and Selected Competitive Countries



Source: Report Travel & Tourism economic impact 2017 Serbia - WTTC

Currently, Republic of Serbia is in an accession negotiation process, which was preceded by the decision of the European Council to grant the country candidate status on March 1st, 2012.

On 21 January 2014, the first meeting of the Accession Conference with Serbia at ministerial level opened **accession negotiations**. Since then, six Accession Conference meetings at ministerial level were held in Brussels.

The seventh meeting of the Accession Conference with Serbia at ministerial level took place on 11 December 2017.

The conference opened negotiations on:

- Chapter 6 - Company law
- Chapter 30 - External relations.

After this Conference, out of a total of 35 negotiation chapters, 12 chapters have now been opened for negotiations of which 2 chapters have already been provisionally closed. Further Accession Conferences will be planned, as appropriate, in order to take the process forward in the first half of 2018.

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The next argument is related to the interdependence of the sectors and industries within a country – as a complex economic activity the development of tourism is in dynamic correlation with other branches of the economy and its progress, respectively stagnation is a result of many factors with unproportional magnitude and scope, which have to be taken into consideration when analyzing the condition of the sector.

“Dynamics, scope and structure of tourism economy impose a rhythm on the whole tertiary economy, which it has to follow; at the same time, tourism influences the development and growth of tertiary sector.”²

² Tomic, Radovan, Tamara Gajic, and Denis Bugar. 2012. Tourism as a basis for development of the economy of Serbia. UTMS Journal of Economics 3 (1): 21–31.

For example in Serbia (among other countries members or non-members of the EU) exists a malpractice of excessive construction work, often on nature reserves without planning permission, which can be classified as an endemic problem inherited from the communist era and the specificity of the behavioural pattern back then. So the problem here, directly related to the tourism industry, is the process of spoiling of natural resources and the consequent alteration of ecosystems, biodiversity reduction, pollution, etc. which have the potential to harm the international image of Serbia as a tourist destination. However, it cannot be solved independently as the agents in the industry do not possess actual power to alterate the system - they can express their position in a chosen form, but in the jurisdiction of the certain governing organ stands the opportunity for imposing more strict regulations and sanctions regarding illegal construction. Also important aspect here is the general commitment of the country`s government to the environmental issues and the course of action undertaken in regard.

As a conclusion can be said that the role of tourism in the economic development of Serbia is question of major significance that needs to be addressed relevantly, the first step of which - a comprehensive analysis of its current state, followed by an inclusive strategy in compliance with the country`s international engagements and in accordance with its best interest, without leaving the framework of sustainable and responsible course of behaviour.

2.2 Tourism Development Strategy of the Republic of Serbia 2016-2025

The Tourism Development Strategy of the Republic of Serbia for the Period from 2016 to 2025 (hereinafter referred to as: the Strategy) was prepared in accordance with Article 7 of the Law on Tourism. The baseline study of the Strategy specifically contains:

- an analysis of the current state and the existing level of tourism development;
- a comparative analysis of tourism in competitive countries;
- an analysis of the advantages and disadvantages of tourism, business mission, vision and goals of tourism development; a selection of

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- priority tourism products, a proposal of the priority tourist destinations;
- an analysis of the impact on cultural heritage and natural resources and a proposal of a tourism development policy;

Rationale:

The Tourism Development Strategy of the Republic of Serbia ("RS Official Gazette", No. 91/06) adopted for the period from 2006 to 2015 (hereinafter referred to as: the Previous Strategy), establishing the fundamental guidelines for the tourism sector in the Republic of Serbia in the long term, ceased to be valid: therefore a new strategic document was drafted, taking into account the following key aspects:

- 1) The Previous Strategy was implemented to a lesser extent, due to the fact that the global world crisis arose immediately after its adoption, slackening the inflow of investment and slowing down the pace of commercialisation of tourism in the Republic of Serbia;
- 2) Owing to budgetary constraints and other development priorities, as well as the neglect and non- recognition of tourism as one of the key economic sectors, the Government failed to implement an active tourism policy that would give tourism in the Republic of Serbia a significant competitive edge;
- 3) For most of the time since the adoption of the Previous Strategy, the Republic of Serbia was going through a difficult period of finding its own political and economic stability, i.e. internal consolidation, which resulted in lower political and value interest of the Republic of Serbia with respect to tourism development.

Current condition, favouring the development and implementation of a new Strategy:

At the current moment the Republic of Serbia is embarking on the process of European integration and building a unique geostrategic position, presenting opportunities for numerous private and public projects that would aid Serbia in creating clear and unambiguous alternatives for long-term sustainable growth and development in the future. In circumstances when the Republic of Serbia is enhancing its negotiating powers in respect of both closer and more distant global markets, it is realistic to expect more favourable conditions for significant tourism development of the country.

The overall aim: establishment of a systematic approach to tourism, not only through economic indicators, but also through the multiplier effects that tourism has on the overall social development, local and regional development.

Specific objectives made explicit:

- Sustainable economic, environmental and social development of tourism in the Republic of Serbia;
- Improving the competitiveness of the tourism industry and related activities in the domestic and international markets;

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- An increase in the direct and total contribution of the tourism sector to the gross domestic product (hereinafter: GDP) of the Republic of Serbia, as well as an increase in direct and total employment in the tourism sector and its share in total employment in the Republic of Serbia;
- Improvement of the overall image of the Republic of Serbia in the region, Europe and worldwide

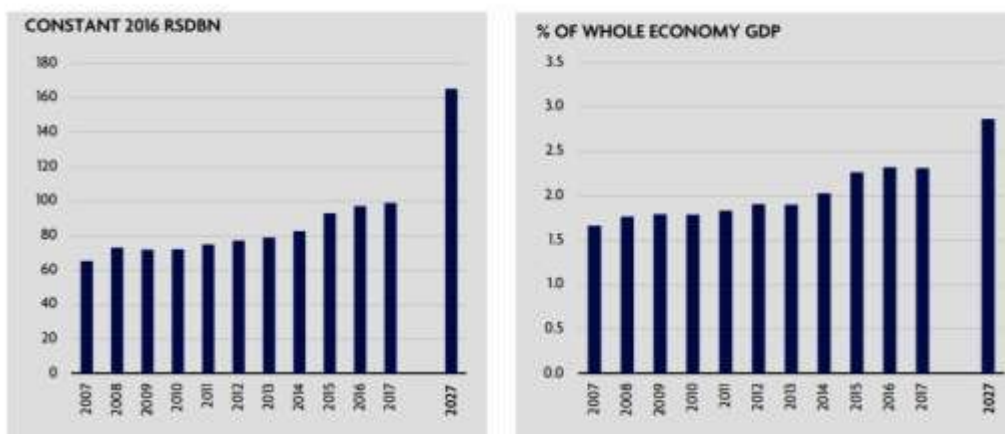
Importance of the tourism sector for the development of the Serbian economy:

- Defined by external sources

The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;
- Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the community at large' – eg tourism marketing and promotion, aviation, administration, security services, resort area security services, resort area sanitation services, etc.;
- Domestic purchases of goods and services by the sectors dealing directly with tourists – including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents. The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism industry;

SERBIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO GDP



The total contribution of Travel & Tourism to GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was RSD280.6bn in 2016 (6.7% of GDP) and is expected to grow by 2.0% to RSD286.3bn (6.7% of GDP) in 2017.

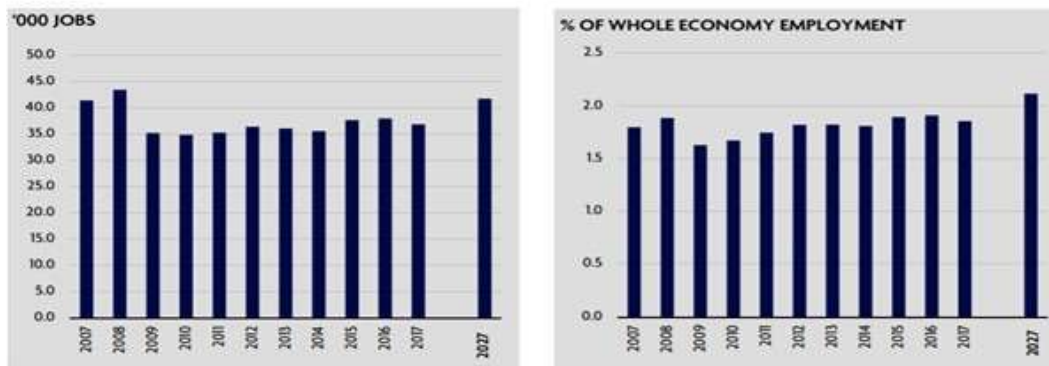
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It is forecast to rise by 4.8% pa to RSD456.1bn by 2027 (7.9% of GDP).

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By 2027, Travel & Tourism will account for 42,000 jobs directly, an increase of 1.2% pa over the next ten years.

SERBIA: DIRECT CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT



The total contribution of Travel & Tourism to employment (including wider effects from investment, the supply chain and induced income impacts, see page 2) was 99,500 jobs in 2016 (5.0% of total employment). This is forecast to fall by 2.3% in 2017 to 97,000 jobs (4.9% of total employment).

