O.T2.1 - Joint Strategy for the Amazon of Europe Destination Development

BASIC INFORMATION

Project	Responsible Green Destination Amazon of Europe
Acronym	Amazing AoE, DTP3-362-2.2
Duration	1.7.2020 – 31.12.2022
Website	http://www.interreg-danube.eu/approved-projects/amazing-aoe

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Output/Deliverable	Output O.T2.1: Joint strategy for AoE destination development
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Date	31.7. 2022

List of partner organisations in the Amazing Amazon of Europe and Amazon of Europe Bike Trail projects

No.	Organisation name (in English)	Acronym	Country
1	Iskriva, Institute for Development of Local Potentials	Iskriva	Slovenia
2	Arctur Ltd.	ARCTUR	Slovenia
3	Municipality of Velika Polana	Velika Polana	Slovenia
4	West Pannon Regional and Economic Development Public Nonprofit Ltd.	WPRED	Hungary
5	CROST Regional Development Nonprofit Ltd.	CROST	Hungary
6	Tourism Board of Međimurje County	TZMŽ	Croatia
7	Osijek-Baranya County	OBŽ	Croatia
8	Association for nature and environment protection Green Osijek	Green Osijek	Croatia
9	Koprivnica Križevci County	KKZ	Croatia
10	Varaždin County	VZZ	Croatia
11	Trail Angels GmbH	Trail Angels	Austria
12	8Cities	8Cities	Austria
13	Municipality of Apatin	MOA	Serbia
14	City of Sombor	COS	Serbia
15	Ministry of Tourism		Croatia
16	Active and Ecotourism Development Center		Hungary
17	World Wide Fund for Nature Austria - WWF Austria		Austria
18	Zala County Government		Hungary
19	Government of Somogy County		Hungary
20	Government of Baranya County		Hungary
21	Virovitica-Podravina County Tourist Board		Croatia
22	Tourist Board of Osijek-Baranja County		Croatia
23	Varazdin County Tourist Board		Croatia
24	Public institution Kopacki rit Nature Park		Croatia
25	Slovenian National Commission for UNESCO		Slovenia
26	Slovenian Tourist Board		Slovenia
27	Tourist Association of Slovenia		Slovenia
28	Thermenland Süd- & Oststeiermark Marketing GmbH		Austria
29	Central Podravina Tourist Board		Croatia

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Table of abbreviations

ADAC - Allgemeiner Deutscher Automobil-Club

AGR – Aggregation

AoE – Amazon of Europe

AoE BT – Amazon of Europe Bike Trail

AR – Augmented Reality

AT – Austria

BENELUX – BE - Belgium, NE – Netherlands, LUX - Luxemburg

CBI – 'Centre for the Promotion of Imports from developing countries' - department of the Netherlands Enterprise Agency, funded by the Dutch Ministry

of Foreign Affairs

CELTH - Centre of Expertise for Leisure, Tourism & Hospitality

CZ – Czech Republic

DACH – D - Deutschland (Germany), A - Austria, CH - Confœderatio Helvetica (Switzerland)

DDO – Destination Development Organisation

EU – European Union

FB – Facebook

FSP – Flagship Tourism Product

GDP – Gross Domestic Product

Gen X – Generation X was born between 1965 and 1980. They are in 2022 between 42 and 57 years old

Gen Y – Generation Y or Millennials, were born between 1981 and 1996. They are in 2022 between 26 and 41 years old

Gen Z – Generation Z was born between 1997 and 2012. They are in 2022 between 10 and 25 years old

HR – Croatia

HTWW – Health Tourism World Wide

HU – Hungary

IG – Instagram

IoT – Internet of Things

LAG – Local Action Group

NFC – Near Field Communication

NUTS - Nomenclature of Territorial Units for Statistics

OTA – Online Travel Agency

POL – Poland

RGD TIM – Responsible Green Destination Tourism Impact Model

SI - Slovenia

SME – Small and Medium Enterprises

SPA - A bath containing hot aerated water. "Sanus Per Aquam", meaning 'health by or through water'

SR – Serbia

SWOT – Strengths, Weaknesses, Opportunities, Threats

TBR MDD – Transboundary Biosphere Reserve "Mura-Drava-Danube" or 5-country UNESCO Biosphere Reserve "Mura-Drava-Danube"

TIC – Tourist Information Centre

UN – United Nations

UNESCO - The United Nations Educational, Scientific and Cultural Organization

USP – Unique Selling Proposition

VR – Virtual Reality

WTA - Wellness Tourism Association

YTB – Youtube

Executive summary

The aim of the strategy is to present the goals for strategic development of the Amazon of Europe destination. The Amazon of Europe (AoE) destination spans across 1 million hectares of extraordinary natural and cultural landscapes, where the three rivers Mura, Drava and Danube connect 5 countries: Austria, Slovenia, Croatia, Hungary, and Serbia. This area hosts the world's first 5-country UNESCO Biosphere Reserve Mura-Drava-Danube. Amazon of Europe as a leading sustainable cross-border tourism destination, offers comfortable adventures on the river, cycling and forest paths combined with authentic local natural, cultural and culinary experiences. It has its own AoE Booking Center that designs custom-made packages and provides support to the travellers on every step of their journey.

Joint vision of the destination is: Amazing Amazon of Europe is a leading sustainable cross-border tourism destination, preserving the natural and cultural heritage and inviting its explorers to slow down along the mighty rivers, reconnect with nature and recharge their batteries through amazing green local stories.

In the destination, three flagship tourism products are available for visitors:

1. Amazon of Europe Bike Trail: a bookable long-distance cycling trail, following the natural meanders of the rivers Mura, Drava and Danube, for over 1,250 km.
2. Amazon of Europe River Journey: exploring the Amazon of Europe from water perspective paddling in a canoe or kayak on Mura, Drava and Danube.
3. Amazon of Europe Amazing Moments: authentic experiences of the destination with active engagement of the travellers.

The following goals have been set for strategic development of the AoE destination until 2030:

1. All stakeholders in the region know the Amazon of Europe story, identify themselves with it and are able to present it in a comprehensive way.
2. The Amazon of Europe story and destination is a brand that is recognized across the globe.
3. Amazon of Europe Destination Development Organisation (DMO) is fully established and functional.
4. 8 Joint AoE Flagship Products (FSPs) are fully operational and profitable.
5. The infrastructure of all 8 FSPs is established and regularly monitored and improved.
6. AoE Collective brand and quality system is operational.
7. AoE Academy is functioning and is regularly improved.
8. AoE Business Hub is functioning and is regularly improved.
9. The public transportation networks enable the AoE visitors and residents to arrive and travel within the destination with ease.
10. A reliable, green AoE mobility network is fully functional and regularly monitored and improved.
11. A fixed compensation valorisation system – Give back to nature is operational.
12. A green behaviour valorisation programme is operational.
13. Climate neutrality of the AoE destination (all involved stakeholders) is achieved.

These goals will be achieved with active engagement of key stakeholders in the area, including tourism organisations, ministries, regional and local authorities, private sector organisations, nature conservation authorities, NGOs, and the locals. Strategic pillars and key actions are presented in the document.

Destination website: www.visitaoe.com

1 Background and goals

1.1 Background and purpose of the document

The conception of a joint development strategy for the transboundary green destination Amazon of Europe is prepared as part of the project Amazing Amazon of Europe, co-funded by the Interreg Danube Transnational Programme.

Joint development strategy for the transboundary green destination Amazon of Europe has a crucial role in achieving the project objectives, as a key strategic document for uniting the efforts of the pentalateral AoE area to be strongly present in international tourism markets and develop green tourism as one of key development opportunities in less developed border regions. The strategy has been developed in close cooperation with key stakeholders from 12 participating regions, in a carefully designed participatory process.

1.2 Strategy development methodology

The joint strategy was developed with a combination of a top-down and bottom-up methodology, resulting in much higher trust and motivation of stakeholders for its implementation later on:

- Top down – global trends, presentation of the TBR MDD area and related snapshots
- Bottom up - data analysis and workshops with stakeholders, focused on the destination Amazing AoE.

In order to gain wide knowledge about the present trends in the area of developing and managing destinations, an analysis of present tourism and marketing trends was conducted as the first step in developing the joint strategy. This was followed by a detailed presentation of the destination Amazon of Europe within the TBR MDD area. Since the USP of the destination is the natural and cultural heritage, the analysis was conducted on the level of NUTS3 regions. This provided the necessary information regarding the similarities, differences and uniqueness, which served as a basis for initiating the bottom-up research.

The latter is an extensive participatory process which provided the inputs from stakeholders and set the guidelines for the joint AoE Destination vision, strategy, joint tourism products and future cooperation.

Firstly, the activity leader Iskriva, Institute for development of Local potential (Slovenia) prepared a Plan of the participatory process for developing the joint strategy, defining the tasks of partners and target groups.

Secondly, based on the process plan, a series of 8 workshops was implemented. The stakeholders were divided into groups so that each stakeholder participated at one workshop. The purpose of the WSs was to identify main attractions in the regions, joint destination vision, strategic areas of tourism development and potential joint flagship tourism products.

Thirdly, a joint workshop was organised for the project partners, where the results of the stakeholders' workshops were presented, discussed and merged. Additionally, the first draft of the strategic pillars of the destination Amazon of Europe was presented and inputs were collected for the main objectives of each pillar, a joint vision and mission statement for the destination as well as the main objectives for a timeframe until 2030. The results of the joint workshop were analysed and merged into three concise mission and vision statement's which were put to a vote in a short follow-up meeting.

Fourthly, an extensive socio-economic analysis was implemented, which updated the socio-economic analysis from 2017, which was conducted in the same area through the project Amazon of Europe Bike

Trail. Some crucial tourism indicators were added to the present analysis, which provided extensive insights into the current situation and helped identify tourism potential in the destination Amazon of Europe.

Fifthly, a master thesis with the title: "Which Future for the ''Amazing Amazon of Europe''? Proposals for the Strategic Tourism Development of a Transboundary UNESCO Biosphere Reserve" was written by Philip Uršnik Žuran, a student at FH Joanneum Bad Gleichenberg, studying Health, Tourism and Sports Management. The thesis was finished in August 2021. An extensive analysis of the area was conducted through the thesis, which resulted in a comprehensive SWOT and TOWS matrix, which was beneficial for the development of a joint development strategy of the destination Amazon of Europe.

Sixthly, an extensive table research about the present tourism trends has been conducted, clarifying the tourism areas with greatest potential in the near and far future, as well as the expectations of the visitors in the post-covid era.

Last but not least, all the data has been merged into a concise document and a SWOT table, followed by setting a clear action plan for the direction of the joint development of the destination Amazon of Europe with precise objectives, and a clear destination mission and vision.

1.3   Goals of the process and stakeholder inclusion

The project Amazing Amazon of Europe has been initiated with the following aims:

- Enhance sustainable growth and tourism development on distinctive natural and cultural heritage
- Create a collaborative network of key actors
- Enable the environment for high-quality tourism, responding to limited resources of ecosystems
- Manage diversity of natural and cultural heritage and resources in the destination from local to transnational level
- Enable unique experiences for international visitors.

The project Amazing Amazon of Europe has enhanced the cooperation of key stakeholders in the destination, enabled development of the three common umbrella flagship tourism products, and fostered agreement on long-term strategic goals of the destination.

1.4　Document composition

Background and goals

Defining the destination Amazon of Europe

Basic presentation of the TBR MDD area	Socio-economic profile of the AoE	Tourism development and marketing trends

Tourism as an economic activity in the destination

Overnight stays and tourist arrivals in the Amazon of Europe

Tourism supply in the destination Amazon of Europe	Tourism demand in the destination Amazon of Europe
Marketing communication of the tourist offer in the destination	Tourism SWOT analysis for the destination Amazon of Europe

Vision and strategic goals of tourism development and marketing in Amazon of Europe 2022 - 2030

Joint vision of the destination Amazing AoE 2021-2030	Joint strategic long-term development goals in the destination Amazing AoE 2021-2030
Strategic pillars of the destination	Identification of flagship tourism products

Main findings and related documents

2 Defining the destination Amazon of Europe

2.1 Presentation of the TBR MDD

The Amazon of Europe destination overlaps and is based on the area of the **5-country Biosphere Reserve Mura-Drava-Danube (TBR MDD).** The 5-country Biosphere Reserve Mura-Drava-Danube, designated by UNESCO in September 2021, connects the individual national Biosphere Reserves, designated by UNESCO, and 12 protected areas along three rivers. As such, it is Europe's largest coherent riverine protected area and the world's first-ever biosphere reserve connecting five countries. The TBR MDD includes the following countries and Biosphere Reserves (Zollner & Wolf 2019):

- "Mura-Drava-Danube Transboundary Biosphere Reserve" – Croatia and Hungary, established in 2012
- "Bačko Podunavlje Biosphere Reserve" – Serbia, established in 2017
- "The Mura River Biosphere Reserve" – Slovenia, established in 2018
- "Biosphere Reserve Lower Mura Valley" – Austria, established in 2019.

The TBR MDD area is based on national or bilateral zonation of individual BRs already designated by UNESCO. It is divided into three areas/zones (figure 1):

- Core area
- Buffer zones
- Transition area.
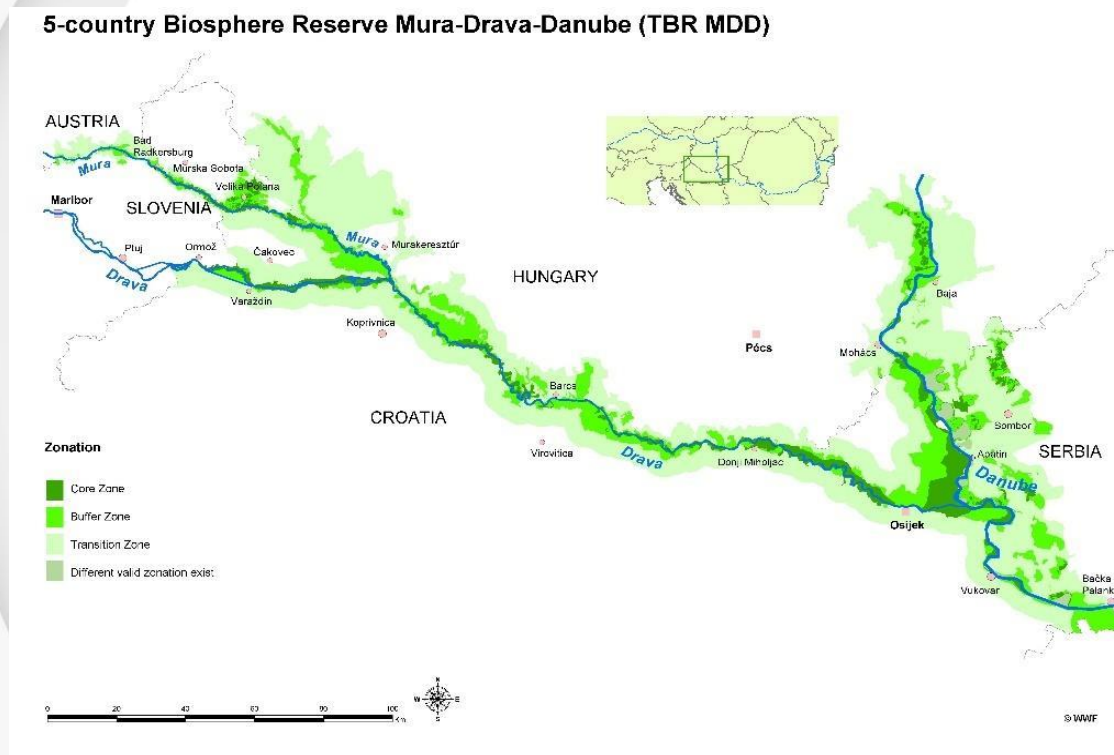
The core area consists of river bodies and associated habitats, the buffer zones mostly consists of forests, grasslands and meadows and the transition areas consists of more populated land such as towns and villages. Conservation levels, and the role the area plays in the biosphere reserve, is determined by this zonation. The core area is the most protected whereas the transition area is the least protected and serves to support small-scale business and sustainable tourism as well as to provide scientific research and education programmes for the protection and conservation of core and buffer zones.

The joint vision of the TBR MDD sets the basis also for tourism and regional development in the area.

Joint vision of the TBR MDD

Comprising nearly 1,000,000 ha along 700 km, the TBR MDD covers Europe`s largest coherent and dynamic river ecosystem. It brings up the responsibility to the global scale and acts as the backbone for the survival of characteristic habitats and species, while ensuring significant ecosystem services for people by its wise use. By "thinking globally, and acting locally", the States Parties jointly strive for a harmonised management of the TBR, serving as a best practice example of international cooperation in the river basin and in water management. The development is based on a trustful collaboration between all involved States Parties and a cross-sectoral participation of all relevant stakeholders and local communities. With respect to the historic dimension of the region, it is also designed to build bridges between people and nature. Multiculturality is one of the unique values of the TBR MDD, thus it should shine as a symbol of unity in the world´s first 5-country Biosphere Reserve. (Zollner & Wolf 2019)

The main part of the establishment of TBR MDD is the Common Work Plan (CWP; figure 4) that provides a joint vision, mission, long-term and operational goals of the BR. TBR MDD's joint vision and mission is to connect rivers, nature and people, by achieving four main goals.

These goals are based on three main functions of BRs from Article 3 of WNBR Statutory: nature conservation, sustainable development and logistic support through research and education. Combined, they serve the abovementioned mission of the TBR MDD and are further divided into operational goals that are presented in the TBR MDD Common Work Plan (Zollner & Wolf 2019).

Spanning across Austria, Croatia, Hungary, Serbia and Slovenia, the lower courses of the Drava and Mura rivers and related sections of the Danube are among Europe's most ecologically important riverine areas: the so-called "Amazon of Europe" destination (hereafter referred to as "AoE").

The rivers form 700 kilometres long "green belt" connecting almost 8.499,28 km² of highly valuable natural and cultural landscapes from all five countries and have become a symbol of unity by becoming world´s first UNESCO 5-country Biosphere Reserve Mura-Drava-Danube (TBD MDD). The 5-country Biosphere Reserve Mura-Drava-Danube altogether covers 2,5% of the total surface of the respective five countries.

Despite numerous man-made changes in the past, this stunning river landscape hosts an amazing biological diversity and is a hotspot of rare natural habitats such as large floodplain forests, river islands, gravel and sand banks, side branches and oxbows. These habitats are home to the highest density of breeding pairs of white-tailed eagles in Continental Europe and other endangered species such as the little tern, black stork, beaver, otter and the nearly extinct ship sturgeon. Every year, more than 250.000 migratory waterfowls use the rivers to rest and to feed.

A coherent network of 12 protected areas along the rivers highlight their ecological values including the world famous "Kopački Rit" Nature Park at the Danube-Drava confluence, "Drava-Mura" Regional

Park in Croatia, "Gornje Podunavlje" Special Nature Reserve in Serbia and the "Danube-Drava" National Park in Hungary as well as – Biosphere Reserve Mura in Slovenia and Natura 2000 Site and Protected Landscape, Mura in Austria (Amazon of Europe, 2019). Natura 2000 sites in the TBR MDD offer new possible financing opportunities for further development of the area through the LIFE programme - EU's funding instrument for the environment and climate action. In total they represent 2,5% of the total Natura 2000 surface of the five countries in focus.

Figure 3: Protected areas partially included in the Transboundary River System of the Mura, Drava and Danube
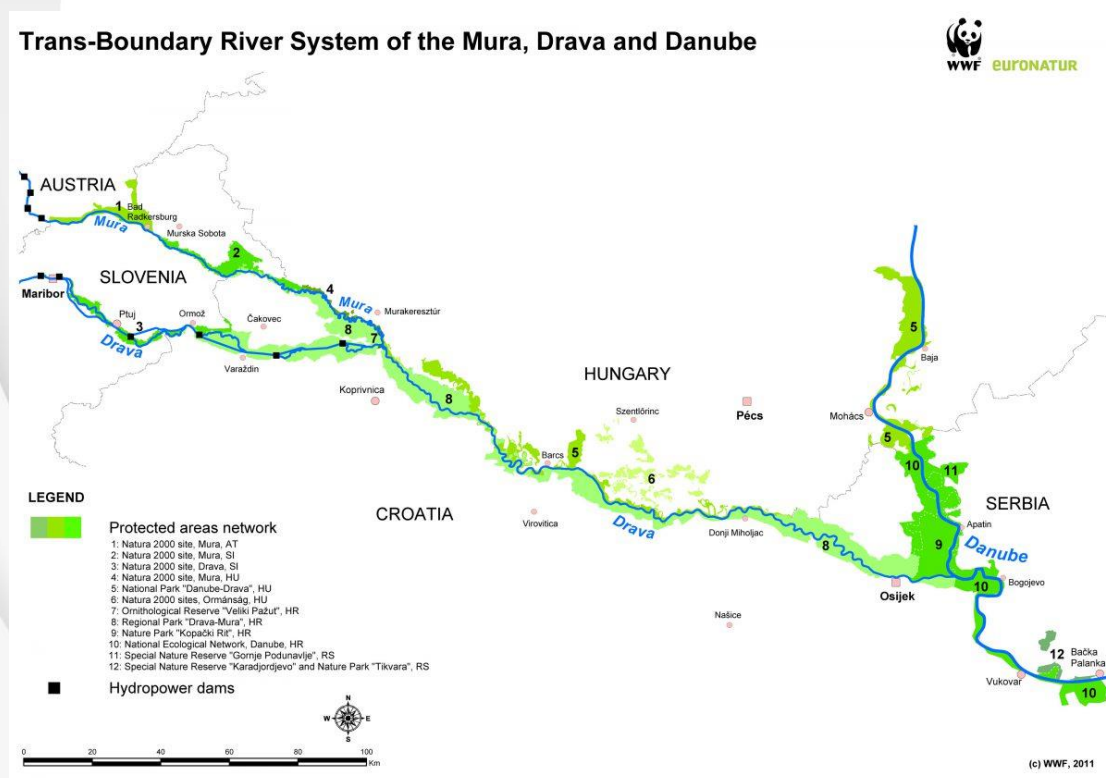
The Table 1 presents all protected areas that are partially included in the Transnational Biosphere Reserve Mura-Drava-Danube. However, not all of them are a part of the Amazon of Europe project territory (protected areas numbered 3, 6, 7).

Table 1: Sizes of protected areas that are partially included in TBR MDD (EUROSTAT, 2022)

No.	NAME OF PROTECTED AREA	COUNTRY	SIZE (km²)
1	Natura 2000 Site and Protected Landscape, Mura	Austria	21,59
2	Natura 2000 Site, Mura	Slovenia	127,67
3	Natura 2000 Site, Drava	Slovenia	95,35
4	Natura 2000 Site, Mura	Hungary	21,35
5	National Park Danube-Drava	Hungary	504,41
6	Natura 2000 Site, Ormánság	Hungary	14,14
7	Ornithological Reserve Veliki Pažut	Croatia	5,71
8	Regional Park Drava-Mura, Natura 2000	Croatia	876,81
9	Nature Park and Special Zoological Reserve Kopački Rit	Croatia	231,26
10	National Ecological Network, Danube	Croatia	133,49
11	Special Nature Reserve Gornje Podunavlje	Serbia	196,05
12	Special Nature Reserve Karadjordjevo	Serbia	41,84

	Nature Park Tikvara	**Serbia**	**5,53**

Total size of all protected areas partially included in the TBR MDD:　　**2.275,20 km²**

The Table 2 presents the share of Natura 2000 sites' surface included in the TBR MDD by countries.

Table 2: Share of Natura 2000 sites' surface in the TBR MDD (EUROSTAT, 2022)

Country	Share of Natura 2000 sites' surface in the TBR MDD
Austria	0,2%
Slovenia	2,9%
Croatia	4,3%
Hungary	0,2%
Serbia	0,0%

The Table 3 presents the sizes of the TBR MDD and the % of TBR MDD surface by countries.

Table 3: Sizes of TBR MDD area by countries (EUROSTAT, 2022)

No.	COUNTRY	SIZE of TBR MDD (km²)	% of TBR MDD surface out of whole country territory
1	**Austria**	131,80	0,2%
2	**Slovenia**	286,52	1,4%
3	**Hungary**	2.356,00	7,0%
4	**Croatia**	3.958,61	2,5%
5	**Serbia**	1.766,49	2,0%

Source: UNESCO Transboundary Biosphere Reserve "Mura-Drava-Danube", Screening Process for Nomination, Working document (E.C.O., 2019)

Total size of the TBR MDD:　　**8.499,42 km²**

The Table 4 presents the major cities in the Amazon of Europe area by countries.

Table 4: Major cities in the Amazon of Europe area by countries

Country	Major cities in the Amazon of Europe area
Austria	Bad Radkersburg
Slovenia	Murska Sobota, Lendava
Croatia	Čakovec, Varaždin, Koprivnica, Virovitica, Donji Miholjac, Osijek
Hungary	Nagykanizsa, Csurgó, Nagyatád, Barcs, Kaposvár, Pécs, Harkány
Serbia	Sombor, Apatin

Aside from natural beauty, the Amazon of Europe is very rich in cultural heritage and local crafts that can be found as well in the cities, as in the rural areas. Ancient castles, picturesque churches, museums, and traditional watermills are only a few examples of the most typical cultural attractions in the area. Moreover, many interesting festivals take place in the region including fairs, cultural, music, dance and cycling festivals that are very attractive for visitors. Rich natural and cultural heritage of the area

therefore represent a great opportunity for further development and strengthening a tourism economy in the region.

2.2   Management of the TBR MDD

In the TBR MDD Common Work Plan, common goals were set for the TBR MDD, targeting many different levels of TBR MDD development, including sustainable tourism. The BR management is responsible for the implementation of the goals. The proposition of a coordinating management body of TBR MDD is also provided in the CWP. It consists of three levels (figure 5):

- Level 1: National Biosphere Reserve Management
- Level 2: Coordinating Management Body
- Level 3: Steering Committee.

The level 1 management body (National Biosphere Reserve Management) is already established and contact persons have been defined for each of the consisting BRs. The purpose of this body is to serve as the link between the TBR MDD and the national BRs. The main purpose of the level 2 management body (Coordinating Management Body) is to provide a sustainable institutional mechanism for the implementation of TBR MDD goals. The main aim of the level 3 management body (Steering Committee) is to provide a joint strategic development plan for the TBR MDD, regularly assess its implementation progress and prepare proposals for improvements.

Figure 4: Transboundary, harmonised management structure according to the CWP and proposed in the Nomination document of the TBR MDD (Zollner & Wolf 2019)
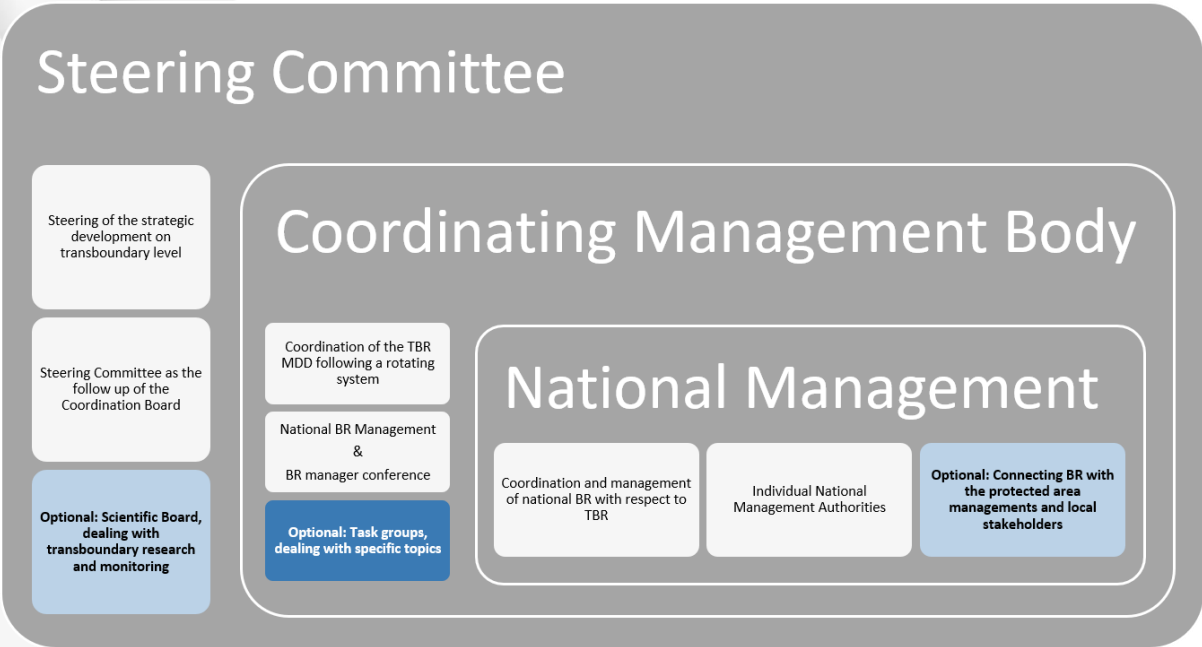
The CWP, agreed upon by the States Parties during the nomination process, is the main **technical basis** for the development of stakeholder platforms for the TBR MDD. Since the CWP was jointly elaborated and agreed upon by the States Parties during the nomination process, it is logical to align the stakeholder participation processes as well as the installation of different stakeholder platforms as far

as possible according to it. However, as participation processes are dynamic, enough leeway should be left to develop new ideas and to be able to take up current, unpredictable focal points.

The main **structural basis** for the development of the stakeholder platforms is the before mentioned proposed harmonised management structure within the TBR MDD, consisting of three levels, each of them in turn subdivided into three groups (see figure 5). On all levels, these structures are already established (especially the National Management) or are in the process of being established (e.g., the Coordination Board [CB] had been restructured into the Steering Committee). It is important to mention, that this structure is the starting point, adaptations and adjustments are therefore still possible and may be necessary in terms of resources and practicability. Thus, definite stakeholder platforms will have to be constantly adjusted to the structural development on a national and transboundary level over the years. Nevertheless, and independent of future developments, the stakeholder platforms need to be embedded at least into the transboundary level (Coordination Management Body; see figure 5). In this context, the field 'Optional: task groups, dealing with specific topics' represents the placeholder to attach specific transboundary stakeholder platforms (as presented below). A key aspect is the fact that a lively transboundary stakeholder community depends on successful participatory approaches on national levels. The national and transboundary levels are highly interwoven. Partly, they may even consist of the same stakeholders. Thus, these two levels can affect each other positively as well as negatively. Above all, when it comes to the development of management plans, participation is crucial for the acceptance of the national BRs and the TBR MDD as a whole. Furthermore, the connection to the steering committee level and its proposed scientific board is another key to success and should link international knowledge and research with the needs of the BR management and its stakeholders.

During the concrete nomination phase of the TBR MDD a general stakeholder overview had been created and approved by all States Parties (Zollner & Wolf 2019; ANNEX - C. Stakeholder Overview of the Nomination Process of the TBR MDD). Projects like coopMDD or the follow-up project lifelineMDD directed and guide the way towards future developments within the TBR MDD and provide good examples of project-based collaboration schemes.

In the field of sustainable tourism, two projects set the basis for cooperation platforms between key tourism-related stakeholders across the whole TBR MDD: Amazon of Europe (AoE) Bike Trail and Amazing Amazon of Europe.

- The **AoE Bike Trail** is a long-distance cycling trail, connecting touristic infrastructure, local producers, providers of sports equipment and leisure companies. The Amazon of Europe Bike Trail is the first project that joins the efforts of five countries (Slovenia, Austria, Croatia, Hungary, Serbia) for the sustainable economic development of the whole region based on the valorisation of natural and cultural resources. It is a joint integrated solution for sustainable cycling tourism implemented in the Amazon of Europe TBR MDD. The main goal of the project is to establish a unique, internationally known, bookable sustainable cycling tourism product that will contribute to regional development within all five countries.
- The main goal of the **Amazing Amazon of Europe** project is to bring sustainable development opportunities for managing diversity of natural and cultural heritage and resources in Amazon of Europe destination from local to transnational level, while enabling unique experiences for international visitors. It is aiming to establish a collaboration network of key actors and enable environment for high-quality tourism, responding to limited resources of ecosystems.

2.3 NUTS 3 regions of the Amazon of Europe

The Amazon of Europe area stretches across five countries and 11 NUTS 3 regions:

- Austria: Eastern Styria,
- Slovenia: Pomurska region,
- Croatia: Međimurje County, Osijek-Baranja County, Koprivnica-Križevci County, Varaždinska županija, Virovitica-Podravina County,
- Hungary: Zala County, Somogy County, Baranya County,
- Serbia: West Bačka District.

The NUTS 3 regions in the Amazon of Europe area cover 8,5% of the total surface of the five countries in which they're located (Austria, Slovenia, Croatia, Hungary and Serbia) and therefore, they represent a substantial part of national territories.

