

# **A STUDY ON TYPICAL AGRO-FOOD PRODUCTS**

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## 1. Introduction

A part of the “Central Danube Tour” project has been carried out by a project partner, the Provincial Secretariat for Regional Development, Interregional Cooperation and Local Self-Government, within the programme of Interreg - IPA CBC Croatia - Serbia 2014 – 2020. The project leader is the Regional Development Agency of Slavonia and Baranja, and the project partners are the Osijek-Baranja County, The Town of Ilok, the Danube Competence Center and the Provincial Secretariat for Regional Development, Interregional Cooperation and Local Self-Government of the Autonomous Province of Vojvodina. The aim of the project is supporting the development of tourism in transboundary regions by enhancement of the quality and diversity of the tourist offer through creation and promotion of a common transboundary tourist destination of Central Danube basin as well as the creation of new transboundary thematic routes, networking, enhancement of the participants’ knowledge and capacities, and the valorization of the tourist potential of the transboundary region. The project was initiated on July 15<sup>th</sup> 2017 and has been intended to last for 20 months. The project has been carried out in the Osijek-Baranja County and the Vukovar-Srijem County as well as the areas of the South Bačka District, the North Bačka District, the West Bačka District and the Srem District.

### 1.1. The starting premise of the study

It has been the responsibility of Educons University to carry out a Study of Typical Agricultural and Food Products (hereinafter: the Study) within the “Central Danube Tour” project. The aim of the Study is valorization of traditional resources of the transboundary region through identification and valorization of the so called typical products of the project areas of the South Bačka District, the North Bačka District, the West Bačka District and the Srem District.

The project team has decided for the Study to focus on the products with protected geographical indication. The main task of the Study is to give an overview of the products, identify key products with traditional value and economic potential that can be further valorized through the tourist sector as well as to propose the valorization measures. The results of the Study include the identification of four traditional products recommended for further intensive promotion within the construction of tourist recognition of the region, as well as drawing up the guidelines for marketing activity.

When the importance of local products for the tourism of a destination is referred to, it is not only the economic aspect of the value chain that is considered. A much more important aspect is the one referring to the implementation of local products into the creation of a unique trading offer of a tourist destination as well as into the creation of market recognition and identity of a tourist destination. 2018-2020 Vojvodina Tourism Development Programme<sup>1</sup> highlights the importance of gastronomy as a tourist product which enhances the value of a stay in a tourist destination.

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<sup>1</sup> In adoption

## 1.2. Analysis of the “CDT” tourist destination according to the “gastronomy” product

Gastronomy tourism refers to the production of specialties in a traditional way, together with frequently organized thematic gastro-routes (Cheese route, Wine route, Prosciutto tasting, etc.). In addition, food gives ground to organization of different events in rural areas (Cabbage festival, Sausage festival, Pumpkin days, etc.). Ethnogastronomy is typical of strong agricultural, especially wine regions. Consumers of this product visit a destination primarily to enjoy the food and beverages. Additionally, they want to learn about the specific features of the destination. For that reason the additional components of the product are more relevant to these consumers than to the ones visiting a destination for different purposes (e.g. health or events). In addition to food and beverages, the packages of these products include introducing the guests to the history and stories relating to the lead gastronomy products. This is why regions with well developed tourist gastronomy product feature special exhibition centres relating to wine and branded food products.

Gastronomy is an integral part of rural tourism as an element which fulfills the tourist demand for quality food. Gastronomy, traditional eating habits in particular, is most frequently the primary tourist motive. Production process observation is an activity that enables tourists to observe either the whole or just the most interesting steps of the production process. In plant production it refers to observation of a few steps of production, as the complete production process lasts for several months. The most interesting production steps for tourists are the ones referring to the moments of sowing, blooming and harvesting. Tourists can also learn about the process of soil cultivation. Similar rules apply to food industry as well. Special interest is shown in small companies that perform the production process, that is the processing of the primary agricultural products, in a traditional way. These companies put more effort into attracting the tourists, for which reason their premises include special areas for tourist access (e.g. behind a glass barrier which enables an undisturbed food production process; tasting rooms in wine cellars; etc.).<sup>2</sup>

In spite of the fact that the importance of rural tourism is recognized as a possible means for rural area development, as well as the possible brand in international tourist market, in Vojvodina it is still at the initial phase of development. Developing global tourist brands enables substantial marketing economies and enhances the scope of agents' and tourists' interest in the tourist products. However, a surge in global brand development can cause a lack of interest in local attractions, especially so if a local brand gives way to regional or global ones.