By 2027, Travel & Tourism is forecast to support 106,000 jobs (5.4% of total employment), an increase of 0.9% pa over the period.

4

- Defined by the Strategy:

³ TRAVEL & TOURISM ECONOMIC IMPACT 2017 SERBIA

⁴ TRAVEL & TOURISM ECONOMIC IMPACT 2017 SERBIA

Tourism, seen from the perspective of the strategy, can be considered as “undoubtedly one of the leading global industries with permanent, stable and sustainable growth” which circumstance defines the government’s efforts for its positioning at the centre of the Serbian economy.

The particular data, presented for the legitimization of the tourism importance include:

1. Total contribution of tourism to GDP of the Republic of Serbia - 6.4% in 2015;
2. Tourism directly contributed to 2.2% of GDP of the Republic of Serbia;
3. Tourism and hospitality industry (according to the above methodology) accounted for about 30,000 (directly) created new jobs, while about 157,000 new jobs in total were created in tourism and related activities involving numerous newly founded micro and small-sized enterprises in the tourism and hospitality industry and related activities;
4. "Invisible export” accounted for 7.3% of the total export of the Republic of Serbia, i.e. almost 29% of the export of services;
5. Investments in tourism accounted for 4.1% of total investment in the Republic of Serbia;

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Furthermore, the relevant authorities have not only expressed the significance of the tourism sector, but have also declared willingness to actively work for its development and modernization:

by accepting the Strategy, the Government will accept not only the vision and goals of tourism development, but also other duties and responsibilities, in particular:

- To position tourism as one of the priority development sectors;
- To continue with the implementation of development plans for key destinations as the basis of the growth model and the future of tourism development;
- To establish effective interdepartmental cooperation and make efficient use of the available EU funds;
- To be proactive in the strengthening and capacity building of NTOS (budgets, human resources, institutional support);
- To responsibly and actively guide the tourism sector, particularly through a policy of incentives and exemptions;
- To strengthen the PPP model in terms of increasing investments in tourism;

The main tourism activities in Serbia include tourism in major cities, spa tourism, the cultural and natural heritage, hunting, fishing, village tourism and river tourism.

Negative environmental impacts of tourism include pressure on natural resources, biodiversity and habitats, waste generation and pollution. Unsustainable tourism development could lead to the same forms of pollution as any other industry: emissions in the air, noise, waste, waste water discharge, discharge of oil and chemicals, even architectural/scenic pollution. Timely planning of tourism may prevent damages and expensive mistakes and avoid gradual degradation of natural values significant for tourism. The current negative environmental impacts of tourism activities are caused by weak implementation of planning and construction regulations, lack of infrastructure for waste water treatment and uncontrolled waste disposal, and inefficient management of protected natural values.

The objectives of sustainable development of tourism include:

- ❖ Improving accommodation capacities;
- ❖ Develop the quality assurance system in tourism and consumer protection systems;
- ❖ Develop an IT system for tourism (tourist information centers, leaflets, image, positioning, etc.);
- ❖ Develop additional tourism supply with cost-effective operation and potential for local development (trade, gastronomy, hospitality services, travel agencies, etc.), generating new employment accompanied by maximum preservation of cultural heritage and natural diversity;
- ❖ Identify and remove current and potential conflicts between tourism and other activities related to use of resources;

The tourism sector is widely recognized as a sector that has the potential, and this is reflected in the fact that there is a vertical institutional structure for tourism development. Apart from the Ministry of Economy and Regional Development, which is in charge of tourism development, there is the Tourist Organization of Serbia and a network of tourist organizations in municipalities. The Law on Tourism sets out the establishment of the Tourism Development Agency, which should provide an adequate framework for the implementation of the Tourism Development Strategy.

Quick overview:

Table 5. Tourist Arrivals in the Republic of Serbia from 2007 to 2015

Year	Tourist arrivals ⁷ (thousands)					
	Total	Index	Domestic	Index	Foreign	Index
2007 ⁸	2,306	115	1,610	105	696	148
2008	2,266	98	1,619	101	646	93
2009	2,021	89	1,376	85	645	100
2010	2,000	99	1,318	96	683	106
2011	2,068	103	1,304	99	764	112
2012	2,079	100	1,270	97	810	106
2013	2,192	105	1,271	100	922	114
2014	2,192	100	1,160	92	1,029	112
2015	2,437	111	1,305	112	1,132	110

Source: SORS

Characteristics of the tourism demand in the Republic of Serbia

Tourism in the Republic of Serbia has gone through a vigorous restructuring of sources of demand. It is worth noting that the influx of domestic tourists decreased after 2008, mainly due to the economic crisis which affected the standard of living in the Republic of Serbia. On the other hand, the influx of foreign tourists from European countries registered continuous growth, including what is becoming a traditionally high number of visitors from the countries in the region. In 2015 the first signs of recovery of domestic demand have been witnessed.

Important facts and figures:

- ❖ A total of 2,437,000 tourist arrivals were registered, representing a rise of 11% over 2014. The average annual growth rate of the total number of tourist arrivals compared to 2007 is 0.8%;
- ❖ A total of 1,305,000 domestic tourist arrivals were registered (an increase of 12% over 2014), accounting for 53.5% of the total number of arrivals. An average annual decrease of 2.7% was registered in this category during the period under review;
- ❖ A total of 1,132,000 arrivals were registered in the category of foreign tourists (10% more than in 2014), i.e. 46.5% of the total tourist arrivals, the average annual increase from 2007 to 2015 being 6.3%.

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Table 6. Overnights in the Republic of Serbia from 2007 to 2015

Overnights ⁹ (thousands)						
Year	Total	Index	Domestic	Index	Foreign	Index
2007 ¹⁰	7,329	111	5,853	105	1,476	145
2008	7,334	100	5,935	101	1,398	95
2009	6,776	92	5,307	89	1,469	105
2010	6,413	95	4,961	94	1,452	99
2011	6,645	104	5,002	101	1,643	113
2012	6,485	98	4,688	94	1,796	109
2013	6,567	101	4,579	98	1,988	111
2014	6,086	92	3,925	86	2,161	109
2015	6,652	109	4,242	108	2,410	112

Source: SORS

- ❖ A total of 6,652,000 overnights were registered, representing a rise of 9% over 2014. The average annual growth rate of the total number of overnights compared to 2007 is 1.2%;
- ❖ Domestic tourists registered 4,242,000 overnights or 8% more than in 2014, providing the first indicator of growth after eight years of decrease and accounting for 64% of the total number of overnights. An average annual decrease of 4.1% was registered in this category during the period under review;
- ❖ Foreign tourists registered 2,410,000 overnights (12% more than in 2014), accounting for of 36% of the total number of overnights in the Republic of Serbia, the average annual increase from 2007 to 2015 being 7.5%;
- ❖ In terms of number of overnights in 2015, spas received the biggest influx (1,855,000 overnights), retaining the level achieved in 2014, and recording a rise in foreign tourist overnights (231,000) of 14.7%;
- ❖ Based on the registered number of overnights, the most popular destination for domestic tourists, after spa centres, were the mountainous areas (1,419,000 overnights), recording an increase of 19% compared to 2014;
- ❖ The structure of foreign tourists in 2015 shows that tourists from the region have the biggest share (45%), specifically: Bosnia and Herzegovina (87,000 arrivals / + 17%; 192,000 overnights / +17%), Montenegro (71,000 arrivals / + 15%; 171,000 overnights / + 25%) Croatia (66,000 arrivals / + 3%; 121,000 overnights / + 4%), Slovenia (66,000 arrivals / + 2%; 115,000 overnights / + 3%);
- ❖ the largest number of arrivals from EU countries was recorded from Germany (61,000), Romania (44,000), Italy (44,000) and Greece

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(44,000);

- ❖ the largest number of arrivals from other European countries was for tourists from Turkey (64,000), the Russian Federation (42,000), Switzerland and Liechtenstein (20,000);
- ❖ the biggest increase of arrivals from non-European countries was recorded by tourists from South Africa (+58%), China and Hong Kong (+45%) and the United States (+22%).

The evident increase of tourist influx from countries in the region and Europe contributed to a significant increase in foreign exchange inflow from tourism, as shown in Table 7.

Table 7. Foreign Currency Inflow from Tourism in the Republic of Serbia from 2007 to 2015

Year	EUR (millions)	Index	USD (millions)	Index
2007 ¹¹	630	/	531	130
2008	640	101	944	109
2009	617	97	865	92
2010	605	98	798	92
2011	710	117	992	124
2012	708	100	906	91
2013	792	110	1,053	116
2014	863	109	1,139	108
2015	945	109	1,048	92

Source: National Bank of Serbia (hereinafter: NBS)

The positive development tendency of foreign exchange inflow from tourism between 2007 and 2015 is shown in Table 7, with an average annual growth rate of 3.3% in EUR, or 9.8% in USD. The expenditure of our citizens on trips abroad between 2007 and 2015 is shown in Table 8, based on data from the NBS.



2.3 SWOT analysis –tourism development in the Republic of Serbia

SWOT analysis is a strategic planning tool which summarizes in a concise and succinct way the key aspects of a project, economic sector or a particular area. In planning procedures, SWOT analysis serves as a sublimation of all analytical findings for the purpose of defining strategic starting points, the vision and major strategies for further development.