In Figure 8 the whole surface of NUTS 3 regions partially included in the Amazon of Europe area is graphically presented.

Figure 5: NUTS 3 regions of the Amazon of Europe area

Table 5: The sizes of NUTS 3 regions of the Amazon of Europe (EUROSTAT, 2022)

NUTS 3 ID	NAME IN ORIGINAL LANGUAGE	NAME IN ENGLISH	SIZE OF NUTS 3 REGION (km²)	% of NUTS 3 surface out of whole country territory
AT224	Oststeiermark	Eastern Styria	2.231,36	2,7%
SI031	Pomurje	Pomurska Region	1.337,00	6,6%
HR046	Međimurska županija	Međimurje County	729,00	15,3%
HR04B	Osječko-baranjska županija	Osijek-Baranja County	4.149,00	15,3%
HR045	Koprivničko-križevačka županija	Koprivnica-Križevci County	1.748,00	2,7%
HR048	Virovitičko-podravska županija	Virovitica-Podravina County	2.024,00	2,7%
HR062	Varaždinska županija	Varaždin County	1.262,00	2,5%
HU223	Zala	Zala County	3.784,84	6,6%
HU232	Somogy	Somogy County	6.065,09	15,3%
HU231	Baranya	Baranya County	4.429,60	15,3%

The largest NUTS3 areas, represented with 15,3 % by each, or 61,2% in total are Somogy County, Baranya County, Osijek-Baranya County and Međimurje County. The smallest NUTS3 area represented in the Amazon of Europe is Varaždin County, with 2,5% of the total surface. Eastern Styria, Korpivnic-Križevci County and Virovitica Podravina County are each represented by 2,7%, whereas Pomurska Region and Zala County represent 6,6% of the total Amazon of Europe area.

Diagram 1: % of surface of NUTS 3 regions in the Amazon of Europe area
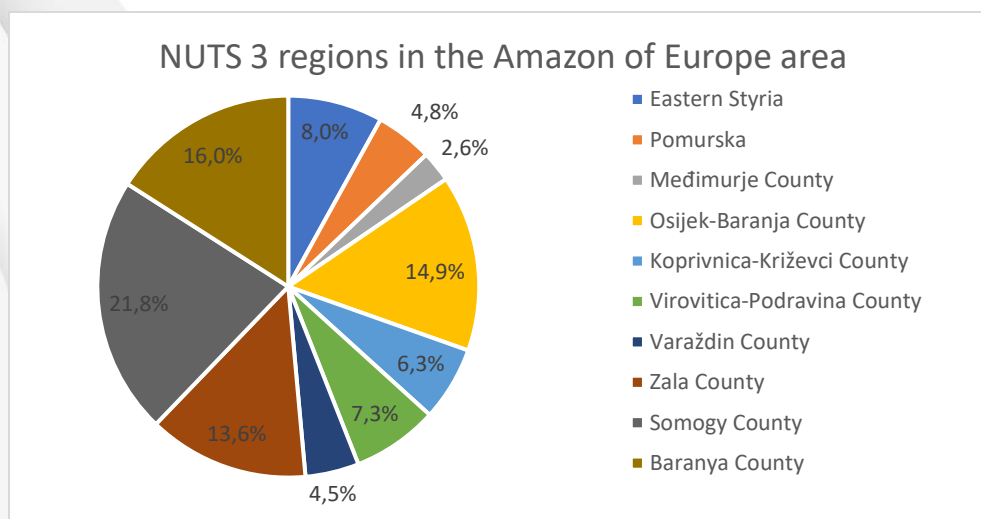
The largest NUTS 3 region in the Amazon of Europe area is Somogy County with the size of 6.065 km² covering 21,8% of the whole AoE. It is followed by Baranya County (4.430 km²; 16% of the AoE), Osijek-Baranja County (4.149 km²; 14,9% of the AoE) and Zala County (3.785 km²; 13,6% of the AoE). The smallest three NUTS 3 regions are Međimurje County with the size of 729 km² covering 2,6% of the AoE, Varaždin County with the size of 1.262,00 km² and Pomurska region with the size of 1.337 km2 covering 4,8% of the AoE. The shares of surface of the other four NUTS 3 regions vary from 6,3% to 8,0% of the whole AoE.

3 Vision and strategic goals of tourism development and marketing in destination Amazon of Europe 2022-2030

The purpose of this chapter is to concisely present the joint vision & mission statements, as well as to elaborate main objectives and the organisational structure of the destination, which will ensure the implementation of the set objectives.

The main strategic opportunities of the Amazon of Europe destination are presented throughout the document and summarized in the following chapters with the SWOT analysis. The latter serve as the main guidelines for determining the destination development strategy. In order to give emphasis on the vision and strategic goals, this chapter is presented before the in-depth destination analysis and SWOT.

3.1 Joint vision of the destination Amazon of Europe 2022-2030

To overcome and tackle the identified challenges from the previous chapters, a joint mindset about the current state, as well as the direction in which the tourism development activities should take place will be identified. Whereas the current state was thoroughly presented in the previous chapter, this chapter will be dealing with the joint direction we will be heading to in the future.

The first step in this complex process is the identification of a joint tourism development vision and mission statements of the destination Amazon of Europe, which was determined at a joint workshop with all 14 project partners.

The joint tourism development vision is:

"Amazon of Europe is

a leading sustainable cross-border tourism destination, preserving the natural and cultural heritage and inviting its explorers to slow down along the mighty rivers, reconnect with nature and recharge their batteries through amazing green local stories."

The joint tourism development mission statement:

We will achieve this through acting as one destination, which will enable us to implement green economic and socially sustainable projects, give back to nature (ensure nature conservation) and raise awareness internally and externally about the unique undiscovered riverine destination in the first UNESCO 5-country biosphere reserve in the world, where health and nature are always the priority.

3.2 Presentation of flagship tourism products

The Amazon of Europe destination spans across 1 million hectares of extraordinary natural and cultural landscapes, where the three rivers Mura, Drava and Danube connect Austria, Slovenia, Croatia, Hungary, and Serbia. This area hosts the world's first 5-country UNESCO Biosphere Reserve. Amazing Amazon of Europe as a leading sustainable cross-border tourism destination, offers comfortable adventures on the river, cycling and forest paths combined with authentic local natural, cultural and culinary experiences. It has its own AoE Booking Center that designs custom-made packages and provides support to the travellers on every step of their journey.

In the destination, three flagship tourism products are available for visitors:

1. **Amazon of Europe Bike Trail**: a bookable long-distance cycling trail offering a combination of individual freedom, high quality service, comfort, and safety.
2. **Amazon of Europe River Journey**: exploring the Amazon of Europe from water perspective paddling in a canoe or kayak on Mura, Drava and Danube.
3. **Amazon of Europe Amazing Moments**: authentic experiences of the destination with active engagement of the travellers.

3.2.1   Amazon of Europe Bike Trail

The Amazon of Europe Bike Trail is a transnational long-distance cycling trail offering you a unique opportunity for cycling holidays. It follows the natural meanders of the rivers Mura, Drava and Danube crossing Austria, Slovenia, Hungary, Croatia and Serbia. You can cycle more than 1,250 km through the world's first 5-country UNESCO biosphere reserve where you can discover natural river landscapes of pristine beauty, floodplain forests and beautiful cultural landscapes and villages. There are 27 stages, 11 on the North and 16 on the South route, offering unique sights, various activities and genuine hospitality which you will carry in your heart and memories forever. The Amazon of Europe Bike Trail has its own Service & Booking Centre where you can book a full-package cycling holidays. Our product is unique, since it allows you to combine individual freedom with service, comfort, and safety. By booking cycling holidays with us you also support nature conservation programmes for endangered habitats and species in the region.

Detailed information is available at the product website: www.aoebiketrail.com.

Figure 6: Map of the Amazon of Europe Bike Trail (Iskriva and WWF Austria)
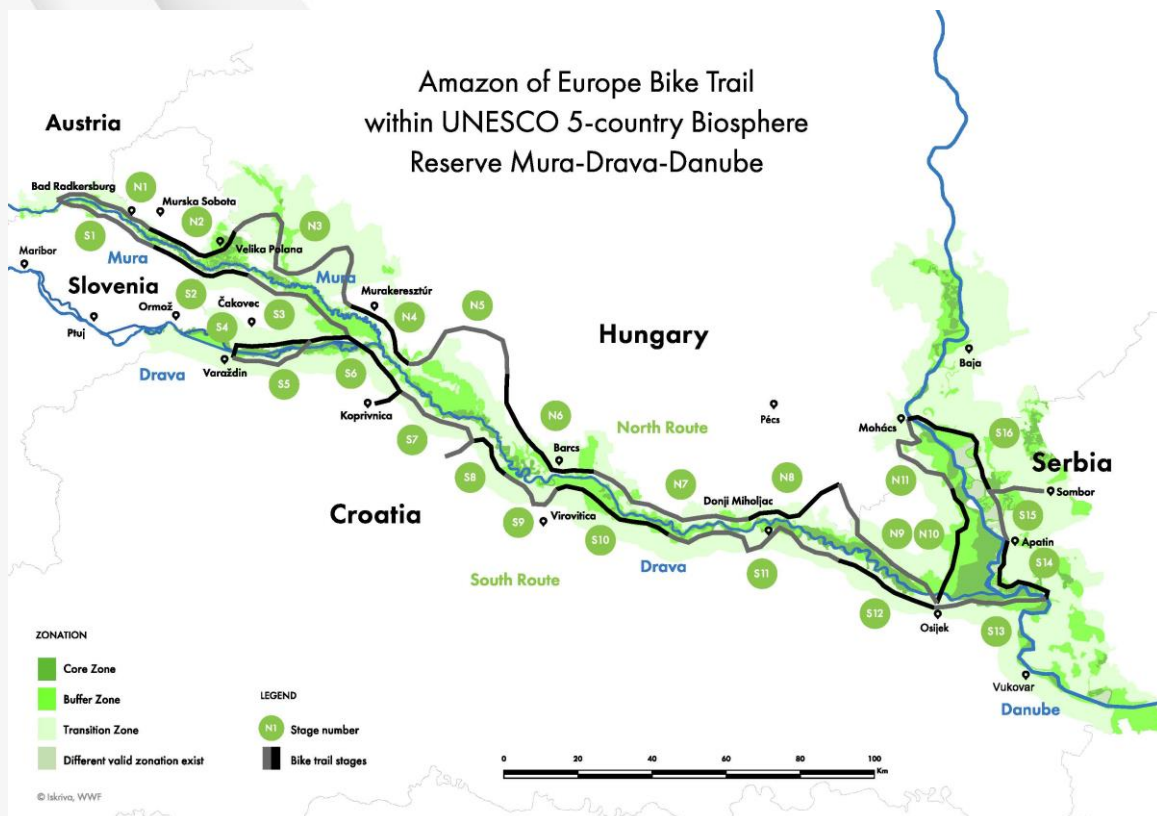
3.2.2 Amazon of Europe River Journey

Amazon of Europe River Journey has two types of group programmes which are organised by the Amazon of Europe Booking Center. The group programmes are presented below, offering paddling in canoe or kayak in one of the last free flowing river system in Europe – Amazon of Europe.

Big River Journey Mura – Drava – Danube

Big River Journey is an 8-day programme that will take the visitors through 4 out of 5 countries which form the UNESCO 5-Country Biosphere Reserve Mura-Drava-Danube. In 8 days, they will experience the nature of the Drava river. The flow of Drava River is suitable for paddling beginners and will reward them with nice flow and beautiful meanders. Starting at the confluence of Mura-Drava in Legrad, they will be paddling on the borders between Croatia and Hungary, and finishing at the mighty Drava-Danube confluence and world-famous Nature Park Kopački Rit. Along the way, they will meet the amazingly hospitable locals who will share their cultural and natural uniqueness.

Free-flowing River Journey Mura-Drava

Free-flowing River Journey Mura-Drava is a 5-day programme where the visitors experience paddling two mighty free flowing rivers, Mura and Drava. While paddling on the Mura river they will pass three countries of the biosphere reserve with a great number of rare internationally endangered habitat types and wildlife species. On the journey they will meet hospitable locals from three different cultures telling their story of living together with river and nature. On the confluence of two rivers Mura and Drava in Legrad they will experience great power of rivers merging into one. Drava will reward them with diamond blue colour and meanders full of birds of all kind. Join us on adventure of your lifetime by paddling in canoe or kayak in one of the last free flowing river systems in Europe – Amazon of Europe.

Figure XY:

3.2.3 Amazon of Europe Amazing Moments

AoE Amazing Moments are the authentic experiences of the destination which are combined with the AoE Bike Trail or AoE River Journey. The local hosts will welcome the guests with their true hospitality and the visitors will be actively engaged in a special moment that focuses on:

- discovering the forests and wildlife along the rivers,
- sensing the cultural highlights and the Pannonian soul, or
- immersing into culinary delights where all their senses will be pampered.

Examples of authentic Amazing Moments include:

- Water tour on three rivers in Kerkaszentkiraly, Hungary
- Husk Weaving Workshop in Mala Polana, Slovenia

- Invisible companions (Birdwatching) in Sveti Martin na Muri, Croatia
- Pottery Workshop at Center Duo in Veržej, Slovenia
- Experience the Kaszo forest, Hungary
- Hands on clay – Unleash your creativity in the pottery course, Hungary
- In pursuit of gold – Revival of the gold panning tradition, Međimurje, Croatia
- The Drava River Adventure Croatia – Experiencing the riverine landscape, Varaždin, Croatia
- Village of Naïve Art – Experience and learn the art of naive painting in Hlebine, Croatia
- Once upon a time – The life and food habits of the „Šokci" people in Bački Monoštor, Serbia
- On the track of the Donau Schwaben – Historical city tour through Sombor city, Serbia
- Wildlife water tour Kopački Rit, Croatia
- Back in time – Historic city tour through Osijek, Croatia.

3.3   Joint strategic long-term development goals in the destination Amazing AoE until 2030

We have set the following commitments through which we will follow the vision and develop "a leading sustainable cross border tourism destination" until 2030:

1. All stakeholders in the region know the Amazon of Europe story, identify themselves with it and are able to present it in a comprehensive way.
2. The Amazon of Europe story and destination is a brand that is recognized across the globe.
3. Amazon of Europe Destination Development Organisation (DMO) is fully established and functional.
4. 8 Joint AoE Flagship Products (FSPs) are fully operational and profitable.
5. The infrastructure of all 8 FSPs is established and regularly monitored and improved.
6. AoE Collective brand and quality system is operational.
7. AoE Academy is functioning and is regularly improved.
8. AoE Business Hub is functioning and is regularly improved.
9. The public transportation networks enable the AoE visitors and residents to arrive and travel within the destination with ease.
10. A reliable, green AoE mobility network is fully functional and regularly monitored and improved.
11. A fixed compensation valorisation system – Give back to nature is operational.
12. A green behaviour valorisation programme is operational.
13. Climate neutrality of the AoE destination (all involved stakeholders) is achieved.

3.4 Strategic pillars of the destination

To achieve the set commitments and follow the set vision and mission statement, a strategic model, consisting of 5 main pillars was identified, highlighting the main areas of focus in the development of the Responsible Green Destination Amazon of Europe. The pillars are presented in the following 5 subchapters and shown at the figure below.

1. Product & Quality Management
2. Regional Uptake
3. Marketing
4. Infrastructure
5. Ecological Sustainability

Figure 7: Strategic pillars of the development of the Amazon of Europe destination

3.4.1 Product & Quality Management

For a joint destination, joint quality and management standards will be set, which will enable a joint development. This must take place in the areas of tourism- and with tourism related products, services and events.

In all the mentioned areas, the focus in developing the standards will be given to:

- Sustainability
- In-depth tourism experiences
- Local inclusion
- Short supply chains
- Net carbon neutrality
- Environmental stewardship
- Safety / health
- Outdoor and adventure tourism
- Resilience

- The digitalisation of natural and cultural heritage to develop unique digitally enriched products of the tangible and intangible natural and cultural heritage. (This can be understood as a user-oriented development of new products and services that use the potential of new technologies (augmented reality, 3D scanning and 3D printing, web platforms, …), while respecting the natural and cultural heritage and its protection regimes to develop new knowledge and skills (art & design thinking, business modelling, user experience, digital marketing, …).

A system of quality and origin of products and services will be established for all accompanying stakeholders of identified gastronomic/rural/outdoor micro destinations in the joint macro destination Amazon of Europe. Horizontal networks will connect the same kind of providers which in the so-called business incubators share knowledge and form a connected destination offer also in conjunction with other providers in the vertical networks. This is how great guided experiences are created not just on the level of each brand and destination, but also on the regional, national and even international level.

In Slovenia, the example of best practice is the model "Authentic from Slovenia", which is based on systematic integration, training, consulting, quality assessment, certification process, establishing a marketing, sales, logistics and continuous quality assurance system through planned monitoring of product quality and origin. This model is already connecting more than 40% of Slovenia with collective unique regional collective brands.

The implementation is a long process, taking place on 3 timely and developmentally identified levels. The final goal is that the destination offer would be certified by one collective umbrella brand, which connects all stakeholders in the macro destination Amazon of Europe, but on the other hand, micro destinations will develop their own collective brands with short supply chains, which distinguish them with local added value. This process benefits all stakeholders.

Table 6: Product & Quality Management - Objectives and action plan

	1	2
Objective	**AoE Joint flagship products (FSPs) (AoE BT, River Journey, Amazing Moments, etc.)**	**AoE Collective brand and quality system**
Action	Network for each flagship product (FSP) of the AoE destination	Establishment and implementation of a collective brand & quality system network in the AoE destination
Activity	Activities for each FSP 1. Identification and setting up a network of each FSP 2. Identification of exact chain of action with stakeholders for each FSP 3. Quality and management standards identification and implementation 4. Education, skill building and further development of each network	Activities for each element (products, services, events, ambassadors) of the collective brand system 1. Identification and setting up a network of experts for each element in cooperation with the AoE Academy (presented in Regional uptake pillar) 2. Identification and setting up a network of providers of each element 3. AoE Adaptation of quality standards for each element 4. Education on product development and its visual identity, study tours

		5. Certification system for products, services, events and ambassadors 6. Establishment of an evaluation system for monitoring and further development of the certified offer 7. Marketing, sales, distribution and logistics 8. Establishment of a presentation and sales center in each NUTS3 region for certified elements
Responsible beneficiary	TZMZ + ISKRIVA + TRAIL ANGELS	ISKRIVA + TZMZ
Role of DDO founders	Actively cooperate in activity implementation	Actively cooperate in activity implementation
Deadline for implementation	2 Additional Flagship products per 4 years	The whole certification system can be developed until 2027. Certification system establishment timeline: 1st year: handicraft & food products 2nd year: services (catering, accommodation & experiences – WSs, etc.) 3rd year: touristic and with tourism related events 4th year: Identification and certification of the AoE ambassadors 5th year: Presentation and sales center in each NUTS3 region
Estimated value	Depending on the scope of products	Cca. 45.000 €/year per NUTS3 region (not including the marketing and sales channels and promotional materials)
Source of financing	Transnational project, cross-border projects, national projects, LAG projects, municipal financing, private financing.	Transnational project, cross-border projects, national projects, LAG projects, municipal financing.

3.4.2 Regional uptake

Regional uptake represents the local and regional identification with the joint destination Amazon of Europe, and how such identification can be achieved. Firstly, there has to be a joint development consortium – The AoE Destination Development Organization, which serves as the governing and stewarding body, taking into account the tourism development, as well as nature conservation.

Secondly, all stakeholders in the destination must be informed, connected and educated on the expected quality of the incoming visitors, and the ones complying with the set quality standards should be rewarded with a certification scheme. This will help create a mentoring environment - the Amazon of Europe Academy and increase the retention of local talents.

Last, but not least, a business hub must be created, which will enable the networking, retention and upgrade of the know-how among the local talents, NGO's, educational institutions, SME's, and public institutions. This platform should not be limited only to tourism and with tourism related industries

but should cover as many areas as possible. Great emphasis should be given to improving digital literacy and know-how.

3.4.2.1 Amazon of Europe destination management: AoE Destination Development Organisation

Organizational structure of the destination

Key organisations dealing with tourism, regional development and nature conservation in the TBR MDD have agreed to create a joint management structure organisation with the aim of managing the Amazon of Europe destination. In the Amazon of Europe Bike Trail and Amazing Amazon of Europe projects, it was agreed that the organisation will be called **Amazon of Europe Destination Development Organisation (AoE DDO)**, and that interested partner organisations will join. The process of the establishment and joining of partner organisations is on-going in 2022. Further details have been specified in the Act on the establishment of the AoE DDO, and shall be elaborated in further documents that will define the functioning of the AoE DDO.

The goals of the Amazon of Europe Destination Development Organisation are:

- development and management of tourism products in connection with the Amazon of Europe Bike Trail and the Responsible Green Destination Amazon of Europe projects,
- development of new tourism products in accordance with the principles of sustainable development, with the aim of increasing added value in the region and in accordance with international standards,
- protection of natural and cultural heritage in the TBR MDD area, with the support of a valorisation program,
- sustainable development of the TBR MDD area according to the principle "good for nature, good for people".

The AoE DDO carries out the following activities:

- participation in the creation of a comprehensive tourism offer in TBR MDD,
- promotion of the tourism offer in TBR MDD,
- providing quality content for the implementation of tourism activities,
- Amazon of Europe destination and tourism products brand development,
- raising the quality of tourism activities,
- development of information systems and tools to promote tourism and protection of the environment,
- networking and coordination of various organizations that want to actively and constructively participate in the activities of the AoE DDO,
- promoting stakeholder networking and cooperation for the joint development and marketing of products and services that contribute to the development and promotion of the area,
- organizing, conducting or participating in the organization of tourism, educational, entertainment, and other events,
- protection of the environment, natural and cultural heritage and folk traditions,
- design and publishing of publications and printed materials,
- informing target groups,
- cooperation with related associations and organizations in all countries,

- informing members and the public about the problems and progress in the field of operation of the AoE DDO,
- commitment to respect the ethical and moral principles of the profession in the operation of the AoE DDO,
- striving for a high professional level of the AoE DDO's work.

3.4.2.2   AoE Academy for tourism development

The academy connects local talent (individuals / start-ups / SMEs) in the tourism and with tourism related industries with a network of experts, mentors, educational institutions and the "local economy".

The vision of the AoE Academy is:

Development of high-quality offer with local added value and its holistic unified visual identity (branding) under a collective umbrella brand.

The purpose of the academy is to:

1. Increase the quality of products and services with local added value
2. Create local jobs with higher added value
3. Retain talents/providers in the tourism and with tourism related industries in the region
4. Contribute to economic development of the region
5. Increase the quality of life and well-being for the local population

This will be achieved through the unification of the quality standards in product and service development through a certification model (focus on start-ups and SMEs).

The implementation of the AoE Academy will be supported through European, cross-border and national funds, as well as directly through the economy via AoEs own booking platform. This combination of funds ensures a stable and resilient development of a common offer with local added value and consequently, of the joint destination Amazon of Europe.

3.4.2.3   Business platform – AoE hub

The Business platform connects local talents from all industries with a network of experts, mentors, educational institutions and the "local economy".

The vision of the Business-hub is:

Provide talented and success driven individuals and SMEs in the Amazon of Europe destination with an environment of mentored development in the field that inspires them.

The platform consists of the following stakeholders:

Supported stakeholders:

- Individuals
- Sports clubs / Cultural clubs / Organizations
- SMEs

The mentoring network / capacity builders:

- Active / retired successful individuals (from various fields) – the mentors
- SMEs – benchmarks

- Educational institutions
- The investors – economic and "capacity" leaders of the destination AoE (Technix, Podravka, RIMAC, Radenska, Carthago, Roto …)

The purpose of the AoE hub is to connect businesses and educational institutions, with the aim to upgrade and retain the local / regional / destination know-how. Through developing such an environment, companies (from large to small employers) can develop a socially responsible story and raise the company's reputation and awareness by supporting the local talents through mentorships, scholarships, or sponsorships. Raising awareness about digital solutions and the utilisation of digital tools e.g. for benchmarking and performance monitoring as well as guiding companies with recommendations to improve and measure the improvements etc. no matter the industry, should receive special attention.

Table 7: Regional Uptake - Objectives and action plan

	1	2	3
Objective	Fully established and functional DDO (2023).	AoE Academy.	AoE Business Hub.
Action	Active and ongoing education, coordination, support and further development of the AoE network of public and private organisations for a sustainable development of the AoE destination.	Development and recognition of a smart, sustainable, outdoor tourism destination AoE with its member network.	Development and recognition of a smart, sustainable, accessible, and productive environment in the AoE region.
Activity	1. To engage tourism boards, regions, municipalities 2. On-going enlargement of the AoE network in public and private organisations 3. Internal promotion of the AoE destination 4. Active role of the DDO as steward of the destination (Conservancy) 5. Yearly events of the DDO - networking 6. Development of international and cross-border projects that support AoE objectives 7. Active cooperation with regional and local levels to develop other areas	1. Increase the quality of products and services with local added value 2. Create local jobs with higher added value 3. Retain talents/providers in the tourism and with tourism related industries in the region 4. Contribute to economic development of the region 5. Increase the quality of life and well-being for the local population	1. Establishment of a mentoring network of capacity builders 2. Promotion of the mentoring network to the supported network 3. Support in establishing a dialogue between the talent and mentor 4. Networking among providers on different levels to share tacit knowledge (e.g. digitalisation + handicraft + design + marketing + sales) 5. Use of digital tools for benchmarking and performance monitoring

			6. On-going enlargement of the Business hub
	supporting the destination (recycling, water supply, internet coverage etc.?)		
Responsible beneficiary	KKZ	ISKRIVA	Westpannon
Role of DDO founders	Actively cooperate in activity implementation	Actively cooperate in activity implementation	Actively cooperate in activity implementation
Deadline for implementation	1. All activities are on-going 2. International projects: 1 project / 2 years 3. Cross border projects: 2 projects / programme	2027	Starts with launch of Smarter AoE – end of 2022. Then on-going.
Source of financing	DDO fee + bookings + Projects + private investments + public + tourism tax	Projects	Projects + business sponsorships

3.4.3   Marketing

Since we are developing the first 5-country destination in the world's first 5 country biosphere reserve, the internal marketing will play as much of a crucial role as the external marketing of the destination.

Internal Marketing

The main objective of the internal marketing campaign is that:

All stakeholders know the Amazon of Europe story, identify themselves with it and are able to present it in a comprehensive way.

To achieve this, the academy and the networking platform will be utilised. This will build the capacity and understanding of the importance of joint quality standards (visual identity and brand book, regional communication strategies, brands, products and services). The later will unify the understanding of the expectations of the incoming tourists.

The DDO will also develop a Toolkit for the service providers.

The identification of the stakeholders with the Amazon of Europe story will be strengthened through the following annual networking events (the attendance is mandatory for all DDO members, whereas all stakeholders are invited – live or online where possible):

1. DDO annual meeting

2. Amazing AoE conference

3. Study visits and networking

4. Fairs of local products

External Marketing

To attract the tourists and bring them into the destination Amazon of Europe, external marketing plays the most important role.

The marketing campaigns will be designed with the purpose of creating a pull through the 3 phases:

1. Awareness
2. Interest
3. Desire

The main target markets for the Amazon of Europe external communication activities are the following, ranked by their importance:

1. DACH market – Germany, Austria, Switzerland
2. BENELUX – Belgium, Netherlands, Luxemburg
3. North America – Unites States of America and Canada
4. Local – Austria, Slovenia, Hungary, Croatia, Serbia
5. CZ/POL – Czech Republic and Poland

For reaching the mentioned target groups online and offline media will be utilized.

Online:

1. Destination Website & Booking platform
2. Social media (IG, Fb, Ytb, TikTok)
3. Online tourism conferences
4. Tourism blogs
5. External booking/tourism platforms
6. Back-linking by all stakeholders to the destination website

Offline:

1. Tourism fairs and events
2. Internal written publications (Own travel guides and other promotional materials)
3. External written publications (Magazines, Travel guides, etc.)
4. Cooperation with tourism organizations and agencies
5. Infrastructure of the trail and resting places, selfie frames etc.

Sales of the flagship products is licensed by the DDO to the official AoE Booking Center.

Direct Sales

Amazon of Europe Bike Trail Booking Center

Indirect Sales

Cooperations with external booking platforms and travel agencies.

Table 8: Marketing - Objectives and action plan

	1	**2**
Objective	All stakeholders know the Amazon of Europe story, identify themselves with it and are able to present it in a comprehensive way.	Whole world knows the Amazon of Europe story.
Action	Clear joint internal marketing in the destination Amazon of Europe.	Clear joint external marketing of the destination Amazon of Europe.
Activity	Main activities: 1. Development of a 2030 detailed internal marketing plan 2. Development, implementation and evaluation of yearly action plans Additional activities: 1. Established network of TICs 2. Developed destination Brandbook 3. Joint network platform 4. Merchandise design, development, logistics, sales	Main activities: 1. Development of a detailed 2030 external marketing plan 2. Development, implementation and evaluation of yearly action plans Additional activities: 1. Destination landing-page 2. Destination social media channels 3. Destination promotional materials 4. Developed destination guidebook (updated issue each 2 years) 5. Develop FSP guidebook (updated issue each 2 years), 6. Merchandise design, development, logistics, sales
Responsible beneficiary	Crost + OBŽ	ISKRIVA
Role of DDO founders	Actively cooperate in activity implementation	Actively cooperate in activity implementation
Deadline for implementation	Development of the 2030 plan and the 1st yearly action plan by 2023, then on-going.	Development of the 2030 plan and the 1st yearly action plan by 2023, then on-going.
Source of financing	Project Amazing AoE for 2030 plan. Yearly plans by DDO.	Project Amazing AoE for 2030 plan. Yearly plans by DDO.

3.4.4 Infrastructure

Breath-taking natural and cultural heritage has to be backed with appropriate physical and digital infrastructure to get the visitors to the location safely, with minimised ecological footprint, in a timely manner, with optimised visitor flows to avoid overcrowding and in accordance with expected quality standards. To achieve this, three work packages have been identified in the pillar of Infrastructure, all connected by digitalisation, monitoring the visitor flows.

The purpose of this pillar is to analyse, manage, adapt and influence further development of the road and public transportation infrastructure to- and within the destination, mobility service within the destination and the outdoor tourism infrastructure within the destination.

3.4.4.1 *Flagship tourism products infrastructure*

The outdoor infrastructure of each flagship tourism product has to first be elaborated in a development plan. Based on the plan, the implementation and maintenance of each FSP infrastructure network must take place. This includes the signage in physical and digital form. Acquisition of an internationally approved certification (e.g. ADAC or others, depending on the FSP) would be very beneficial for each FSP, since more and more attention is given to such international certification rankings and platforms, as discussed in the chapter about tourism trends.

What is crucial in ensuring that the FSPs are consistently the USP's of the destination Amazon of Europe is the process of on-going optimisation of its infrastructure, where the monitoring and evaluation should be conducted both physically and digitally.

3.4.4.2 *Public transportation networks*

The purpose of this pillar is to analyse, manage, adapt and influence further development of the road and public transportation infrastructure to- and within the destination. How to approach this major task should first be elaborated through a Public transportation optimisation plan (including the optimised time schedules, suggestions for adapted vehicles to support the use of public transport for FSPs et.c), which should then be presented to all stakeholders of public transport in the AoE, including the public transport companies and deciding regional bodies. What is crucial, is that the DDO cooperates in the implementation, monitoring and evaluation of the optimised public transportation networks. Through the presentation of digital tools and solutions, the DDO would aid the digital transformation of the regional public transport networks and therefore gain trust with the deciding regional bodies.

3.4.4.3 *AoE mobility service network*

Since the optimisation of the public transport to fully support the FSPs is farfetched, at least in a short timely manner, a specialised mobility network should be established within the destination, taking care of shuttle services, luggage transfer and transfer back to the start of the journey.

To achieve this, a AoE mobility development plan should be developed, encompassing the organizational structure and the e-mobility transformation plan 2030. Based on the latter, the mobility network plan should be established on a national, regional and local level. Becoming part of the network has to be regulated by a standardisation scheme and granted by awarding a AoE mobility partner certificate. The development plan and network should be constantly monitored, evaluated and updated. Only through on-going optimisation will the mobility network become a benchmark among long distance, multinational tourism products.

