

Analysis of Potential Tourism Market Segments for the North-East Planning Region and the municipalities of Kyustendil and Nevestino



Kyustendil



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Nevestino



Center for
Development of the
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INTRODUCTION

This joint analysis treats the territory of the North-East Planning Region in the Republic of North Macedonia and the municipalities of Kyustendil and Nevestino in the Republic of Bulgaria as a single cross-border tourist destination. Instead of positioning the administrative areas separately, the analysis connects their complementary resources: cultural and archaeological heritage, the Osogovo mountain range, mineral waters and spa facilities, rural landscapes, spiritual sites, local gastronomy and active tourism opportunities.

The aim is to identify the market segments and specific tourist profiles to be targeted by the marketing campaign promoting the joint tourism products. The analysis brings together the findings from the two submitted documents and organizes them according to the structure of the analysis for the North-East Planning Region: statistical indicators, geographical, demographic, psychographic and behavioural segmentation, definition of the target segments and development of tourist profiles.

Market segmentation has a practical function. It should enable different tourism products to be presented with an appropriate message, through an appropriate communication channel and to markets with a realistic probability of visit. In this sense, the profiles in the document are not strict and mutually exclusive categories, but rather working marketing groups that can overlap depending on the motive, season and composition of the trip.

A joint destination has the greatest competitive advantage when its resources are combined in short, easy-to-understand programmes of one to four days: culture and SPA; nature and active holidays; family and educational experiences; spirituality and rural authenticity; geoheritage and scientific and educational content. It is this combined value that should be the basis of promotional communication.

I. TOURIST POTENTIAL

The joint destination encompasses the six municipalities in the North-East Planning Region – Kumanovo, Lipkovo, Staro Nagorichane, Rankovce, Kratovo and Kriva Palanka – and the municipalities of Kyustendil and Nevestino. The area includes urban centres, a large number of rural settlements, mountain and river landscapes, archaeological and sacred sites, as well as existing or potential short-stay tourism products.

The main recognisable attractions are Kokino, Kuklica, Cocev Kamen, Kratovo, Staro Nagorichane, the monastery "St. Joakim Osogovski", the Bislim Gorge and the Osogovo Mountains on the Macedonian side, as well as the city of Kyustendil, Hisarlaka, the Roman baths, the mineral springs, Kadin Bridge, the "St. Anna" complex near Smolichano and the rural areas of Nevestino on the Bulgarian side. Together, they enable the destination to be promoted as a place for several different travel motivations within a single trip.

1. STATISTICAL INDICATORS RELATED TO TOURISM

The two documents use different statistical systems and different territorial scopes, which is why the data should not be mechanically aggregated into a single official statistical series. For marketing planning, however, they provide a clear common picture: demand is growing, short stays dominate, nearby markets generate the largest volume, and specialised and international visitors create the opportunity for longer stays and higher added value.

Indicator	Status and trend	Marketing implication
North-East Planning Region	Around 22,000 tourist arrivals in 2025; average stay increases to approximately 1.76 nights.	Packages are needed that will turn a one-day visit into a 2–3-day stay.
Kyustendil and Nevestino	Approximately 99,000 registered overnight stays in 2025, compared to around 46,000 in 2022; Kyustendil is the main centre of accommodation and services.	The spa facilities and the city's tourism offer can be the basis for combined cross-border programmes.
Demand structure	Domestic and nearby cross-border markets are best suited for frequent short visits; more distant markets generate lower volume but longer stays.	The campaign should differentiate markets that provide higher volume from those that create higher value.
Seasonality	SPA, culture and spiritual content have potential all year round; nature, cycling and events are stronger from spring to autumn.	Seasonal variations of messages and offers are needed.
Travel arrangements	A large proportion of visitors plan their trips independently through digital channels; organised groups remain important for cultural, religious, educational and senior visits.	In parallel, direct digital promotion and partnerships with tour operators, clubs and institutions should be used.

The most important conclusion is that a destination should not be promoted solely through the number of visitors, but through the possibility of increasing the length of stay, spending in the local economy and visits outside the main season. To this end, products should be modular, clearly described and easy to combine.

1.1 Methodological framework and data limitations

The extended analysis combines three levels of evidence: data and conclusions from the two main regional analyses; official national tourism statistics from North Macedonia and Bulgaria; and comparable European trends from Eurostat and the World Tourism Organization (UN Tourism). The territorial units, reporting periods and coverage of accommodation facilities are not entirely the same, which is why the figures are used for trend recognition and marketing planning, and not for creating a new official consolidated statistical series.

In market segmentation, the focus is not only on the number of tourists, but also on the likelihood of visiting, length of stay, average spending, seasonal distribution, likelihood of repeat visits and the ease with which the segment can be reached through specific channels.

Thus, the priority of the segments is linked to the real ability of the destination to offer and sell an appropriate product.