In accordance with the meaning of the acronym (SWOT – Strengths, Weaknesses, Opportunities and Threats), the key analytical findings are classified into:

1. Strengths - aspects which essentially give advantage over competitors;
2. Weaknesses - impediments and aggravating circumstances for the development that need to be improved and overcome (if possible) or bypassed in a way that would allow for the adoption of strategic development directions to which these elements bear no relevance;
3. Opportunities – elements and upcoming trends, primarily in the external environment, which can be used for creating competitive advantage;
4. Threats – elements and upcoming trends, primarily in the external environment, which may render difficult or, in the long run, even prevent development.

SWOT analysis of the tourism of Republic of Serbia was created on the basis of:

1. Analysis of the current state of the tourism sector;
2. Comparative analysis: the tourism sector of Serbia and other countries of relevance;
3. Analysis of development documents and official policies of the Republic of Serbia and all the development plans stated therein;
4. Analysis of the documents elaborated by external experts (on EU and international level) regarding the tourism development indicators of Serbia;

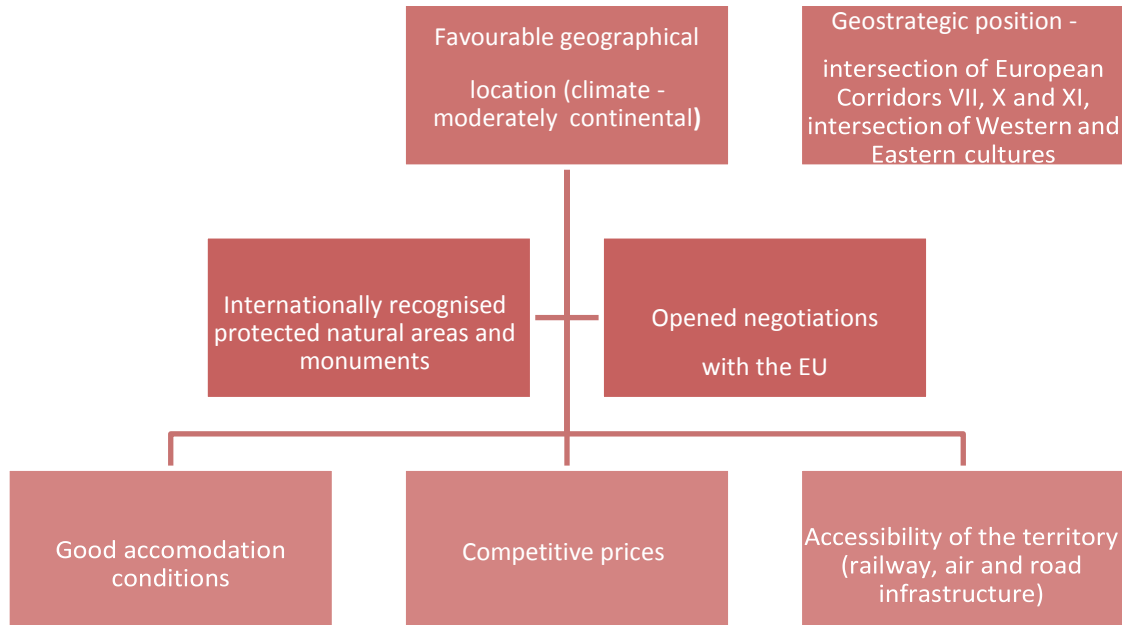
Strengths:

- Opened negotiations with the European Union;
- Diverse resource and attraction structure of the Republic of Serbia as a basis for the development of a diversified tourism product portfolio (thermal springs, untouched nature, cultural heritage, internationally recognised protected natural areas and

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monuments, gastronomy)

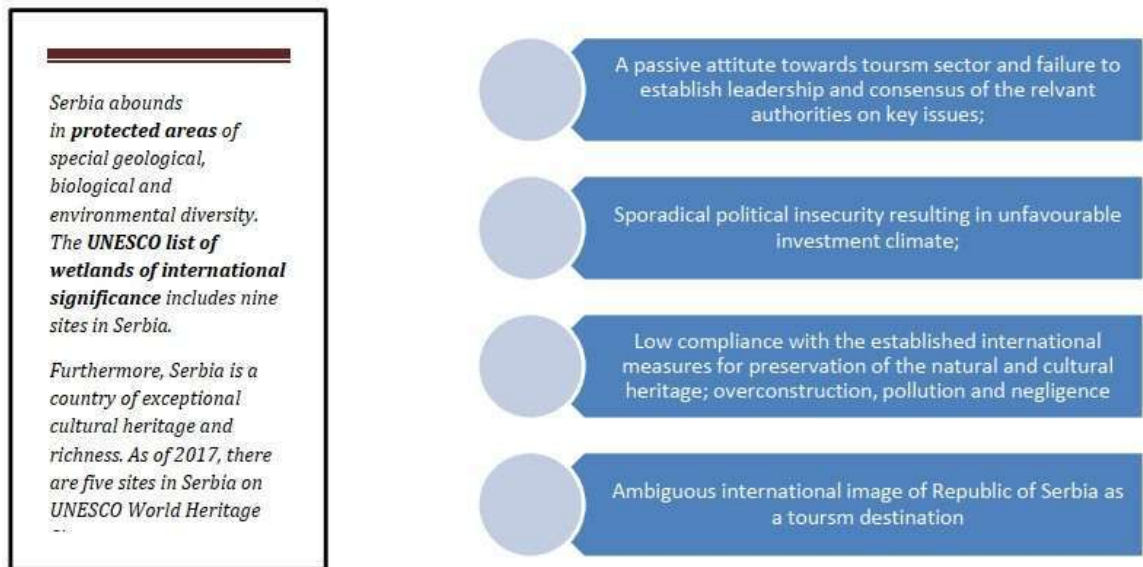
- Geo-strategic position of Belgrade and the Republic of Serbia (intersection of European Corridors VII, X and XI, intersection of Western and Eastern cultures, transit position, European river corridors and well developed network of waterways;



- Entry of global and regional brands into the hotel market of the Republic of Serbia (Hyatt, Crowne Plaza, Holiday Inn -InterContinental, Radisson Blu - Rezidor, Luxury Collection - Starwood, and Falkensteiner) and overall improvement of quality standards in the hotel industry;
- Favourable climate;
- A standard of living that generally allows for affordable prices for the tourist product;
- Possibility to practice various types of tourism in relatively compact territory and small distances;
- Good accommodation conditions.

Weaknesses:

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- A passive attitude towards tourism and a failure to establish leadership and consensus of relevant entities on the key issues of the development of the tourism sector of the Republic of Serbia;
- Poor incentive rates, non-financial and financial support for enterprises in the tourism sector and activities related to tourism;
- Small and insufficient investments;
- Insufficient or poor presence of the Republic of Serbia on the global tourism map (undeveloped national tourist identity/tourism brand of the Republic of Serbia);
- Failure to comply with conservation measures in protected natural areas, dilapidated buildings and monuments under state protection, numerous cases of neglect and pollution of the environment and degradation of the area and insufficient coordination of the development of tourism and environmental protection;
- Insufficient participation of local self-government in the planning and development of tourism, inadequate coordination mechanisms at all levels of government in the development of tourism;

Opportunities:

- Finalization of negotiations and successful accession of Serbia in the European Union – more opportunities to use a large number of programmes

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- and projects for the support and funding of activities in tourism;
- Dynamic growth and development of air transport (Etihad - Air Serbia strategic agreement) and opening doors to new destinations (Middle East, Asia and the United States);
 - Strengthening regional cooperation and the creation of regional tourism products (with interested countries in the region) in order to attain a better position for the tourism offer and attract tourists from distant (overseas) markets;
 - Foreign policy of the Republic of Serbia - abolition of visas and visa facilitation for particular countries and simplification of issuing visas at the border (Turkey and China);
 - Elaboration of a more competitive marketing strategy regarding the existing tourism offer;
 - Improvement of the existing tourism offer through more investments in infrastructure, better care of natural and cultural resources, incorporation of new routes/sites in accordance with the tourists' demand for high density and meaningfulness of the experience;

Threats:

- Decreased rate of the integration processes within the EU due to internal and/or external factors;
- Enhanced political tension between the Republic of Serbia and other Balkan countries;
- Disproportional development of the different tourism destinations in the country;
- Disproportional development of the different tourism sectors in the country and prioritization of some on the expense of the others;

3. Analysis of the current condition and the perspectives for development of Nis (Republic of Serbia) as a tourist destination in the field of cultural, adventure and speleology tourism

The current analysis aims to present the actual condition and perspectives towards the development of cultural, adventure and speleology tourism, therefore is limited in content; however, the conclusions made can be of assistance for the general evaluation of the condition of the tourist product in Nis as the three areas subject to the analysis are part of a systematic whole, which presupposes certain repeatability of the pattern and provides space for an inductive reasoning, able to grasp the whole through an establishment of a better perspective towards its integral elements.