	1	2	3
Objective	Improved Flagship Tourism Product (FSP) infrastructure.	Improved public transportation networks.	Reliable AoE network of mobility services.
Action	Safe and optimised FSP infrastructure networks (road surfaces, river access, signage, parking, (bike, canoe) stops, outdoor centers, equipment rentals, charging stations…).	Well-functioning public transportation networks, supporting FSPs (bus, train, airport, ferries).	Well-functioning AoE mobility network (shuttle, luggage transfer, back transfer).
Activity	1. FSP infrastructure development plan (for each FSP) 2. Development and maintenance of (each) FSP network 3. Development and maintenance of the orientation and information signage 4. Standardisation and certificate development / acquisition (e.g. ADAC) 5. On-going optimisation of the FSP infrastructure (monitoring and evaluation).	1. Public transportation optimisation plan (including public transport companies) 2. Presentation of the optimisation plan to the deciding regional bodies 3. Cooperation of the DDO in the implementation, monitoring and evaluation of the optimised public transportation networks.	1. AoE mobility development plan (organizational structure, e-mobility transformation plan) 2. AoE mobility network plan (national, regional, local level) 3. Standardisation and certificate development 4. On-going optimisation of the AoE mobility network (monitoring and evaluation), also using digital tools for monitoring (tourist) flows
Responsible beneficiary	Westpannon + protected area coordinators	OBŽ	VZZ (Feel Active) + Westpannon + 8Cities
Role of DDO founders	Actively cooperate in activity implementation	Actively cooperate in activity implementation	Actively cooperate in activity implementation
Deadline for implementation	On-going – related to each FSP. AoE BT in its entirety off the main road by 2030.	Railway connections along the whole Aoe by 2050 (with bike transport possibility).	Plan developed by end of 2022. Certification system established by 2024. The AoE mobility network entirely transformed to e-mobility by 2030.

Source of financing	Projects on all levels	Projects on all levels	DDO and projects on all levels

3.4.5 Ecological sustainability

The tourism destination Amazon of Europe is located in the world's first UNESCO 5-country biosphere reserve Mura-Drava-Danube. As such, ecological sustainability has to be one of the top priorities of the DDO. With this purpose, two work packages have been identified – first, the "Give back to nature" programme, ensuring a fixed compensation fee for each visitor arriving in the destination and taking part in various FSPs; second, the "Green AoE card", a reward system for green, sustainable behaviour within the destination. Both work packages rely largely on digital solutions for managing and supporting the networks of visitors and stakeholders.

3.4.5.1 Fixed compensation: Give Back to Nature Programme

The fixed compensation programme has already been implemented in the first FSP, the AoE Bike Trail, and is called "Cycle for Nature". The upgrade and adaptation of the latter should be elaborated in a manner that fits all FSPs. The developed concept must also include how the collected budget will be used – who are the nature conservation projects carriers (receivers of funds), what is the main focus and what are the supporting goals to ensure climate neutrality of all AoE stakeholders by 2030.

It is crucial that the Give Back to Nature programme is actively present in the promotional activities of the destination since it can be seen as one of the USP's of the destination.

3.4.5.2 Green behaviour valorisation programme: Based on ecological footprint calculator

The best incentive for the visitors to act ecologically responsible is the introduction of a reward system for green behaviour. In a simplified manner, this is a reward system, where each individual collects rewards in terms of points or discounts if they act ecologically sustainable.

Two main calculation parameters are:

1. Ecological footprint of the arrival to the destination
2. Ecological footprint with the behaviour in the destination

An example of the latter could be the decision to visit another natural or cultural heritage site, because the one they primarily wanted to visit is flagged as overcrowded or close to the limit, whereas they can get a points for visiting a less crowded location. These points can then be redeemed as discounts in partner facilities for e.g. meals, souvenirs, entrance fees etc.

The detailed plan of the Green AoE Card work package should first be elaborated, including as many stakeholders and touristically interesting locations (natural and cultural) as possible to create a digital twin of the destination. The first steps in this direction have already been done in this project, through the RGD TIM implementation to monitor sustainability. Once the network is established, the implementation of the Green AoE Card should take place with regular monitoring and evaluation of the programme benefits. The programme should be regularly optimised to best serve its purpose and not to fall behind the global trends but rather set trends as a benchmark.

It is crucial that the Green AoE Card programme is actively present in the promotional activities of the destination since it can be seen as one of the USP's of the destination.

3.4.5.3   Climate neutral destination by 2030

The purpose of both previously mentioned work packages is to help achieve the objective of Climate neutrality of the tourism destination Amazon of Europe and its stakeholders by 2030. It is unrealistic to expect climate neutrality of every household, business or institution in the area of the Amazon of Europe. We are targeting climate neutrality of the stakeholders of the Amazon of Europe tourism destination – meaning the service providers and the tourists. In addition, local added value could be created through exploiting climate change and seeing the latter as an opportunity to differentiate the destination from the competition through digital solutions and tools.

The detailed plan for the latter should be elaborated in a "Climate neutral destination strategy", backed with several action plans on regional levels for green adaptation opportunities on local, regional, national and international levels. It also has to encompass the previously mentioned "Give Back to Nature" and "Green AoE Card" programmes.

The implementation of the individual action plans should take place with regular monitoring and evaluation to ensure on-going optimisation of the actions to achieve the set objective.

Table 10: Ecological sustainability - Objectives and action plan

	1	2	3
Objective	Established fixed compensation valorisation system – Give back to nature	Established green behaviour valorisation programme – e.g. Green AoE card	Climate neutral destination by 2030
Action	Ensured fixed funds for ecological conservation projects	Established Green AoE card system based on ecological footprint calculator	Exploit climate change as an opportunity for local added value and reach climate neutrality by 2030
Activity	1. Upgrade and adaptation of the Cycle for Nature programme to other FSPs 2. Implementation, monitoring and evaluation of the programme and the use of its funds 3. Integration of the valorisation system in marketing communication strategy as USP	1. Development of the Green AoE card programme 2. Establishment of the Green AoE card stakeholder network (obtaining and consuming benefits for green behaviour) 3. Implementation, monitoring and evaluation of the programme benefits 4. Integration of the programme in marketing communication strategy as USP 5. On-going optimisation of the programme	1. Development of a climate neutral destination strategy (e-mobility networks, green adaptations of providers) 2. Development of action plans on regional levels for green adaptation opportunities (destination + providers) 3. Possibility to switch between indoor and outdoor activities dependent on climate conditions 4. Tourism impact management and visitor flow

			management through Green AoE card programme 5. Integration of the objective in marketing communication strategy as USP 6. Implementation, monitoring and evaluation for on-going optimisation of the objective
Responsible beneficiary	CROST	WWF (Adria + Austria) + ISKRIVA + ARCTUR	CROST + ISKRIVA + ARCTUR
Role of DDO founders	Actively cooperate in activity implementation	Actively cooperate in activity implementation	Actively cooperate in activity implementation
Deadline for implementation	2023	2025	2030
Source of financing	Amazing AoE project	Projects	Projects

4 Socio-economic profile of the Amazon of Europe

This chapter provides a socio-economic profile of the Amazon of Europe area by comparing the key demographical indicators.

For defining socio-economic profile of the region, the data is collected on NUTS 3 level for the years 2018 and 2019 except for the data for the indicator Net migration plus statistical adjustment that is collected on NUTS 3 level for the years 2013-2019.

Sources of secondary data used: regional, national and Eurostat statistics.

Demographic indicators included in the analysis are:

- **Net migration plus statistical adjustment:** Net migration plus statistical adjustment is the difference between total population change and natural change where population change is the difference in the size of a population between the end and the beginning of a one year and natural population change the number of live births minus the number of deaths. The statistics on 'net migration plus statistical adjustment' are therefore affected by all the statistical inaccuracies in the two components of this equation, especially population change. The indicator shows the presence of either emigration or immigration in the area of interest (Eurostat, 2022).
- **Crude rate of net migration plus statistical adjustment:** Crude rate of net migration plus statistical adjustment is the ratio of net migration plus statistical adjustment during the year to the average population in that year. The value is expressed per 1.000 inhabitants (Eurostat, 2022).
- **Employment (1.000 persons):** The employment level is defined as the number people engaged in productive activities in an economy. The concept includes both employees and the self-employed. The two main measures used for employment are the number of persons employed or the number of employees (Eurostat, 2022).
- **Employment rate:** Employment rates are defined as a measure of the extent to which available labour resources (people available to work) are being used. They are calculated as the ratio of the employed to the working age population. The working age population refers to people aged 15 to 64. This indicator is presented as a percentage of working age population (OECD data, 2022).
- **GDP (gross domestic product) at current market prices:** GDP at current market prices is an indicator for a region´s economic situation. It reflects the total value of all goods and services produced less the value of goods and services used for intermediate consumption in their production. It's presented at current prices (Eurostat, 2022).

The calculations of the indicators for the Amazon of Europe area (Net migration plus statistical adjustment, Net migration plus statistical adjustment rate, GDP at current market prices (€/inhabitant), Employment (1.000 persons), Employment rate are based on the average values of all NUTS 3 regions included in the area.

Table 6 (below) shows the socio-economic profile of the Amazon of Europe area.

Table 11: Socio-economic profile of the Amazon of Europe area (EUROSTAT, 2022)

AMAZON OF EUROPE – year 2019	
Total surface of the region	30.253,89 km²
Number of inhabitants	2.215.577
Average net migration plus statistical adjustment for the year 2019	-439
Average crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for the year 2019	-3,4
GDP at current market prices for the year 2019 in million €	29.206,59
GDP at current market prices for the regions included in the Amazon of Europe for the year 2019	13.182,39
Employment (1.000 persons) for the year 2019	842,08
Employment rate for the year	38%

Figure 4 represents the age distribution of residents in the AoE. The diagram is based on the data from all NUTS 3 regions in the AoE.

Figure 8: Age distribution of residents in the AoE
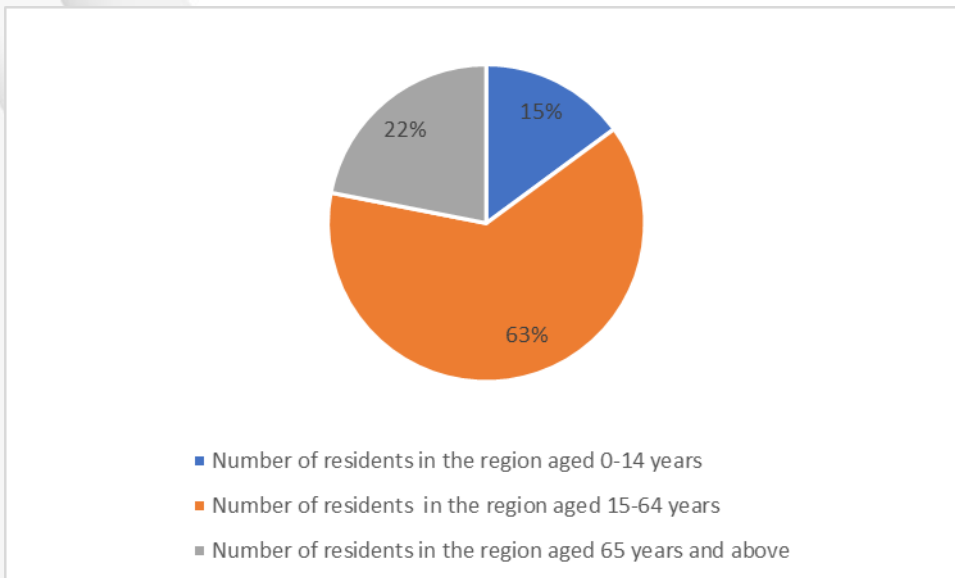
More than half of the residents of the AoE (63 %) are aged 15-64 years. The residents aged 65 years and above are the second largest group representing 22 % of all population. Residents aged 0-14 years represent 15%. Those percentages indicate the aging of population in the area.

Figure 9: Average net migration plus statistical adjustment of NUTS 3 regions in the Amazon of Europe for the years 2013-2019
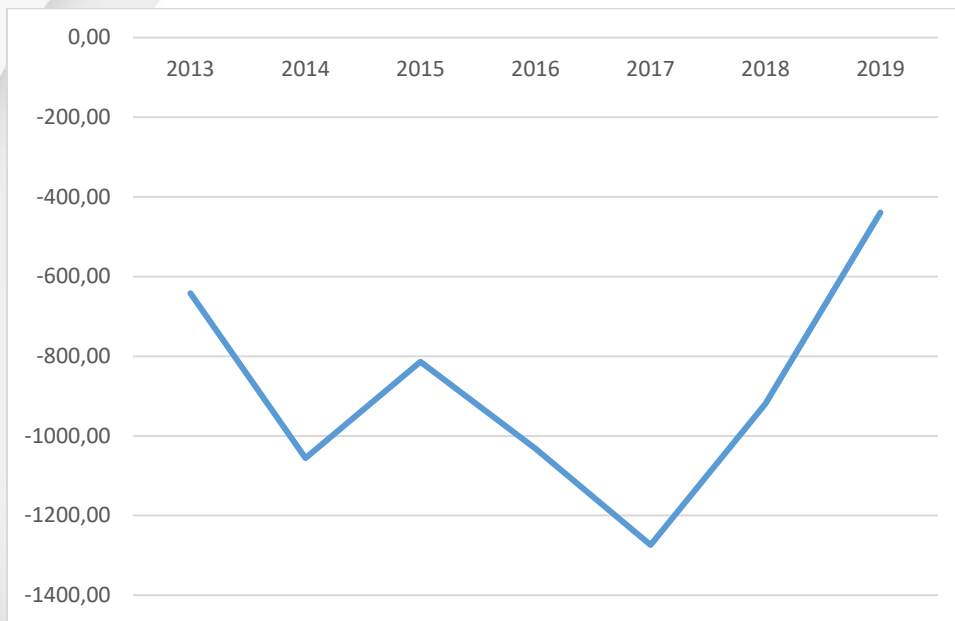
Average net migration plus statistical adjustment of NUTS 3 regions in the Amazon of Europe is negative for the years 2013-2019, meaning that there were more emigrants than immigrants in the Amazon of Europe region during that period. The diagram shows the trend in emigration of residents in the region for those years is slowly decreasing.

Figure 10: Number of inhabitants and crude rate of net migration in the Amazon of Europe area by NUTS 3 regions for the year 2019
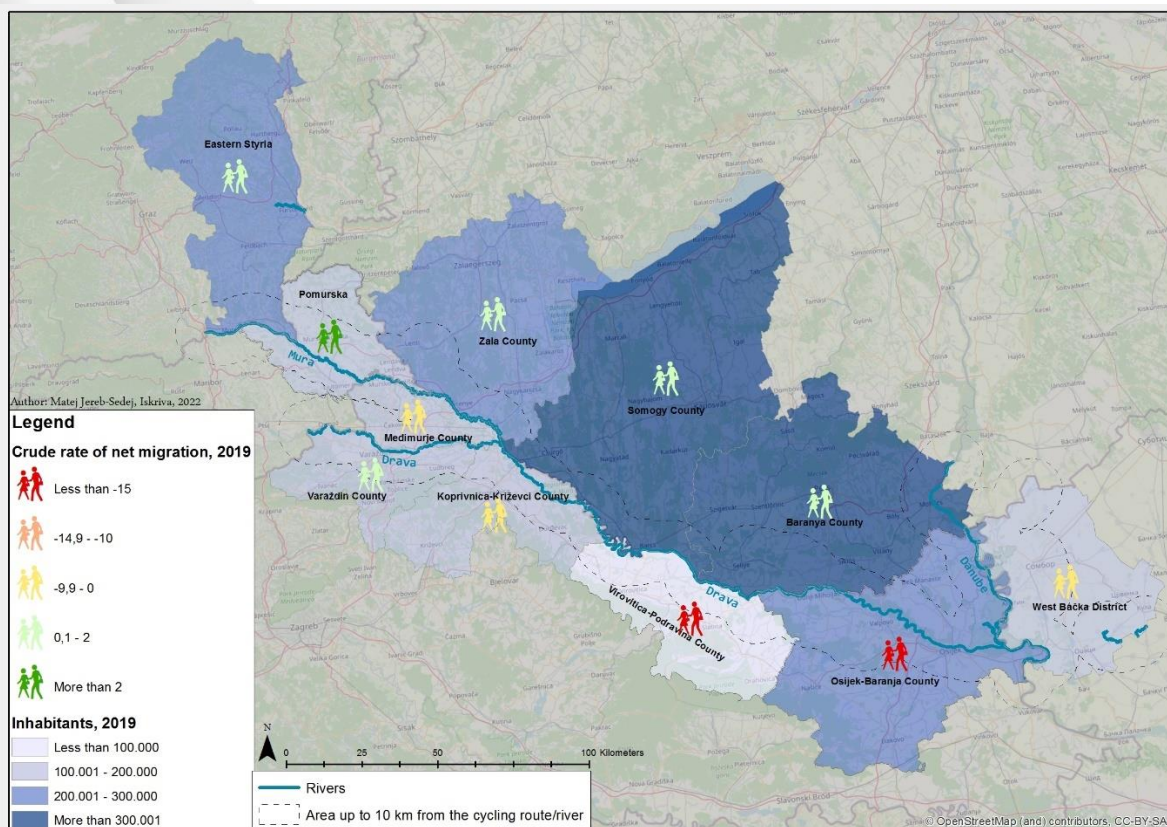
In the year 2019 the NUTS 3 region with the highest value of the Net migration plus statistical adjustment indicator is Zala county (456) and the region with the lowest value is Osijek-Baranja County (-2,557).

The NUTS 3 region with the highest value of the Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) indicator is Pomurska (4,3) and the regions with the lowest value are Virovitica-Podravina County (-15,8), followed by Osijek-Baranja County (-9,4). Comparing the data analysis of 2017, the crude rate of net migration plus statistical adjustment for both Virovitica-Podravina County and Osijek-Baranja County increased.

Table 12: GDP at current market prices (€/inhabitant) in the Amazon od Europe for the years 2017-2019 (EUROSTAT, 2022)

GDP at current market prices (€/inhabitant)				
YEAR			AVERAGE GROWTH RATE	
2017	2018	**2019**	**2017-2018**	**2018-2020**
2.523	2.644	2.777	10%	5%

*The data of West Bačka District is excluded from the indicator due to unavailability.

Figure 7 demonstrates that the values of the indicator GDP at current market prices (€/inhabitant) for the Amazon of Europe were growing significantly from the year 2017 to 2019. Average growth rate of the GDP at current market prices (€/inhabitant) for those years was 10. In the year 2019 the value of the GDP at current market prices in the Amazon of Europe was 2.777,00 €/inhabitant. However, remarkable differences in GDP between the NUTS3 regions of the Amazon of Europe are noticeable. In the year 2016 the highest value of GDP was recorded in Eastern Styria (8.799,78 €/inhabitant) and the lowest in Virovitica-Podravina County (579,44 €/inhabitant). Apparent difference is visible also between the average GDP of NUTS 3 regions of the Amazon of Europe (2.777,00 €) and the average national GDP of countries partially included in the area (20,620€). The data indicates that the regions of the Amazon of Europe are less economically developed than the national average.

Figure 11: GDP at current market prices (€/ inhabitant) in the Amazon of Europe area for the years 2017-2019
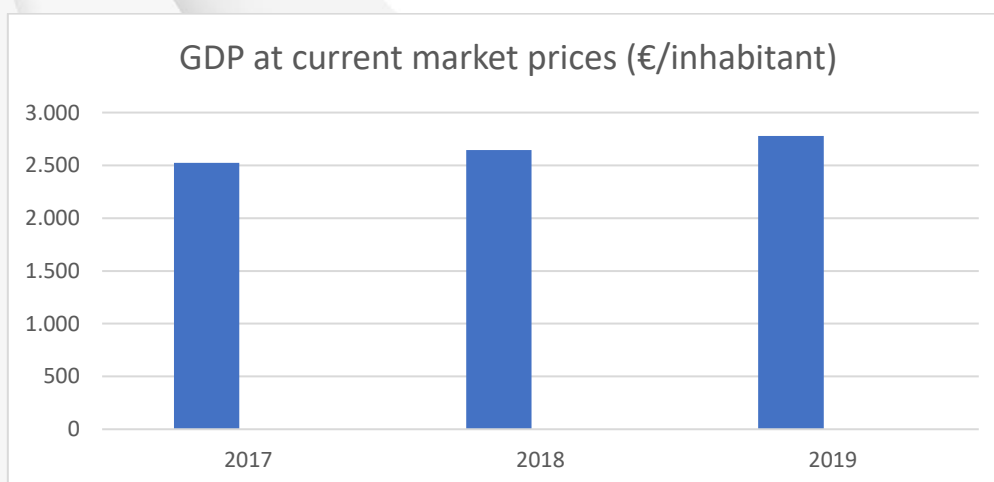
*The data for West Bačka District is not included in the analysis due to unavailability.

Figure 8 below demonstrates the growing trend of employment (1.000 persons) in the years 2015-2019 in the Amazon of Europe area. The employment rate for the area is 39,1% meaning that 39,1% of the available labor resources were being used. However, remarkable differences in employment between the NUTS 3 regions of the Amazon of Europe are noticeable. In the year 2019 the highest value of employment (1.000 persons) was recorded in Baranya County (134,9) and the lowest in Virovitica-Podravina County (25,65). In the same year, the highest employment rate was recorded in Eastern Styria (46%) but in declined when we compare the data from 2016 which was 67%.

Figure 12: Employment (1000 persons) in the Amazon of Europe area for the years 2015-2019
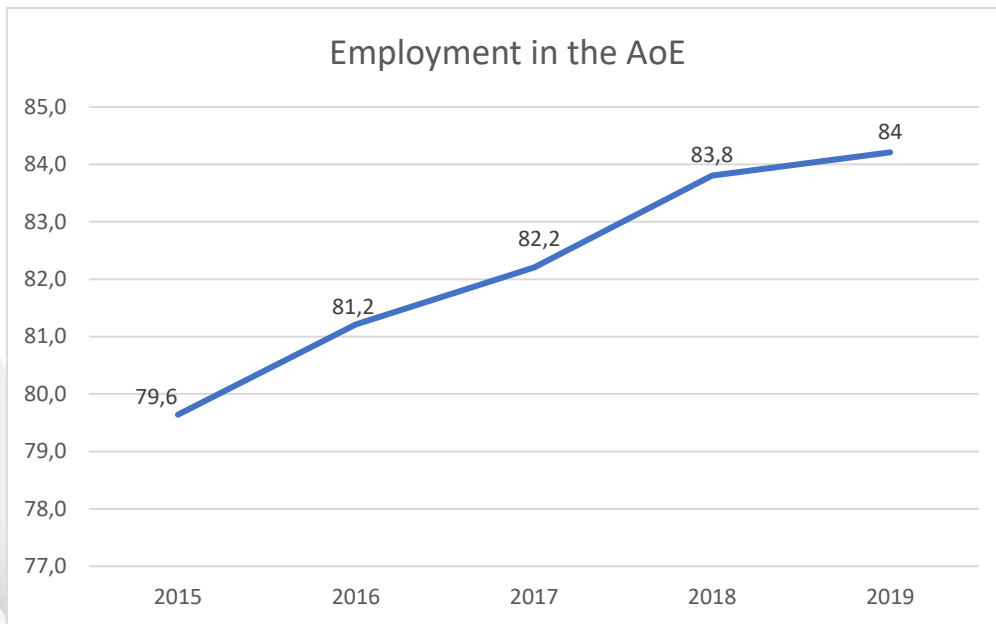
The figure 10 (on the next page) shows the population density, GDP at current market prices and employment rate in the Amazon of Europe area by NUTS 3 regions.

Figure 13: Density, GDP and employment rate in the Amazon of Europe area by NUTS 3 regions
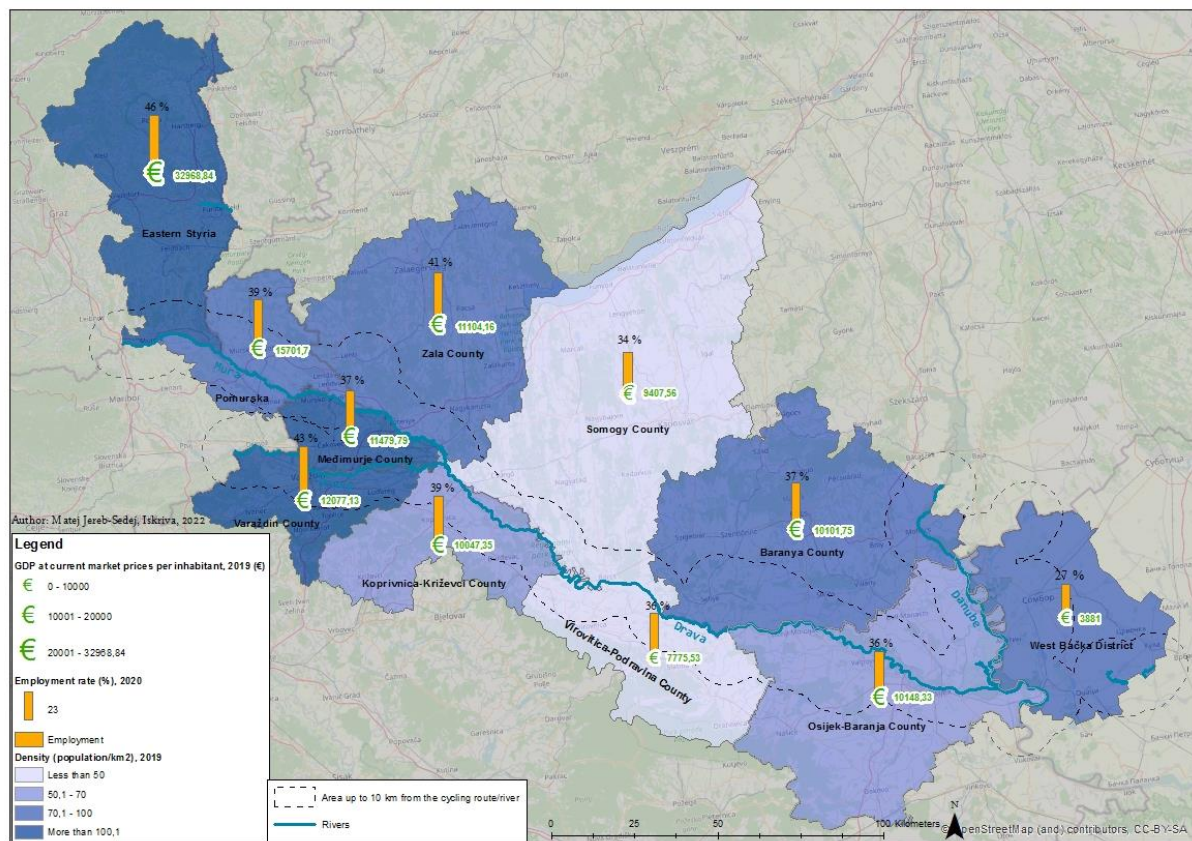
The results of the analysis of socio-economic indicators have shown that the border regions of the Amazon of Europe area are significantly less developed than the national average in the fields of GDP and employment. Moreover, the trend of emigration of residents is evident in those regions as well. Since those regions represent 8,5% of national territories, it's even more important that measures in the field of investment and development are implemented there in the future. The aim of the Amazing Amazon of Europe project is to contribute to the improvement of the economic situation in the area by developing and launching new flagship tourism products, in addition to the Amazon of Europe Bike Trail. These products will attract more visitors to the region and thus, stimulate the development of new touristic services that will create more jobs for local inhabitants. Most likely new businesses and jobs will positively affect the economic wealth of the region and decrease the phenomenon of emigration.

Socio-economic profiles of individual regions are presented more in details in the following subchapters.

4.1.1 Profile of Eastern Styria region

In Eastern Styria the indicator net migration plus statistical adjustment is positive for the years 2013-2017 and from 2015-2019 (with the exception of the year 2014) meaning that there were more immigrants than emigrants in this region during that period. Nevertheless, the diagram shows the trend in emigration of residents in the region for those years (with the exception of the year 2015 when there is a great reduction in emigration in comparison to immigration).

Table 13: Socio-economic profile of Eastern Styria region (EUROSTAT, 2022)

AT224 – EASTERN STYRIA -2019	
Total surface of the region	2.231,36 km²
Number of inhabitants	266.912
% of inhabitants in the country	21,47%
Net migration plus statistical adjustment	378
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	1,4
GDP at current market prices for the year 2019 in million €	8.799,78
GDP at current market prices per inhabitant for the year 2019	32.968,84
Employment (thousand persons) for the year 2019	123,3
Employment rate for the year 2020	46%

Figure 14: Eastern Styria - Net migration plus statistical adjustment for the years 2013-2019
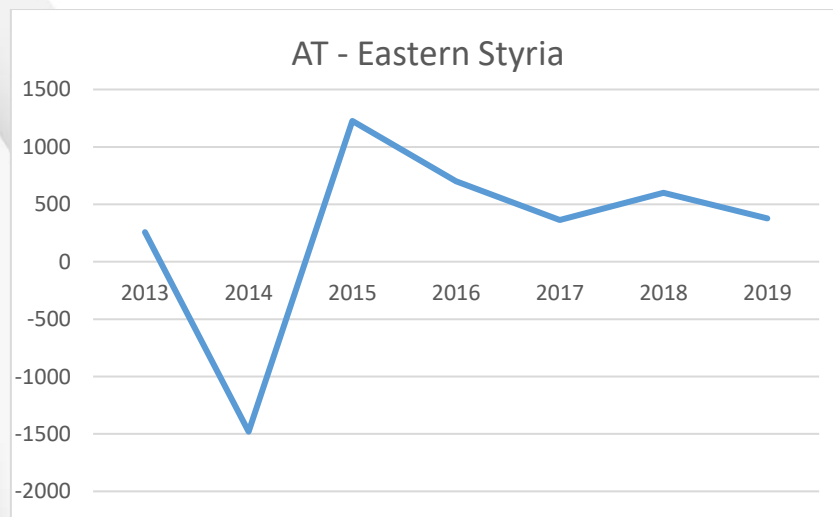
4.1.2 Profile of Pomurska region

In Pomurska region the indicator net migration plus statistical adjustment was negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. But from 2018 to 2020 the number of immigrants is gradually increasing.

Table 14: Socio-economic profile of Pomurska region (EUROSTAT, 2022)

SI031 – POMURSKA – year 2019	
Total surface of the region	1.337,00 km²
Number of inhabitants	114.287
% of inhabitants in the country	5,49%
Net migration plus statistical adjustment	489
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	4,3
GDP at current market prices for the year 2019 in million €	1.794,50
GDP at current market prices per inhabitant for the year 2019	15.701,70
Employment (thousand persons) for the year 2019	45,07
Employment rate for the year 2020	39%

Figure 15: Pomurska region - Net migration plus statistical adjustment for the years 2013-2019

4.1.3 Profile of Međimurje County region

In Međimurje County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period (except for the year 2015 when there is a slight reduction in emigration in comparison to immigration). From 2018 to 2019 and 2020 and further, the trend is expected to be positive as the diagram shows the trend in emigration of residents in the region for those years.

Table 15: Socio-economic profile of Međimurje County region (EUROSTAT, 2022)

HR046 – MEĐIMURJE COUNTY – year 2019	
Total surface of the region	729,00 km²
Number of inhabitants	109.232
% of inhabitants in the country	2,69%
Net migration plus statistical adjustment	- 308
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	-2,8
GDP at current market prices for the year 2019 in million €	1.253,96
GDP at current market prices per inhabitant for the year 2019	11.479,79
Employment (thousand persons) for the year 2019	40,58
Employment rate for the year 2020	37%

Figure 16: Međimurje County – Net migration plus statistical adjustment for the years 2013-2019

4.1.4 Profile of Osijek-Baranja County region

In Osijek-Baranja County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. But from 2018 to 2019, the Diagram shows the trend in immigration of residents in the region for those years as the number of emigrants was getting reduced.

Table 16: Socio-economic profile of Osijek-Baranja County region (EUROSTAT, 2022)

HR04B – OSIJEK-BARANJA COUNTY – year 2019	
Total surface of the region	4.155,00 km²
Number of inhabitants	275.056
% of inhabitants in the country	6,86%
Net migration plus statistical adjustment	-2.557
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	-9,3
GDP at current market prices for the year 2019 in million €	2.791,36
GDP at current market prices per inhabitant for the year 2019	10.148,33
Employment (thousand persons) for the year 2019	99,88
Employment rate for the year 2020	36%

Figure 17: Osijek-Baranja County – Net migration plus statistical adjustment for the years 2013-2019

4.1.5 Profile of Koprivnica-Križevci County region

In Koprivnica-Križevci County the indicator net migration plus statistical adjustment is negative for the years 2013-2019 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows the trend in emigration of residents in the region for those years. In addition, from 2017 to 2019, there is a reduction in the number of emigrants.