1.2 Broader market context

Indicator	Finding	Implication for the common destination
North Macedonia, 2024	At the national level, the number of tourists increased by 7.8%, and overnight stays by 5.2% compared to 2023. The growth is stronger among foreign tourists.	There is a growing interest that can be directed towards lesser-known regions through combined short itineraries and additional excursions from Skopje.
European tourism market, 2024	Around 65% of the EU population aged 15 and over have made at least one private overnight tourist trip.	The market is large, but the competition is strong; therefore, a clear positioning of the region as a authentic and uncrowded destination is needed.
Length of trips in the EU	More than half of tourist trips are short stays of 1 to 3 nights, and about 71% are domestic trips.	The most realistic products are two- to four-day programmes for nearby markets, with simple booking and a clearly stated price.
International tourism, 2025	Europe sees further growth in international arrivals in the first half of 2025.	Promotion can be targeted at experienced European travellers already staying in Sofia or Skopje and looking for an additional, less crowded destination.
Bulgarian market	The national policy emphasizes year-round, sustainable, SPA, cultural and nature tourism.	Kyustendil can be an accommodation and SPA anchor, and the wider region can provide cultural, active and rural modules.

1.3 Accessibility zones and market reach

Zone	Approximate access logic	Main markets	The most suitable product
Zone A – immediate reach	Day trip or overnight; usually by private car.	Kumanovo, Kriva Palanka, Kratovo, Kyustendil, Pernik and surrounding settlements.	Events, family outings, gastronomy, easy walks, SPA and recurring seasonal visits.
Zone B – weekend reach	Practical stay of 1–3 nights.	Skopje, Sofia, Stip, Veles, Blagoevgrad and Nis.	Combined weekend packages: culture + SPA, nature + gastronomy, family education.
Zone C – regional short break	2–4 nights and a pre-prepared programme are required.	Other parts of North Macedonia, Bulgaria, Serbia and northern Greece.	Thematic itineraries, active packages, religious tours, organised small groups.
Zone D – selective international market	The destination is part of a wider Balkan tour or an addition to a stay in Sofia/Skopje.	Germany, Austria, Netherlands, Poland, Czech Republic, Italy, United Kingdom.	Multilingual 3–4-day programmes with transfer, guide, SPA, heritage and nature.

1.4 Key gaps that limit demand

The main obstacle is not the lack of attractions, but their fragmentation. A potential visitor finds it difficult to find a single place with complete information on access, opening hours, duration, price, reservation, transport, guide, accommodation and combination with other sites. Additional limitations are uneven multilingual interpretation, insufficient online sales, poorly connected public transport and a limited offer of ready-made cross-border packages.

The marketing campaign must therefore be linked to the preparation of the product. The advertisement creates interest, but the conversion will depend on whether the visitor immediately receives a specific programme, price or list of inclusions, map, contact details and a booking option.

2. TOURIST MARKET SEGMENTATION

Segmentation is based on four interrelated criteria: geographical origin, demographic characteristics, values and lifestyle, as well as specific behaviour in choosing and using the tourist offer. A target segment is viable only when there is a real connection between the market, motivation, resources and the ability to communicate and sell the offer.

- geographical criterion – where the visitor comes from and what the transport barrier is;
- demographic criteria – age, life stage, group composition, income and mobility;
- psychographic criteria – motives, interests, values and desired travel style;
- behavioural criterion – length and frequency of stay, planning method, price sensitivity, channels and expected services.

2.1 Geographic segmentation

Geographical segment	Coverage	Typical behaviour	Priority
Immediate local and regional market	The North-East Planning Region, Skopje and nearby Macedonian cities; Kyustendil, Sofia and Western Bulgaria	One-day and weekend visits, high likelihood of repeat visits, travel by private vehicle.	Highest
Cross-border market	North Macedonia, Bulgaria and Serbia, especially Skopje–Kumanovo–Kriva Palanka–Kyustendil–Sofia and Niš–Pirot	1–3 days, cultural, SPA, natural and event motifs; high cultural familiarity.	Very high
National markets	Other major cities and regions in North Macedonia and Bulgaria	2–3 days, holiday weekends and combination packages; greater need for clear value for money.	High
Nearby Balkan markets	Greece, Romania, Albania and other markets in the region	Thematic tours, SPA, culture, mountains and Balkan heritage; 1–3 nights.	Medium
European and other international markets	Germany, Austria, Netherlands, Poland, Czech Republic, United Kingdom, Italy and others; visitors already staying in Sofia or North Macedonia	2–4 days in a wider tour, higher requirements for digital information, languages, and reservations.	Selectively high

For quick results, the bulk of the campaign should be directed towards nearby urban markets and the cross-border corridor. International markets should be targeted selectively through cultural, active, geotourism and combined short programmes, as well as through visitors already staying in Sofia, Skopje or other nearby destinations.