3.1 Introduction:

Tourism resources and tourism development potential in Nis have been the subject of numerous research and analysis in recent years. Despite the differences in approaches, criteria, and assessments, all studies reaffirm the fact that the above mentioned area has an extremely rich and varied recreational and tourist potential.

3.1.1 Location:

The town of Nis is located in the Niš valley near the place where the Nishava River flows into the South Morava River at 43 ° 19 'north latitude and 21 ° 54' east longitude. The city centre is 194 meters above sea level (at the monument in the city centre). The highest point on the territory of the town is Sokolov Kamen, the highest point of Suva Planina (1,523 m above sea level), and the lowest one is situated downstream from the mouth of Nishava in the area of Trupale (173 m above sea level). The area of the city covers an area of 596.71 km² and includes Nis, Nishka Bath and 68 suburban neighbourhoods and villages.

Geographically Nis is at the crossroads of the most important Balkan and European transport corridors. Through Nis passes the highway from Belgrade to the valley of Morava, it turns southwards along the valley of Vardar to Thessaloniki and Athens and eastwards to the valleys of Nishava and Maritsa to Sofia and Istanbul and thence to the Middle East. Nis departs from the northwest (to Zajcar, Kladovo and Timisoara) and southwest (to the Adriatic). All of these roads have been known since antiquity as roads through which people, goods, and troops have moved. These were Via Militaris during the Roman Empire and Byzantium and the Tsarigrad road through the Middle Ages and during the Ottoman Empire, and today are the main European transport arteries in the Balkans that turn Nis into an important crossroads between Europe, Asia Minor, The Black Sea region and the Mediterranean.

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3.1.2 Historical background, natural and cultural resources:

Nish is located in South-eastern Serbia and is the administrative centre of Nishki County (Nišavski okrug). The town is situated on the Nishava River with a population of 260 237 inhabitants after population census in 2011.

Demographics of Niš		
Ethnic group	City	Urban
Serbs	243,381	174,225
Romani	6,996	5,490
Montenegrins	659	579
Bulgarians	927	741
Yugoslavs	202	202
Croats	398	344
Others	7,674	1,963
Total	260,237	183,544

← Source: Wikipedia

The town is a crossroads as a road and railway junction on the Balkan Peninsula. A strategically important motorway linking the Middle East with Central and Western Europe passes through Nis. From the Nis railway junction begins a deviation, which goes through Leskovac and Presevo to Thessaloniki in Greece.

Nis is one of the oldest cities in the Balkans, called the "Gate between the East and the West". Since ancient times it has been a crossroads of major trade routes. The city was founded by the Celts in the third century BC. Prehistoric inhabitants called the city of Navisos, the city of the Faith.

Due to its important geographic location, natural resources, transport infrastructure and rich cultural and historical heritage, this region has exceptional opportunities for tourism development. Resort tourism has a long tradition - from the discovery of the mineral springs from the Romans to the present day. There are several famous resorts in Niš County - Nisha Bath Spa (Nish County), Kurushumishka Spa, Prolom Bath Spa and Lukovska Banya Spa (Toplitsa District).

Emperor Constantine's Nis Airport is a destination for many tourists during the winter season, who visit the Kopaonik Mountain and whose number will grow with the increase in the amount of investment near the Balkan Mountains.

In summary, Nis is:

- ❖ The third largest city in Serbia after Belgrade and Novi Sad;

- ❖ Cultural, economic, administrative, business and university centre of South-eastern Serbia;
- ❖ A city located along the European transport corridor № 10;
- ❖ A city from ancient times known as the "door between East and West" because it is a crossroads of roads connecting Europe with the Middle East;
- ❖ A city with over 250,000 inhabitants;
- ❖ University Centre with 13 faculties;
- ❖ One of the oldest cities in Europe, evidenced by the numerous historical sites on the territory of the city;

3.2 Criteria for quality of the tourist product of city of Nis (incl. current tourist visits and interest to the sites, management, etc.) - Current compliance, deficits and actions to be taken:

The city of Nis is a social, educational, economic and cultural centre of the South- East Serbia; it unarguably possess high potential for sustainable development, which if explored right, can result in benefits of various character for the individual, the community and the country as a whole.

The tourism product of every destination can be defined as a cumulative effect of several important factors, which reflect the most substantial needs of the visitors and are responsible for the positioning of the destination in the international tourism niche:

- **Accessibility:**

The term accessibility can be interpreted in a dualistic way: i)accessibility as constructed proper infrastructure (such as railway and air connections), allowing the potential visitors to organize their time and resources in a predictable and reasonable manner and ii) referring to the concept of “accessible tourism” representing the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age. It encompasses publicly and privately owned tourist locations.

Darcy and Dickson (2009, p34) :

Accessible tourism enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments. This

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definition is inclusive of all people including those travelling with children in prams, people with disabilities and seniors.

Compliance with the stated criterion:

Regarding point i) – accessibility as constructed proper infrastructure, the city of Nis can be placed in average to high level of compliance with the requirement as it possess functioning infrastructure, although efforts need to be directed towards its modernization.

- **Air transport:**

Niš has an international airport named after Constantine the Great (international code: INI) which offers flights from and to European cities including Milan Italy (Bergamo), Basel Euroairport and Zurich (Switzerland), Munich Memmingen (Germany), Dortmund (Germany), Berlin Schoenefeld (Germany), Dusseldorf Weeze (Germany), Bratislava (Slovakia), Eindhoven (The Netherlands), Malmo (Sweden) and from fall 2017 Stockholm (Sweden). Many world destinations can be connected over Zurich flight.

The airport is 4km away from the city center – important advantage of Nis, as many of the airports in Europe (especially in big cities) are located in a non-walking distance from the cities which presupposes additional expenses for travel, time resources, etc.

Apart from taxis, there are buses taking passengers from the airport to the city on regular basis (every 15 minutes from early morning till midnight on workdays).

- **Railways:**

Railway links include international trains from Thessaloniki, Greece to Ljubljana, Slovenia, via Skopje, Niš, Belgrade and Zagreb, as well as Istanbul, Turkey - Vienna, Austria via Sofia, Niš, Belgrade and Budapest. Another important railway link is the one to Bar, Montenegro, which connects Niš with the Adriatic sea

However, there are some deficits related to the service which prevent passengers from active exploitation: insufficient speed, low-maintenance when it comes to internal conditions, limited modernization activities, etc.

Similarly to the airport, the train station is 2Km west of the main square which is a factor of importance for the overall convenience of the visitors.

- **Other options - car and bus:**

The European motorway E75 routes through Niš. From the north, visitors may use any highway from the Hungarian border over Novi Sad and Belgrade to Niš. From the northwest, they can travel over Austria, via Slovenia and Croatia to Belgrade and then to Niš. These are all modern highways, including the section Belgrade-Niš. It is a fast road with six lanes and 120km/h speed limit in favourable condition.

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Regarding point ii) the concept of “accessible tourism” representing the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age,

Nis has to dedicate more efforts for active compliance as the current infrastructure cannot be defined as satisfactory in terms of accessibility.

despite the progress made during the recent years. The concept need to be incorporated more constructively in strategic documents on local and national level and actions shall be taken in order to ensure its applicability and active implementation. Furthermore, the dynamics of the social dialogue towards the topic has to be enhanced, allowing more people to engage purposefully in the problematic, thus strengthening their civil position and role in the society.

- **Attractions**

The second criterion is directly related to the existence, maintenance and development of natural and cultural resources, situated in the particular area; it involves opportunities for meaningful distribution of the visitors’ time and is one of the most important factor for their overall evaluation of stay, incorporating elements such as: availability, location, access, price-quality-ratio, etc. Furthermore, the criterion implies a certain responsibility in the context of the global situation towards the exploitation manner of natural and cultural heritage and strongly focus on sustainability as a rightful framework for tourism development.

Definition:

Sustainable Tourism involves social responsibility, a strong commitment to nature and the integration of local people in any tourist operation or development. Sustainable tourism is defined by the World Tourism Organisation (WTO), the Tourism Council (WTTC) and the Earth Council as:

“Sustainable Tourism Development meets the needs of present tourists, host regions while protecting and enhancing opportunity for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems. Sustainable tourism products are products which are operated in harmony with the local environment, community and cultures so that these become the beneficiaries not the victims of tourism development.”

The city of Nis as natural, social and cultural centre in the southeast of Serbia is characterized by a rich variety of attractions, which is one of the reasons for its high development rate during the years tourism is an important factor for the socio-economic status of an area. The city offers content of solid quality, example of which are the opportunities for sightseeing, various tours, cultural manifestations and events, satisfactory quality of services and competitive price. As

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stated above, important advantage of the city of Nis is the international airport Konstantin Veliki.

Some of the most important attractions located on the territory of Nis are:

- **Mediana** – a large 4th-century Roman estate;
- **Niš Fortress** – the best-preserved Turkish fortress in the central Balkans, built in 1723 and containing the remains of Roman Naissus in its foundations;
- The **Skull Tower** (Ćele Kula);
- **Čegar**, where a monument stands on the site of the battle between Stevan Sinđelić and the Turks;
- The **Monument to the Liberators of Niš** – erected in 1937 in memory of the fight for the liberation of Niš;
- the **Red Cross Camp** – a Nazi concentration camp;
- **Bubanj Memorial Park** – one of the largest Second World War execution sites in Serbia.