Table 17: Socio-economic profile of Koprivnica-Križevci County region (EUROSTAT, 2022)

HR045 – KOPRIVNICA-KRIŽEVCI COUNTY – year 2019	
Total surface of the region	1.748,00 km²
Number of inhabitants	107.076
% of inhabitants in the country	2,63%
Net migration plus statistical adjustment	-652
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	-6,1
GDP at current market prices for the year 2019 in million €	1.075,83
GDP at current market prices per inhabitant for the year 2019	10.047,35
Employment (thousand persons) for the year 2019	41,81
Employment rate for the year 2020	39%

Figure 18: Koprivnica-Križevci County – Net migration plus statistical adjustment for the years 2013-2019
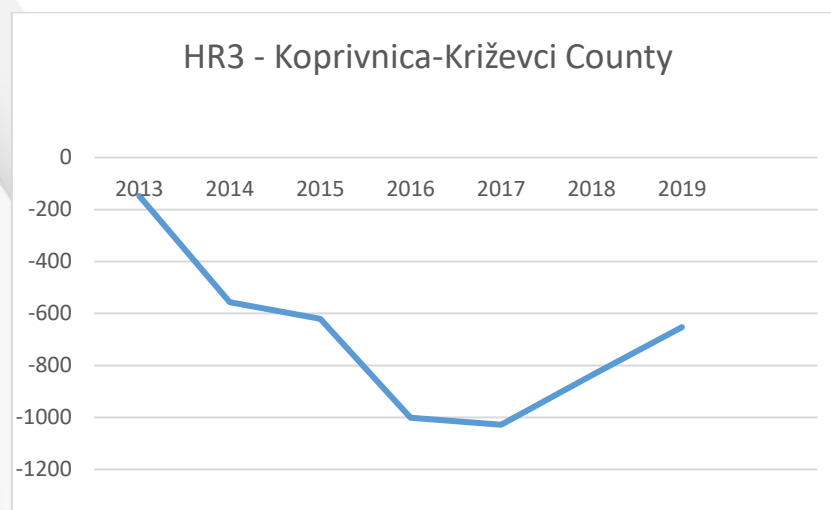
4.1.6 Profile of Virovitica-Podravina County region

In Virovitica-Podravina County the indicator net migration plus statistical adjustment is negative for the years 2013-2019 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows the trend in emigration of residents in the region for those years. But apart from that, from 2017 to 2019, there is a reduction in the number of emigrants.

Table 18: Socio-economic profile of Virovitica-Podravina County region (EUROSTAT, 2022)

HR048 – VIROVITICA-PODRAVINA COUNTY – year 2019	
Total surface of the region	2.024,00 km²
Number of inhabitants	74.521
% of inhabitants in the country	1,85%
Net migration plus statistical adjustment	-1.166
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	-15,7
GDP at current market prices for the year 2019 in million €	579,44
GDP at current market prices per inhabitant for the year 2019	7.775,53
Employment (thousand persons) for the year 2019	26,59
Employment rate for the year 2019*	36%

Figure 19: : Virovitica-Podravina County - Net migration plus statistical adjustment for the years 2013-2019
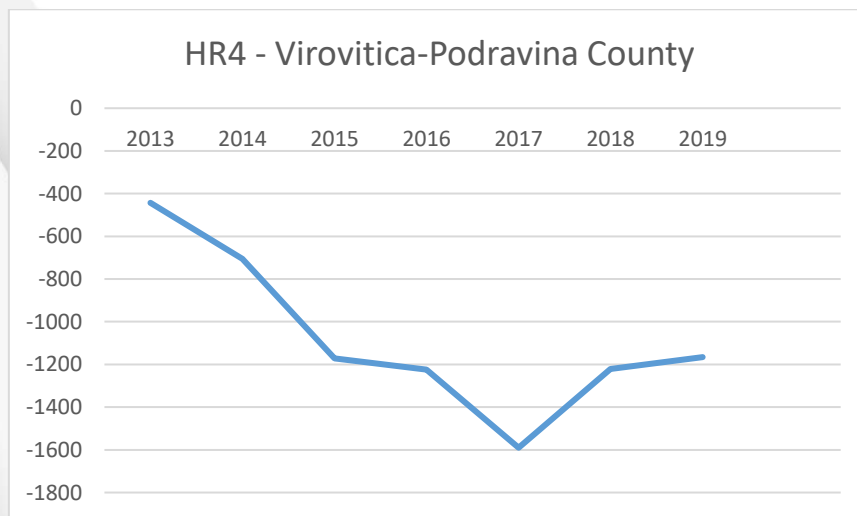
4.1.7 Profile of Varaždin County region

In Varaždin County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. However, from 2017 to 2019, the number of emigrants reduced dramatically and the Diagram shows the trend in emigration of residents in the region for those years from 2013 to 2017 and immigration trend from 2017 to 2019.

Table 19: Socio-economic profile of Varaždin County region (EUROSTAT, 2022)

HR5 - Varaždin– year 2019	
Total surface of the region	1.262,00 km²
Number of inhabitants	166.658
% of inhabitants in the country	4.09%
Net migration plus statistical adjustment	18
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	0,1
GDP at current market prices for the year 2019 in million €	2.012,75
GDP at current market prices per inhabitant for the year 2019	12.077,13
Employment (thousand persons) for the year 2019	71,61
Employment rate for the year 2019	43%

Figure 20: Varaždin County - Net migration plus statistical adjustment for the years 2013-2019
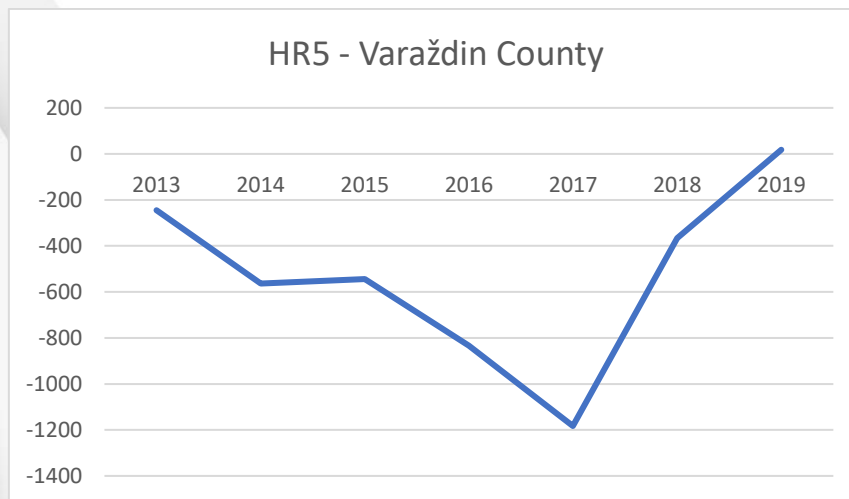
4.1.8 Profile of Zala County region

In Zala County the indicator net migration plus statistical adjustment is negative for the years 2013-2018 meaning that there were more emigrants than immigrants in this region during that period. But from period 2014 to 2015 the number of emigrants were getting reduced and again increased from 2015 to 2016 and further reduced from 2017 to 2019. The Diagram shows the trend in emigration of residents in the region for those years from 2013 to 2018 and immigration trend from 2018 to 2019.

Table 20: Socio-economic profile of Zala County region (EUROSTAT, 2022)

HU223 – ZALA COUNTY – year 2019	
Total surface of the region	3.784,84 km²
Number of inhabitants	268.648
% of inhabitants in the country	2,75%
Net migration plus statistical adjustment	456
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	1,7
GDP at current market prices for the year 2019 in million €	2.983,11
GDP at current market prices per inhabitant for the year 2019	11.104,16
Employment (thousand persons) for the year 2019	110,78
Employment rate for the year 2019	41%

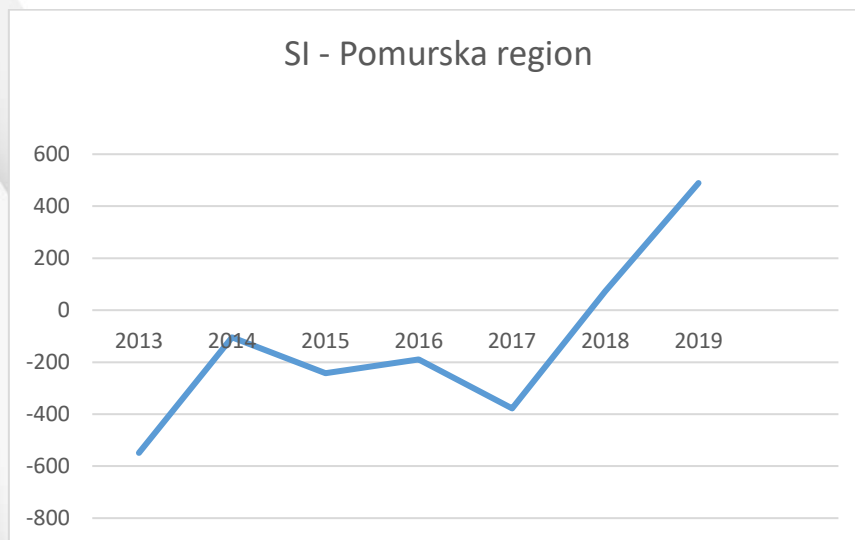*Figure 21: Zala County – Net migration plus statistical adjustment for the years 2013-2019*
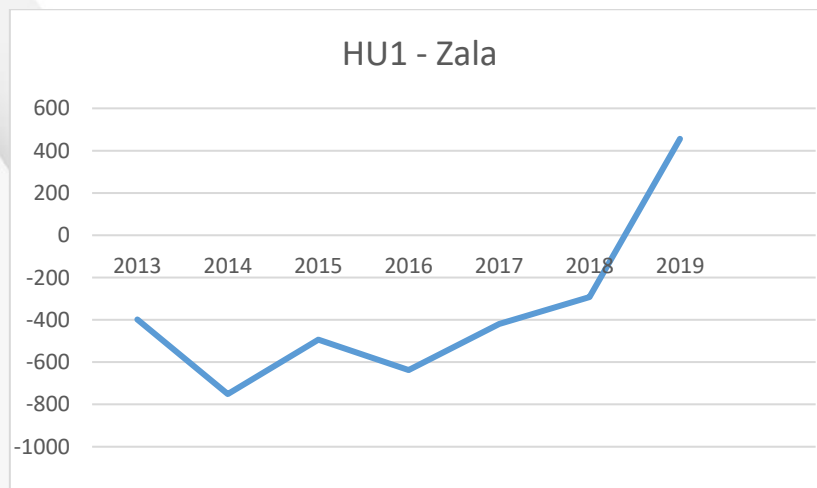
4.1.9 Profile of Somogy County region

In Somogy County the indicator net migration plus statistical adjustment is negative for the years 2013-2018 meaning that there were more emigrants than immigrants in this region during that period. Diagram shows a great increase in emigration (in comparison to immigration) in the year 2014. The next two years the number of emigrants is decreasing but it slightly increases again in the year 2017 and further decreasing from 2017 to 2019.

Table 21: Socio-economic profile of Somogy County region (EUROSTAT, 2022)

HU232 – SOMOGY COUNTY – year 2019	
Total surface of the region	6.065,09 km²
Number of inhabitants	301.429
% of inhabitants in the country	3,08%
Net migration plus statistical adjustment	381
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	1,3
GDP at current market prices for the year 2019 in million €	2.835,71
GDP at current market prices per inhabitant for the year 2019	9.407,56
Employment (thousand persons) for the year 2019	102,52
Employment rate for the year 2019	34%

Figure 22: Somogy County – Net migration plus statistical adjustment for the years 2013-2019
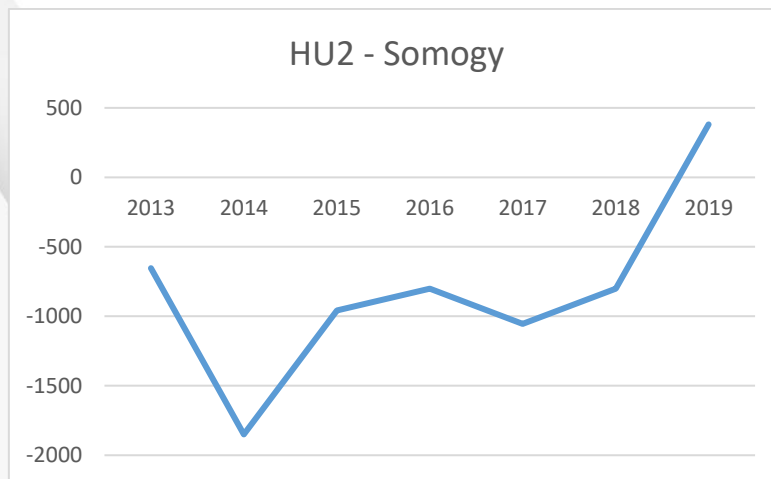
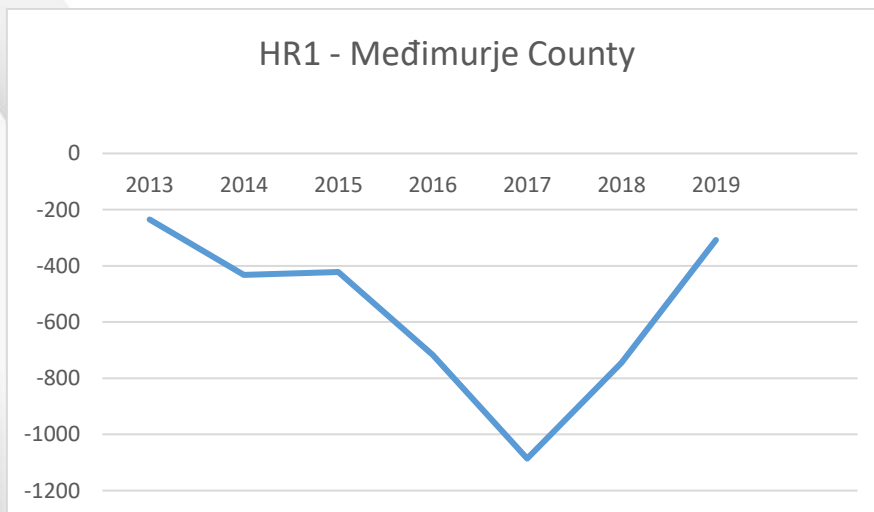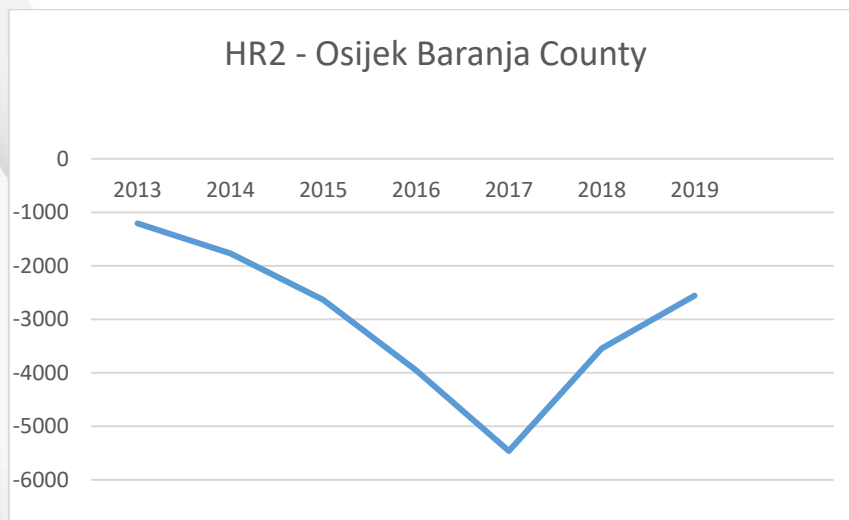## 4.1.10 Profile of Baranya County region

In Baranya County the indicator net migration plus statistical adjustment is negative for the years 2013-2017 meaning that there were more emigrants than immigrants in this region during that period. As we can see, from 2014 to 2017, there was a huge decline in the number of emigrants and in 2018 it increased rapidly. In addition, from 2018 to 2019, the number of emigrants further decreased and resulting in positive net migration Diagram shows the trend in immigration of residents in the region for those years.

Table 22: Socio-economic profile of Baranya County region (EUROSTAT, 2022)

HU231 – BARANYA COUNTY – year 2019	
Total surface of the region	4.429,60 km²
Number of inhabitants	360.704
% of inhabitants in the country	3,69%
Net migration plus statistical adjustment	289
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	0,8
GDP at current market prices for the year 2019 in million €	3.643,74
GDP at current market prices per inhabitant for the year 2019	10.101,75
Employment (thousand persons) for the year 2019	132,67
Employment rate for the year 2019	37%

*Figure 23: Baranya County – Net migration plus statistical adjustment for the years 2013-2019*
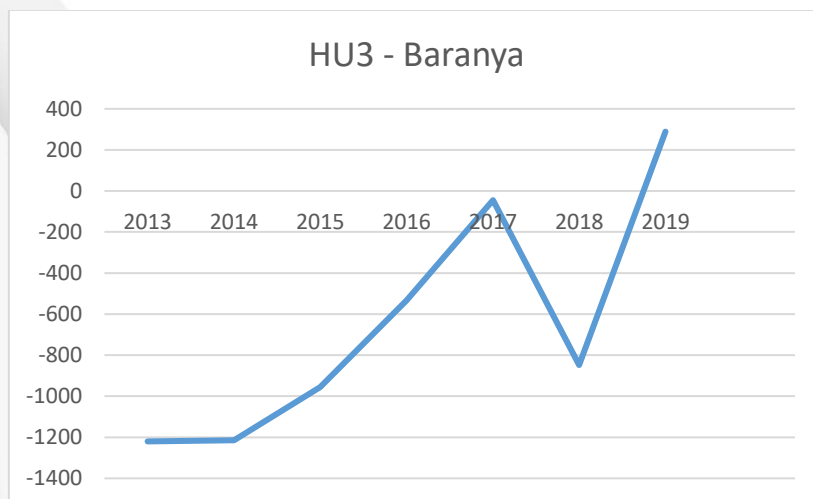
4.1.11 Profile of West Bačka District

Only half of the data representing the profile of West Bačka district could have been collected. Since data for »employment (thousand persons)« and »employment rate« were not available for the West Bačka District no graphical representation could be created.

Table 23: Socio-economic profile of West Bačka District region (EUROSTAT, 2022)

RS121 – WEST BAČKA DISTRICT – year 2019	
Total surface of the region	2.488,00 km²
Number of inhabitants	171.054
% of inhabitants in the region	2,46%
Net migration plus statistical adjustment	-2.159
Crude rate of net migration plus statistical adjustment (per 1.000 inhabitants) for 2019	-12,6
GDP at current market prices for the year 2019 in million € *	664,00
GDP at current market prices per inhabitant for the year 2019 *	3.881,00
Employment (thousand persons) for the year 2019	47,27
Employment rate for the year 2019	27%

*Only GVA values available for district level

Figure 24: West Bačka District – Net migration plus statistical adjustment for the years 2013-2019
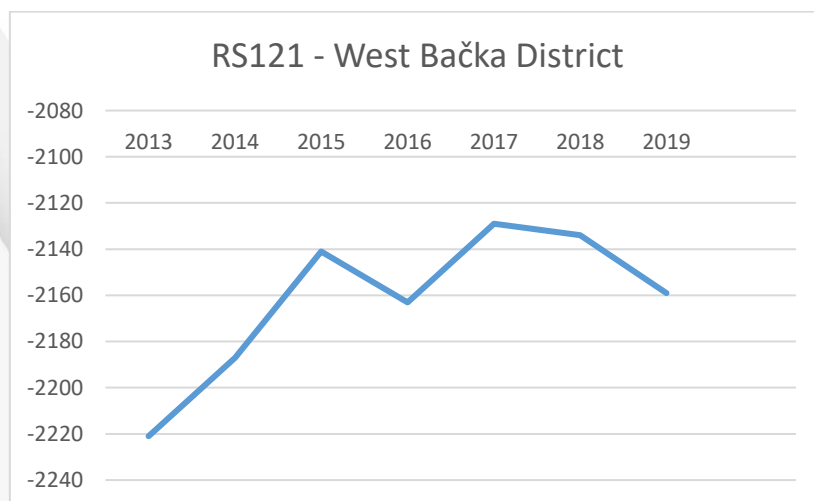
5   Tourism development and marketing trends

The last few years have shown how vulnerable the travel and tourism market actually is, despite the rapid growth from the years before. On one side, new generations with different demands are taking over the market and on the other, there is the raising concern for health, safety and sustainability, intensified by the COVID-19 pandemic. New decision-making factors and new booking behaviour before travelling to a destination, as well as when already within a destination will force the suppliers on the tourism market to adjust to these changes. The 'Centre for the Promotion of Imports from developing countries' (CBI) has prepared a detailed overview of the trends that offer opportunities or pose threats on the European tourism market in the years to come. The latter are summarised and discussed in the continuation of the chapter 2.4. (CBI, 2021)

5.1.1   Disruptive impact of COVID-19 on global tourism

The outbreak of COVID-19 in in the beginning of 2020 has had an enormous disruptive effect on tourism across the world. Numerous tourism trends have been put on hold for many years. The pandemic has made travellers more demanding concerning services, facilities and experiences, especially when it comes to sanitation, wellness, health and overall well-being.

Stating with certainty when and how global tourism will recover is illusionary. A study by CELTH (Centre of Expertise for Leisure, Tourism & Hospitality) has introduced us to 4 scenarios of what could happen with global tourism until 2025 (Figure 21). Each of the scenarios would result in different threats and/or opportunities for the tourism sector. However, seeing these scenarios in an isolated form is unrealistic. The future of European tourism will most probably include features of multiple scenarios. (CELTH, 2022)

Figure 25: Four global tourism scenarios in 2025 - post Covid-19 (CELTH, 2022)
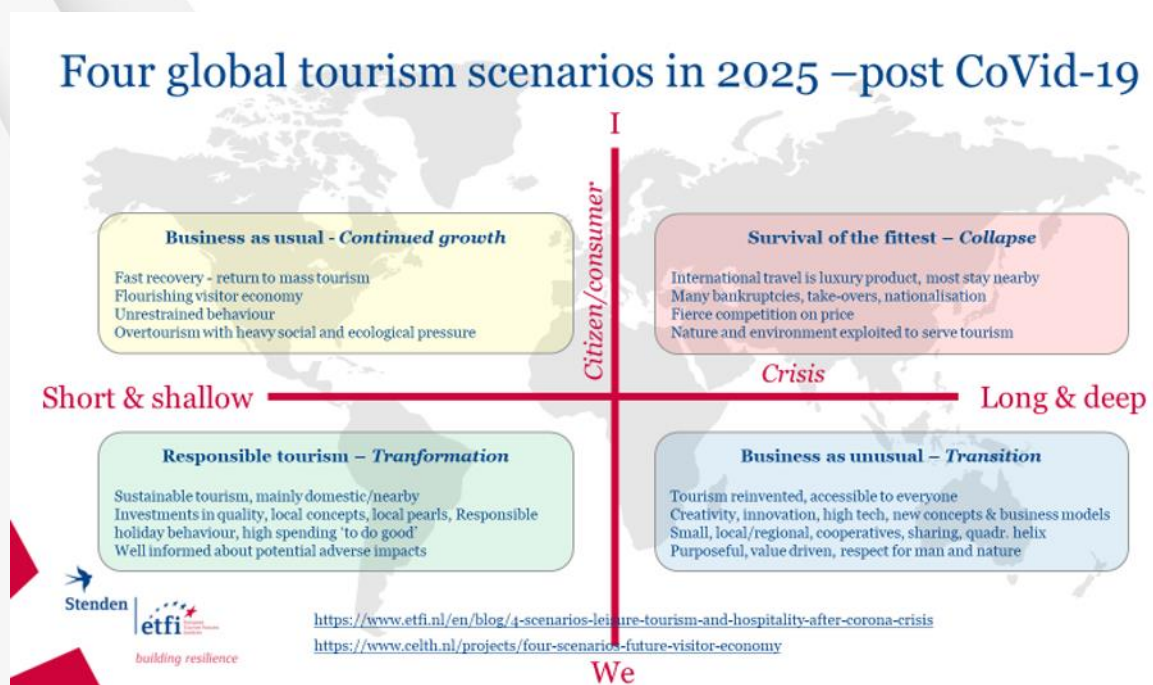
5.1.2   Generation Y and Generation Z

The market of Generation Y (Gen Y) and Generation Z (Gen Z) in Europe is growing rapidly and among other sectors, shaping the future of travel. On a global scale it is expected that this market will represent 50% of all travellers by 2025. Even the family market is increasingly taken over by families led by millennial parents.

What makes these two generations specific is, that they were born and have grown up in the digital world. Both generations are tech savvy and technologically driven. Compared to older generations, Gen Y and Z have different needs and demands in terms of travel and require different kinds of related services on their holidays. Although technology is essential for both generations, they do vary in their needs for communication, consumption and tourist experiences (see Table 19). (CBI, 2021)

Table 24: Differences between generations Y and Z (CBI, 2021)

	Gen Y	Gen Z
Synonyms	Millennials	Centennials, screen agers, iGen, click'n'go children
Born	1980–1995 (in 2021: 26–41 years)	1995–2010 (in 2020: 11–26 years)
% of European population	EU 16%, Europe 16%	EU 19%, Europe 20%
Profile	Tech savvy: 2 screens at once Curators and Sharers Now focused Optimists	Tech innate: 5 screens at once Creators and Collaborators Future focused Realists
Aspiration	Freedom and flexibility	Security and stability
Communication preference	With text (online and mobile)	With images (emoticons, stickers, Skype and Facetime)
Technology milestone	Smartphone, tablet	Augmented Reality/Virtual Reality
Tourism demand characteristics	- Prefers experiences over possessions (for example they favour a holiday over purchasing the latest TV or latest fashion), and they are more demanding of experience in their orientation and purchasing phase. - Spends more on the things that really matter, such as high-end travel experiences, and cut back (often significantly) on those that do not, such as flying (low-cost airlines). - Expects a greater link between tourism services and their everyday life. They want to travel as a flashpacker, because they combine conventional social, local, simple backpacking with their enhanced lifestyle and need for flashy experiences. - Focus on exploration, interaction and emotional experience	- Relies heavily on social media, reviews and influencers, but they are more careful with their online persona than Gen Y and they prefer more privacy on platforms, so privacy settings are important. Most popular among Generation Z are YouTube, Snapchat, Instagram, Facebook and TikTok. - More price-conscious and economical than Gen Y - Focus on exploration, interaction and emotional experience

According to CBI, Gen Y and Z share the attraction to various kinds of holidays, activities and experiences, which might be extended over multiple days, and they prefer going to unspoilt places where they can avoid the masses (see Table 20). The most obvious difference between Gen Y and Gen Z is that the latter is more price sensitive and requires a brand to be open, fair and respectful. Gen Z travellers expect real-time information, short, yet powerful messages mostly sent via pictures, videos and channels that allow them to interact, co-create and share information.

Table 25: Examples of products and services Gen Y and Z are attracted to (CBI, 2021)

Examples of products and services Gen Y and Z are attracted to	
Types of holidays	- 'do-good, feel-good holidays', where travellers do something in return for the destination, such as a beach clean-up - 'purposeful holidays' with the aim of returning reborn, such as a 'mumcation' for mothers who want to refuel, safe-your-marriage trips, 'painmoons' (travelling with the aim of recovering from a stressful period or a period of hard work), or a digital detox (jomo – the joy of missing out) - 'adventure holidays' to escape from the daily hustle and bustle, such as adrenaline-pumping activities - so-called second city travel, to cities beyond the well-known overcrowded tourism hot spots - surfing holidays - epic rail journeys where the transportation with a luxury, historical or scenic train is part of the experience, such as the Orient Express. According to a study by Expedia it seems that the younger the generation, the more interest in such journeys - Long-distance hikes that offer travellers a once-in-a-lifetime experience and the opportunity to immerse themselves in places and get to know locals, connect or reconnect with their inner self and find peace and consolation.
Types of products and experiences	- slow travel, which means that travellers invest more time to experience destinations more deeply and in a more laid-back way - transformative experiences that focus on helping others as well as helping oneself. This could be a destination off the beaten track, a yoga retreat or a spartan holiday that combines a digital detox with minimalist living, whereby you travel with as little as possible - authentic, unique and once-in-a-lifetime experiences - opportunities to immerse in the local culture and to 'feel like a local', such as opportunities to stay with a local family, indulge in the local nightlife or services that connect travellers to local tastes, made accessible via platforms - opportunities to explore hidden gems - part of the history made more tangible by means of a VR walking tour - opportunities to learn a new skill or to experience a new way of thinking - history and culture walking tours (where visitors have the opportunity to meet other travellers and have a destination expert at their disposal) - ecological tours (unique experiences that educate visitors and share inside information with them on the area and how to protect it for the future)
Facilities	- space for experiences with other consumers, to make new friends - sleeping accommodation in a stylish, fun-loving and hipster manner with a smart design (such as AirBnB or boutique hostels) - hometels (hotels that give you the feeling of being at home). - community camping - opportunities to mix business with leisure, or leisure with business (referred to as 'bleisure')

The CBI study highlights the following points to especially appeal to the Gen Y and Gen Z market:

- understand their habits, preferences and values, show empathy, respect their opinion, and treat them in a personal way,
- place emphasis on the consumer experience and offer opportunities for (solo) travellers who are willing to pay for an engaging experience. Examples are to personalise the offer and to provide a seamless travel experience,
- be instagrammable, meaning the visual appeal should stimulate the travellers to take photographs that they post on social media,
- be transparent about who you are, the core values that drive you, and that you are socially responsible; Do not show pictures that are made-up, and also show the downsides of tourism for the community or destination and how it looks like in the high tourism season,
- create a meaningful brand
- allow them to interact and to co-create,
- customise and personalise your product and service. (CBI, 2021)

Figure 26: The customer journey of a millennial
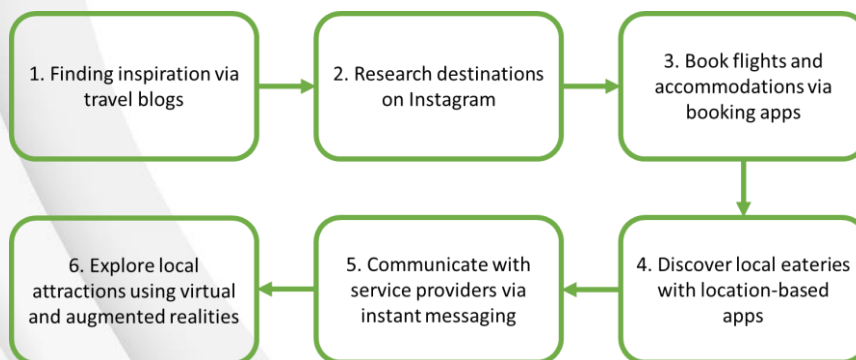
To connect with the market of Generations Y and Z, a destination must ensure a clear online presence on multiple platforms such as Facebook and Instagram. In this manner, the visitors from these generations are able to find the destination online and access its online information in an easy way. To build trust and awareness, connecting with trusted bloggers, social media influencers or even reviewers from magazines such as National Geographic, Business Insider or Travel Channel is essential for these generations. (CBI, 2021)

Future perspective

As for everyone else, the pandemic has trapped both generations into a limited social and natural environment, meaning they were not able to meet friends, go to festivals or other events and had difficulties in finding a job. Since they were stuck at home, a strong presumption could be they may want to use their time better after the pandemic and cut back on unnecessary spending. This may give an extra boost to their interest in holidays where they can meet others, learn a new skill, do-good-feel-good holidays and purposeful holidays and suppress the demand for relax holidays and long-haul travel. Younger and higher educated youngsters are among the biggest target groups of long-haul travel.

Working from home has become widely accepted during the pandemic and is probably going to stay this way. Therefore, the demand for workcations or nomadic working, a combination of working and travelling, is expected to increase. What must be insured in relations with this type of travel is good connection services and internet coverage, which enables a working environment within the destination.

The demand for sabbaticals may also increase. Especially when sabbaticals focus on reconnecting with yourself and really getting to know a destination.

A sum up on how to attract the Gen Y and Z:

- focus the tourism offer to learning new skills, do-good-feel-good holidays and purposeful holidays,
- target travellers with a demand for nomadic working. Offer leisure activities to stretch the legs and unwind by offering guided or self-guided walks in nature, wellness after the walk and opportunities to cook local food afterwards together with locals and ending the day with a local dance performance. Create experiences that will lead to new inspiration and a creative mind for another working day,
- although businesses' budgets for business travel are scaled down, there is potential in offering a combination of co-working camps, walking activities and retreats for personnel,
- offer products for sabbatical travellers, such as sabbatical walks. (CBI, 2021)

5.1.3   Sustainable and regenerative holidays

Sustainable tourism is mainly about finding a fair balance between the economic benefits of tourism and the negative environmental and societal consequences of travel and tourism. Examples of the latter are sacrifice of nature and agricultural land, dislocation of traditional societies, concerns about excessive water usage, unsustainable food consumption, concerns about labour practices, animal welfare, the negative impact of 'overtourism' on host communities' quality of life, etc.