2.2 Demographic segmentation

Demographic group	Age/composition	Most suitable products	Marketing potential
Young active visitors	18–35; individuals, couples and groups of friends	Cycling, hiking, adventure, festivals, short city visits and digital routes.	High for visibility and content that is shared.
Young families with children	30–45; families with one or more children	Safe nature routes, cultural stories, interactive and educational content, SPA and family weekends.	Very high
Mature generation	45–65; couples, individuals and small groups	SPA and wellness, cultural routes, gastronomy, spiritual places and easy walks.	Very high; year-round
Seniors and people with reduced mobility	60+; couples, organised groups and individual visitors	Balneology, peaceful cultural and spiritual visits, accessible routes, virtual tours.	Medium-high; important for the offseason
Active specialised groups	20–55; clubs, associations and small groups	Cycling, hiking, geotourism, photography and scientific-educational programmes.	High in the niches

2.3 Psychographic segmentation

Psychographic segmentation explains the motive behind the trip. The following dominant orientations stand out in the common destination:

- authenticity seekers – they love local stories, tradition, rural environment, food and contact with hosts;
- cultural researchers – interested in archaeology, history, architecture, museums, art and thematic routes;
- SPA and relaxation tourists – looking for mineral waters, comfort, peace, good value for money and additional gentle activities;
- active and experience-oriented tourists – looking for movement, challenge, nature, cycling, hiking and content suitable for sharing;
- family explorers – looking for safety, education, entertainment and a variety of activities in a short stay;
- spiritual and value-oriented visitors – seeking peace, sacred places, religious events and respect for local customs;
- eco-conscious and “slow travel” tourists – prefer less crowded places, local products, sustainable behaviour and longer stays in one area.

2.4 Behavioural segmentation

Behavior	Features	Implication for the campaign
Day and weekend visitors	Short-term decision, travel by car, high sensitivity to weather conditions and easy accessibility.	Geographically targeted ads, ready-made "today/this weekend" programmes, maps, and clear time durations.
Pre-planned short breaks	Booking in advance, 2–4 days, expectation for accommodation, food and organised programme.	Package sites, hotel and SPA partnerships, tour operators and a clearly displayed total value.
Independent digital planners	They use search engines, maps, social media, videos, ratings, and online bookings.	Multilingual content, SEO, short videos, GPS maps and QR code routes, updated opening hours and photos.
Organized and thematic groups	Cultural, religious, educational, senior and club groups; require a guide, schedule and logistics.	Direct B2B communication, sample programmes, group conditions and booking contacts.
Repeat and loyal visitors	Nearby markets that can return for another season, event, or new route.	Remarketing, event calendar, seasonal packages and a "discover another side of the region" programme.
Visitors with special interest	They travel for a specific topic: cycling, geology, photography, spirituality, gastronomy, or balneology.	Specialized messaging and partnerships with clubs, associations, media and micro-influencer content creators.

2.5 Segmentation by decision stage

Phase	Tourist's question	Required content	Key indicator
Inspiration	Why should I visit this region?	Short videos, strong visual stories, combinations that show the diversity of the destination.	Reach, video views, saves, and shares.
Review	What can I do and how much time will I need?	Itineraries by profile, sample programmes, maps, seasonal suggestions and package comparison.	Website visits, time on page, map downloads.
Planning	How do I get there, how much does it cost and where can I stay?	Accurate information about access, opening hours, price, accommodation, guide and contact.	Clicks to partners, requests for information, and reservations initiated.
Booking	Can I book the package easily?	A simple call to action, direct contact or online booking.	Conversions and booking value.
Stay and advocacy	What else should I visit and would I recommend the region?	QR maps, additional suggestions, rating collection, user photos and seasonal offers.	Length of stay, return visit, ratings and recommendations.

2.6 Segmentation by price sensitivity

The price should be communicated differently for each segment. Families and young active tourists are more likely to demand a clear total price and free or low-cost activities. SPA, wellness, cultural and international individual tourists are more willing to pay more for comfort, quality interpretation and time savings. For organised religious, educational and senior groups, the most important are the group price, logistics and programme reliability.

2.7 Seasonal segmentation

Period	Strongest motives	Priority profiles	Message suggestion
January–March	SPA, wellness, gastronomy, winter landscapes, indoor culture.	spa couples, seniors, small groups.	"A warm break among mineral waters, culture and winter Osogovo landscapes."
April–June	Hiking, cycling, school visits, spring nature, holidays.	Families, active, educational and spiritual visitors.	"A spring cross-border adventure of movement, learning and discovery."
July–September	Mountains, events, rural experiences, festivals and cultural tours.	Active, gastronomic, cultural and international guests.	"Escape the crowds and discover living traditions and mountain trails."
October–December	Colors of nature, food, wine/local products, SPA and holiday programmes.	Couples, foodies, cultural tourists and families.	"Taste the autumn and continue the day with mineral water and local stories."

3. DEFINING THE FINAL SEGMENTS

The final segments are a synthesis of geographic, demographic, psychographic and behavioural analysis. They are selected based on alignment with the overall destination resources, market accessibility, year-round sales potential, potential for increasing stay and practical opportunity for targeted communication.

3.1 Segment 1 – Family Weekend Explorers

Families with children looking for a safe, accessible and diverse short break respond best to a combination of gentle outdoor activities, cultural stories, interactive content, a spa or pool, local food and activities that are suitable for different age groups.

Feature	Description
Basic profile	30–50 years; nearby urban markets; 1–3 days
Key locations and attractions	Kokino, Kuklica, Kratovo, Hisarlaka, museums in Kyustendil, Kadin Bridge, easy trails and family SPA content
Market potential	Very high
Key promotional message	"History, nature and fun for the whole family – in one weekend."

3.2 Segment 2 – Cultural, historical and thematic tourists

Visitors motivated by archaeology, architecture, history, museums, art and local stories. They travel individually or in organised groups and expect quality interpretation, guides, multilingual information and the opportunity to connect multiple sites.