Picnic sites in the surroundings of Niš include the **Sićevačka Klisura gorge** – a 16 km-long protected natural feature with rare plants and animals; the **Jelašnička Klisura gorge** – a special 2 km-long nature reserve with waterfalls and rare plants and animals; the **Bojanine Vode** holiday resort; **Kamenički Vis** – a holiday resort with winter sports facilities; and **Cerjanska Pećina cave**, 4 km long, with spacious chambers beautifully decorated in cave formations (stalagmites, stalactites, etc.).



“Serbia's third-largest metropolis is a lively city of curious contrasts, where Roma in horse-drawn carriages trot alongside new cars, and posh cocktails are sipped in antiquated alleyways. It's a buzzy kind of place, with a high number of university students, packed-out laneway bars, a happening live music scene and pop-up markets and funfairs come summertime.”⁵

(⁵ Niš travel - Lonely Planet)

The favourable climate further contributes to the high popularity of the Serbian city and is of assistance for the maximization of the natural and cultural resources:

Average annual temperature in the area of Niš is 11.9 °C (53.4 °F). July is the warmest month of the year, with an average of 22.5 °C (72.5 °F). The coldest month is January, averaging at 0.6 °C (33.1 °F). The average of the annual rainfall is 580.3 mm (22.85 in). The average barometer value is 992.74 mb. On average, there are 134 days with rain and snow cover lasts for 41 days.

The city also provides opportunities for active cultural activity as a theatre with various performances is present: Niš is a home of the National Theatre in Niš, that was founded as

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"Sindelić" Theatre in 1889, as well as a music festival of high attendance which is gaining more and more popularity among national and international citizens: from 1981 Niš is the host of Nišville International Jazz music festival which begins in mid-August and lasts for 4 days.

However, for the successful positioning of the city of Nis tourism destination, a necessity for advancement of the quality of the tourism offer is needed in terms of legislation and public-private partnerships; the abundance of natural and historical sites creates a horizon for constructive utilization and provides opportunities for individual and communal growth, **but their low international recognisability affects negativity the capitalization of the resources available**. Furthermore, better coordination between the stakeholders is required as a prerequisite for balanced and sustainable development; stated priorities and strategic evaluations are existent, but more efforts need to be focused towards their detailization and logic of connectivity – a clear development program regarding tourism development in compliance with the sustainable tourism rationale (promoted by the European Institutions) shall be elaborated in order to avoid fragmentarity of the efforts and to provide coherence with the international standards.

Also of significant importance is the support of the local community regarding the undertaken course of tourism development in the area – seminars, awareness raising initiatives and campaigns on the topic need to be incorporated in the social life so that the citizens have the necessary information in order to form a position to be respectively heard and taken into consideration by the relevant authorities.

Regarding the low recognisability, **a modern and inclusive marketing approach needs to be elaborated**, in compliance with the established international norms, in order to be improved the general performance of the tourist sector and to contribute to the formation of a resilient image of Nis as a distinguishable tourist destination.

- **Staying conditions**

“Accommodation and local food play a critical role in shaping international visitors’ quality of experience at a destination, along with other key influential tangible and intangible factors (safety, environment, locals hospitality...)”

The staying condition criterion consists of the different services and products provided for the domestic and foreign tourists at a certain destination; it includes: location, parking space, extra fees, number of stars, facilities, accuracy of the information, reviews, feedback, etc.

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Cities	2012	2013	2014	2015
Belgrade	172,088	164,054	155,977	157,245
% change		-4.67	-4.92	0.81
Novi Sad	46,361	44,307	53,872	61,489
% change		-4.43	21.59	14.14
Niš	29,847	29,927	31,297	34,924
% change		0.27	4.58	11.59
Other	342,220	314,810	297,784	333,782
% change		-8.01	-5.41	12.09

Source: Statistical Office, Press, 2013, 2014, 2015, 2016

Arrivals in major cities (in thousands)

The structure of accommodation facilities or their capacities has changed over the past few years. There have been dynamic developments in the offer of hotel-type accommodation facilities, primarily in the category of 4* hotels. Compared to 2005, the share of major hotel brands increased (Radisson Blu, Crowne Plaza, Luxury Collection - Starwood, Falkensteiner, Holiday Inn, Best Western), mostly in Niš, Belgrade, Subotica and Novi Sad.

According to the Ministry of Tourism, at the end of 2015, there were 358 categorised facilities for hotel-type accommodation (including garni and aparthotels), motels, boarding houses and tourist and apartment complexes (excluding private houses, rooms, rural tourism households, hunting villas and camps). These facilities had a total of 18,244 and 30,417 accommodation units and beds respectively.

In the area of Niš there are many accommodation options –hotels, hostels, sanatoriums, Airbnb's with extensive bed base and equipped with all facilities needed for a qualitative stay; however **their most tangible advantage is the competitive prices** – when in comparison with other European countries, but when it comes to neighbouring ones, *there is a similarity of the offer in terms of price, which makes evident that the particular advantage itself is not enough to stimulate tourist interest and defines a necessity for a more innovative approach, able to distinguish the accommodation capacity of Nis and to make it attractive on the domestic and international market.*

According to a Eurostat survey, accommodation is an important component of the visit to another country and one of the main reasons which defines their willingness to come back to the particular areas.

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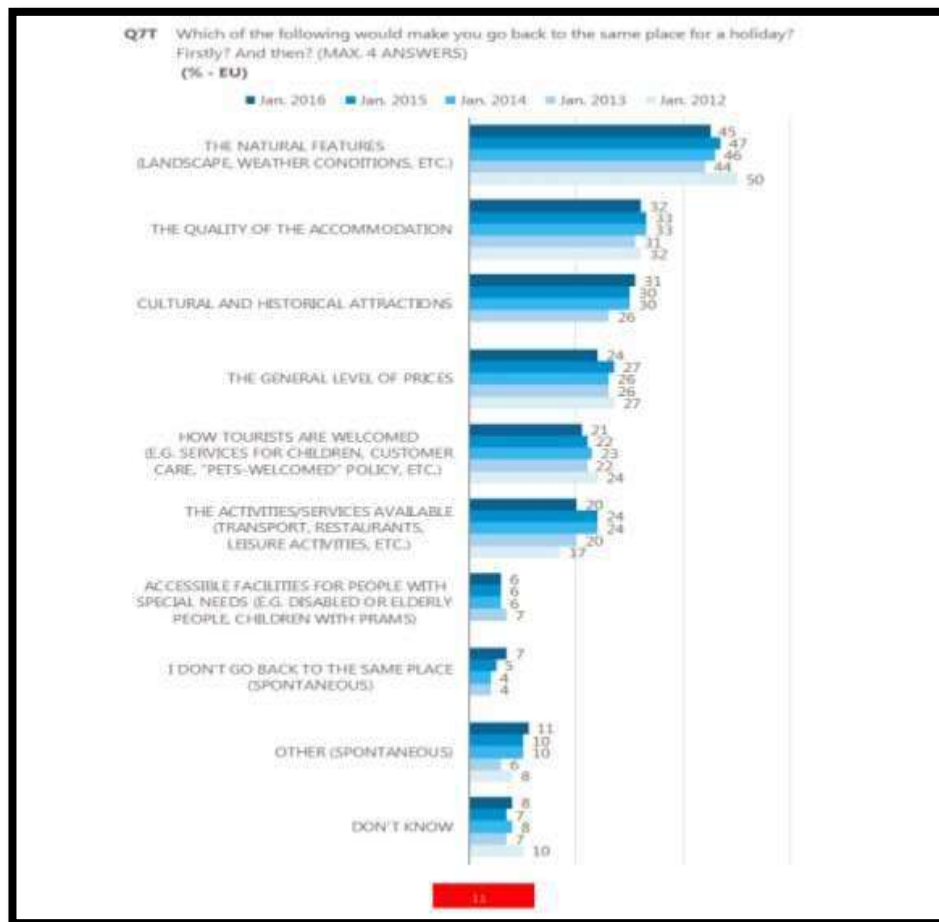
Q7T Which of the following would make you go back to the same place for a holiday? Firstly? And then?
(% - EU)

	The natural features (landscape, weather conditions, etc.)	The quality of the accommodation	Cultural and historical attractions	The general level of prices	How tourists are welcomed (e.g. services for children, customer care, "pets-welcomed" policy, etc.)	The activities/services available (transport, restaurants, leisure activities, etc.)	Accessible facilities for people with special needs (e.g. disabled or elderly people, children with prams)
EU28	45	32	31	24	21	20	6
Age							
15-24	50	34	38	29	22	29	3
25-39	46	34	32	29	26	24	6
40-54	47	34	30	26	24	19	6
55+	42	28	27	17	16	14	6
Education (End of)							
15-	34	25	18	17	15	12	7
16-19	44	34	28	24	22	18	6
20+	49	33	35	25	23	20	5
Still studying	51	33	39	29	24	31	3
Respondent occupation scale							
Self-employed	48	34	30	26	23	20	4
Employee	48	37	33	28	25	23	5
Manual workers	49	29	27	27	22	20	5
Not working	43	28	29	20	18	17	7

Nearly half of the respondents (45 %) answered that the natural features of a holiday destination would persuade them to go back to the same destination. The next most significant factors mentioned were the quality of accommodation (32%) as well as quality of cultural and historical attractions (31%). Around a quarter of people said that the general level of prices (24%) would make them go back to the same place, closely followed by how tourists are welcomed (21%) and the activities or services available (20%).