Travellers, with emphasis on generations Y and Z, are increasingly aware of the importance of sustainable travel. The coronavirus pandemic, in combination with worries about climate change, has made them even more eco-conscious during their booking behaviour. A study by Abercrombie & Kent and another by Booking.com showed that more than half of respondents prefer to have more responsible or sustainable travel options. The second study showed a shift in keywords towards more nature-based, rural and outdoor ways of travelling. (CBI, 2021)

European Green Deal

With the European Green Deal initiative, climate change has been put high on the political agenda of the EU. It entails a series of policy measures to fight climate change and make Europe climate neutral by 2050. Since the Green Deal entails all sectors of the economy, including travel, energy and infrastructure, it will most likely have a big impact on the way Europeans travel and where they travel as well. (CBI, 2021)

Regenerative tourism

Regenerative tourism can be seen as a new niche in sustainable tourism development. While sustainable tourism focuses on minimising negative effects, regenerative tourism aims to leave the place or the local community better than it was before the tourist's arrival. Tourism in this manner is used as a tool to improve the quality of life of the residents and to revitalise the local community. This was already mentioned above as do-good-feel-good holidays and the demand for the latter is increasing. So is the transparency of how travel organisations use their money for building or rebuilding communities.

The UN has developed the United Nations Sustainable Development Goals, which sum up the most important aspects of a sustainable, regenerative tourism destination. These goals aim to stimulate actions to end poverty, protect the planet and ensure that, by 2030, all people enjoy peace and prosperity.

In developing a sustainable destination, one should however be cautious not to present the destinations' products and services as more sustainable than they actually are – avoid 'greenwashing'. The latter can have a severe negative effect once the tourists arrive to the destination and experience the presented products and services in a different manner. (CBI, 2021)

Create shared value

Following the principle of Creating Shared Value, the destination creates value for both the businesses and the community. Thus, a sustainable business model turns into a regenerative business model. When an investment into sustainability in a destination fails to produce value for the customers/visitors, employees and/or stakeholders in the community, it is called 'greywashing'. (CBI, 2021)

Future perspective

It is expected that after the pandemic 2 specific forms of regenerative tourism will most stand out, being volunteer tourism and peace tourism. Volunteer tourists, also known as voluntourists, want to volunteer in a foreign destination. Peace tourists on the other hand want to either help a destination establish peace after a period of conflict or understand and study how peace is developed and celebrated by the population. This development is facilitated by Global Peace Parks.

A sum up on important aspects of a sustainable regenerative tourism destination:

- Increased focus on sustainable procurement, meaning that products and services offered in a destination are as sustainable as possible, so with minimum social and environmental impacts,
- Involvement of the local community in planning and development, such as local guides or experts, providers of local food and of local accommodation, local farms or factories, etc.
- Offering work opportunities to visitors e.g., in a nature reserve or engaging in conservation work,
- Promote the sustainable nature of the destinations' products and services e.g., by offering activities with a low footprint, by investing part of the profit from bookings in nature conservation, etc. (CBI, 2021)

5.1.4 Seamless customer journey

Like in most other industries, players in the travel industry traditionally operate rather independently. However, the ongoing improvement of mobile devices and their connectivity, the increased dominance of digital channels, Online Travel Agencies (OTAs) and meta search engines allow travellers to access information anywhere in real time. In this manner, the traveller has more control over the subsequent phases of their holiday and they want these phases to be seamlessly connected. The increase in demand for a seamless customer journey cannot be regarded separately from the rise of the Gen Y and Gen Z markets. (CBI, 2021)

Examples of digital channels: Uber, AirBnB and CarRentals.

Examples of OTAs: Expedia, Priceline, Agoda and Booking.com

Examples of meta search engines: Trivago, Trip Advisor and Google.

Through digitalisation, the personalised customer journey gives more and more control to the traveller. They can make their holiday more affordable (through personalised pricing), efficient and accessible as ever before and the phases of their customer journey should be as seamless as possible. The latter starts from the moment of orientation and fine tuning of the holiday plans to the booking, travel, stay at the destination and all the way to the return travel, reflection and evaluation of the holiday once back home. Along this journey there is a series of so-called touch points between traveller and service providers. The main challenge for a destination is to create value at each of these touchpoints and build a more rewarding, integrated, and seamless customer journey.

Figure 28: Customer journey with 5 phases and a series of touch points (CELTH, 2022)
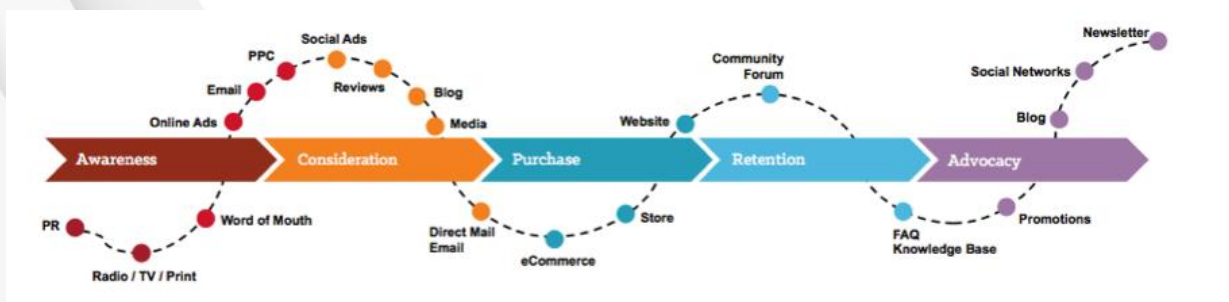
Implementing appropriate solutions and services at each stage of the journey will be crucial to success of a tourism destination. It is a fact that the accumulation of positive and negative experiences at each touchpoint define the overall holiday experience and the level of satisfaction. The higher the level of satisfaction, the more likely it is that the tourist will come back and promote the tourism destination to his friends, fans and followers. However, an annoyed and dissatisfied tourist does not only not come back to the destination but shares his or her bad experiences even more intensely with his peers.

What also should not be neglected is that an increasing group of tourists want to escape from their complex digital life and want to be unplugged during their holiday – the Joy of Missing Out (JoMo), which offers another niche opportunity. (CBI, 2021)

Future perspective

With the continued evolution of technology and the increasing market of Gen Y and Gen Z, the need for personalised and seamless customer journeys is anticipated to increase. Predicting travellers' needs, directing visitor streams, and therefore solving problems on various levels in real time with new, powerful technologies, such as 5G, blockchain etc., will establish the so-called seamless customer journey sooner than we think. The shift to digital channels has been accelerated by the COVID-19

pandemic for at least 5 years according to experts, and technologies like instant check-in and facial recognition will spread out throughout travel and tourism industry rapidly.

A sum up on important aspects on seamless customer journey:

- ensure online presence in social media, review sites, messaging apps, chatbots, internet-enabled subscription programmes, pop-up shops, OTAs,
- map and understand the customer journey in the specific destination,
- get to know the customer both online (via technology) and during his/her stay and establish a relationship through personalised engagement on as many touchpoints as possible,
- understand which stakeholders may play a role in the customer journey of the visitor and collaborate with them to create a seamless customer journey,
- participate in OTAs or pay for actions to increase online presence and findability,
- work with social media strategist with sufficient experience. (CBI, 2021)

5.1.5   Modular travel and booking behaviour

The rise of Gen Y and Gen Z has significantly influenced another aspect of tourism and travel. With high expectations concerning flexibility and individuality the demand for "modular travel" is expected to rise even further in the future with these two generations starting to dominate the travel industry. Modular travel consists of several modules, which are interconnected to form a personalised travel experience. The latter are expected to be flexible and adaptive to the travellers needs and interests.

Since the two mentioned generations are very digitally skilful, the traditional tour operators are facing a serious threat, since the travellers have in many cases become better informed than the tour operators offering classical packages. The latter can be easily researched online and booked directly – often at better prices and conditions. What these generations are looking for is added value – something they cannot book by themselves. The older generations however are still fond of traditional package offers, but this is expected to decrease in the near future as well.

Since the two generations have grown up with technology, their trust in AI and the tech-led travel and other individualised unique experience recommendations is unquestionable and even preferred to traditional travel agencies.

The consequence of the latter is the rise of online travel agencies (OTAs), last-minute bookings (in terms of whole journeys as well as individual experiences once already in the destination), real time push promotions, etc. which develops a personalised relationship in the customer journey. On the other hand, last minute bookings pose a great challenge for travel related business, since they make it very hard to plan staff capacity and resources in advance. It also makes the businesses more dependent on the weather. To overcome these factors, local partnerships, networks, and collaborations should be established, providing live availability, short value chains and shared success and development opportunities within the destination. (CBI, 2021)

Future perspective

With the concerns about travel safety, hygiene and the variety in health regulations and contradicting information, it is expected that travel will gain severely on its complexity, which will make the travellers turn to tour operators (online or offline) and other travel experts, to safely plan their trip. The pandemic has also made travellers more price conscious, which led to more home research before planning the trip. Destinations, modules, individual experiences etc. are very carefully considered, compared based on reviews, promotions and discounts – with the main goal to get highest value for the paid price. This also includes the flexibility in terms of payment refunds, cancelled or postponed bookings without additional costs, additional insurance possibilities, last-minute booking possibilities etc.

A sum up on important aspects of modular travel and booking behaviour:

- identify and design relevant modules, that can be adapted with a few tweaks to suit the needs of the customers throughout their customer journey,
- design various flexible packages that connect modules and save customer's time in his decision-making process,
- ensure the presence of the identified modules on a variety of online distribution channels, including the new OTAs,
- strive to build a personal relationship with each customer. Educate them on the destinations offer and it's marketing platforms with the purpose to speed up and optimise their booking behaviour and orientation in the destination. (CELTH, 2022)

5.1.6 Health, wellness and sports holidays

A shift towards healthy lifestyle, both in terms of physical and mental health has been growing in the last few years – on one hand because of concerns about obesity, food sensitivity and diseases, and on the other because of the rising social pressure and constant connectiveness brought by globalisation and digitalisation.

As a consequence, the WTA (Wellness Tourism Association) and HTWW (Health Tourism World Wide) have identified the need to de-stress or recharge, relaxation, self-healing, self-development, fitness, escapism, self-reward, rejuvenation and pampering, as the most important motivators and triggers for wellness travel.

The most significant target groups for wellness tourism are couples, groups of friends, women travelling solo and ordinary guests looking for healthy options and alternatives during their holidays. People born before 1946 mainly feel attracted to natural resource-based therapies. The cohort born between 1946 and 1975 predominantly feels attracted by natural resource-based therapies in combination with medical wellness and spiritual practices such as yoga. Cohorts born in 1976 and later (including Generation Y and Generation Z) show a main interest in Sports & Fitness and Therapeutic Recreation. Both of these types of wellness are closely related to physical activities.

According to a recent study by the WTA and HTWW, Central and Eastern Europe are the most important wellness travel markets in Europe. In addition, Europe is the leading continent for wellness focused trips on a global scale and its position is still increasing.

European destinations, known especially for wellness tourism, with health as a primary motive are Iceland, Sweden, Hungary, Portugal, Slovakia and the Czech Republic. These markets, as well as travellers from these markets, give special attention to the spas and medical-focused destination spas. The latter focus on the concepts of holistic wellbeing with the purpose of monitoring and improving both, the physical and mental health goals.

The highest potential for all kinds of small and medium-sized business lies in health and wellness travellers with health as a secondary motivation (health not as a primary reason). Expending the offers with various health and wellness services or even transforming the models should be considered. Rituals, natural resources-based therapies, spiritual practices, psychological therapies, medical wellness, nutrition/detox programmes, massages & therapeutic recreation offer the biggest potential on the European market of wellness treatments. (CBI, 2021)

Future perspective

Wellness tourism is extremely profitable, as wellness travellers generally spend 178% more than the average traveller, according to Heritage Hotels of Europe. Additionally, the wellness sector is expected to recover faster after the pandemic than other subsectors in tourism. It is also anticipated that spiritual travel, wellness travel and extreme wellness travel (interest in more challenging and enduring activities) will see a strong growth once the pandemic is over.

A sum up on important aspects of health, wellness and sports holidays:

- by most wellness travellers, the wellness offer of a facility is not perceived as a luxury offer, so it should not be promoted as one. They mostly see wellness as a free and affordable environment that matches their healthy lifestyle,
- in order to broaden the product pallet with health and wellness products, cooperate with the health sector by establishing an association or by branding it as both a tourism and a health product. This will be perceived as added value. (CELTH, 2022)

5.1.7 Multi-generational travel and extended families

The market of multi-gen travel is booming and already makes up between 33% and 40% of the total travel market. Multi-gen travel refers to multiple generations within one family going on holiday together - kids, parents and grandparents. They are in search of experiences that will bring them closer together and create lasting shared memories. The growth of this market has led to a growing demand for larger types of accommodations, which can cater for bigger groups, such as hotel suites, (semi-detached) villas and cottages.

Opposed to traditional family holidays with grandparents taking the kids and grandkids, the baby-boomer parents (born between 1946 and 1964) tend to take the adult children plus their grandparents on family trips. This results in a larger number of 20- and 30-year-olds taking more pricy trips than they would travelling on their own. What should be highlighted is that the adult 'children' (Gen Z, born between 1995 and 2010) play a big role in the holiday planning and drive the decision on destination and type of trips, which results in more exotic or adventurous travel.

Whereas last-minute bookings were presented as a rising global trend in the previous chapter, this target group represents a specific niche. The multi-gen families tend to book earlier, and they prefer multiple holidays per year, while they tend to end the family vacation with planning the next one. They prefer to stay in accommodations that offer enough space and privacy for everyone, with connecting rooms, at a colourful destination, off the beaten track and unique for the family to explore and discover together. They also highly value the chances to swim in pools or at the beach.

Since Multi-gen travellers include the generation Y and Z individuals, they also tend to return to the new generation of travel agents (OTAs). Consequently, the older generations are beginning to realise the value of an experienced travel agent who customises a trip that is a perfect fit for their family. Therefore, experienced travel agents offer another opportunity to approach this market. (CBI, 2021)

Future perspective

Just like regular family travel, multi-gen travel is expected to surge once tourism starts to recover again. One of the reasons being that the families have not been able to meet for an extended period, since the travel restrictions have forced them to skip many holiday come-togethers. Multi-gen holidays are an opportunity for them to have a family reunion and reconnect with their loved ones.

In contrast with the pre-pandemic times, the families give bigger emphasis to safety, cleanliness, distance from crowded resorts and popular destinations. Such accommodations are larger villas and private homes and apartments. This might force hotels to restructure their business, invest in private villas or rent entire floors to satisfy such expectations of customers.

A sum up on important aspects of multi-generational travel and extended families:

- composing a multi-gen holiday is very complex. Considering a diversity of ages and interests must be backed with sufficient research and planning to please everyone's needs and interests,
- large accommodations are essential and must be in prime condition, with enough room for privacy for each of the family members,
- joint activities have to be appropriate for the whole family to take part, e.g. private guided tours,
- leisure activities have to satisfy all age groups – from kid's clubs, game and evening entertainment, sports and spa programmes to babysitting services. (CELTH, 2022)

5.1.8 Technologically manufactured personal experiences

The increasing impact of generations Y and Z is also driving the demand for technologically manufactured personal experiences. Digitalised personalisation of customer's experiences is therefore becoming part of all levels of the customer journey. The demand for the latter is boosted by the technological advancements, like augmented reality (AR), virtual reality (VR), humanised interfaces, near field communication (NFC), the internet of things (IoT) and others, which make such individualised experiences possible. (Conorea, 2022)

Augmented reality: with the help of AR, virtual elements are projected onto real world experiences. By using an AR app on the smart phone and directing the lens of the phone to a place or object, information is projected on the screen in the form of an overlay. AR can be used to provide targeted and specific information to customers. (CBI, 2021)

Virtual reality: with VR, travellers do not physically have to be at a place in order to view and experience it. VR requires the use of a VR Headset in combination with videos that are shot in 3D. With the headset travellers can look around in all directions by turning their head, like they would do on site. VR can be used to:

- promote a destination, accommodation, restaurant interiors, or services at the traveller's home during the planning and decision-making phase of the customer journey,
- provide virtual excursions or experiences that would otherwise be inaccessible (disability), unsafe (wild animals), impossible (mountain climb, Covid-19), non-sustainable (destinations suffering from over tourism) or unaffordable. Also, museums have discovered the possibility of using virtual tours to walk through the property and enjoy pieces of art. In Denmark, there are plans to turn a virtual reality exhibition exploring Viking history and Norse mythology into a permanent theme park. (CBI, 2021)

Booking.com conducted a study, where 36% of the respondents indicated they prefer to see an unknown destination through virtual reality before they visit it in person, to feel at ease. While 5G has been rolled out in most parts of Europe, it will be much easier for travel brands to create breath-taking digital experiences to excite potential customers for their visit. On the other hand, the "stay-at-homers" will also have the opportunity to experience collections from museums and galleries, destinations and tourist attractions online, without leaving their home. (CELTH, 2022)

Humanised interfaces: voice search, voice control and other interfaces with mobile devices are becoming more and more intuitive, interactive, gesture sensitive and "human". Mobile assistants like Siri, Google Assistant, Alexa and others help travellers on their journey. In order for the assistants to work properly, the web content of the tourism destination and individual businesses has to be well-structured. (CBI, 2021)

An independent study has been conducted by the Development Counsellors International, which found that 54% of the respondents would consider asking their virtual assistant about potential destinations to visit on their next holiday. The percentage was at 64% for Gen Y and Z and at 44% for Gen X. (CBI, 2021)

Near Field Communication (NFC): allows the communication among devices over a short distance (4cm or less). This technology has enormous potential in the tourism industry and is already speeding up various services in the customer journey through contactless payment (e.g. check-ins and check-outs, spontaneous purchases because of the ease of payment etc.). (CBI, 2021)

The Internet of Things (IoT): refers to the digital connection of the mobile phone with other devices, like entertainment systems, heating, fridges, air conditioning, gadgets etc. via a mobile app through the internet. (CBI, 2021)

Future perspective

With the raising market segments of Gen Y and Z, the demand for manufactured personal experiences, VR and online presence are anticipated to grow. The virtual and artificial reality experiences are expected to play a more and more decisive role in the decision-making process in planning the next trip.

Technology will play a major role for travellers to get back to making spontaneous decisions and regain self-confidence during travelling, assisting in safe and responsible decision making. There is already a term used to describe this phenomenon, called Spontechnaity – using technology for spontaneous decisions during travelling.

A sum up on important aspects of technologically manufactured personal experiences:

- understand the new trend setters – Gen Y and Z; and involve them in personalising the travel experience,
- be digitally accessible and be innovative with the use of digital tools and platforms,
- use augmented reality to inform customers about the region, national park, wildlife, amenities, menus, etc.,
- create an ecosystem with other tourism service providers in the destination to digitalise and integrate the modular components in which the travellers are interested,
- transform and digitalise your business where possible – but store personal data with care and in accordance with the GDPR,
- seek to enrich experiences using AR and VR. (CBI, 2021)

5.1.9   Safety, security, and health

Safety and security circumstances have always affected travellers while choosing a destination. Threats like terrorism, political upheaval, excessive weather conditions etc. have been joined by an additional factor, with enormous influence on Europe's travel behaviour and attitude towards hygiene – the Covid-19 pandemic. While Gen Z's travel does not seem to be as much affected in the pandemic time, older generations showed great concerns about travelling and preferred to stay at home. (Southan, 2022)

The pandemic has not only changed how and if people travel to a destination, but also how they travel and behave within a destination. Tourism hotspots, crowded places and accommodations (like large scale hotels) and travelling in groups with strangers tend to be avoided or feared, while individual holidays and accommodations are perceived as safe. This is mostly because of the largely increased expectations in hygiene standards. Precautionary measures like seat spacing, social distancing, clear regulations and communication about how hygiene is handled in specific destinations, locations or businesses have become paramount in the decision-making process. It is not surprising that empathy and care are also perceived as crucial for travellers to adapt to the "new reality of travel". (CBI, 2021)

In the effort to minimise contacts to avoid unnecessary risk of transmission, contactless systems have experienced an upsurge wherever possible. The most widespread is contactless payment, which was already present before the pandemic. Other examples are app-controlled hotel room locks, air conditioning systems, light adjustment, menu cards, robots serving food etc. Utilising some of such services adds value to the destination or business since it is perceived by the visitors that health and sanitation is taken seriously. (CBI, 2021)

Future perspective

Since health safety has in many cases become the priority for travellers, hygiene, cleanliness, and sanitation should become the priorities for businesses and destinations. It is very likely that COVID-19 related travel conditions will continue to impede holidays in the foreseeable future. And even if resolved quickly, the travelling psychology will remain more demanding concerning services, facilities and experiences, not only in relation to health safety, but also regarding wellness and overall wellbeing. To sum up, global vaccination and increased adoption of digital solutions for safe travel are probably the only things that could lead to a recovery of international tourism over the months and maybe years to come.

A sum up on important aspects of safety, security, and health:

- empathically understand safety, security and health factors that concern travellers,
- transparently show health- and hygiene safety protocols in place in your marketing communication materials and channels to build trust,
- be precautious in cleaning and other hygiene measures, provide health safety accessories (e.g. masks, glasses, gloves etc. with clear branding) and offer contactless services (e.g. payment),
- know the hygiene and safety policies of other suppliers in the modular value chain, so you can answer questions in this regard, if asked. (CBI, 2021)

6 Tourism as an economic activity in the destination

The previous chapter presented the trends in which Europe's and global tourism is expected to develop in the upcoming years. In order to understand and assess the potential of the Amazon of Europe as a 5-country tourist destination, a snapshot of tourism as an economic activity in the destination has been conducted in the chapter to come. It includes the analysis of the key tourism indicators – overnight stays and tourist arrivals; as well as analysis of the reasons why and how a traveller can find his or her way into the Amazon of Europe – the pull factors or the tourism supply in the destination. It is then further elaborated with the push factors, or the analysed demand of the tourists in the destination.

6.1 Number of overnight stays and tourist arrivals in the Amazon of Europe

This chapter provides information of a current state of tourism development in the Amazon of Europe area by comparing the key tourism indicators tourist arrivals and overnight stays.

Data in this chapter is collected on NUTS 3 level if not stated differently in specific subcategory. Data for the years 2018, 2019 and 2020 is collected on annual basis and on monthly basis for tourist arrivals and overnight stays.

Secondary data from existing databases on regional, national, and European level was used for the analysis. Sources of data: regional, national and Eurostat statistics.

TOURIST ARRIVALS		OVERNIGHT STAYS	
Year 2020:	**cca. 2,5 mio**	**Year 2020:**	**cca. 7,4 mio**
AGR (2018-2020):	**-14,7%**	**AGR (2018-2020):**	**-36%**

Table 26: Tourist arrivals and overnight stays in the Amazon of Europe for the years 2018, 2019 and 2020

	YEAR			AVERAGE GROWTH RATE
	2018	**2019**	**2020**	**2018-2020**
Tourist Arrivals	2.986.366	4.169.635	2.547.763	**-14,7%**
Overnight stays	11.611.010	11.728.530	7.396.464	**-36%**

The table shows that the number of tourist arrivals and overnight stays was growing from the years 2018 to 2019 which indicates touristic potential of the region. The region with the most tourist arrivals and overnight stays is Eastern Styria and the region with the least is West Bačka District.

As it can be seen from Figure 20, the tourists' arrivals and overnight stays showed an increasing trend until February 2020 and from March to April it dropped significantly. The tourists' arrivals and overnight stays were significantly affected due to Covid-19 pandemic. The decline in March & April was due to the first lockdown and the decline from October to December due to the second lockdown. Apart from the covid pandemic crisis, July, August, September marks the highest number of overnight stays and Tourist's arrivals in 2020.

This also explains the growth rate being negative in both cases as a consequence of the strict regulations caused by the Covid 19 pandemic. As it can be seen from Figure 20, the peaks in 2020 still

reached almost the same amounts of arrivals and overnights as in 2019 and 2018 in the high season, or when the restrictions have been lifted. The biggest difference can be identified in the low season months, when there was almost no tourism activity in the area.

With this in mind the tourist arrivals and overnight stays are expected to have significantly improved in 2021 and will bounce back to pre-Covid 19 values in 2022.

Despite the promising results before the pandemic, the Amazon of Europe area is still touristically underdeveloped and many efforts from local actors and organizations will have to be put in place to make it a successful tourism destination. Figure 20 also shows a clear tourism peak from June to August, showing a strong seasonal pattern.

Figure 21 sums up the tourist arrivals and overnight stays for the years 2018, 2019 and 2020. It is evident, that there was an increasing trend in tourist arrivals until 2020, however the overnight stays did not have such a big surge as the tourist arrivals. This can be explained through strong seasonal dependency of the destination and limited capacities.

Due to a significant increase in the popularity of outdoor and cycling tourism, the timing for expending the offer with new outdoor tourism products in addition to the Amazon of Europe Bike Trail and setting a joint tourism development strategy seems to be right. Especially with many tourism experts seeing the Covid 19 pandemic as a "great reset" for green, responsible and safe tourism, which is exactly what the destination Amazon of Europe has to offer. This will also solve the seasonal peak and make the destination less season depended.

Figure 29: Overnight stays and arrivals in the Amazon of Europe on NUTS3 level in 2018, 2019 and 2020 – monthly
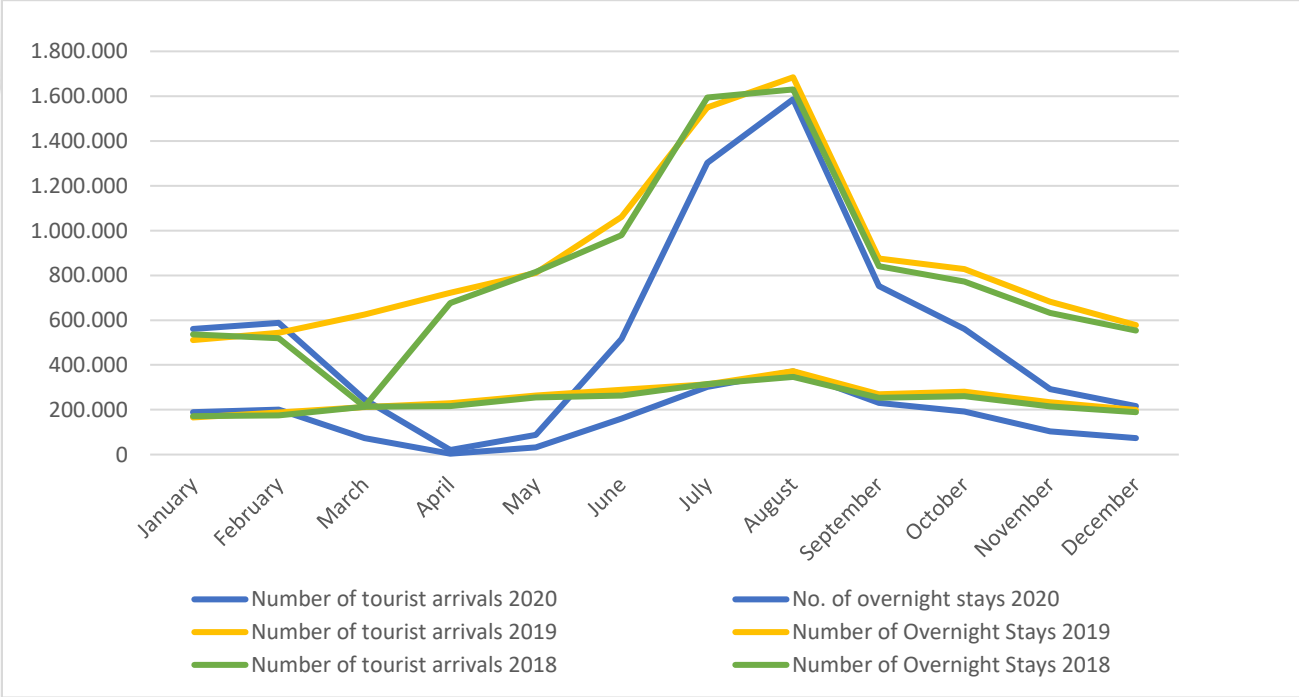
Thus, we expect the number of visitors to further increase once the cycling and other joint tourism products gain recognition in Europe and around the world.
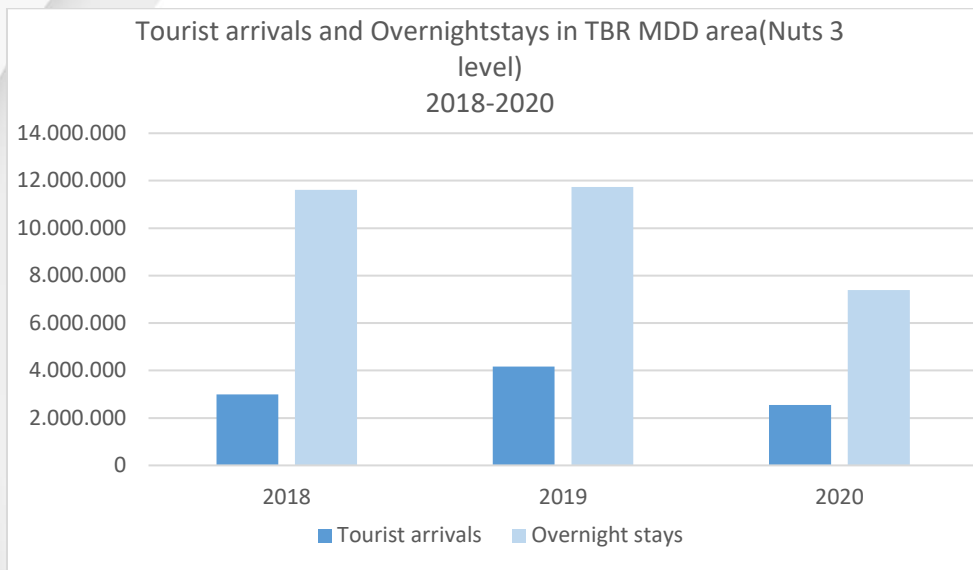
6.2   Tourism supply in the Amazon of Europe – the pull factors

Pull factors are destination generated forces and the knowledge that tourists hold about a destination. Tourism supply has to do with the provision of the key elements of the tourism industry by the host destination to attract tourists. This chapter provides an overview of destination features and existing tourism resources important for the development of tourism in the Amazon of Europe area.

6.2.1   Accessibility of the Amazon of Europe

This chapter provides information about accessibility of the destination AoE in all regions by different means of transportation and explains border policies and potential issues visitors might encounter while trying to reach the destination or while travelling within the destination.

The Amazon of Europe area had a quite good public transportation network already before the launch of the first flagship product – the AoE Bike Trail. On the other hand, much attention was given to establishing a functioning mobility network specialized for the bike trail, which encompasses shuttle services, luggage transfers and transfer back to the starting point. The latter will be used and further developed for new flagship products, like the "River journey" and "Amazing moments". In the table below accessibility of the Amazon of Europe is presented on a level of the whole Amazon of Europe region.

Table 27: Accessibility of the Amazon of Europe

ACCESSIBILITY OF THE AMAZON OF EUROPE	
BY AIR	**Main airports:** Graz Airport (AT), Zagreb Airport (HR), Osijek Airport Klisa (HR), Budapest Airport (HU), Hévíz-Balaton international airport (HU)
BY BUS	Good connections to bigger cities or towns in the region such as Murska Sobota, Lendava, Čakovec, Koprivnica, Đurđevac, Virovitica, Osijek, Zalaegerszeg, Nagykanizsa, Pécs, Sombor, Apatin. From bigger cities there are local buses to smaller towns and villages near the cycling route.
BY TRAIN	Main train stations in the region are Bad Radkersburg, Mureck, Murska Sobota, Lendava, Čakovec, Koprivnica, Đurđevac, Virovitica, Osijek, Zalaegerszeg, Nagykanizsa, Gyékényes, Csurgó, Pécs, Barcs, Mohács, Villány, Sombor, Bogojevo.
SHUTTLE SERVICES	Airport shuttle services, local shuttle services and taxi. An established mobility network throughout the whole destination, led by the AoE Booking center and organized by Feel Active.
BORDER POLICIES AND POTENTIAL ISSUES	Austria, Slovenia and Hungary are within the EU Schengen area and therefore there are generally no controls on the borders between the countries in normal circumstances. The free movement of goods regulation is present with Schengen borders in the European Union countries, which means that you can bring with you any items for personal use. This was not the case during the Covid-19 related regulations, when stricter controls were being implemented on all border crossings. However, carrying an ID or passport is still required by law in all 3 countries, especially in case of border crossing. Croatia is not within the Schengen area so in order to pass the border with Hungary and Slovenia an ID or passport is required. The same applies for the border with Serbia. Moreover, usually there are stricter controls on the Schengen borders for non-EU citizens.

Accessibility of the destination by regions of the Amazon of Europe is presented more in detail in the following tables.