Vojvodina rural tourism and local products brand have to be considered as the highest possible value for the offered price. The value of a brand stems from the perception of a consumer, in which way the perception of Vojvodina as a high quality tourist destination has to be developed. A brand has to maintain its perceived quality and standards in order to be successful in international market and to build the consumer loyalty. A consumer expects equal value in all segments of tourist offer, which is why substantial effort has to be put into maintaining the consistency of the overall brand structure.

A brand can effect the rise in tourist product prices as well as the volume of a market share in an ever complex tourist market. A brand has a direct influence on the consumers' i.e. tourists' purchase decisions. A brand makes the consumers' product choice simpler, it lowers the risk of making purchase decisions and it offers emotional benefits.

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<sup>2</sup> For more detail: Zoran Njegovan (2016): *Ekonomika turizma i seoskog turizma*, Poljoprivredni fakultet, Novi Sad

By developing a distinguishing image, name or identity, rural tourism of Vojvodina can be well positioned in an ever-competitive market. Tourist stays in the villages should be combined with spa treatments, birdwatching, fishing, hunting, cycling, sports camps, and mountaineering. Following a rural household stay, a visit to a stable including organized horseriding or a few-day visit to monasteries could be organized. All the mentioned possibilities are the elements that could constitute an outstanding tourist offer, creating a positive image of rural tourism in Vojvodina.

According to Vojvodina Tourism Development Programme, creating a uniform masterbrand and the logo of the region is crucial in building consistent marketing system. This is a systematic, predetermined and guided process the result of which is a clear presentation of the complex, rich and diverse nature of people, landscape, history, heritage, resources and products of Vojvodina. Understanding the existing reputation of Vojvodina is of key importance within this process. In conclusion, the essence of the process is the creation of the positive representation of Vojvodina (image of Vojvodina) as a tourist destination, i.e. defining its competitive identity, as well as the process of managing the reputation of Vojvodina as a tourist destination. Within this process it would be useful to rely on the recognizable and affirmative identity that Vojvodina can already count on (Novi Sad as European Capital of Culture/European Youth Capital, Exit Festival, the Danube – Bačko Podunavlje as UNESCO Biosphere Reserve, etc.).

Before branding is initiated it is inevitable to define the brand strategy. Since a long-term brand support is in question, the strategy should be grounded in predefined characteristics of the target market segments, their preferences and expectations. Given the fact that a masterbrand of Vojvodina is proposed for two sectors – the first being the tourist sector, and the second being the sector of agricultural food/production of high added value – it is of the utmost importance to build a valuable strategy that will clearly differentiate, but also synergistically unify the mentioned vision. The future brand has to represent a unique set of experiences, sensations, benefits and images that altogether create the market recognizability and the connection with the consumers. It must clearly differ from its competitors and it must possess both a developed value system and an elaborated visual identity. Given the comprehensive nature of the masterbrand, it is important to develop a certification system adjusted both to the tourist sector on the one hand, and the producers of the food commodities on the other hand. Finally, the most important aspects are the consistency and the complementary nature of the provisional solution so as to create a high level of awareness of a common brand in the market (both tourist market and food market) and to build an image of the region.<sup>3</sup>

When the visual identity of the brand is considered, it is important to define the adequate certification marks of the local products. A brand of regional food products comprises a defined architecture of a masterbrand and communicates the origin and the quality of the local agricultural products.