Feature	Description
Basic profile	35–70 years; national, cross-border and selective European markets; 2–4 days
Key locations and attractions	Kokino, Kratovo, Staro Nagorichane, Pelince, the Roman baths, the museums and galleries in Kyustendil, Hisarlaka and Kadin Bridge
Market potential	Very high
Key promotional message	"Two countries, one treasure trove of stories and heritage."

3.3 Segment 3 – SPA, wellness and relaxation tourists

Visitors seeking mineral waters, comfort, peace, and easily accessible additional activities. Kyustendil is the main anchor, and the cultural, natural, and gastronomic offerings throughout the destination extend the visit and increase the value of the package.

Feature	Description
Basic profile	40–70 years; couples, small groups and seniors; 2–5 days
Key locations and attractions	Mineral waters and SPA in Kyustendil, city culture, Hisarlaka, Osogovo, Kratovo, monasteries, Kadin Bridge and quiet rural places
Market potential	Very high; year-round
Key promotional message	"Mineral water, peace and culture – a restorative break."

3.4 Segment 4 – Active tourists, cyclists and nature lovers

Tourists who choose a destination based on trails, scenery, activities, and the ability to explore independently. They look for accurate GPS data, signage, difficulty and safety information, bike-friendly accommodations, and visually appealing content.

Feature	Description
Basic profile	20–55 years; individuals, couples, friends and clubs; 2–5 days
Key locations and attractions	Osogovo Mountains, Bislim Gorge, Kriva Palanka, Rankovce, Hisarlaka, Osogovo near Kyustendil, Struma Valley and the rural roads of Nevestino
Market potential	High
Key promotional message	"Move without limits – Osogovo, valleys and trails in one adventure."

3.5 Segment 5 – Religious and Spiritual Visitors

Visitors motivated by sacred places, religious holidays, pilgrimage, silence and spiritual renewal. They are most often couples, families, seniors and organised groups who combine spiritual experience with culture, nature and local gastronomy.

Feature	Description
Basic profile	40+; North Macedonia, Bulgaria and Serbia; 1–3 days
Key locations and attractions	"St. Joachim Osogovski", "St. George" in Staro Nagorichane, local monasteries and churches, the "St. Anna" complex and the sacral heritage in Kyustendil and Nevestino

Feature	Description
Market potential	High
Key promotional message	"A journey through faith, silence, and spiritual heritage."

3.6 Segment 6 – Rural, gastronomic and “slow travel” tourists

Visitors looking for local food, authentic villages, crafts, festivals, orchards and agricultural landscapes, and direct contact with hosts. They value the laid-back atmosphere and are willing to pay for a quality local experience.

Feature	Description
Basic profile	30–65 years; couples and small groups; 2–4 days
Key locations and attractions	Kratovo, the Kriva Palanka area, Staro Nagorichane, Rankovce and Lipkovo; the villages, festivals, local cuisine and orchards of Kyustendil and Nevestino
Market potential	High
Key promotional message	"Taste the region slowly – local people, products and stories."

3.7 Segment 7 – Geotourists, scientific and educational visitors

Niche segment with strong potential for differentiation. It consists of pupils, students, researchers, photographers and enthusiasts of geology, archaeoastronomy and natural phenomena. They are looking for expert interpretation, field information and educational materials.

Feature	Description
Basic profile	15–65 years; schools, universities, clubs and individual visitors; 1–3 days
Key locations and attractions	Kokino, Kuklica, Cocev Kamen, basalt formations, geological landscapes, Roman thermal baths, mineral springs, gorges and river valleys
Market potential	Medium
Key promotional message	"Read the history written in stone, water, and stars."

3.8 Segment 8 – International Combined Short Stays

Visitors from European markets who are already staying in Sofia, Skopje or the wider Balkans, as well as individual tourists looking for lesser-known, authentic destinations. They need multilingual content, easy online organisation and a compact product with clear logic.

Feature	Description
Basic profile	35–65 years old; individual travellers, couples, and small groups; 2–4 days
Key locations and attractions	Combined routes Sofia–Kyustendil–Nevestino–Kriva Palanka–Kratovo/Kumanovo; culture, SPA, nature and gastronomy
Market potential	Selectively high
Key promotional message	"A hidden cross-border destination – authentic, peaceful and surprisingly close."

3.9 Segment prioritization methodology

The segments are evaluated according to the following six criteria: market size and accessibility; alignment with existing resources; year-round sales potential; overnight and local consumption potential; digital reach; and willingness of partners to create a specific package. The evaluation is qualitative and serves as a basis for marketing budget allocation, but is not a substitute for primary visitor research.

Segment	Market volume	Potential for stay	Year-round	Priority
Family Weekend Explorers	High	Medium	Medium-high	1 – immediate conversion
Cultural and thematic tourists	Medium-high	High	High	1 – supporting segment
SPA and wellness tourists	High	High	Very high	1 – supporting segment
Active tourists	Medium	High	Medium	2 – differentiation
Religious and spiritual visitors	Medium	Medium	Medium-high	3 – thematic niche
Rural and gastronomic tourists	Medium	High	Medium-high	2 – high local value
Geotourists and educational visitors	Smaller, but clearly defined	Medium	Medium	3 – specialised niche
International short stays	Smaller in the initial phase	Very high	High	2 – development segment

3.10 Selection of clusters and number of clusters

Eight market clusters are selected for the joint cross-border tourism destination comprising the North-East Planning Region and the municipalities of Kyustendil and Nevestino. They correspond to the eight final segments identified in the analysis and provide a practical basis for developing tourism offers, selecting target markets and directing marketing communications.