Table 28: Accessibility of Eastern Styria

Accessibility of Eastern Styria	
BY AIR	**Nearest airport:** Graz Airport (AT) – distance 80 km. Connections mainly to Germany (Stuttgart, Frankfurt, Berlin), Switzerland (Zurich) and Vienna. If you travel by plane, you need to take a shuttle service or train from the airport to Bad Radkersburg.
BY BUS	Bus connection from Graz but at irregular times.
BY TRAIN	Train station in Bad Radkersburg (In some cases switching trains in Spielfeld is necessary). Train station in Mureck – starting point of the AoE Bike Trail.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services.
BORDER POLICIES AND POTENTIAL ISSUES	Austria, Slovenia and Hungary are all part of Schengen. The free movement of goods regulation is present with Schengen borders in the European Union countries, which means that you can bring with you any items for personal use. There are stricter restrictions for non-EU citizens.

	Because of the current Covid-19 pandemic regulation changes, one should check the most frequent border crossing regulations. In normal circumstances, no control is present at the border crossings between within Schengen.

Table 29: Accessibility of Pomurska region

Accessibility of Pomurska region	
BY AIR	**Nearest airports:** Maribor (SI) - 80 km (no regular lines), Graz Airport (AT) - distance 120 km, Zagreb Airport (HR) - distance 150 km, Jože Pučnik Airport Ljubljana (SI) - distance 200 km, Klagenfurt Airport (AT) - distance 200 km. **Other airports:** Vienna Airport (AT) - distance 240 km, Budapest Airport (HU) - distance 300 km.
BY BUS	Possibility of urban, long-distance and international bus transport. There are good bus connections between the bigger cities in Pomurje, while to smaller towns there are connections mostly once a day. Detailed information on bus and coach transport can be found at the main bus stops and their web pages: e.g. Bus Station Murska Sobota: www.apms.si, (local lines and lines between Pomurje and other Slovenian regions). Timetables and information about bus connections within Slovenia and to foreign countries can be found on https://www.ap-ljubljana.si/.
BY TRAIN	The Railway network is well branched and easily leads you to major cities and towns. Due to the extended railway network and short distances, it is also recommended to travel the surrounding area by train. All information on the railway network can be found on the web site www.slo-zeleznice.si. Information about the main railway stations in the region: Murska Sobota Railway Station: +386 (0) 2 292 48 22.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services. In addition, shuttle service GoOpti Airport Transfer offers various types of transport, including low-cost group transfers to airports and cities, private transport for business users and customized services organized according to wishes and needs. More information about this shuttle service can be found at the web site www.goopti.si. Shuttle service iGOline also offers three options for booking: low cost transport to airports and cities, customized user transport and transport for business users and more demanding costumers. ŠTRK Slovenia offers shuttle service by bus from airports and different locations to Velika Polana, Pomurje Region.
BORDER POLICIES AND POTENTIAL ISSUES	Slovenia, Austria and Hungary are all in the Schengen area, which means that, as a rule, there are no controls at the border crossings. In order to enter Slovenia from Croatia or vice versa, an ID or passport is sufficient, if the visit does not last more than three months. The restrictions are stricter for non-EU citizens.

Table 30: Accessibility of Međimurje County

Accessibility of Međimurje County	
BY AIR	**Nearest airport:** Zagreb Airport (HR) - distance 100 km.
BY BUS	Public bus transportation provided at every stop (village, city) across the cycling route. Info about the bus transportation can be found on the website: http://www.buscroatia.com
BY TRAIN	The most significant railway junction in Medjimurje is the Railway Station Čakovec (border crossing and customs), 1 km from the town centre. The local railway stations include: Mursko Središće, Vratišinec, Krištanovec, Novo Selo Rok, Macinec, Dunjkovec, Buzovec, Mala Subotica, Čehovec, Donji Kraljevec, Donji Mihaljevec and Kotoriba (border crossing and customs). More information about the timetable is available at the website: http://vred.hznet.hr/hzinfo/?category=hzinfo&service=vred3
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services.
BORDER POLICIES AND POTENTIAL ISSUES	Croatia is not yet part of the Schengen area, so in order to pass the border with Hungary and Slovenia ID or passport is required at all times. The same applies for crossing the border with Serbia, which is not part of the EU. A stricter control can be expected while crossing the border to Serbia.

Table 31: Accessibility of Osijek-Baranja County

Accessibility of Osijek-Baranja County	
BY AIR	**Nearest airport:** Osijek Airport Klisa (HR) - distance 50 km. Lines to Zagreb, Rijeka, Dubrovnik, Split, Pula, Basel, Stuttgart, Koln (Bonn). All of the lines are seasonal and available at the official webpage: http://www.osijek-airport.hr/
BY BUS	Central bus station in Osijek: Main bus station for the international and domestic arrivals. There are year-round lines to the cities within the region: Đakovo, Slavonski Brod, Požega, Gradiška and cities within the country: Pula, Rijeka, Umag, Poreč, Rovinj, Zagreb, Karlovac, Zadar, Split, Šibenik, Trogir. There are international direct lines to Germany (Munich, Stuttgart, Koln, Dusseldorf, Dortmund), Switzerland (Basel, Luzern) and Serbia (Novi Sad, Beograd) as well. There are also regional and local lines to the places around the county. Official webpage: https://www.arriva.com.hr/hr-hr/naslovna Other cities: Beli Manastir, Valpovo, Belišće, Donji Miholjac, Erdut, Dalj.
BY TRAIN	Osijek train station: There are year-round lines to cities within the region (Đakovo, Vinkovci, Slavonski Brod, Beli Manastir) and to Zagreb. Other cities: Beli Manastir, Dalj - lines connecting with Osijek.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services.
BORDER POLICIES AND POTENTIAL ISSUES	Croatia is not yet part of the Schengen area, so in order to pass the border with Hungary and Slovenia ID or passport is required at all times. The same applies for crossing the border with Serbia, which is not part of the EU. A stricter control can be expected while crossing the border to Serbia.

Table 32: Accessibility of Koprivnica-Križevci County

Accessibility of Koprivnica-Križevci County	
BY AIR	**Nearest airports:** Zagreb Airport (HR) - distance 100 km, Osijek Airport Klisa (HR) - distance 200 km. **Other airports:** Budapest Airport (HU) - distance 300 km, Graz Airport (AT) - distance 200 km, Maribor Airport (SI) - distance 110 km (no regular lines).
BY BUS	Bus stations: Koprivnica, Đurđevac. Operators: Čazmatrans, AP Varaždin Đurđevac.
BY TRAIN	Koprivnica train station - train lines: Budapest - Koprivnica - Zagreb; Osijek - Đurđevac - Koprivnica – Varaždin. Operator: Croatian railways.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services. In addition, shuttle services are offered by Taxi Cammeo and Taxi Sunce.
BORDER POLICIES AND POTENTIAL ISSUES	Croatia is not yet part of the Schengen area, so in order to pass the border with Hungary and Slovenia ID or passport is required at all times. The same applies for crossing the border with Serbia, which is not part of the EU. A stricter control can be expected while crossing the border to Serbia.

Table 33: Accessibility of Virovitica-Podravina County

Accessibility of Virovitica-Podravina County	
BY AIR	**Nearest airports:** Zagreb Airport (HR) - distance 190 km, Budapest Airport (HU) - distance 320 km.
BY BUS	Bus stations: The nearest bus station is situated in the city of Virovitica, 15 km away from the cycling route. 6 arrivals from Zagreb and 6 departures to Zagreb on a daily basis; 2 direct weekly bus routes to Zurich, Vienna and to dozen cities in Germany.
BY TRAIN	Train station: The nearest train station is situated in the city of Virovitica, 15 km away from the cycling route. 4 arrivals from Zagreb and 4 departures to Zagreb on a daily basis.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services.
BORDER POLICIES AND POTENTIAL ISSUES	Croatia is not yet part of the Schengen area, so in order to pass the border with Hungary and Slovenia ID or passport is required at all times. The same applies for crossing the border with Serbia, which is not part of the EU. A stricter control can be expected while crossing the border to Serbia.

Table 34: Accessibility of Zala County

	Accessibility of Zala County
BY AIR	**Nearest airport:** Hévíz-Balaton international airport at Sármellék (HU) - distance 66 km from Letenye, Hungarian-Croatian border crossing. In 2018 the airport had one regular airline to Frankfurt once a week until 20th October. The rest are charter flights.
BY BUS	All settlements are accessible by scheduled bus services; however, the connections may be rare in small settlements at weekends. Carrying bicycle is not allowed on scheduled buses.
BY TRAIN	Zalaegerszeg train station: located on the international railway line Budapest - Ljubljana. There is one train daily from Ljubljana and three from Hodoš (border crossing with Slovenia). There are also 7 direct trains from Budapest per day. Bicycle carriage might be possible on these trains. Nagykanizsa train station: located on the international railway line Budapest-Zagreb, with two direct trains from Zagreb and 7 trains a day from Budapest. Bicycle carriage might be possible on these trains.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services.
BORDER POLICIES AND POTENTIAL ISSUES	Hungary, Slovenia and Austria are all in the Schengen area, which means that, as a rule, there are no controls at the border crossings. In order to enter Hungary from Croatia or vice versa, an ID or passport is sufficient, if the visit does not last more than three months. The restrictions are stricter for non-EU citizens.

Table 35: Accessibility of Somogy County

	Accessibility of Somogy County
BY AIR	**Nearest airports:** Hévíz-Balaton international airport (HU) – distance 90 km, Budapest Airport (HU) – distance 260 km.
BY BUS	All settlements are accessibly by scheduled bus services; however, the connections may be rare in small settlements at weekends. Carrying bicycle is not allowed on scheduled buses.
BY TRAIN	The border crossing settlement Zákány/Gyékényes is located on the international railway line Budapest-Zagreb, with two direct trains from Zagreb. Gyékényes and Csurgó have 3 daily connections from Budapest and several further with transfers. Bicycle carriage might be possible on these trains. The settlements between Nagykanizsa and Barcs are located on the railway line Pécs-Nagykanizsa-Sopron. These localities have 3 connections to Pécs a day, 2 to Szombathely and 1 to Sopron. Bicycle carriage is possible.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services.
BORDER POLICIES AND POTENTIAL ISSUES	Hungary, Slovenia and Austria are all in the Schengen area, which means that, as a rule, there are no controls at the border crossings. In order to enter Hungary from Croatia or vice versa, an ID or passport is sufficient, if the visit does not last more than three months. The restrictions are stricter for non-EU citizens.

Table 36: Accessibility of Baranya County

	Accessibility of Baranya County
BY AIR	**Nearest airports:** Osijek Airport Klisa (HR) - distance 100 km, Budapest Airport (HU) – distance 250 km, Belgrade Nikola Tesla Airport (SR) - distance 300 km.
BY BUS	All settlements are accessible by scheduled bus services; however, the connections may be rare in small settlements at weekends. Carrying a bicycle is not allowed on scheduled buses.
BY TRAIN	There is one direct train a day from Budapest to Pécs and 16 further trains from Szászhalombatta (direct shuttle bus from Budapest Kelenföld railway station). This option will be replaced by direct trains from autumn 2019 onwards. Carriage of bicycles is not possible on these trains at the moment. There are 3 trains a day from Pécs to Mohács, with a rapid transfer in Villány. Villány is accessible from Pécs by 11 trains a day. Pécs is accessible from Sopron (1 train), Szombathely (2 trains) and Nagykanizsa (3 trains) as well. Bicycle carriage is possible on these trains.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services. In addition, there are shuttle services from all nearby airports (Budapest, Vienna, Zagreb, Belgrade, Hévíz-Balaton) to Pécs and the wider area. Carriage of bicycles is not possible on these services by default.
BORDER POLICIES AND POTENTIAL ISSUES	Hungary, Slovenia and Austria are all in the Schengen area, which means that, as a rule, there are no controls at the border crossings. In order to enter Hungary from Croatia or vice versa, an ID or passport is sufficient, if the visit does not last more than three months. The restrictions are stricter for non-EU citizens. Border crossings Hungary-Croatia at Drávaszabolcs-Donji Miholjac (58-D53), Beremend-Baranjsko Petrovo Selo (5708-D211), Udvar-Duboševica (56-D7). Crossings are open to all citizens.

Table 37: Accessibility of West Bačka District

	Accessibility of West Bačka District
BY AIR	**Nearest airports:** Osijek Airport Klisa (HR) - distance 30 km from the route, Belgrade Nikola Tesla Airport (SR) - distance 160 km.
BY BUS	Bus station: 5 km from the route there is a bus station of the local transport companies Apatin-trans and Sever-trans.
BY TRAIN	Train station: 10-15 km from the AoE bike route there is a railway station in the villages Sonta (Municipality of Apatin) and Bogojevo (Municipality Odžaci). Stations are located on the magistral railway line (E-71, Subotica (Serbia) - Sombor (Serbia) – Bogojevo (Serbia) - state border - Erdut (Croatia) and are connected with neighbouring Croatia.
SHUTTLE SERVICES	AoE shuttle service can be organized from any point of arrival per request to the AoE Booking Center. The network should be further developed with local shuttle service providers to lower the carbon footprint of shuttle services. In the area there are registered taxi drivers for transport of goods and passengers. There is also the possibility of renting a van for transportation in Apatin and Sombor.
BORDER POLICIES AND	Serbia is not part of the EU, therefore stricter controls can be expected for entering the EU – in Croatia or Hungary. An ID or passport is required for crossing the border to and from Serbia, if the visit does not last more than 3 months.

POTENTIAL ISSUES	Apatin has a direct exit to the Danube River. There is a state border crossing for floating-sailing objects (foreign and domestic) at the riverbank area of the Danube River - left coast from 1418 to 1433 km. Apatin Harbor Office-Port Authority, refers to the branch unit and municipalities Sombor and Kula, headquartered in Bezdan, for the border crossing area in Bezdan and the area of the river Danube. The national border crossing for floating-sailing objects foreign and domestic flags Captain's Port of Apatin operates 24 hours continuously. There are no specific problems at the border crossing Bogojevo (Serbia) - Erdut (Croatia), except of possible queues due to heavy traffic.

The findings show that despite relatively good connections with public transport in larger cities, some rural areas are still quite hard to reach. There is especially a lack of cycling related transport services such as trains and busses allowing transport of bicycles, luggage transport services, shuttle services, etc. The latter forced the partnership to set up the AoE shuttle service network, which is supervised by the AoE Booking center and led by the company Feel Active from Varaždin, Croatia. Further efforts will be needed to cover the whole AoE destination with the mobility network, to lower the carbon footprint of mobility services, involve local stakeholders and consequently provide new job opportunities. With setting up a comprehensive AoE mobility network, a strong argument will be created as an example of good practice, for convincing the local, regional and national public transportation organizers, to improve the connections and adapt the vehicles to outdoor tourism demands. Moreover, the cooperation and collaboration between public and private sector will be of key importance when dealing with that issue.

6.2.2   Tourism infrastructure in the Amazon of Europe

This chapter provides an overview of the tourism and cycling infrastructure in the Amazon of Europe.

Data is collected for the area up to 10 km away from the cycling route or rivers, except of the data about tour operators/travel agencies, which is collected on NUTS 3 level.

6.2.2.1   Accommodation in the Amazon of Europe

Available accommodations: **521**   **Available beds:**   **14.628**

In the Amazon of Europe destination, the highest number of available beds is in 4* hotels, followed by 3* hotels, private apartments and campsites and the lowest number of available beds is in 5* hotel, followed by 2* hotels and touristic farms.

The region with the highest number of available beds is Baranya County (3.563) and the region with the lowest number of available beds is Virovitca County (34).

Table 38: Number of accommodations and available beds in the Amazon of Europe area (up to 10 km from the cycling route/river)

Type of accommodation	Number of beds	Number of accommodations
5* Hotels	0	0
4* Hotels	4.665	30
3* Hotels	2.993	46
2* Hotels	192	5
Hostels	783	12
Camping & Glamping	1.589	22
B&Bs	556	32
Touristic farms	381	45
Private apartments	1.314	197
Private rooms	1.156	97
Other	999	35
TOTAL	14.628	521

There are literally no 5* hotels present in the area of Amazon of Europe (at the time of data collection). On the other hand, there is an abundance of private apartments in the area. This indicates that the direction of the development of the Amazon of Europe into an outdoor tourism destination with unique nature and culture-oriented experiences has appropriate foundations in terms of accommodation as well. The highest number of beds is in 4* hotels, which can be found in all regions of the AoE. This indicates that although not the main target group, groups with up to 25 people can be facilitated in the destination in all regions. In order to further develop outdoor tourism, emphasis should be given to developing camping and glamping sites, since this best corresponds to outdoor tourism and the target groups the partnership is planning to attract with the new flagship products. A graphical presentation of the table above can be found in figures 22 and 23 below.

Figure 31: Share of available beds by type of the accommodation in the Amazon of Europe area (up to 10 km from the cycling route/river)

Figure 32: Number of accommodations in the Amazon of Europe area (up to 10 km from the cycling route/river)
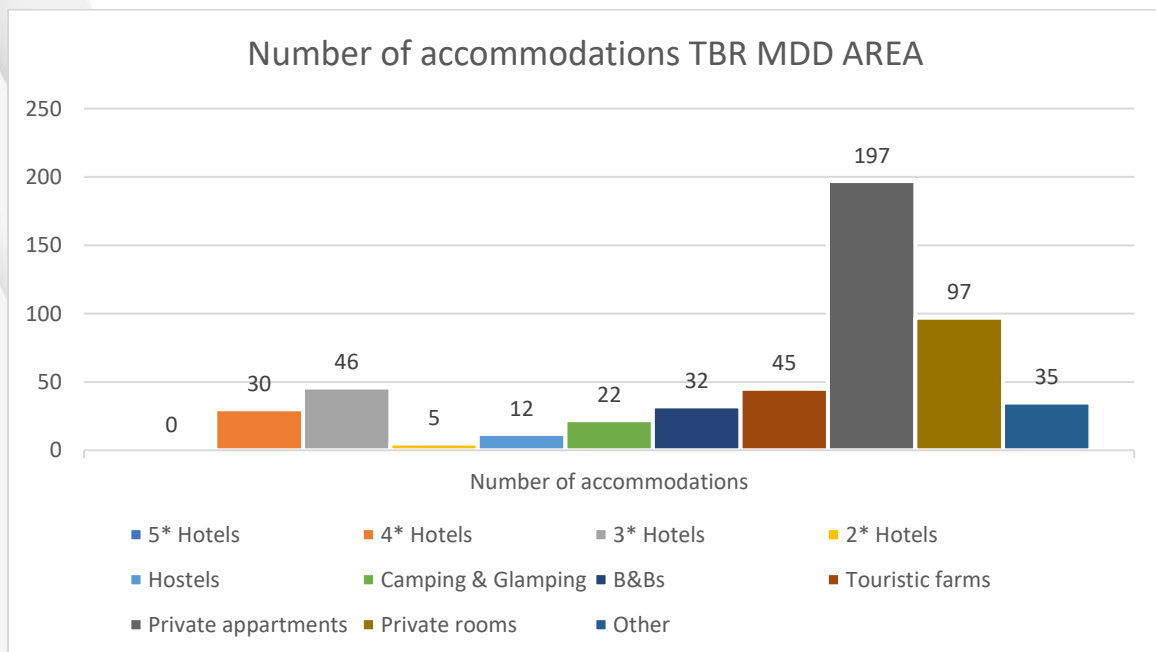
The overview of accommodations by region is graphically presented in the Figures 24, 25 and 26 below. It is evident that there are major differences in the availability of accommodation facilities throughout the destination. The regions where additional appropriate tourism facilities should be developed are Virovitica-Podravina County in Croatia, and West-Bačka district in Serbia. Although East-Styria is showing low number of accommodations as well, the number of beds is well within the average, since the two bigger cities – Mureck and Bad Radkersburg are both well developed in terms of tourism and are part of a well-functioning local/regional micro-destination (e.g. Vulkanland). The reason for the major spike in Baranya County is the "touristic hot-spot" of Villany, which is one of the best developed micro-destinations with emphasis on gastronomic and wine tourism in Hungary.

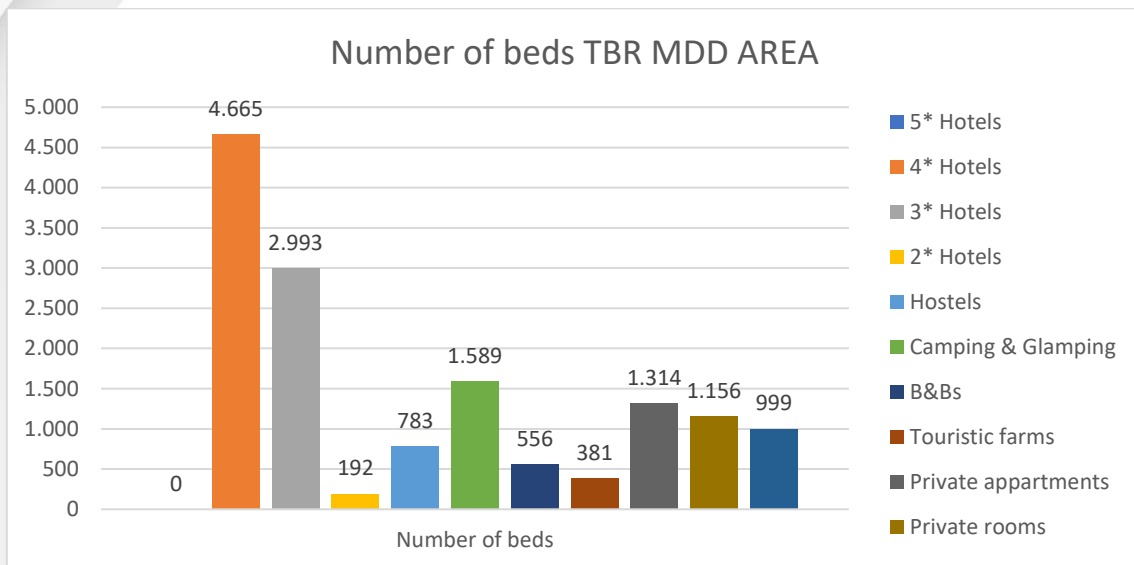*Figure 33: Categories of accommodations in the Amazon of Europe area (up to 10 km from the cycling route/river) by region*

Number of accommodations by region

Legend:
- AT - Oststeiermark
- SI - Pomurska
- HR1 - Međimurska županija
- HR2 - Osječko-baranjska županija
- HR3 - Koprivničko-križevačka županija
- HR4 - Virovitičko-podravska županija
- HR5 - Varaždinska županija
- HU1 - Zala
- HU2 - Somogy

Values (Number of accommodations): 21, 38, 32, 61, 39, 3, 91, 64, 39, 130, 17

Figure 34: Number of available beds in the Amazon of Europe area (up to 10 km from the cycling route/river) by region

Number of beds by region

Legend:
- AT - Oststeiermark
- SI - Pomurska
- HR1 - Međimurska županija
- HR2 - Osječko-baranjska županija
- HR3 - Koprivničko-križevačka županija
- HR4 - Virovitičko-podravska županija
- HR5 - Varaždinska županija
- HU1 - Zala
- HU2 - Somogy
- HU3 - Baranya
- SR1 - West Bačka District

Values (Number of beds): 1.196, 2.541, 1.093, 1.369, 699, 34, 1.024, 1.587, 1.098, 3.563, 424

The map below (figure 26) gives a good representation of the unequal dispersion of the number of accommodations, types of accommodations, number of beds, and especially the prices achieved for a double room per night in the destination. A tendency from west to east is evident in terms of price achieved. With creation of a knowledge platform, and joint management and quality standards, the partnership is aiming to improve the prices achieved in the eastern part of the destination. Additionally, special emphasis should be given to encouraging additional accommodation facilities in the regions Virovitica-Podravina County and West Bačka District.

Figure 35: Accommodations in the AoE area (up to 10km from the cycling route/river) by regions
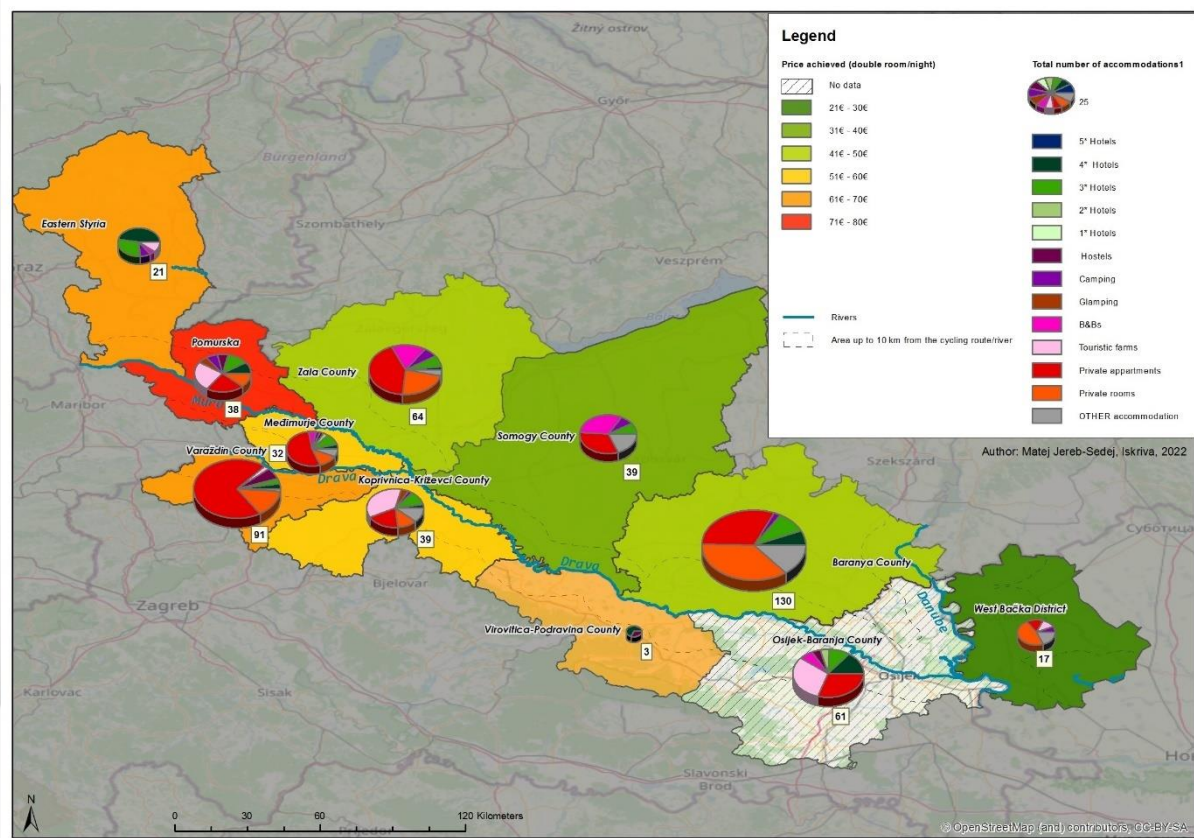
Restaurants: **342**

In the Amazon of Europe there are 342 restaurants altogether in the zone up to 10 km away from the cycling route/river. The highest number of restaurants (79) is in Osijek-Baranja County and the lowest number of restaurants (7) is in Međimurje County and West Bačka District (12). A common problem of all Amazon of Europe regions is that restaurants are predominantly available in larger towns and cities with a lack in the rural parts near the rivers. There are however some benchmarks which can be seen as examples of best practice in the development of joint management and quality standards.

Table 39: Number of restaurants in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river by regions

Regions	No. of Restaurants
AT - Oststeiermark	27
SI - Pomurska	27
HR1 - Međimurska županija	7
HR2 - Osječko-baranjska županija	79
HR3 - Koprivničko-križevačka županija	66
HR4 - Virovitičko-podravska županija	24
HR5 - Varaždinska županija	17
HU1 - Zala	29
HU2 - Somogy	21
HU3 - Baranya	34
SR1 - West Bačka District	12
Total	342

Data on restaurants by regions is graphically presented in detail in the Figure 13 below.

Figure 36: Number of restaurants in the Amazon of Europe area (up to 10 km from the cycling route/river) by regions
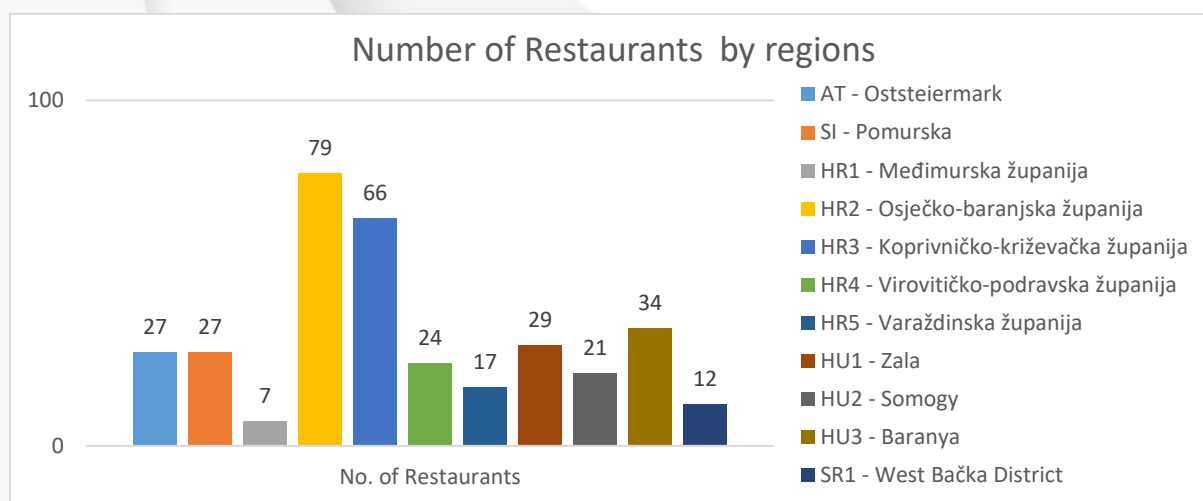
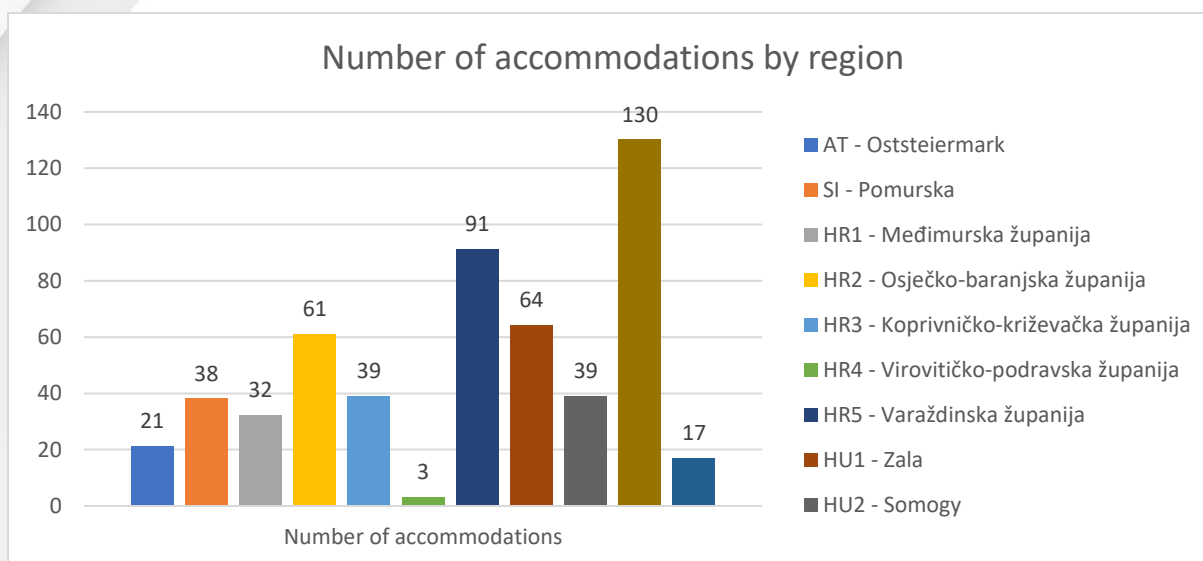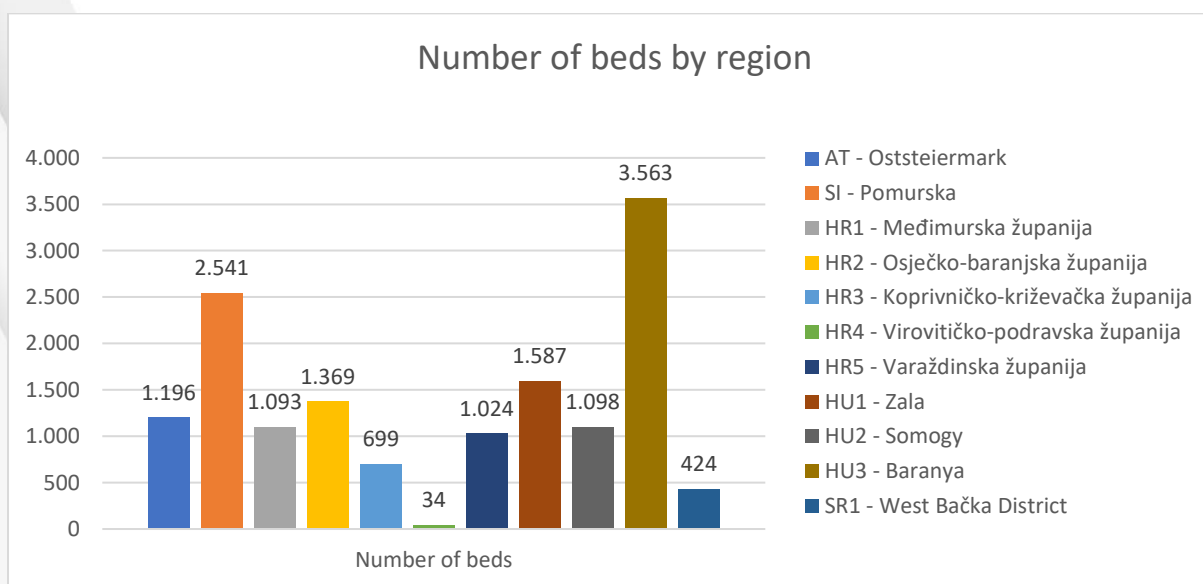The map below shows the number of restaurants, their area of focus as well as the prices achieved for a 3-course menu. In the areas where there is no information available for the prices achieved, one can conclude that the differences between the prices are too big because of the size of the area and regional differences (city and rural area).