Given the conditions of large-scale market changes and globalization, it is inevitable to direct one's efforts towards the agricultural production of higher/high added value. In such conditions Vojvodina has to reconsider its current production model and ensure the longterm transfer to high quality products and processing, if it wishes to reach an acceptable level of profit margins in agricultural sector.<sup>4</sup>

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<sup>3</sup> 2018-2022 Autonomous Province of Vojvodina Tourism Development Programme – in adoption

<sup>4</sup> 2018-2022 Autonomous Province of Vojvodina Tourism Development Programme – in adoption

Products of such potential already exist in Vojvodina – first of all wine and processed meat by a few active producers – but it is necessary to put a consistent effort in defining and controlling the standards and certification, as well as branding that takes international market, standards and rules into consideration. Fruit and vegetable production still owns a profit potential based on the production within the standard quality segment, but it should be a priority to support all the entrepreneurial ideas directed towards a high quality fruit and vegetables production. One of the main reasons for this is the fact that such products have a much higher efficiency in regional development (not solely economic).<sup>5</sup>

Simultaneous development of agriculture and tourism is not only a matter of best practice, but a standard model of development in almost all developed agricultural regions. Such a model is not fully adequate for the production of raw material based on accomplishing the effect of the economies of scale. Large-scale synergy is achieved in cases of high added value production such as cheese, wine, meat delicatessen, spices, and some breeds of fruit and vegetable. Synergy is mirrored in agriculture and tourism joint branding (given the fact that small-scale high quality production is in chance of global commercialization, as well as tourism is), in defining tourist products (certain products form a baseline in regional branding), as well as in enlarging the market potential of the existing agricultural products by offering them to tourists and visitors.<sup>6</sup>

Vojvodina, as a region of distinctly multicultural character, should reconsider the contents and priorities of its traditional values in space, gastronomy, and lifestyle and use them for rehabilitation and emphasis of its identity in the forthcoming period. It is important to understand that this process by no means includes the inhibition of foreign influence, the prevention of the inevitable globalization, or the voluntary rigid cultural isolation, quite the contrary. The process includes reinvention of the hidden and forgotten values that will return both pride and identity to the inhabitants of Vojvodina, along with being competitive in contemporary tourist market.<sup>7</sup>

Autonomous Province of Vojvodina Tourism Development Programme highlights the fact that branded agricultural products and history and tradition of their production are often integral components in building and fortifying tourist image of a region. They are specifically strong factors in attracting tourist visitors in these regions. For such reasons certain brands are used in creating the overall tourist offer of the region.

Key success factors in branding agricultural products are as follows:

1. Traditional production with strict rules and standards (starting with the geographic indication, through the rules of breeding, to the processing technology),
2. Branding (certification marks, visual identity, standards of packaging, etc.),
3. Support in protection, promotion, partnership, etc. by founding organizations/associations that take care of such aspects,
4. Controlled distribution,

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<sup>5</sup> 2018-2022 Autonomous Province of Vojvodina Tourism Development Programme – in adoption

<sup>6</sup> 2018-2022 Autonomous Province of Vojvodina Tourism Development Programme – in adoption

<sup>7</sup> 2018-2022 Autonomous Province of Vojvodina Tourism Development Programme – in adoption

5. Key of the branding success and marking quality regional food products is in masterbrand integration, which would include both the food component and the strong tourist component,

6. Quality certification marks of the regional food products could include simple food provisions (flour, oil, fruit, etc.), different processed food commodities (such as meat and processed meat, dried fruit, honey, jams, etc.) and finally beverages, juices and wine.

## **2. Overview of the typical local products supply (quantitative and qualitative analyses of the supply)**

For the purpose of this Study, and with the aim of giving the overview of the typical local products supply, it has been proposed to identify and analyse the products listed as the ones with protected geographical indication. The basic reason for such an approach are the questions that arise, such as: “Which products are considered to be typical?”, “What criteria single a product out as “typical”?”. These and alike questions additionally complicate the research, which is why the researchers have decided to focus on the products with protected geographical indication and equate them with typical local products.

Products with the international status of the ones with protected geographical indication are recognizable, bred and processed in a uniform procedure, made according to a standardized recipe, have a leveled quality, and their retail price is significantly higher than the price of other similar products. If export is considered, according to the Lisbon Treaty customs barriers are not applied to these products and they are free of customs duty tariffs when exported into European Union market.

### **2.1. Current condition of the typical products (description, level of production etc.)**

Products that have appeared and developed simultaneously with the development of a national culture have become a part of the national identity and are for that reason protected. Today these products reflect both the culture and the tradition of the nationalities living in certain areas. Nowadays countries protect their typical products as items of intellectual property, either through specific legal treatment, or through trading, certification and collective labeling.