Almost half of respondents in Austria (47 %) and over 4 in 10 in the United Kingdom and Belgium mentioned the quality of accommodation.

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Source: Eurostat

In the light of the mentioned statistics, it is important that the results are being taken into consideration when formulating a strategy for the tourism development of high relevance. Furthermore it is important to be stressed that statistics of such type (containing analysis of the views of EU-citizens) need to be prioritised as **the tourism activity in Serbia and Nis is primarily defined by tourists from the European Union**, along with neighbouring countries, as stated in the Tourism Development Strategy 2016-2025:

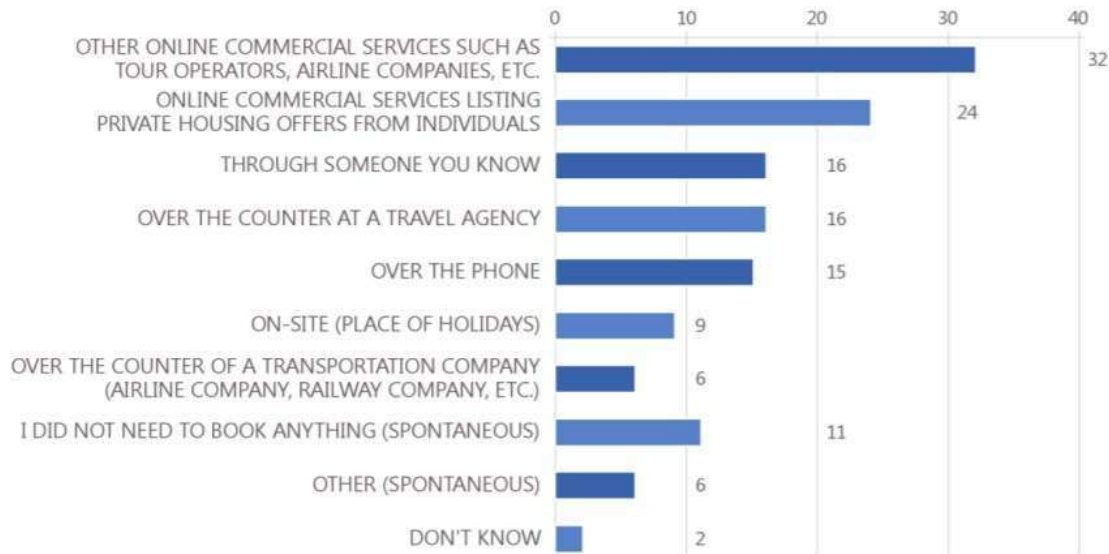
SORS data about the arrivals of foreign tourists in 2015/16 shows that, out of 1,132,221 total arrivals, the largest number of tourists arrived from: 1) Bordering countries and countries of the former Yugoslavia: 87,000 from Bosnia and Herzegovina, 70,891 from Bulgaria, 70,861 from Montenegro, 65,886 from Croatia and 65,754 from Slovenia; 2) **EU-28 countries, excluding Croatia and Bulgaria, where the highest number of arrivals was recorded from Germany 60,886, Romania 44,225, Italy 44,314 and Greece 43,869**; 3) Other European countries: Turkey 64,191, the Russian Federation 41,623 (a decrease of 17.8% compared to 2014).

Nonetheless, special efforts should be dedicated for the digitalization of the tourist offer as the interest of the tourists towards the online methods has marked significant increase during the

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last years; people search for information before a trip, they compare prices and opinions, reserve hotels, tickets for shows, museums, give feedback, etc. This phenomenon becomes evident in different surveys, analysing the behaviour of the tourists and most importantly imposes new “rules” with which the tourist operators need to comply – an alteration of the marketing strategy is a demand that has to be met in order to generate favourable results.

Q6 Did you book your holiday in 2015 by any of the following methods? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Source: Eurostat

As a conclusion, it can be said that the city of Nis meets all three criteria for the quality of the tourist offer (used by the current analysis in accordance with its general aim without the pretention to be the only ones or the most legitimate ones in terms of accuracy) to some extent:

a) accessibility

- accessibility as constructed proper infrastructure, the city of Nis can be placed in average to high level of compliance with the requirement as it possess functioning infrastructure, **although efforts need to be directed towards its modernization;**
- regarding the concept of “accessible tourism” Nis has to dedicate more efforts for active compliance **as the current infrastructure cannot be defined as satisfactory in terms of accessibility, despite the progress made during the recent years.** The concept need to be incorporated more constructively in strategic documents on local and national level and actions shall be taken in order to ensure its applicability and active implementation;

b) attractions

Niš has a rich variety of natural and cultural resources, which attract many tourists on a regular basis, however,

- their low international recognisability affects negatively the capitalization of the resources available;
- better coordination between the stakeholders is required as a prerequisite for balanced and sustainable development;
- stated priorities and strategic evaluations are existent, but more efforts need to be focused towards their detailization and logic of connectivity;
- local citizens are not engaged enough in the tourism problematic which obstruct them from being active agents in the development of Niš as a recognizable tourist destination;

c) staying conditions

In the area of Niš there are many accommodation options –hotels, hostels, sanatoriums, Airbnb's with extensive bed base and equipped with all facilities needed for a qualitative stay; however their most tangible advantage is the competitive prices – when in comparison with other European countries, but when it comes to neighbouring ones, there is a similarity of the offer in terms of price, which makes evident that **the particular advantage itself is not enough to stimulate tourist interest and defines a necessity for a more innovative approach, able to distinguish the accommodation capacity of Niš and to make it attractive on the domestic and international market.**

Furthermore, a strategy for the digitalization of the tourist offer is strongly needed.

3.3 Cultural tourism in Niš – overview (resources, interest to the sites, management)

Cultural tourism is the subset of tourism concerned with a traveller's engagement with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those people, their art, architecture, religion(s), and other elements that helped shape their way of life.

Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres. It can also include tourism in rural areas showcasing the traditions of indigenous cultural communities (i.e. festivals, rituals), and their values and lifestyle, as well as niches like industrial tourism and creative tourism.

It is generally agreed that cultural tourists spend substantially more than standard tourists do. This form of tourism is also becoming generally more popular throughout the world, and a recent OECD report has highlighted the role that cultural tourism can play in regional development in different world regions.

Cultural tourism has been defined as 'the movement of persons to cultural attractions away from their normal place of residence, with the intention to gather new information and experiences to

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satisfy their cultural needs'. These cultural needs can include the solidification of one's own cultural identity, by observing the exotic "others".

3.3.1 Analysis of the resources for the development of cultural tourism in the city of Nis:

- an attractive destination for people with an interest in history and culture;
- the resources for the development of cultural tourism in Nis include: archaeological, architectural, ethnological, religious sites, historical sites as well as cultural institutions - museums, galleries, community centres, theatres, etc.
- preserved ethnographic heritage;
- rich cultural calendar, crafts, festivals, ancient traditions and customs that are practiced to this day, forms of different traditional and contemporary cultural events related to the intangible heritage and modern culture;
- Competitive prices;

In the cultural calendar of Niš important place is being taken by Nishki Music Festival "Nishvil" - a jazz festival, festival of new urban songs and romances; "May Song" - designed for children's songs, International Ethnic Festival, the celebration of the city, which since 2002 is celebrated on 3 June and celebrated with religious, musical and sporting events celebrating the birthday of the most famous man born in Nis - King Constantine and his mother Queen Elena.

A special place in the cultural calendar is held by the Book Fair. The Book of Columns in Sichevo is an invitation to exchange thoughts, feelings and friendship, made by the avant-garde artist, a great national hero and founder of Horo of Serbian sisters Nadezhda Petrovich. This is the oldest picturesque colony on the Balkans, founded in 1905 and restored in 1964.