After taking a glimpse of the map, the dark green shares of the pies stand out throughout the whole destination, which is of great importance. This colour represents the local cuisine, which is one of the USP's of the destination Amazon of Europe, since it shows the area's dependence on nature, or with other words, the synergies between culture and nature which have developed throughout history. Setting up common management and quality standards will help improve the prices achieved in less developed areas and an international recognition.

Figure 37: Gastronomic capacity of the Amazon of Europe
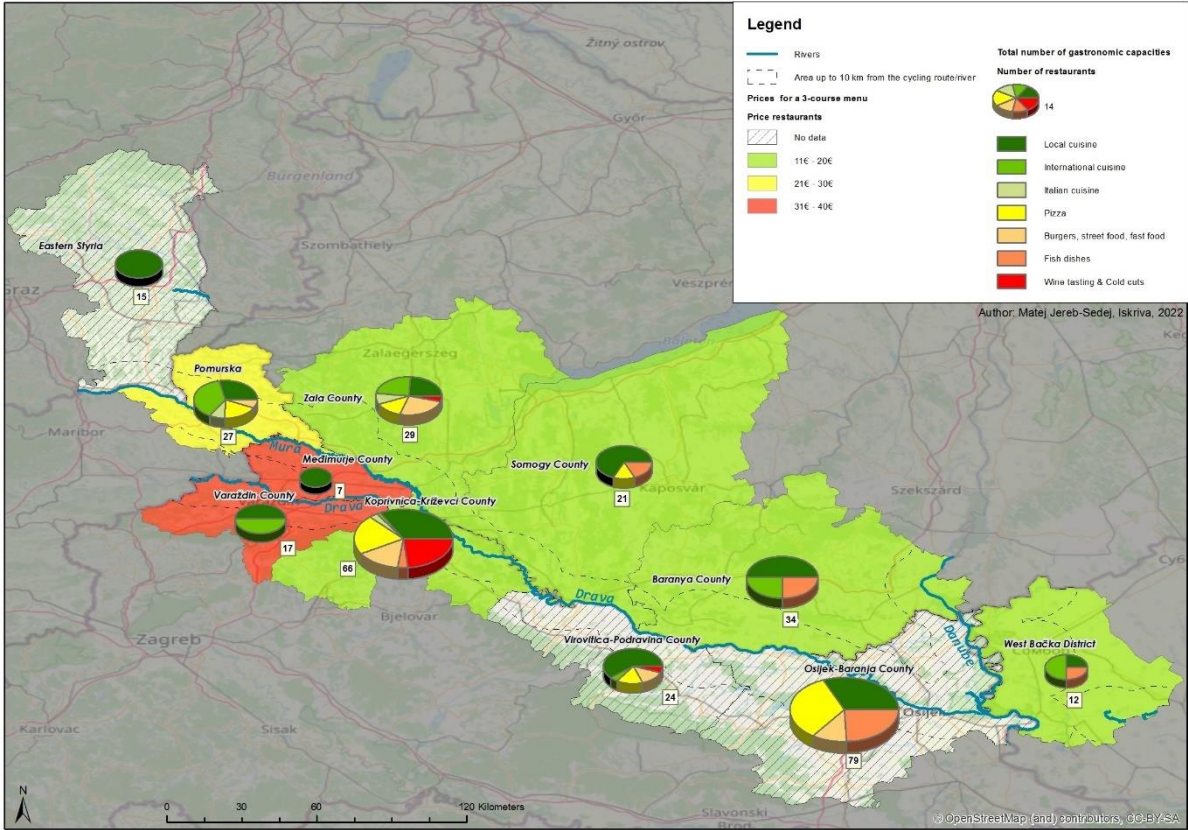
General tour operators/travel agencies: 167

Outdoor/Adventure travel agencies: 61

On a NUTS 3 level in the Amazon of Europe, there are 167 general tour operators/travel agencies and 61 outdoor tour operators/travel agencies.

The NUTS 3 region with the highest number of general tour operators/travel agencies is East Styria (40), followed by Somogy County (36). On the other hand, there were no general tour operators/travel agencies in Virovitica-Podravina County.

The region with the highest number of adventure tour operators/travel agencies is Pomurska region (20). However, there were no specialized biking tour operators/travel agencies in Osijek-Baranja, Koprivnica-Križevci and Somogy County and West Bačka District in 2017, but now all these regions have at least one, the only region without any specialized outdoor tour operators is Virovitica-Podravina county. The data indicates a need for development of specialized outdoor tour operators/travel agencies in this region.

Figure 38: General and biking tour operators/travel agencies in NUTS 3 regions in the Amazon of Europe area
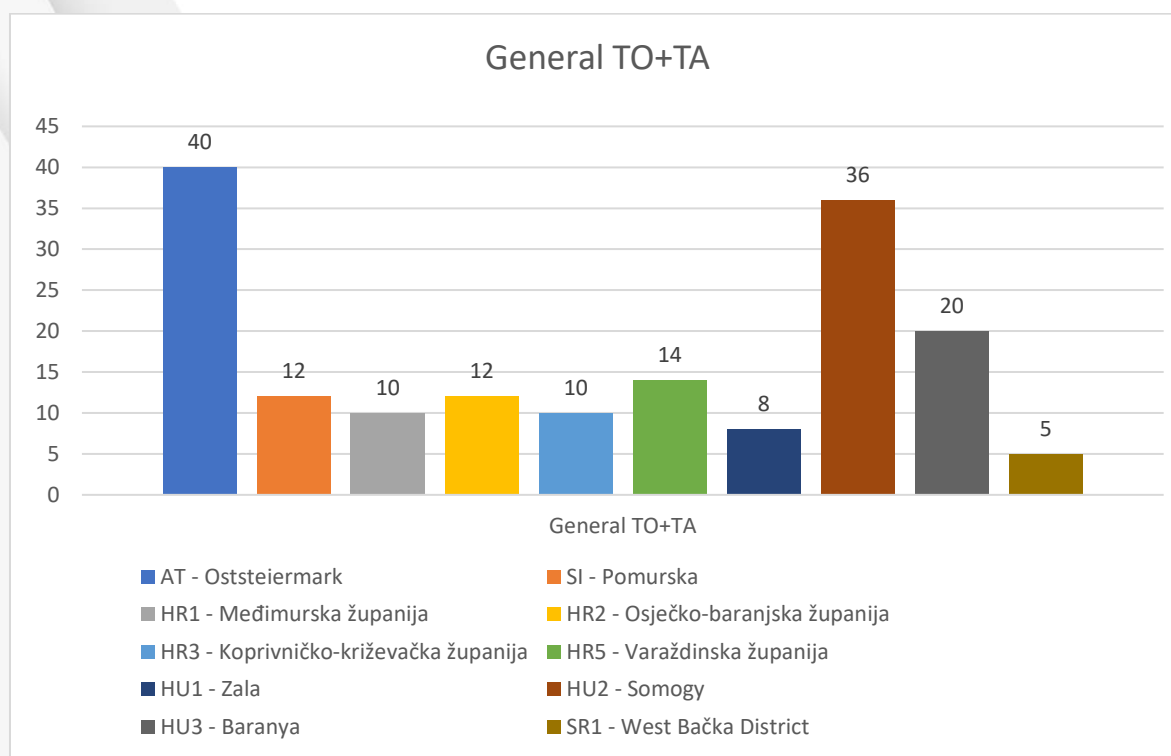
6.2.2.4   Outdoor tourism infrastructure and offer of leisure activities

This chapter provides and overview of outdoor tourism related infrastructure and offer in the Amazon of Europe area.

In the Amazon of Europe there are 39 bike rentals and 56 bike shops in the zone up to 10 km away from the rivers/cycling path.

The region with the highest number of cycling infrastructure available is Osijek-Baranja County with 7 bike rentals and 16 bike shops, followed by Eastern Styria with 4 bike rentals and 6 bike shops. The region with the lowest number of cycling infrastructure is West Bačka District. There are no bike rentals in Somogy County.

Table 40: Cycling-related infrastructure in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river by regions

REGIONS	BIKE SHOPS	BIKE RENTALS
Eastern Styria	6	4
Pomurska	4	4
Međimurje County	2	3
Osijek-Baranja County	16	7
Koprivnica-Križevci County	6	3
Virovitica-Podravina County	4	3
Varaždin County	3	5
Zala County	4	5
Somogy County	4	-
Baranya County	6	3
West Bačka district	1	2
Total	56	39

In addition to the bike shops and bike rentals, the following cycling infrastructure has been installed through the Amazon of Europe Bike Trail project, which ended in 2020:

- 37 large info boards
- 23 small info boards
- 17 resting places
- 50 other types of elements (17 bicycle repair stands, 26 bicycle racks, 4 solar benches, 2 solar lamps and one e-charging pillar for e-bicycles)
- more than 1700 signposts/signs

Table 34 represents the tourism offer for various activities, spanning from outdoor, to wellness, handicraft and agriculture workshops. The dispersion of the offered activities throughout the destination can be found on the following 3 maps. The activities have been divided into 3 groups – Air, Land, Water. What stands out from the table below is the very low availability of panoramic flights – air activities. There is only one location in the 10km radius from the river/bike trail where panoramic flights, balloon flights or sky-diving is offered. The second location is in East-Styria, approximately 40km from the river Mura. Since the destination AoE shows its greatest potential when viewed from the air, it would be of great importance to add additional possibilities of panoramic flights and other air activities.

In addition, new sport/private airports should be established, following the very successful model of Italian agrotourism niche, which is primarily attracting visitors from the DACH market, travelling with their own ultralight airplanes. This market segment has great potential since the offer is not as vast quite yet, but the buying power is big.

Table 41: Tourism related offer in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river by regions

LEISURE ACTIVITY PROVIDERS IN AoE	
Guided tours providers	56
Bike shops / rent	56
Local biking activities providers	12
Bird watching providers	6
Kayaking, canoeing, rafting providers	18
Boat tours providers	11
Panoramic flight providers	2
Wellness & SPA providers	26
Handicrafts workshop providers	21
Agriculture workshop providers	6

Figure 39: Offers of tourism related products and services in the AIR in the Amazon of Europe area by regions
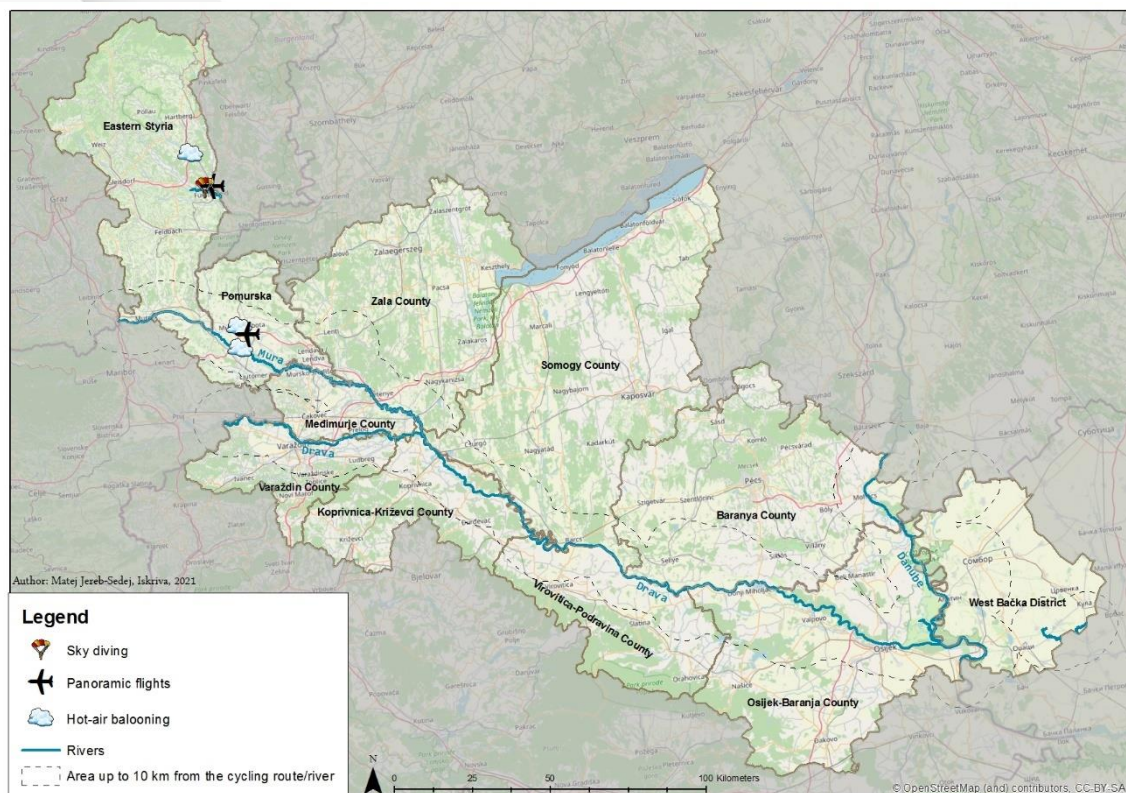
Figure 40: Offers of tourism related products and services on LAND in the Amazon of Europe area (with focus on the zone up to 10 km from the cycling route/river) by regions
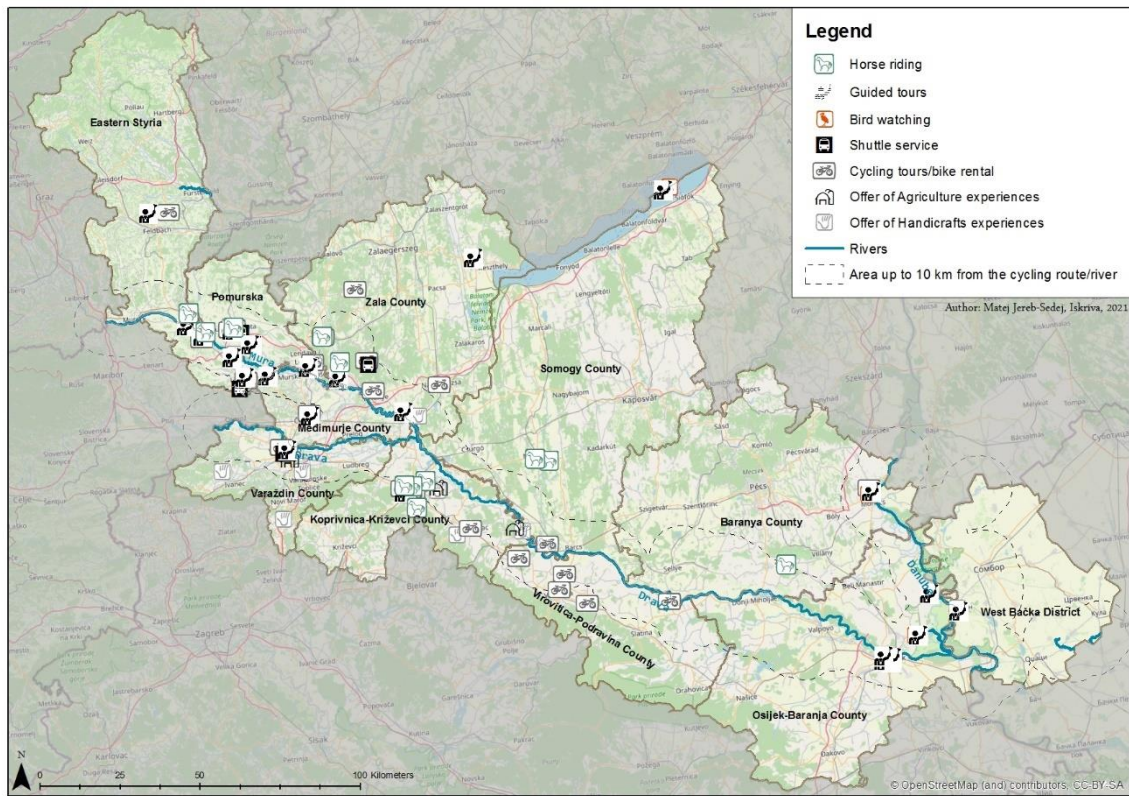
Figure 41: Offers of tourism related products and services in WATER in the Amazon of Europe area (with focus on the zone up to 10 km from the cycling route/river) by regions
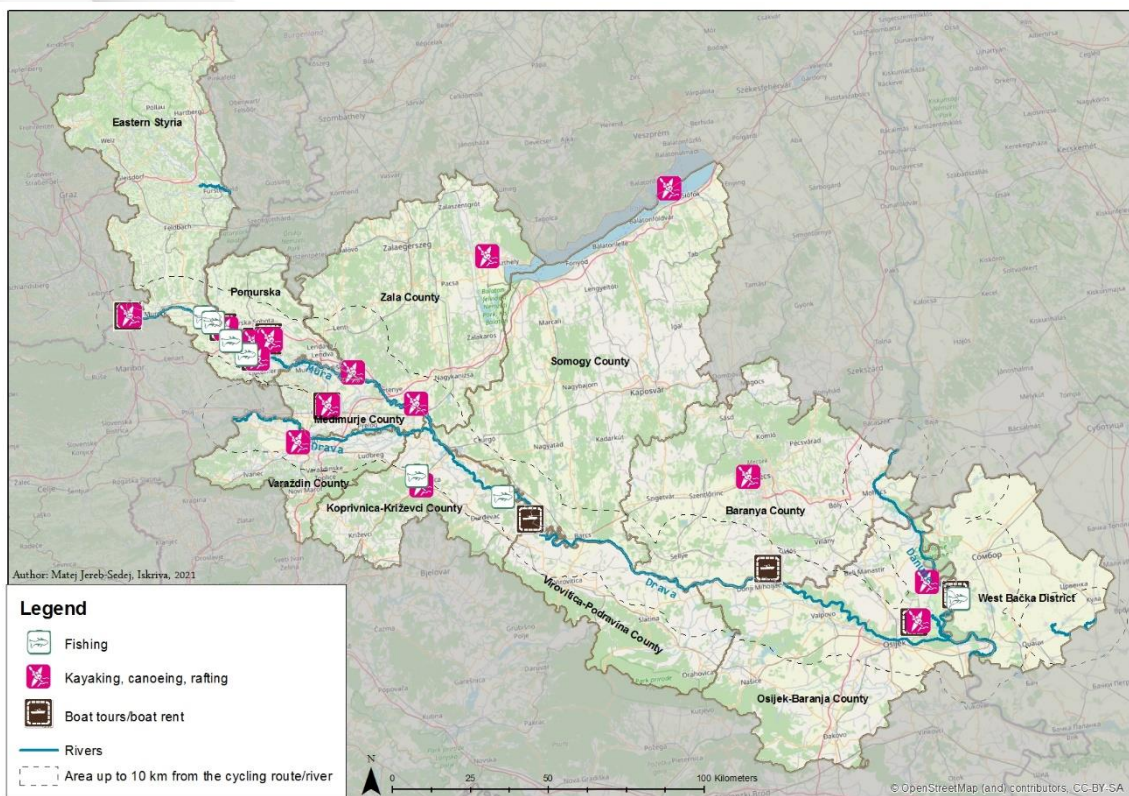
The above visual representations show a great lack of the outdoor tourism activity offers in the center of the destination, more precise in the Somogy and Baranya Counties in Hungary, and in the Virovitica-Podravina and Osijek-Baranya Counties.

Through the launch of the first tourism flagship product – the AoE Bike Trail, the cycling infrastructure and offer has already experienced a surge. With the planned additional flagship products – Amazing moments and the River Journey, one could expect the same will happen with the related offers on water and on land (with relation to handicraft and agricultural workshops).

Establishing joint management and quality standards and a certification programme will be of great importance for ensuring stable growth of the tourism offer as well as a minimization of the differences in the perceived value for similar products/services within the destination AoE.

Since the Amazon of Europe is an area rich with thermal water, a vast offer of wellnesses & SPAs (26 service providers) is present in the destination, with a stable dispersion throughout the destination as can be seen from the map below.

Figure 42: Offers for health and well-being in the Amazon of Europe area (with focus on the zone up to 10 km from the cycling route/river) by regions
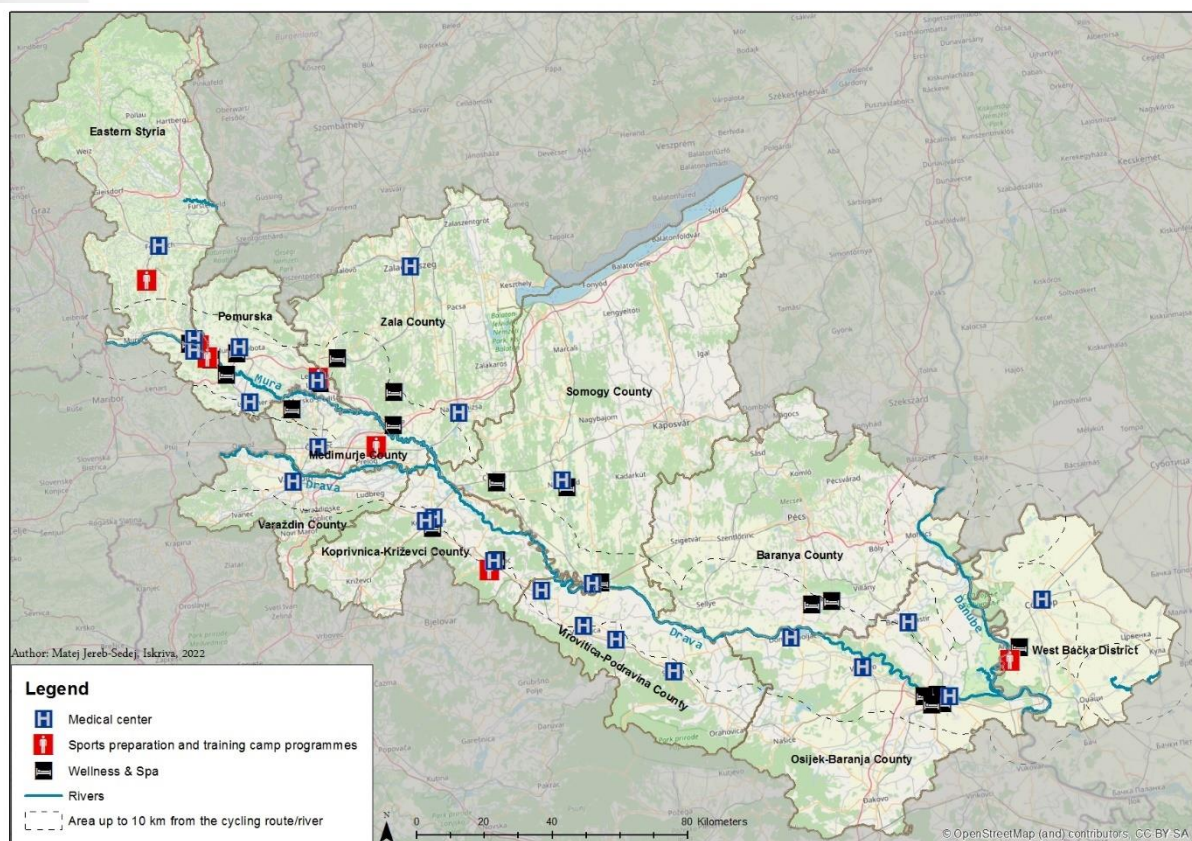
Since outdoor tourism is the focus of the Amazon of Europe tourism destination, it is crucial to have an appropriate distribution of medical services throughout the destination. As the map above shows, the distribution is well dispersed in the case of Amazon of Europe. For additional tourism offers, sports preparation and training camp programmes are also already present in the destination.

Another very important aspect is the presence of Tourist Information Centers (TICs) in individual regions as well as their dispersion throughout the destination. As it is evident from the map below, there is a lack of TICs in the Hungarian part of the destination, as well as in Osijek-Baranja County. If the visitors cannot access a TIC physically, it is crucial to provide them with the required tourism information virtually. Therefore, a well updated and user-friendly app should be developed. Having an offer without letting people know about it or how to access it is almost the same as having no offer. Therefore, internal and external communication will play an important role in reaching global recognition.

Figure 43: Tourist Information Centers and Visitor Centers in the Amazon of Europe area (with focus on the zone up to 10 km from the cycling route/river) by regions
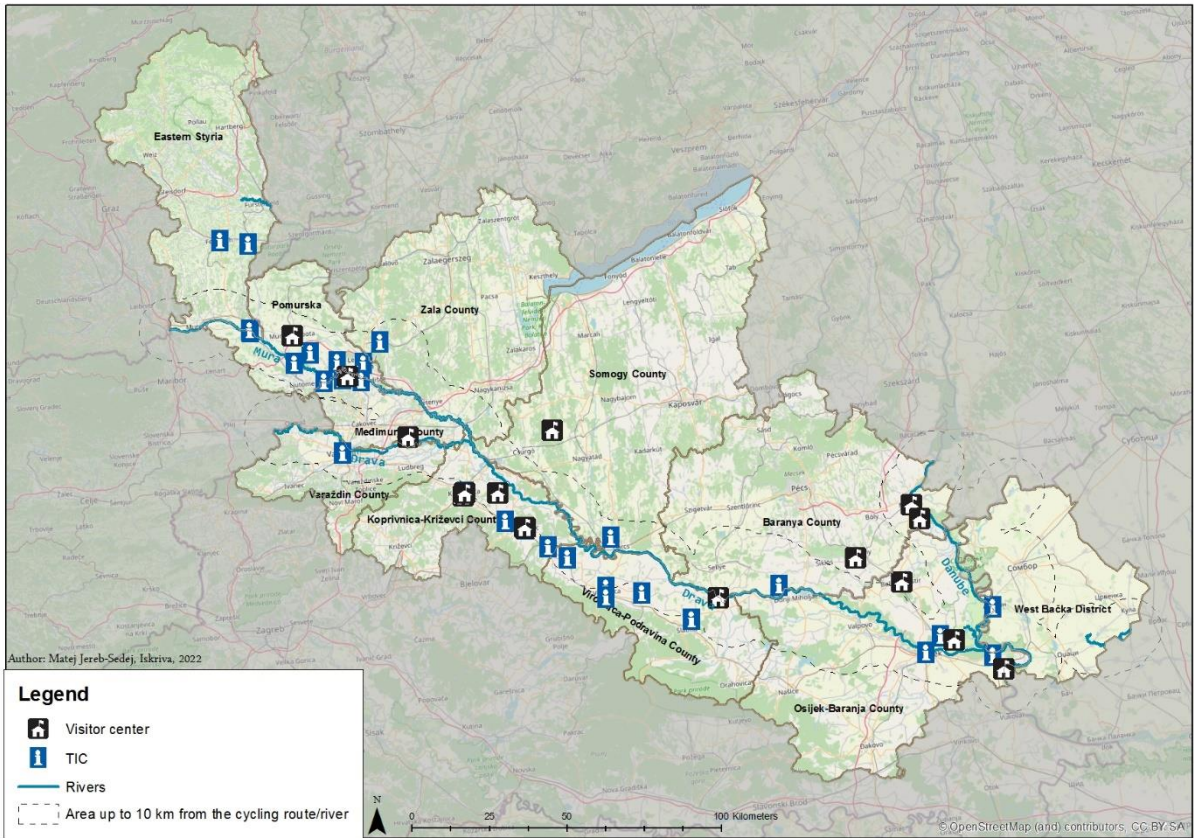
The analysis showed that in most regions there is a suitable offer of complementary leisure activities visitors could engage in aside from cycling on their trip through the Amazon of Europe destination. Nonetheless, some initiatives are still necessary to improve tourist offer in order to provide a unique travel experience for the visitors.

6.2.3 Attractions and events in the Amazon of Europe

This chapter provides an overview of main natural and cultural tourist attractions, as well as the main festivals & events in the Amazon of Europe destination.

Data was collected by listing most important attractions and service providers in a range up to 10 km from the rivers/cycling route if not requested differently in individual cases.

In the tables below the major nature and cultural attractions, festivals and events are presented for all regions of the Amazon of Europe.