Clusters are groups of visitors with similar travel motivations, expectations and behaviour. They are defined through a combined assessment of geographical, demographic, psychographic and behavioural characteristics. The selection is qualitative and derives from the resources and market profiles analysed; it is not the result of a statistical cluster analysis of individual survey data.

Criteria for selecting the clusters

Six selection criteria are applied: market size and accessibility; alignment with existing tourism resources; potential for a year-round offer; potential for overnight stays and local spending; the ability to reach visitors through digital channels; and partners' readiness to develop a specific package. Each cluster should have a recognisable motivation for visiting, a suitable offer within the destination and communication channels through which that offer can be promoted.

The eight selected market clusters

1. Family weekend explorers

Families with children, mainly from nearby urban and cross-border markets, seeking a short, safe and easily organised stay. A suitable offer combines cultural sites, easy nature routes, interactive and educational activities, family accommodation and local food.

2. Cultural, historical and special-interest tourists

Visitors whose main motivation is to discover archaeology, history, architecture, museums and local stories. This cluster is associated with thematic cross-border itineraries, professional guiding and multilingual heritage interpretation.

3. Spa, wellness and relaxation tourists

Couples, small groups and seniors seeking mineral waters, comfort and tranquillity. Kyustendil is the main centre for this cluster, while cultural, natural and gastronomic experiences across the wider destination complement the offer and create opportunities for longer stays.

4. Active tourists, cyclists and nature enthusiasts

Individuals, couples, friends and club groups motivated by hiking, cycling, mountain landscapes and independent exploration. They need verified routes, GPS tracks, information

on difficulty and seasonal conditions, safety information, and suitable accommodation and logistical services.

5. Religious and spiritual visitors

Visitors interested in monasteries, churches, religious festivals, pilgrimage and spiritual renewal. The offer is organised through spiritual and cultural programmes that respect the rules of sacred sites and provide guides, meals and accommodation according to the group's needs.

6. Rural, gastronomic and slow-travel tourists

Couples and small groups seeking the authenticity of villages, local cuisine, products, crafts and direct contact with hosts. Tastings, workshops, festivals and rural accommodation help direct tourism spending towards local producers and services.

7. Geotourists, scientific and educational visitors

School pupils, university students, teachers, researchers, photographers and visitors interested in geology, archaeo-astronomy and natural phenomena. The offer is based on expert interpretation, field programmes and educational materials, with clearly stated access and safety requirements.

8. International visitors on combined short breaks

Independent travellers, couples and small groups incorporating the destination into a wider Balkan trip or as an addition to a stay in Sofia or Skopje. This cluster requires compact multilingual programmes, clear transport guidance, accessible information and straightforward booking arrangements.

Rationale for the number of clusters and their priorities

Eight clusters allow the main motivations for visiting to be covered without creating groups too small to support distinct offers and campaigns. Fewer clusters would combine visitors with different expectations, while further subdivision would complicate marketing management. The eight clusters form a working framework whose usefulness should be assessed against actual visits, enquiries and bookings.

In line with the priorities set out in the analysis, the clusters are arranged in three tiers. The first priority covers family, cultural and spa/wellness visitors. The second priority covers active, rural and gastronomic tourists, and international short-break visitors. Religious and spiritual visitors, together with geotourists and scientific and educational visitors, form supporting thematic niches. These three tiers guide the allocation of effort and do not change the total of eight clusters.

Clusters may overlap: the same visitor may combine spa, culture and gastronomy, or a family trip with educational activities. Each specific offer and promotional material should therefore

have one primary cluster, with complementary activities that increase the value of the stay. The number of clusters and their priorities should be reviewed periodically in light of seasonal demand, campaign results and feedback from tourism partners.

4. PROFILES OF TOURISTS

The following profiles are the operational basis for the marketing campaign. For each profile, the basic characteristics, motives, expectations, communication channels and call to action are determined. The profiles should be used when creating ads, videos, visual materials, landing pages, partner packages and campaign calendar.

Profile 1 – Family looking for a weekend together

Basic features

Feature	Description
Age and composition	30–50 years old; parents with children
Origin	Skopje, Kumanovo, Sofia, Kyustendil, Veles, Shtip, Pernik, Blagoevgrad and other nearby cities
Length of stay	1–3 days
Main motivation	safety, easy organisation, various activities, education and entertainment

Marketing application

Element	Recommendation
Communication channels	short videos, Facebook/Instagram, family portals, Google Maps, schools and hotels
Product to promote	A ready-made family itinerary with a map, duration, price, places to eat and activities for children.
Key message	"Plan your next family weekend – nature, stories, and fun without the long commute."
Indicative daily expenditure	80–160 euros per family per day, depending on accommodation and included services.