Some of the most significant cultural places of value in the city of Nis are:

- ❖ **Mediana** (4th cent.)- Birthplace of Emperor Constantine the Great. This ancient historical site on the road Niš - Niška Banja (Spa) is a testimony of the wealth and glory of the imperial Naissus . The remains of imperial palace, together with peristyle (range of surrounding columns) have been discovered. Luxury villas with mosaic floors, sacral objects (baptistry room), farming buildings with pithos, Roman bathrooms, water tanks, fort remains etc. testify about Naissus culture and wealth from the times of Emperor Constantine the Great, who was born in Nis.
- ❖ **Skull Tower** (19th cent.). Skull Tower (Cele kula) was built by the Turks from the skulls of the Serbs killed in the battle of Cegar, near Nis, in May 1809. It is of rectangular shape, about 3 m high and was built from quicklime, sand and the skinned skulls, upon the order of Khurshid

- Pasha who had first sent the skulls filled with cotton to the Sultan in Istanbul. Each side of the Tower has 14 rows with 17 openings where the skulls were embedded. There were 952 skulls, but today only 58 have remained. The rest were pulled out to be buried or were lost in time. In 1892 a chapel was built around the Tower, according to the design of the Belgrade architect Dimitrie T. Leko. The skulls are situated inside the small chapel consisting of four glass walls.
- ❖ **Niš Fortress** (18th cent.). On the Nišava riverbank, over the remains of a Roman military camp, then Roman town called Naissus, and finally the remains of a destroyed Byzantine fortification, the Turks built a strong fortress at the beginning of 18th century. The construction of this fortress lasted from 1719 to 1723. It was built with the help of local laborers, Istanbul stonecutters and bricklayers. Beside those well saved walls and gates, numerous facilities remain from various periods, such as the armory, Turkish steam bath, Turkish post station, Bali-mosque, powderroom and prison.
 - ❖ **Rusalia Church** (11th cent.). Church of Holy Trinity of Rusalia is located above the village of Gornji Matejevac. Rusalia is the most attractive ancient structure in Niš. The church was built after the order of a local Byzantine dignitary in the first half of 11th century.
 - ❖ **Kazandzijsko sokace** (Tinkers alley-18th cent.). This is an old urban quarter in what is today Kopitareva Street. It was built in the first half of 18th century. It was a street full of tinkers and other craftsmen, together with their houses coming from Turkish period. Unfortunately, only some of those are preserved today and protected by the state. The street has recently become packed with cafes, a favorite site for the visitors.
 - ❖ **Niška Banja or "Niš Spa"** is located a couple of kilometers to the southeast. There is a large park and some restaurants to accompany the nice view out over the valley. The spa is famous for its mildly radioactive hot water springs which help treat rheumatic disorders. Heart conditions are also successfully treated in the vicinity. 5km away from the spa, one reaches Sicevacka and Jelasnicka Gorges, state-protected natural reserves with intact scenery, ancient monasteries, and endemic species.
 - ❖ **Mausoleum of Count Alexei Kirillovich Vronsky** - lover of Anna Karenina (19th cent.). The Holy Trinity Church in Gornji Adrovac (municipality of Aleksinac) near Nis was built in commemoration of the death of Nikolai Rayevsky. Rayevsky was celebrated as Count Vronsky

in Tolstoy's famous novel Anna Karenina.

- ❖ **Red Cross Concentration Camp.** The first Nazi concentration camp in the former Yugoslavia, constructed in 1941. One of the few fully preserved concentration camps in Europe, almost intact since 1944, 'Lager Nis' was the venue of the dramatic escape in February 1942 when about 100 prisoners managed to flee. It is located in the city center, close to the central bus station

3.4 Adventure tourism in Nis – overview (resources, interest to the sites, management)

Adventure travel is a type of niche tourism, involving exploration or travel with a certain degree of risk (real or perceived), and which may require special skills and physical exertion.

Adventure tourists may have the motivation to achieve mental states characterized as rush or flow, resulting from stepping outside their comfort zone. This may be from experiencing culture shock or by performing acts requiring significant effort and involve some degree of risk (real or perceived) and/or physical danger (See extreme sports). This may include activities such as mountaineering, trekking, bungee jumping, mountain biking, cycling, canoeing, scuba diving, rafting, kayaking, zip- lining, paragliding, hiking, exploring, sandboarding, caving and rock climbing. Some obscure forms of adventure travel include disaster and ghetto tourism. Other rising forms of adventure travel include social and jungle tourism.

3.4.1 Analysis of the resources for the development of adventure tourism in the city of Nis:

- an attractive destination for people with an inclination for adventure ;
- the resources for the development of adventure tourism in Nis include: rivers, mountains, lakes, waterfalls, forests, cliffs, etc.;
- the activities available, related to the development of adventure tourism include, but are not limited to: hiking, biking, kayaking, rafting, shooting, jeep safari;
- Competitive prices;

Some of the most significant natural resources for the development of adventure tourism in the area are:

- ◆ **Suva Mountains (Suva Planina)**

Suva Mountain is located in south-eastern Serbia, 45 km long and 15 km wide. It starts to the east of Nis and ends southwest of Babushnica in the Luzhnikata valley, where the Lužnica River flows. When you go to the valleys of Suva Mountain, you must carry bundles of water. The

mountain is called Suva, because there are no springs on its peaks. The tops that can be climbing are called Trem - the highest point of the mountain and the Devil's Grave. By marked trails you will reach Sokolov stone, and here is the resort Boyana water, where, as the name says, there is a spring. In the winter, ski slopes can be found in this ski resort, and there are also two children's runs.

◆ **The Sićevo Gorge (Sićevačka klisura)**

The **Sićevo Gorge** is the narrow part of the Nishava valley between the villages of Prosek and Ravni up to 14 km upstream from Nis. It is about 15.9 km long and is part of the Nile Valley along with the Bella Palanka Valley. The gorge is divided into two parts, upper and lower, or the Chernivtsi - Gradishte and Ostrovikka gorges. The upper part is narrower and more like a canyon, while the lower part has wide slopes. The gorge is surrounded by the Mount Mountains to the north and the slopes of Suva Mountain in the south. The gulf provides good conditions for hiking and paragliding. The ideal time to visit because of the almost Mediterranean climate is spring and autumn and even winter when there is not much rainfall.

Sichevska Gorge is an imposing part of the canyon of the river Nishava. It is located on the road SofiaNish, where the last slopes of the Mountains of the Mountains and Suva Mountains end. It is 14 km from Nis. It is 17 km long and is divided into two parts - upper and lower gorge. There are two HPPs built at the beginning of the 20th century in the gorge. One of them still supplies Nis with current. Other important sites in the gorge are the church "St. Petka "in the nearby village of Ostrovitsa and Sichevo monastery" St. Virgin Mary "(built in 1644 and rebuilt in 1875 after being destroyed by the Turks), which is near the road to Sofia

The village of Sichevo is also known for its vineyards and good wines. Every summer here is organized the oldest art colony on the Balkans, founded by the artist Nadezhda Petrovich. Because of the numerous natural features and the rare plants that grow here, Sichevska gorge in 2000 was declared a special nature reserve. Salvia, a very valuable and curative herb, which grows only under Mediterranean conditions, has found in Sichevska gorge its only habitat on the territory of Serbia. Sports enthusiasts can practice mountaineering, nature walks, fishing, rafting (2009 in this part of Nishava is organized World Race Championship) and hang gliding.

◆ **Yelashnichka Gorge (Jelašnička klisura)**

Yelashnichka Gorge is 15 km from Nis and 3 km from Nishka Banya. Although small, it has been declared a special nature reserve and there

are some nice places for camping and picnic. One of them is located at the exit of the Gorge and is equipped with benches, and there are marked paths for hiking. A narrow road passes through the Yelashnichka Gorge which leads to Boyana Water, a resort of Suva Mountain. The Nis climbing club has made it possible to climb a natural climb with certified equipment where climbers can climb everyone under the supervision of the members of the club. Apart from the beautiful rocks, the Ripalka Falls are also interesting, as well as remains of Roman fortifications. It is located between the villages of Yelashnica and Chuklenik, which are connected to the city by bus lines.

◆ **Kamenički vis**

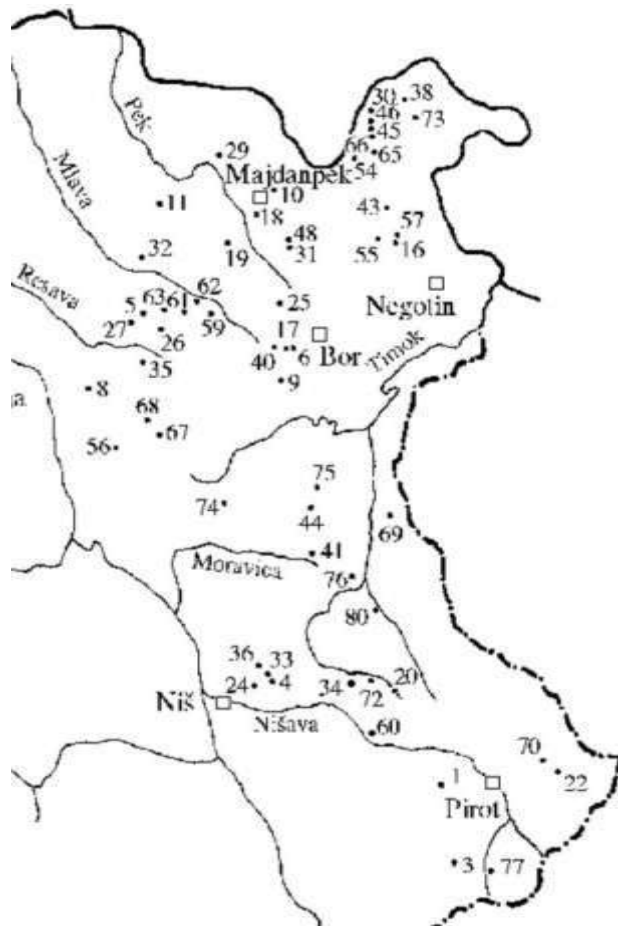
Kamenički vis is a favorite place for day trips to the citizens of Nis throughout the year. It is situated among the folds of the Mountains of Ore Mountains, above the village of Kamenitsa, where its name comes, at an altitude of 750-800 m. It is 14 km from the city. The terrain is slightly shaped and is covered with low forest vegetation. In the northern part is Studen Kladenets - the only source in the vicinity. In the area you can refresh yourself and enjoy hunting specialties in the hunting restaurant.