Table 42: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Eastern Styria

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
EASTERN STYRIA	Liebmann See (lake)	Old Town Bad Radkersburg	Anradeln – the official cycling season opening (beginning of April)
			Tour de Mur – cycling by the river Mura/Stadtfest – city festival (June)
			Flanieren und Radieren – music festival in Bad Radkersburg (every Friday during summer months)
			Kürbisfest – Pumpkin festival (September)
			Christmas Market in December

Table 43: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Pomurska region

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
POMURSKA	Murska Sobota Lake	Expano Murska Sobota	Gornja Radgona Fair – agriculture fair
	Gajševsko Lake	Murska Sobota Castle	Marathon Three Hearts
	Prlekija Wineyards	Pomurje Museum Murska Sobota	Festival Soboški dnevi - Summer Festival in Murska Sobota
	Island of Love	Mill on the Mura - Babič Mill	Street food festival in Murska Sobota - Sočna Vilica
	Park Land of Storks	Tinek brod	Halloween Dance Rakičan
	Black Alder Forest	Homestead of writer Miško Kranjec	Pomurje Sport Festival
	River'scool Mala Polana	Copek Mill	International Folklore Festival Beltinci
	Lendava Wineyards	Lookout tower Vinarium	Pomurje Summer Festival
	Lendavsko Lake	Sabol Homestead and the Rural Development Cooperative Pomelaj	Festival Vinarium
		Prekmurje Homestead	St. Martin day Celebrations

Table 44: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Međimurje County

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
MEĐIMURJE COUNTY	Regional park Mura Drava	Zrinski castle	Urbanovo (wine festival)
	Bedekovićeve grabe	Mill on the Mura river	Porcijunkulovo (traditional manifestation)
	City of labirints	Monastery of st. Jelena	Martinje – St. Martin's day
	Miller's Educational Path	Road of tradition	Fašnik - carnival
		Međimurje wine road	Vincek hike's

Table 45: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Osijek-Baranja County

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
OSIJEK-BARANJA COUNTY	Nature park Kopački rit	City of Osijek (Co-cathedral St. Petar and Paul, European Avenue - "Art Nuoveau", Park of King Tomislav, Sakuntala park, Park of King Petar Krešimir IV. and Cinema Urania) and Tvrđa (Citadel) - the old town of the city of Osijek	Pannonian Challenge, Osijek
	Natural heritage of the River Drava	Monument and the Memorial centar of the Battle of Batina	Night of wine and art, Osijek
	Natural heritage of the River Danube	Norman Prandau Castle	Osijek Summer of Youth, Osijek - educational, artistic, sports and music programme
	Special Ornithological Reserve of Podpanj	Castle of Eugen Savojski	UFO - Urban Fest Osijek
		Castle in Tikveš	Beer Fest, Osijek
		Sancutary of Lady of Shelter Aljmaš	The Fishing days in Kopacevo
		Fortress of Erdut	Ferivi Half marathon, Osijek
		Cultural and Scientific Center "Milutin Milanković	Gatorfest, Banovo brdo – wine festival
		Mailath Castle	
		Prandau-Normann Castle	

Table 46: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Koprivnica-Križevci County

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
KOPRIVNICA-KRIŽEVCI COUNTY	Đurđevac Sands Special Geographical and Botanical Reserve	Easter egg from the heart	The Renaissance festival
	Crni Jarki	The Gallery roads	The festival of "Picoki"
	Veliki Pažut Special Ornithological Reserve	Intangible cultural heritage - Painting on glass in manners of naive art	The motifs of Podravina
	Čambina Significant Landscape	Bicycle monuments in Koprivnica	The Assumption of The Virgin Mary
	Repaš monument of nature	Koprivnica City Museum	Anglers to their town
	Meadow site at Zovje	Đurđevac City Museum	From Granny's Chest
	Šoderica lake	Castle Inkey	
	Čingi Lingi lake	Intangible cultural heritage - traditional dishes	
	Bilogora	Intangible cultural heritage - Handicrafts and traditional crafts	
		Intangible cultural heritage - Traditional processes	

Table 47: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Virovitica-Podravina County

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
VIROVITICA-PODRAVINA COUNTY	UNESCO Transboundary Biosfere Reserve Mura-Drava-Danube	The Count Drašković Mansion	Tradicional music festival "Songs of Podravina", Pitomača
	Lisičine arboretum, Lisičine	The Count Janković Mansion in Kapela Dvor	Living history programme "Visiting past times", Pitomača
	Count Janković valley - Nature Park Jankovac, Papuk	First champagne factory in Croatia, Slatina	Pannonia-Bilogora MTB marathon, Kapela Dvor
	Sequoia giganthea Decs (Mamutovac), Slatina	Ružica city, Orahovica	The Drava River Springtime - folklore festival, Sopje
	Virovitica fish-ponds, Virovitica	Franciscan Church and Monastery of St. Roch, Virovitica	Rokovo (St.Rocco's Day), 16. 8.
		Janković Manor, Kapela Dvor	Viroexpo
		Pejačević Castle, Virovitica	Small trains fair
			Virovitica bike tour and May Day celebration
			The cycling race „The Carp route "
			International Rock and Blues fest

Table 48: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Zala County

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
ZALA COUNTY	The Arboretum of Budafa (Budafa)	Andrássy castle (Letenye)	
	Ancient Beech-woods in Vétyem (Vétyem)	Csömödér Forest Railway (the longest narrow-gauge rail network in Hungary) Passenger transport between Lenti and Kistolmács	
	Lake of Kistolmács (Kistolmács)	Castle and watermill (museum and accomodation) in Szécsisziget	
	Thermal water (Lenti)	Permanent exhibition of the Oil Industry Museum (Bázakerettye)	
		Bunkers between Páka and Szécsisziget	
		Bunker system in Lovászi	

Table 49: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Somogy County

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
SOMOGY COUNTY	Mura - Drava confluence Őrtilos	Border opening Őrtilos - Legrad	Border opening Őrtilos - Legrad
			Family bike tour to Virovitica - Barcs-Virovitica
			eXtremeMan competition - Nagyatád
			Border running - Barcs-Virovitica

Table 50: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – Baranja County

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
BARANJA COUNTY		Busó Festival - Mohács	Busó Festival, Mohács
		Villányi BorZsongás Festival - Villány	Villányi BorZsongás Festival, Villány
	Palkonya Hills Foot Race - Palkonya		Palkonya Hills Foot Race, Palkonya
		Palkonya Pentecost Open Cellars - Palkonya	Palkonya Pentecost Open Cellars, Palkonya
			Villány Rosé Festival and Marathon, Villány
		Harkány Spa Festival - Harkány	Harkány Spa Festival, Harkány
		Ördögkatlan Festival - Nagyharsány, Kisharsány, Beremend, Villánykövesd, Palkonya	Ördögkatlan Festival, Nagyharsány, Kisharsány, Beremend, Villánykövesd, Palkonya
		European Wine Song Festival - Pécs, Villány	European Wine Song Festival, Pécs, Villány

		Villány Red Wine Festival - Villány	Villány Red Wine Festival, Villány

Table 51: Tourism attractions, festivals and events in the Amazon of Europe area in the zone up to 10 km away from the cycling route/river – West Bačka District

	NATURE ATTRACTIONS	CULTURAL ATTRACTIONS	FESTIVALS & EVENTS
WEST BAČKA DISTRICT	Special nature reserve of Upper Danube	The Orthodox temple of the Holy George	Wine festival, Sombor
	Marina Tromedja	Carmel church in Sombor	Poultry fair
	Sulphur wateri in spa Bezdan	The Town hall of Sombor	Bicycle race in Sombor
	Danube bay with wooded peninsula	Museum of the Batina battle	Days of bread
		The Orthodox temple of the Holy apostles	Fishermen evening in Apatin
		Catholic Church od Dormition of Mary	Deer & beer festival
		The Town hall of Apatin	The Lika Olympiad
		Museum of the Danube Germans	Kupusina summer

There are many natural and cultural attractions, as well as festivals and events in the regions of the Amazon of Europe, emphasizing the richness of the area in natural and cultural values and its attractiveness for potential visitors. The festivals and events span from sports to culinary events, and deep-rooted local celebrations, customs and habits. Through the development of a joint management and quality system, there is major potential for an outstanding network of "Amazing moments", which the visitors will be able to experience. Merged under a joint network and a certification programme, a controlled quality of the service/product execution will be ensured, adding perceived value for the providers and the visitors and once again minimizing the differences in the prices achieved throughout the destination.

6.2.4 Implemented and on-going tourism development projects in the Amazon of Europe area

In the table below the overview of the most important implemented and on-going projects related to tourism and cycling in all regions of the Amazon of Europe is presented.

Table 52: Implemented and on-going tourism development projects in the Amazon of Europe area

REGIONS	IMPLEMENTED AND ON-GOING PROJECTS RELATED TO TOURISM IN AOE
EASTERN STYRIA	- Genuss am Fluss/Glamur
POMURSKA REGION	- coopMDD
MEĐIMURJE COUNTY	- Mura Drava Bike, - Cian 1.0 - Cian 2.0
OSIJEK-BARANJA COUNTY	- Via Pacis Panonnie - Baranja Greenways - Development of Pécs-Osijek-Antunovac-Ivanovac biking route
KOPRIVNICA-KRIŽEVCI COUNTY	- Implementation of the Operational plan of tourism development of KKC - project for developing an integrated and intermodal transport in the area of the region of North Croatia - Iron Curtain Trail - INVEST-PRO - Cultervive - Cultervive II - 4 towers - CIVITAS DYN@MO - Tour de Mur - Drava Route - Development of bicycle routes and related services in the natural environment of rivers Mura and Drava - Bicycle oasis - DRAVA-GASTROLOBBY - Legrad and Ortilos on bike - Mobile 2020
VIROVITICA-PODRAVINA COUNTY	- Drava4enjoy - The Drava Story 1 - Cycling routes by the river Drava - Eurovelo 13
ZALA COUNTY	- PaNaNet - Pannon Pleasure - Sustainable water tourism along Mura and Drava River: Two Rivers one Goal - Cycle in a network 2.0 - Happy Bike -Unlimited bicycle experiences along the Mura and Drava rivers - IronCurtainCycling

SOMOGY COUNTY & BARANYA COUNTY	- Iron Curtain Trail project (SEE) - BICBCproject (HU-HR IPA CBC) - development of the cycling infrastructure on the dike of the Drava between Tótujfalu–Felsőszentmárton, Felsőszentmárton–Drávasztára and Mailáthpuszta–Szaporca–Drávaszabolcs - Development of the bicycle route between Drávaszabolcs and Harkány (HU-HR IPA CBC) - Tourpack project
WEST BAČKA DISTRICT	- Eurovelo 6

Regional coordinators reported altogether 39 implemented or on-going projects dealing with the topics of tourism or/and outdoor activities in the area. The results indicate big interest for outdoor tourism development in the Amazon of Europe, though in some regions more than in others.

6.2.5 Existing regional brands in the Amazon of Europe

In the table below the overview of the most important existing regional brands in all regions of the Amazon of Europe that could be incorporated in the Amazon of Europe Bike Trail product is presented.

Table 53: Existing regional brands in the Amazon of Europe

REGIONS	**EXISTING REGIONAL BRANDS IN THE AOE**
EASTERN STYRIA	- Region Bad Radkersburg
POMURSKA REGION	- Chocolate Passero, - Tomato Lušt, - Kodila, - Pomurje Dairy, - Radenska, - Horticulture Celec, - Planika, - Ocean Orchids, - Diši po Prekmurju, - Pomelaj,
MEĐIMURJE COUNTY	- Cyclist welcome Međimurje
OSIJEK-BARANJA COUNTY	- Pannonian challenge Osijek, - Žito Challenge Cup, Osijek, - Wine Marathon, Zmajevac, - The Fishing days in Kopacevo, - Gatorfest - Banovo brdo, Kneževi Vinogradi, Batina, Zmajevac, - Wine and Bike Tour, Erdut, - Beer Fest, Osijek, - Ferivi Half marathon, Osijek, - Summer Valpovo, - Pepper Fest Lug, - Kulenijada, Jagodnjak, - Old Sport Olimpics, Brođanci, - Osijek Summer Night, - Slama land art festival, Bilje,
KOPRIVNICA-KRIŽEVCI COUNTY	- spring water Kala, - Podravka, - Nettle products,

	- Pan beer,
	- Bregi pie,
	- Podravinoteka,
	- Hedona,
VIROVITICA-PODRAVINA COUNTY	- Panonnian Cycling Routes/Panonske biciklističke staze,
	- Drava4Enjoy,
ZALA COUNTY	- /, (please add additional smaller / company brands)
SOMOGY COUNTY	- Three Rivers Bicycle Route,
BARANYA COUNTY	- Busó Festival (Mohács),
	- Villányi Bor Zsongás Festival (Villány),
	- Palkonya Hills Foot Race (Palkonya),
	- Palkonya Pentecost Open Cellars (Palkonya),
	- Villány Rosé Festival and Marathon (Villány),
	- Harkány Spa Festival (Harkány),
	- Ördögkatlan Festival (Nagyharsány, Kisharsány, Beremend, Villánykövesd, Palkonya),
	- European Wine Song Festival (Pécs, Villány),
	- Villány Red Wine Festival (Villány),
WEST BAČKA DISTRICT	- Jelen beer.

The analysis showed there are many existing strong individual brands representing the regions in the area. However, there are no collective brands which would enable the product/service providers and event organizers to collectively represent their local story, regional story and nevertheless, the destination Amazon of Europe's story. This is where major potential for unifying the standards and consequently the perceived value of the products, services and events in the whole destination exists.

6.3 Tourism demand in the Amazon of Europe – the push factors

The data for this chapter was summed up from the socio-economic analysis conducted in 2017, as part of the project Amazon of Europe Bike Trail. In that case, the data was collected through workshops with stakeholders that were organized in each region. Guidelines for organizing the workshops were prepared and sent to partners. Each partner wrote a report, summarizing the information on current tourism demand, collected at the first workshop. The focus of the workshop was to collect the quantitative and especially qualitative information and explanations that cannot be gathered from secondary sources.

6.3.1 Typical Amazon of Europe Visitor

Gender:	female/male	**Nationality:**	German
Age:	30-60 years old	**Duration of stay:**	2-3 days
Daily spending:	30-80 €		

6.3.2 Source of first contact with touristic offer of region

Most frequent sources of first contact with touristic offer of the region are the internet, social media, friends' recommendations, articles in newspapers and specialized travel magazines, promo materials and commercials. Through those channels people gather information about a travel destination before the trip. However, when people are already at the destination, they usually search information in tourist offices and tourist information centres.

6.3.3 First point of sale

The most relevant selling places for visitors are web services (online bookings), travel agencies and booking on the spot. When it comes to cycling, also specialized travel agencies are a point of sale because of the all-inclusive packages they offer. Both individually organized trips and trips organized and booked via travel agencies are common for this area.

6.3.4 Travel styles

The majority of visitors are individual guests, groups (guided tours) and visitors travelling with families or in smaller groups of friends. Business travel is common in Osijek-Baranja County and Koprivnica-Križevci County. Furthermore, in Osijek-Baranja County and West Bačka District a share of visitors arrives also by cruise ships.

6.3.5 Main reasons to visit the area

Main reasons to visit the area are natural beauty, thermal water (spas, wellnesses), touristic manifestations, possibility of cycling, local cuisine, cultural attractions and hunting. Moreover, in some regions day-trips and pilgrimages are popular as well.

6.3.6 Potential barriers to visit the region

Possible barriers to visit the region are insufficient recognisability, lack of means of public transportation, low capacity of service providers and tourism services, lack of tourism infrastructure

or underdeveloped tourism infrastructure, lack of specialized tour operators, problems with reservations, not enough available information and language barriers.

6.3.7 Average duration of stay

The average duration of stay of visitors in the Amazon of Europe is 2-3 days, except for West Bačka District where the average duration of stay is 6 days. In Somogy County they differentiate between stopover visitors (stay 1-2 days, most of the cases they are spending their holidays at Lake Balaton) and longer-term visitors (stay at least 7 days, they are generally returning visitors with special bond with the territory and looking for private accommodations).

6.3.8 Nationality of visitors

In General, visitors in the Amazon of Europe mostly come from the countries within the area – from Austria, Slovenia, Croatia, Hungary and Serbia – and from Germany and Italy. The respective number of visitors is also from the Netherlands, Switzerland and Bosnia and Herzegovina.

Nationality of visitors by countries:

- **SI:** Visitors are mostly from Italy, followed by Germany, Austria, Croatia, the Netherlands and Hungary.
- **AT:** Visitors are mostly from Austria, followed by Germany, Italy and Switzerland.
- **HR:** The largest number of visitors is domestic visitors, followed by visitors from neighbouring countries (Slovenia, Serbia, Hungary, Bosnia and Herzegovina) and from Germany, Italy and Austria.
- **HU:** Most of the visitors are domestic visitors, followed by visitors from Croatia, Austria and Germany.
- **SR**: Visitors are mostly from Germany, followed by visitors from Austria, Croatia, Slovenia, Bosnia and Herzegovina and Serbia.

6.3.9 Amount of money spent on holidays

The visitors usually spend 30-60 € per day during their trip.

6.3.10 Age

The majority of visitors are 30-50 years old – they mostly represent so-called active tourists. The second largest group are 60+ years old visitors who mainly go to spas. The third largest group are 18-30 years old visitors.

6.3.11 Gender

In general, there are no gender-related differences in the frequency of visits of the Amazon of Europe. The exceptions are Osijek-Baranja County where most of the visitors are men and Virovitica-Podravina County where the majority of visitors are women and children.

6.3.12 Interest in local food and products

Visitors are very interested in local food, wine and autochthonous products. They like to buy products from local markets (e.g. pumpkin seed oil, fish products, etc.).

6.4 Marketing communication of the tourist offer in the destination

Marketing communication activities to present the AoE destination and its products, are divided in 5 main pillars:

1. AoE Fundamentals
2. Promotional print publications
3. Digital marketing
4. Events
5. Professional networks.

Details are presented at Figure 44 and are further elaborated in a separate document: Amazon of Europe Destination Strategic Marketing Plan.

Figure 44: Amazon of Europe marketing pillars
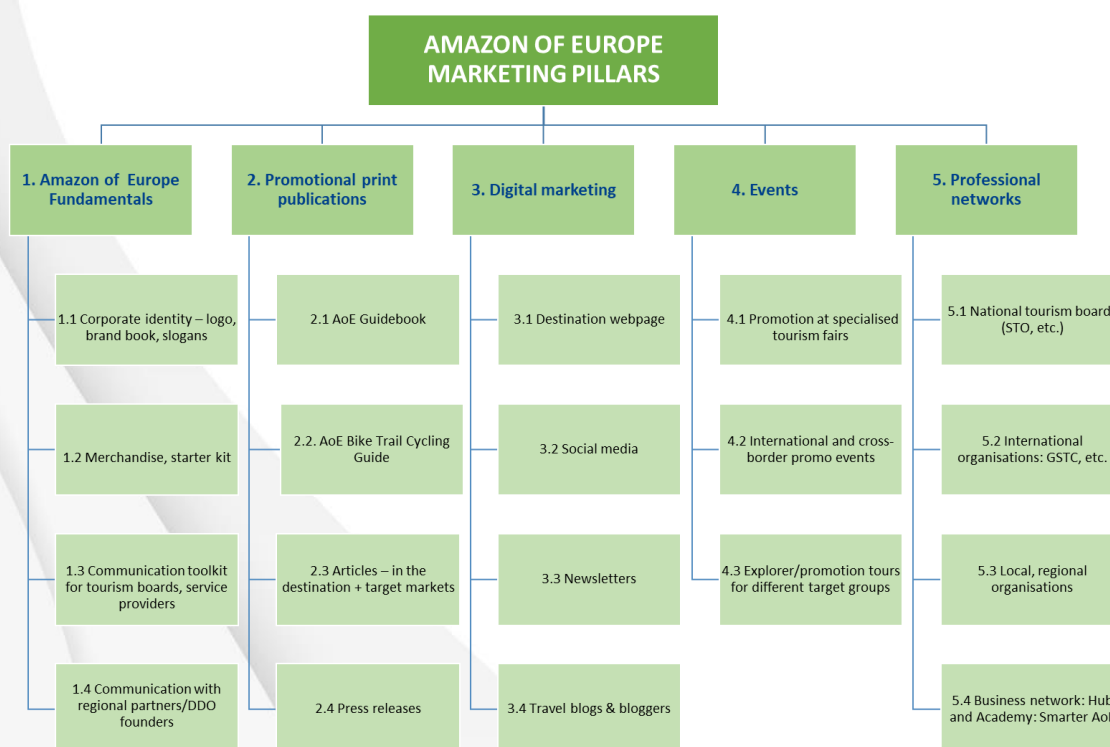
6.5 Tourism SWOT analysis with identified strategic work packages for the destination Amazon of Europe

The following SWOT analysis is created based on 5 identified strategic pillars:

1. Product & Quality Management
2. Regional Uptake
3. Marketing
4. Infrastructure
5. Ecological Sustainability

The definition of each strategic pillar can be found in the chapter 4.4. Organizational model, later in this document. The SWOT analysis has been made for each of the pillars for better transparency. However, it is crucial to understand that some strengths, weaknesses, opportunities, and threats fall under more than just one pillar, so the classification has been made based on most obvious correlation with the pillars. Through the SWOT analysis of each pillar, 1-3 specific work packages have been identified, all of which will require a specific head of operations (NGO, public institution, individual, etc.), which will be suggested later in the document, where the organizational model and each of the pillars will be presented into more detail.

Table 47 represents the SWOT analysis of the first pillar, being the Product & Quality Management. The Amazon of Europe destination is the first transboundary bike trail in the world, which includes five countries, shares the stories of 3 historic cultures (Hunic, Slavic and Germanic) which shaped Europe to a great extent to how we know it today and has enormous potential for green, outdoor tourism, based on its pristine nature, conserved through the world's first UNESCO five country Biosphere Reserve Mura-Drava-Danube. The area has quite a palette of complementary tourism activities, strong regional culinary stories, and various regional, local and national evets. Tourism development is starting to play a role in this area, which has been degraded in the past. This implies there is great potential for successful tourism development strategies with clear quality standards to bear fruit adequately and quickly if set correctly. Since there are major developmental differences in the area, the only way to ensure joint development with a common, globally recognized image/brand, is with an establishment of a Joint Product Development & Quality Management System for product, service, and event development. Presenting the destination from local to regional and destination level with one or with a network of collective brands would minimize the price and standard differences within the destination, as well as overcome the national, EU and language barriers.

Table 54: Amazon of Europe SWOT analysis of 1. Pillar: Product & Quality Management.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS		Joint Product Development & Quality Management System
AoE Bike Trail is the first transboundary bike trail in the world, which includes five countries	Different regulations because of EU and Schengen borders	USP as the first long distance bike trail that takes the cyclists through 5 countries, 3 historic cultures and along 3 mighty rivers.	Language barriers and legislative and administrative differences (EU & Schengen) between the 5 countries can impede problems during travel throughout the destination		
Product development through intensive marketing	Poor tourism offers in certain regions	Early stages of tourism development imply potential for right tourism development strategies with clear quality standards to bear fruit adequately and quickly	Low awareness of the significance of outdoor tourism with emphasis on cycling in some regions of the AoE can hinder development		
Area with pristine nature, well-preserved natural heritage and rich wildlife,					
Area with rich cultural heritage and diversity		Eco-conscious travel possibilities (biking, canoeing) as emerging trends			
A wide range of complementary activities	No collective brands or joint quality standards within the destination	Outdoor tourism with emphasis on cycling tourism is a booming tourism market,			
A large variety of culinary offer		Creation of joint standards and management system for product, service and event development (as one or as a network of collective brands), to minimize the price and standard differences within the destination,	Remarkable differences in GDP between the involved NUTS3 regions will be a challenge for setting clear quality, management and pricing standards		
Added value through various local, regional and national events in the area					
Easy bookable flagship product(s),	Small number of adventure & motoric parks as well as uneven dispersion of them	Ongoing digitalization in tourism	Low digital literacy of the local population		

Table 55: Amazon of Europe SWOT analysis of 2. Pillar: Regional uptake.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS	
A well-developed network of bike shops and bike repairs	Lack of bike and skilled tourism guides	High unemployment rate – opportunity to create new jobs in the tourism and with tourism related industries	The employment rate is at lower standards and could become critically low	Academy for tourism development
Considerable amount of outdoor activities providers	Lack of skills and knowledge between tourism workers and other stakeholders		Skilled tourism workers are leaving the region	
A well-developed network of restaurants focused on local cuisine	Lack of accommodations and restaurants in some areas	The academy will set clear development and quality standards, based on examples of best practice and a knowledge sharing platform. Therefore the no. of restaurants will grow and the differences in prices achieved will shrink.	Limited open-mindedness and motivation of the local population and service providers	
	Major differences in prices achieved for a specific menu		An aging population and high emigration rate will result in the work force not being open to change, following specific standards and digitalising their businesses	
Economical hotspots / global market leaders in specific industries are present in the destination	Limited development opportunities for young talents	Increasing social stability will lead to higher retention of young talents through the development of an economically interesting environment and a business platform		Business platform
Established DDO as a flexible substitute for a DMO	Unclear structure of the stakeholder network	The DDO will set a clear structure and further develop the region through many on-going tourism and Cycling related projects in the respective areas	Low GDP of the region compared to the national averages will make the DDO initiatives unsuccessful in some areas of the destination, making the differences even bigger	DDO

Table 48 represents the SWOT analysis of the second pillar, being the Regional Uptake. The purpose of this pillar is to connect all relevant stakeholders into one or more networks or platforms, as well as to determine the "governing body", which will manage the implementation of the strategic developmental objectives of the destination Amazon of Europe. There are various examples of outstanding practice in most, if not all the product/service/event implementation. From biking infrastructure to outdoor activity providers, restaurants, and hotels, to economic hotspots/global market leaders in specific industries. There is however a high unemployment rate, high emigration and consequently lack of skilled tourism and other workers/specialists since there are limited development opportunities to retain talents. There are also major differences in prices achieved for the same products or service throughout the destination. To overcome these challenges, the establishment of at least 3 specific focus networks would be of great importance. First being the Academy for tourism development, which is basically the governing body of the 1st pillar (Product & Quality Management). Second being the Business platform, which will connect the well-established, innovative, and other best example companies from various industries with universities and (young) talents, to retain their interests and provide them with a growing environment and career opportunities. Finally, a Destination Development Organization (DDO) should be established, which will connect the most important stakeholders from the area and supervise the implementation of the set strategic developmental and marketing objectives and adapt, further develop, and manage the Amazon of Europe destination.

Table 56: Amazon of Europe SWOT analysis of 3. Pillar: Marketing & Sales.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS	
Tourist information centres (TICs) in all larger municipalities and cities	Lack of TICs in some regions (emphasis on Hungarian counties)	A network of cooperating TICs throughout the destination and an increased no. of visitors in the destination will lead to additional TICs being established in the lacking areas	Lack of TICs in the most challenging area in terms of language barriers will lead to tourists getting lost and negative word of mouth promotion	Internal and External Marketing
		A smartphone app as the main point of information and navigation for all tourists in the destination		
Amazon of Europe is a tourism destination in the world's first five country UNESCO Biosphere Reserve,	Low awareness of the general public about the Amazon of Europe	Promotion and financing from the EU for tourism development and health improvement (EU Policy actions are promoting sustainable tourism and sustainable mobility)	Being too EU-funds dependent can lower the market responsiveness of the business model	
		Clear internal marketing strategy to promote the destination within the destination, so the locals start identifying themselves with the Amazon of Europe and start sharing the story	The internal marketing strategy does not achieve brand recognition and AoE awareness by the locals	

				Sales
		Clear external marketing strategy on the destination level, led by the AoE Booking Center, utilising digital and classic marketing channels regularly	The marketing channels and communication are unsuccessful in presenting the tourism destination and products because they are too broad, not focused and not regular	
	Poor tourism marketing activities on national and international level in certain regions	Being the first tourism destination within the world's first five country UNESCO Biosphere Reserve has major promotional advantages to become a benchmark in cross-border green tourism	Jurisdiction of Biosphere Reserves/protected areas in each country lays divided because there is no unified framework, which makes the promotional activities very challenging in order not to false advertise	
One main point of sale for all products with a network of resellers	Low brand recognition of the main point of sale at the beginning	Establishing a clear, thought through network of resellers will be crucial in building a strong, trustworthy, sustainable destination brand	Having one main point of sale is a magnet for competition to start selling the AoE tourism products on their own	
		One main point of sales makes the business model very transparent and increases trust in all marketing communication	Cooperation with numerous resellers can lead to price cutting and lowering the added value of the destination	

Table 49 represents the SWOT analysis of the third pillar, being the Marketing & Sales. The purpose of this pillar is to develop, implement and adapt the best possible internal and external marketing strategies and maximise profits from sales. Since the name "Amazon of Europe" has been present and used only for a couple of years now (in Project management since 2016, on the market only for 1-2 years since 2020, through the development of the AoE Bike Trail), the first major objective must be internal promotion and awareness raising of the brand. This means that the local population must understand, identify with, and further communicate the Amazon of Europe story on all channels on a daily basis. Only then can the area be presented and promoted externally as one joint transboundary tourism destination Amazon of Europe in the world's first UNESCO 5-country Biosphere Reserve. Clear internal and external marketing strategies must be developed with constant adaptations of the short-term action plan to trends and changes on the global/EU/national/regional levels.

Only in this manner will Amazon of Europe reach its potential as becoming the benchmark among green transboundary outdoor tourism destinations. In terms of sales, one main point of sale to which all potential questions, cooperation opportunities, complaints etc. are directed is the optimal solution. In this manner, there is one governing sales body, which establishes and manages its well thought-through network of resellers (in terms of Travel Agencies and booking/travel platforms). As such, the business model of the Amazon of Europe is transparent and builds a strong, trustworthy, sustainable destination brand in B2C and B2B markets.

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS	
Good railroad/train network	Poor accessibility of some parts of the region - lack of public transport, especially public transport offering bike transport services	4 out of 5 countries part of the EU makes the border crossing and other general travel regulations very transparent	Serbia without the membership in the EU or Schengen Area may impede travel possibilities.	Accessibility of the destination
Good accessibility through airports and shuttle services		The growth of outdoor tourism in the individual regions and the whole destination will lead to improvements in the public transportation networks and timeplans	Limited developments take place in optimizing the public transportation for outdoor tourism	
Identified appropriate mobility providers for outdoor tourism in most regions of the AoE	Only few transfer possibilities e.g. bridges between the northern and southern banks of the rivers	Creation of the Amazon of Europe shuttle service network, involving local shuttle providers	Mobility costs make the trips too expensive, resulting in only independent, long-distance cyclists deciding to visit AoE - will have to redefine the main target groups	Mobility within the destination
		Creation of circular packages, where no transfer back to the initial point is necessary (start & end point are the same)		
	Mobility costs make up a great portion of the total price of a tourist package	Additional packages, which do not offer luggage transfer can be offered for price sensitive cyclists.		
Considerable amount of existing hiking trails	Lack of outdoor tourism infrastructure or underdeveloped infrastructure	Development of additional outdoor tourism infrastructure based on natural availabilities and global trends	Non-compliance with the rules of nature protection and conservation by the tourists	Outdoor tourism infrastructure
A well-developed biking infrastructure a well signed bike trail, abundance of bike stops with tools	Some parts of the bike trail are on the main roads with high traffic and are therefore not very safe	Creation and implementation of a clear bike trail infrastructure development plan to ensure safe cycling off the main roads	Inability to sign roads off the main road or in nature, because of strict nature conservation regulations. Disturbance of the natural habitat in nesting or other crucial time frames.	
Good accessibility to medical centres	Inadequate internet coverage and poor signalling of mobile networks in some places along the trail,	Creation of a well-developed mobile app for guidance and navigation, which works offline as well and has an SOS button.	Unable to reach help by phone in case of emergency in some locations will lead to negative word of mouth	

| | | Offer of transfers and shuttles with electric vehicles.

Initiative for upgrade of the railway corridors financed by the TEN-T funds | | |
|---|---|---|---|---|

Table 50 represents the SWOT analysis of the fourth pillar, being the Infrastructure. The purpose of this pillar is to analyse, manage, adapt and influence further development of the road and public transportation infrastructure to- and within the destination, mobility service within the destination and the outdoor tourism infrastructure within the destination. The public transportation network in the Amazon of Europe is good, but there are almost no possibilities where the public transport would allow the transfer of a bicycle. Also, the time schedules are far from optimal and therefore significantly limit the possibility to use public transport as the main mean of transportation within the destination. Therefore, the accessibility of the destination should be optimized. In addition, a strong mobility network within the destination for shuttle services, luggage transfer and transfer back to the start of the journey will have to be established to lower the costs and minimise the risk of unresponsive/unreliable mobility partners and unprofessional service. Only in this manner can we sell the full, all-inclusive service in a manner that will produce positive word of mouth. Last, but not least, the outdoor tourism infrastructure will constantly have to be developed, updated, adapted and managed. This encompasses the signage, road surfaces, mapping of trails and river journeys, establishment of river entrance and exit points for river journeys, as well as the digitalisation of the infrastructure for GPS guidance and info apps, which has to work offline as well, since some locations in the destination have low to zero mobile network coverage.

Table 58: Amazon of Europe SWOT analysis of 5. Pillar: Ecological Sustainability

STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS	Fixed compensation fees and green behaviour valorisation programme
Unique valorisation programme supporting nature conservation projects	Extremely vulnerable ecosystems, which have to be protected and conservated	A long-term fund for nature conservation and green sustainable tourism development in the AoE A marketing strategy to attract more visitors Development of the compensation scheme.	Valorisation fees set too high and therefore distract tourists from choosing AoE as their travel destination	

Table 51 represents the SWOT analysis of the fifth pillar, being the Ecological Sustainability. The purpose of this pillar is to ensure the protection and conservation of the biggest free-flowing riverine system in Europe, known also as the world's first UNESCO 5-country Biosphere Reserve Mura-Drava-Danube. A unique valorisation programme has been put in place, which must be further developed with additional tourism product being launched on the market. To ensure a long-term fund for nature conservation and green sustainable tourism development in the AoE, which will have promotional value for the destination, the valorisation strategy must be backed with a strong marketing strategy, which will convince the tourists to act in accordance to preserve the area they are visiting with green behaviour valorisation programme. On the long term, this will enable sustainable nature conservation programmes as well as reaching the ultimate objective – climate neutrality of the AoE destination (stakeholders) by 2030.

7 Conclusion

7.1 Concluding words

Amazon of Europe destination, spanning across the first world UNESCO 5-country Biosphere Reserve Mura-Drava-Danube (TBR MDD), is unique in global terms. The present strategy has been developed based on wide engagement of stakeholders while developing this 5-country destination. Our joint aim is to enable truly sustainable development with positive impact on the locals, the nature in the region and the visitors. We are aware of many challenges on this path, as well as that it is a very long-term oriented goal.

Tourism trends show that this is the right way forward. Thus, we have set the following long term strategic goals:

1. Amazon of Europe Destination Development Organisation (DMO) is fully established and functional.
2. 8 Joint AoE Flagship Products (FSPs) are fully operational and profitable.
3. The infrastructure of all 8 FSPs is established and regularly monitored and improved.
4. AoE Collective brand and quality system is operational.
5. AoE Academy is functioning and is regularly improved.
6. AoE Business Hub is functioning and is regularly improved.
7. All stakeholders in the region know the Amazon of Europe story, identify themselves with it and are able to present it in a comprehensive way.
8. The Amazon of Europe story and destination is a brand that is recognized across the globe.
9. The public transportation networks enable the AoE visitors and residents to arrive and travel within the destination with ease.
10. A reliable, green AoE mobility network is fully functional and regularly monitored and improved.
11. A fixed compensation valorisation system – Give back to nature is operational.
12. A green behaviour valorisation programme is operational.
13. Climate neutrality of the AoE destination (all involved stakeholders) is achieved.

With strong cooperation and active engagement of key stakeholders from both private and public sector, we are convinced it is possible to achieve the set goals and realize the UNESCO MAB objective: good for nature, good for the people.

7.2 Related documents

Act of the establishment of the Destination Development Organization

Sustainability and transferability plan

Flagship tourism products

Strategic Marketing plan

AoE Destination Toolkit

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