In the Republic of Serbia products with the label of geographical indication are protected by law. Such a label guarantees that the product is produced at the specified geographic locality and that it possesses specific traits as a result of a unique combination of local natural resources, tradition and knowledge.

The products with the label of geographical indication in Bačka District and Srem District are as follows: Srem kulen, Srem homemade sausage, Srem salami, Banat riesling, Apatin Jelen beer, Petrovac sausage (Petrovska klobasa), Bermet, Karlovac Riesling, Futog fresh and sour cabbage, Bezdan damask, Fruška gora linden honey, Sombor cheese, Lemeš kulen and Begeč carrot.

## 2.2. Identification, description of the current condition of products and promotion of the four key products

Among the above listed products with protected geographical indication from Bačka and Srem, four have been chosen as products of significant market share. They are as follows:

- Fruška gora linden honey
- Futog fresh and sour cabbage
- Bermet
- Petrovac sausage (Petrovska klobasa)

Among these four products with nationally protected geographical indication, Bermet is the one with internationally registered protection of geographical indication (Lisbon Treaty).

### **Fruška gora linden honey**

Fruška gora linden honey is monofloral honey made by honeybees collecting and processing the nectar of linden flowers from Fruška gora mountain. It is characteristic for containing more than 60% of linden pollen. Certain beekeepers have even achieved as much as 90% of linden pollen. High level of monoflorality, which is a specific trait of Fruška gora linden honey, is conditioned by a specific bio-geographical characteristics of Fruška gora as well as by the specific production process. The size, density and location of linden forests in Fruška gora enables positioning honeybee colonies in immediate vicinity of high quantity of nectar. Such a situation causes honeybee colonies to collect, store and process a sufficient quantity of pure linden nectar. The specific production process enables honeybee colonies in Fruška gora to intensively exploit the nectar in a limited period of time. Exchanging the frames of a honey super for empty frames just before or after locating the honeybee colonies in Fruška gora guarantees achieving the maximum monoflorality of the honey, as well as a link between the honey and Fruška gora mountain. The colour of the honey is of medium intensity and apart from the usual honey shade includes light yellow shade as well. The flavor is very intensive, of medium sweetness, and instantly reminiscent of linden.<sup>8</sup>

“Jovan Živanović” beekeeping society is the producer of Fruška gora linden honey. If beekeeping household “Hunjadi” is taken as a representative example, the expected production of honey is between 10 and 20 kg of per a honeybee colony. Given the fact that “Jovan Živanović” beekeeping society counts 7.500 honeybee colonies, it is estimated that an annual production of Fruška gora linden honey to be placed in the market is 150 t.<sup>9</sup>

Research shows that the quantity of honey varies according to climate conditions. For that matter, beekeeping household “Hunjadi” produced 40 kg of honey in 2017. and 720 kg of honey in 2016.

Retail price for 1 kg of certified Fruška gora linden honey labeled for geographical indication is 1.200 dinars in the domestic market. A significantly higher price could be achieved in foreign markets, namely 24 € per 1 kg.

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<sup>8</sup> “A Study of Protected Geographical Indication Label for Fruška Gora Linden Honey”

<sup>9</sup> “A Study of Protected Geographical Indication Label for Fruška Gora Linden Honey”



Fruška gora linden honey is sold in Novi Sad markets (Limanska market), in local events, in the Internet.

Fruška gora linden honey is advertised and promoted in local honey fairs, beekeeping fairs, flower fairs such as Novi Sad Beekeeping Fair, Novi Sad Honey Festival, Novi Sad with Love (<http://www.pcelarins.org.rs>). The beekeepers also have their Facebook page where important notices, events, exhibitions are announced.

One of the problems that is highlighted is the fact that Fruška gora linden honey has to be packaged in Fruška gora in a specific purpose facility. Another problem is woodcutting in Fruška gora which affects the volume of linden forests.