Profile 2 – Cultural explorer of cross-border heritage

Basic features

Feature	Description
Age and composition	35–70 years old; couples, small groups and organised visitors
Origin	North Macedonia, Bulgaria, Serbia and selective European markets
Length of stay	2–4 days

Feature	Description
Main motivation	history, archaeology, architecture, museums, art and local stories

Marketing application

Element	Recommendation
Communication channels	tour operators, cultural institutions, thematic media, YouTube, Google Search and multilingual website
Product to promote	A thematic route with a professional guide, interpretation and the opportunity to combine culture, gastronomy and accommodation.
Key message	"Discover a heritage that connects mountains, cities and people on both sides of the border."
Indicative daily expenditure	80–160 euros per person per day.

Profile 3 – SPA and wellness couple who love peace and culture

Basic features

Feature	Description
Age and composition	45–65 years; couples and small groups
Origin	Sofia and Western Bulgaria, larger Macedonian cities, Serbia and nearby European markets
Length of stay	2–4 days
Main motivation	mineral waters, relaxation, comfort, culture, easy walks and quality food

Marketing application

Element	Recommendation
Communication channels	hotels and spa centres, Google Search, Facebook, tourist portals, online offers and tour operators
Product to promote	A package with SPA accommodation in Kyustendil and a choice of a cultural, natural or gastronomic excursion through the shared destination.
Key message	"Relax in mineral water, and fill your day with culture, nature, and local flavours."
Indicative daily expenditure	100–200 euros per person per day.

Profile 4 – Active cyclist and nature explorer

Basic features

Feature	Description
Age and composition	20–55 years old; individuals, couples, friends and clubs
Origin	North Macedonia, Bulgaria, Serbia, Greece and specialised European markets
Length of stay	2–5 days
Main motivation	cycling, hiking, mountain, photography, challenge and uncrowded routes

Marketing application

Element	Recommendation
Communication channels	Instagram, YouTube, Strava/Komoot, active tourism portals, clubs, sporting events, GPS maps and QR codes
Product to promote	A route with exact length, elevation profile, difficulty level, GPS track, service points, accommodation and safety information.
Key message	"From Osogovo to the river valleys – choose your cross-border adventure."
Indicative daily expenditure	70–150 euros per person per day.

Profile 5 – Religious and spiritual visitor

Basic features

Feature	Description
Age and composition	45–75 years old; couples, families and organised groups
Origin	North Macedonia, Bulgaria and Serbia
Length of stay	1–3 days
Main motivation	sacred places, religious holidays, silence, spirituality, culture and tradition

Marketing application

Element	Recommendation
Communication channels	religious communities, associations, group organisers, Facebook, local media and tour operators

Element	Recommendation
Product to promote	Organized spiritual-cultural programme with time for worship or silence, guide, meal, and nearby accommodation.
Key message	"Travel along the traces of faith and spiritual heritage of Osogovo and the cross-border region."
Indicative daily expenditure	50–110 euros per person per day.

Profile 6 – Rural and gastronomic explorer

Basic features

Feature	Description
Age and composition	30–65 years; couples and small groups
Origin	Close national and cross-border markets; selective European guests
Length of stay	2–4 days
Main motivation	local cuisine, products, festivals, crafts, villages, orchards and contact with hosts

Marketing application

Element	Recommendation
Communication channels	Instagram/Facebook, gastronomic media, influencers and content creators, local producers, restaurants and specialised tour operators
Product to promote	Small group programme with tasting, workshop, local host and combined visit to rural and cultural sites.
Key message	"Get to know the region through its people, tables, and traditions."
Indicative daily expenditure	80–170 euros per person per day.

Profile 7 – Geotourist and educational explorer

Basic features

Feature	Description
Age and composition	15–65 years old; students, teachers, researchers, photographers and science enthusiasts
Origin	North Macedonia, Bulgaria, Serbia and specialised international groups

Feature	Description
Length of stay	1–3 days
Main motivation	geology, archaeoastronomy, natural phenomena, mineral waters, photography and field study

Marketing application

Element	Recommendation
Communication channels	schools, universities, scientific associations, thematic portals, YouTube and educational materials
Product to promote	Educational route with a guide or expert, worksheets, field points, digital interpretation and clear safety rules.
Key message	"Explore the rock phenomena, mineral waters, and skies above a living natural laboratory."
Indicative daily expenditure	50–120 euros per person per day.

Profile 8 – Independent international traveller seeking a “hidden” destination

Basic features

Feature	Description
Age and composition	35–65 years old; couples and experienced independent travellers
Origin	Germany, Austria, Netherlands, Poland, Czech Republic, United Kingdom, Italy and visitors already in Sofia or Skopje
Length of stay	2–4 days as part of a broader tour
Main motivation	authenticity, uncrowded places, culture, nature, SPA and easy self-planning

Marketing application

Element	Recommendation
Communication channels	Google Search and Google Maps, YouTube, TripAdvisor, Instagram, international platforms, hotels in Sofia/Skopje and specialised tour operators
Product to promote	Multilingual combined short stay with online booking, travel directions, map, videos and a selection of thematic modules.
Key message	"Discover a hidden cross-border region of mineral waters, ancient stories and mountain landscapes."

Element	Recommendation
Indicative daily expenditure	120–230 euros per person per day.