◆ **Boyanine Water (Bojanine vode)**

The Boyanine Water is located 25 km from Nis. This 700-1300 m above sea level, with its geographic location in the northern part of Suva Mountains, is an oasis of the sun and the fresh, fresh mountain air. The name of the area comes from the spring of pure mountain water "Bojanine Lead". Immediately to the spring there is a mountain house Studenets (55 beds), at an altitude of 860 m, and Ski-house "Nis" (20 beds), at an altitude of 810 m, with the attractive "Orlova fountain" and illuminated basketball court. For mountaineers from Boyanine there are a number of marked hiking trails leading to the beautiful hills in the vicinity, such as Sokolov stone (1523 m), Devil's grave (1317 m), Mosor (984 m) and the highest peak of Suva mountain - Trem 1810 m above sea level). During the winter of Boyaninje, ski can be crossed on the ski slopes "Sokolov Kamen", as long as it is accessible by lift, 900 m long, displacement 320 m and capacity 1100 skiers per hour. The main runway is 1000 meters long. There is also a lighter and shorter ski lane (250 m) designed for school- aged children and amateurs. For the youngest is the track "Studenets" (100 m), with a motorized ski lift. Both playgrounds are illuminated.

3.5 Speleology Tourism in Nis – overview (resources, interest to the sites, management)

Speleology is the scientific study of caves and other karst features, their make-up, structure, physical properties, history, life forms, and the processes by which they form (speleogenesis) and change over time (speleomorphology). The term speleology is also sometimes applied to the recreational activity of exploring caves, but this is more properly known as caving or potholing, or (not usually by participants) by the largely obsolete American term spelunking. Speleology and caving are often connected, as the physical skills required for in situ study are the same.



Caving as a tourist offer is focused on the tourists with a great love for the study and teaching of underground karst phenomena such as caves and pits, as well as unusual and rare plant and animal species. Cavers caving made plans based on the measurement of dimensions and providing cave channels, as well as documentation of morphological, hydrological, geological and physical properties. Given the activity of cavers to deep and complex holes and special caving techniques and training caving team, we can say that part of caving activities like mountain climbing and can be considered a sport activity. For the purposes of tourism, caves and pits are often tailored to the tourists so that tourists, if they decide to speleological research or I visit some of the caves or cave, often go accompanied by guides who are trained to navigate the caves that tourists do not get lost or jeopardized. Known caves often have other tourist offer such as souvenir shop, a place for a meal or refreshment.

Nature has given caves in Serbia the most extraordinary shapes showing its infinite imagination. Most of them can be found in the eastern part of the country.

The majority of caves are located in Eastern Serbia, seven of which are prepared for organized tourist visits, while several caves are destined for more extreme adventurers offering the true speleological tours with guides and necessary equipment.

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The longest caves in Serbia are the Lazareva cave near the city of Bor (9000 meters), Ušački cave system (6,185 meters) and **Cerjanska cave near the city of Niš** (6,025 meters).

Cerjanska Cave is located 14 km away from Nis, close to the Kamenica Hill excursion site. The entrance to the cave is set near the spot where the Provalijska river sinks into the ground, 515 meters above sea level. The cave is hydrologically active. Geologists estimate that the Cave of Cerje originated over 2 million years ago. The end of the cave remains undiscovered.

The cave abounds in cave formations throughout its length. It boasts a wonderful underground world made of corridors and large halls, on average 15 to 40 meters high, showing hundreds of morphological and hydrological forms of different shape, size, and color, cave jewelry – stalactites, helictites, wavy draperies, cave corals, and crystal flowers, which can be found only here in Serbia. Helictites found here represent a special kind of cave jewelry which, contrary to all laws of physics and gravity, extends in all directions, like electrified hair. In 1998, the Institute for the Protection of Natural Monuments proclaimed Cerjanska Cave a first category natural treasure. However, due to the lack of funds, Cerje Cave is still not available for visitors. However, it is possible to visit the cave only with professional speleo guides and in the small groups.

3.5.1 Analysis of the resources for the development of cave (speleology) tourism in the city of Nis:

- **Cerje Cave** – first category national treasure, declared by the Institute for the Protection of Natural Monuments;
- Abundance in morphological and hydrological forms of different shape, size, and color, cave jewelry – stalactites, helictites, wavy draperies, cave corals, and crystal flowers, which can be found only in Serbia;
- Low funding, resulting in limited availability;
- Deficits of analysis, strategies and social consensus, favouring the development of the speleological resources and cave tourism in the region;

3.5.2 SWOT analysis regarding the development of the tourism sector in the City of Nis with a focus on cultural, adventure and cave tourism

No	STRENGTHS
1.	Favourable geographical location, defining the richness of natural resources
2.	Resilient culture with variety of traditions and customs, able to attract visitors and to ensure consistency in their experience

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3.	High accessibility by transport means: Functioning airport, railway and road infrastructure
4.	Competitive prices in comparison with cities in Northern and Western Europe
5.	Unspoiled natural scenery
6.	Diversity of the tourism product
7.	Rich cultural calendar, including musical and dance festivals, literature, crafts & arts and other events.

No	WEAKNESSES
1.	Serbia is not a member of the EU, which makes the travel more complex (limitation of stay, roaming charges, etc.) and reduces the opportunities for active presence of the Nis district in the European market
2.	Low recognisability and limited presence on the international market
3.	Limited destinations;
4.	Regarding the railway transport: insufficient speed, low-maintenance when it comes to internal conditions,
5.	Limited modernization activities;
6.	Low culture of compliance with the established transport rules (speed infringements, etc.)
7.	Prices similar to the ones in cities in Central and Eastern Europe, which circumstance deprives Nis of important advantage
8.	Not enough facilities available at the disposal of children, people with limited physical abilities and elderly;
9.	Low compliance with safety standards in some areas
10.	Low utilization of the available resources,
11.	Ineffective marketing strategy,
12.	Limitation of the reached people;
13.	Insufficient rate of digitalization of the tourist offer
14.	Language barrier,
15.	Low popularity outside the borders of the city of Nis

No	OPPORTUNITIES
1.	Active membership of the EU, which would lead to the elimination of the barriers, currently obstructing the more dynamic tourism development of the region (taking into consideration that eu- citizens represent a significant part of the tourists in the region)
2.	Active exploration of the untapped potentials by comprehensive analysis of the international market and the tourists expectations, resulting in a thorough strategy for the popularization of the City of Nis (incl. implementation of a new marketing approach)
3.	Improving the air infrastructure by launch of a new destinations and more direct flights; modernization of the existing trains and implementation of new services;
4.	Better compliance with the established rules through more awareness raising campaigns or higher sanctions/new rules

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5.	Improving the quality of the tourist offer, active development of the natural and cultural heritage as factors with great significance among tourists (in accordance with Eurostat survey), so that the price factor is not the leading one
6.	Improving the quality of the sites with facilities at the disposal of children, people with limited physical activities, elderly;
7.	Enhancing the compliance with the safety standards and educating citizens and tourists on the topic of safety
8.	Elaboration of a competitive marketing strategy and promotional activities in compliance with the international standards;
9.	Enhanced digitalization of the tourist offer,
10.	Implementation of new online services of assistance to the tourists
11.	Involvement of international artists in the different events,
12.	Extensive promotional campaign,
13.	Elaboration of logistics able to secure the quality stay of the tourists during the festivals;
14.	Intensified dynamics of the communal life

No	THREATS
1.	Intensified tourist presence in result of the popularization of Nis as a tourism destination, which could lead to environmental issues, including pollution, alteration of ecosystems, pressure on the biodiversity, uncontrolled construction, etc.
2.	High level of commercialization, degradation of local identity and marginalization of the “essence” at the expense of the short – term intensification of tourists presence, resulting in immediate profits;
3.	Loss of perspective and long- lasting vision
4.	Focus on the quantity instead of the quality;
5.	Malpractices in terms of repair of the existing infrastructure or construction of new routes;
6.	Unproportional development of the different transportation means on the expense of the others;
7.	Dissatisfaction and public resentment towards the new rules, sanctions.
8.	Artificial lowering of the prices, which can result negatively for the employees in the tourism sector and all other industries of relevance;
9.	Improving the quality and the scope of the services, but not increasing the wages of the employees;
10.	Implementation of short- term strategies and loss of a long-lasting vision for development;
11.	Spoiling of the environment with view of immediate profits, unregulated construction work, unsystematic development without Consideration of the future;
12.	Marginalization of the concept of sustainable tourism
13.	Focus on a limited number of tourism types and activities – for example prioritisation of cultural tourism and neglecting of the speleology as the first one is considered most beneficial at the current stage and the latter require more systematic approach and allocation of financial resources
14.	High incorporation of elements of other cultures and traditions, resulting in alteration of the specific characteristics of the events;
15.	Loss of recognisability among the citizens of Nis,
16.	Disruption of the dynamics of the communal life