Priorities for the marketing campaign

Level	Profiles	Campaign function
First priority	Profile 1 – families; Profile 2 – culture; Profile 3 – SPA and wellness	The strongest balance of market size, product readiness, year-round availability, and the potential for rapid conversion into bookings.
Second priority	Profile 4 – active tourists; Profile 6 – rural and gastronomic; Profile 8 – international short-stay visitors	They differentiate the destination, extend the stay, and create higher digital visibility and added value.
Supporting niches	Profile 5 – spiritual; Profile 7 – geotourists and educational visitors	Smaller scale, but clear motivation, opportunity for organised groups, and strong thematic recognition.

5. POSITIONING AND COMMUNICATION RECOMMENDATIONS

Area	Recommendation
Joint positioning	The destination should be presented as a unique space of mineral waters, cultural heritage, Osogovo landscapes, active routes and local authenticity.
Packaging	To develop clear modular products for 1, 2, 3 and 4 days, with the option to combine locations from all three territorial units.
Digital visibility	For each offer, there should be a mobile-friendly page with duration, price and inclusions, map, access, difficulty, opening hours, photos, a short video and a call for reservation.
Languages	The basic content should be at least in Macedonian, Bulgarian and English; additional destination websites and advertisements should be used for selective markets.
Contents	Instead of general promotional messages, create series by profile: family weekend, SPA + culture, active route, spiritual journey, local flavor, and hidden heritage.
Partnerships	The packages and campaign should include hotels, spa centres, restaurants, guides, museums, monasteries, municipalities, local producers, clubs, and tour operators.
Remarketing	Visitors from nearby markets should be motivated to return through seasonal variations, a calendar of events, and new thematic routes.
Measurement	Track reach, video views, offer clicks, searches, downloaded maps, booking requests, conversions, and visitor profile by market and segment.

For the campaign, it is most important that each promotional material has only one primary profile, one clear benefit and one call to action. The common brand can be the same, but the visual content, tone and offer should be adapted to the segment. In this way, the marketing budget will not be scattered in general promotion, but will create measurable interest in the specific tourism products that are being developed.

5.1 Proposal for joint market positioning

The proposed brand essence is: "A common cross-border destination of mineral waters, ancient stories and Osogovo landscapes, where in a few days rest, movement, culture and local authenticity are combined." The positioning should avoid competition with large urban and mass mountain centres. The advantage is proximity, diversity in a small space, a sense of discovery and the opportunity for the visitor to create their own itinerary.

5.2 Product–market matrix

Product	Primary profile	Duration	Key components	Call to action
Family cross-border weekend	Families with children	2 days / 1 night	Kokino or Kuklica, Kratovo, Hisarlaka and museum, family accommodation and easy activity.	Book a prepared programme for next weekend.

Product	Primary profile	Duration	Key components	Call to action
SPA + heritage	Spa and wellness couples	3 days / 2 nights	Mineral waters in Kyustendil, city heritage, Kratovo or Staro Nagorichane, local dinner.	Choose a date and add a cultural excursion.
Osogovo active route	Cyclists and hikers	3–4 days	GPS routes, Osogovo, Bislim Gorge, rural accommodation, equipment transfer.	Download a track and book a logistics package.
Path of spirituality	Religious and cultural groups	2–3 days	Monasteries and churches, guide, time for worship or silence, local meal.	Request a group quote and appointment.
Flavors and living heritage	Gastronomic and rural tourists	2–3 days	Hosts, tastings, workshops, markets, orchards and local stories.	Reserve a place in a small group.
Hidden stories between Sofia and Skopje	International individual tourists	4 days / 3 nights	Transfer directions, English guide, SPA, heritage, nature and multilingual map.	Add the destination to your Balkan tour.

5.3 Channels and role in the sales process

Channel	Most suitable profiles	Role	Recommended content
Facebook and Instagram	Families, couples, gastronomic and domestic visitors.	Inspiration, remarketing and event promotion.	Short videos, carousels, seasonal packages, testimonials and a clear link to the offer.
Google Search and Maps	All profiles with established travel intent.	Practical planning and conversion.	Optimised pages by theme, accurate location profiles, opening hours and ratings.
YouTube	Cultural, active and international tourists.	Deeper storytelling and trust building.	Thematic films, itineraries, guides and "how to get there" videos.
Strava, Komoot and thematic portals	Active tourists and clubs.	Proof of quality and practical use.	GPS tracks, difficulty level, altitude profile, seasonal conditions and safety.
Tour operators, hotels and spa centres	Groups, seniors, SPA and foreign guests.	Packaging, additional sales and direct booking.	Net prices, group conditions, calendar, transfer and ready-made additional excursions.
Schools, universities and associations	Educational, scientific, religious and specialised groups.	Organized sales and repeat visits.	Program with learning outcomes, safety, guide, learning materials and group price.

5.4 Campaign content pillars

Pillar	Main promise	Sample content
Two countries – one story	The border does not interrupt the story, but makes it richer.	Short comparative stories, common routes and faces from both sides.

Pillar	Main promise	Sample content
Rest that restores	Mineral water, peace and nature are combined with a light cultural programme.	SPA videos, 48-hour programmes, seasonal wellness packages.
Living heritage	Heritage is experienced through guides, hosts, tastings and workshops.	Portraits of local people, recipes, crafts, festivals and stories.
Active discovery	Unpaved trails and natural phenomena for different levels of preparedness.	GPS routes, short guides, safety tips and challenges.
Easy planning	All information and reservations are available in one place.	Maps, time calculator, ready-made packages, FAQ and direct contact.

5.5 Budget allocation by segments and phases

Purpose	Indicative share	Explanation
Leading segments: families, culture, SPA	40%	The fastest sales opportunity, large nearby market and high year-round availability.
Development segments: active, gastronomic, international	30%	They create recognition, longer stays and higher local consumption.
Thematic niches: Spiritual, Geo/Educational	10%	Smaller scale, but high relevance and opportunity for organised groups.
Remarketing and conversion	10%	Converts interested users into inquiries and reservations.
Testing, measuring and optimisation	10%	Enables comparison of messages, markets and channels and budget redirection.

5.6 Key performance indicators

Level	Indicators	Recommended dynamics
Visibility	Reach, impressions, video views, video view share, and search growth for the destination.	Monthly, by market and profile.
Interest	Clicks, time on page, routes viewed, maps downloaded, saves, and newsletter subscriptions.	Monthly and per campaign promotional material.
Conversion	Enquiries, clicks to partner websites, reservations initiated and completed, cost per conversion.	Monthly; weekly in an active campaign.
Destination effect	Number of visitors by offer, nights, length of stay, consumption and seasonal distribution.	Quarterly and annually.
Quality	Ratings, complaints, recommendations, repeat visits, accessibility and satisfaction by profile.	By tour/event and quarterly summary.

5.7 Risks and mitigation measures

Risk	Possible consequence	Measure
Campaign without ready-made packages	High interest, but few reservations.	Provide at least 4–6 fully described and priced products before launch.
Inconsistent information	Distrust, missed visits and negative reviews.	Central database with a responsible person, regular verification of opening hours, prices and contacts.
Poor cross-border logistics	The visitor cancels a combined route.	Clear directions, parking, transfer options, duration and alternatives for visitors without a private vehicle.
Overly general message	Low relevance and expensive advertising.	Separate promotional materials, pages, and calls to action for each priority profile.
Seasonal concentration	Insufficient utilization of capacities.	SPA, gastronomic, cultural and spiritual packages for autumn/winter and active packages for spring/summer.
Insufficient accessibility	Exclusion of seniors, families and people with reduced mobility.	For each product, indicate the physical difficulty, terrain, accessibility, rest areas, and available services.

In conclusion, the campaign should start with three main profiles – families, cultural tourists and SPA/wellness guests – and in parallel build recognition among active, gastronomic and international visitors. The best result will be achieved if marketing, packaging, information available online and partner sales are developed as a single process.

6. CONCLUSIONS

The analysis shows that the North-East Planning Region and the municipalities of Kyustendil and Nevestino have complementary resources for joint tourism positioning. Cultural and sacred heritage, the Osogovo landscapes, mineral waters, rural settlements and local gastronomy allow different motivations for visiting to be combined in a single cross-border programme. The competitive advantage derives from this combination and from the potential for short, varied trips away from mass tourism.

The eight selected market clusters provide a basis for tailoring tourism offers to specific visitors. In the initial phase, the marketing campaign should prioritise family weekend explorers, cultural tourists and spa/wellness guests, particularly from nearby Macedonian and Bulgarian urban markets. Active, rural and gastronomic tourism and international short breaks should be developed in parallel as sources of differentiation and additional local value, with targeted support for spiritual and scientific-educational niches.

The main challenge is to connect attractions and services into offers that visitors can easily understand, plan and book. Modular programmes lasting one to four days are needed, with clear information on duration, price and included services, access, accommodation, guides and contacts. Before the campaign begins, at least four to six fully described products should be prepared, as recommended in the analysis, with opportunities to combine activities on both sides of the border.

Promotion should be based on joint destination positioning, with different messages, visual content and calls to action for each primary cluster. Core information should be available in Macedonian, Bulgarian and English, adapted for mobile devices and regularly updated. Digital channels should be linked to sales through partner hotels, spa centres, tour operators, guides, local producers and organisers of special-interest groups.

The development of the offer should support year-round visitation and a wider distribution of benefits within the local economy. Spa, cultural, gastronomic and spiritual programmes can complement the offer outside the main season, while active and nature-based activities should be adapted to seasonal conditions. The physical difficulty and accessibility of each programme should be stated so that families, seniors and people with reduced mobility can make an informed choice.

Performance should be assessed through tangible results: enquiries and bookings, visitor numbers, overnight stays, length of stay, local spending, seasonal distribution, satisfaction and repeat visits. Reach, clicks and video views are useful communication indicators, but should be linked to the uptake of tourism offers. Results by cluster and market will enable adjustments to messages, products and the allocation of the marketing budget.

The proposed segmentation provides a qualitative basis for decision-making rather than a precise forecast of demand. Differences in statistical coverage between the two countries and the need for primary visitor data require the findings to be regularly supplemented and verified.

Through coordinated development of offers, accessible information and continuous monitoring, the joint destination can turn its resources into longer stays, repeat visits and greater benefits for local communities.

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