**Table 1. SWOT analysis of Fruška gora linden honey**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Honey of unique ingredients and quality – numerous quality awards</li> <li>• Certified for protected geographical indication</li> <li>• Specific – high level of monoflorality</li> <li>• Good cooperation among the society members</li> <li>• Vicinity of Novi Sad – large market</li> </ul>	<ul style="list-style-type: none"> <li>• Annual quantity of honey varies</li> <li>• Low quantity of production</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Selling honey in European Union countries</li> <li>• Opportunities for export – rising the producers’ income according to higher provisional prices in EU market</li> <li>• Events and fairs – exhibitions with the aim of higher demand</li> <li>• Higher price comparing to other types of honey – opportunity for higher profit</li> </ul>	<ul style="list-style-type: none"> <li>• Linden forests woodcutting in Fruška gora</li> <li>• Lack of specific purpose facilities for honey packaging in Fruška gora</li> <li>• High price – purchasing power of customers is not high which makes only people with higher income the provisional buyers</li> </ul>

### **Futog fresh and sour cabbage**

Geographic area where Futog cabbage is processed into sour cabbage is Futog County, a county at the banks of the Danube River. Specific combination of soil, hydrological and climate conditions, as well as a multy-decade selection and production tradition, has enabled this area to build a cabbage population of specific quality, named Futog cabbage. The tradition of Futog cabbage production dates back into the 18<sup>th</sup> century.

Futog fresh cabbage ripens late into the season and is therefore suitable for both souring and fresh usage. Its leaf rosette is of dark green colour, with an average of 10 leaves per a rosette. The rosette is semi-erect, semi-grounded, with smooth, slightly toothed leaves. The leaves are thin, flexible and elastic. The leaf nervature is not prominent which makes both the aesthetic of the sour leaves and the juiciness of the freshly grated cabbage better. The cabbage head is of light green colour, white to pale yellow in longitudinal section, with thin leaves of high firmness and density. The head is slightly flattened. Futog cabbage is appropriate for both fresh consumption and souring, which is evident from its total carbohydrate amount. The length of vegetation period from seedling to technological maturity is 138 days on average. The yield is approximately 50 tons per hectare. It is characterized with high nutritional value of vitamins, vitamin C in particular, minerals and essential amino acids (A Study of Production Process and Specific Characteristics of Futog Fresh and Sour Cabbage).

Sour cabbage production process is traditional and dates back a few centuries ago, but nowadays it is performed using modern machinery built specifically for cabbage processing and sour cabbage production and with the aim of achieving health safety and higher market demand.

The heads are selected solely from Futog cabbage population, and have to be completely healthy, clean, technologically mature, well-developed, containing no holes in the leaves. The specific taste of Futog sour cabbage is influenced by both the characteristics of Futog cabbage heads and the concentration of salt and water temperature in souring basins.<sup>10</sup>

Futog sour cabbage is packed in polymeric materials packaging (polyamide and polyethylene) in vacuum conditions. Futog sour cabbage packaging can contain cabbage heads, cabbage leaves or sauerkraut. The packaging has to be air-impermeable since anaerobic environment is inevitable for sour cabbage preservation. If the abovementioned environment is achieved, Futog sour cabbage product life is 90 days in 4-8 °C.<sup>11</sup>

Futog sour cabbage is firm in its consistency. The longitudinal section shows leaves of equal yellowish shade, thin, gentle, of optimal elasticity, chewability and crispness. Futog sour cabbage flavour has to be gentle, neither too salty nor too sour. Hybrid cabbage breeds receive pungent flavour when soured. The smell and the taste of sour cabbage are created in the first stadium of fermentation by the activity of *Leuconostoc mesenteroides* bacteria. Futog sour cabbage smell has to be gentle and pleasant.<sup>12</sup>

Futog cabbage producers are all members of “Futog Cabbage” society, founded in 2007. The society provides promotion, technical support, advice, sanitary control of the soil and the products.

On average, Futog cabbage is produced at 0.5 ha per a producer. 2.096.987 kg of fresh cabbage and 1.292.162 kg of processed cabbage have been produced for the last four years, and total amount of the cabbage has been certified.

Approximately 20% of Futog cabbage is processed into sour cabbage whereas the rest of the quantity is sold as fresh cabbage. The producers take out a lease on local market stands in Novi Sad. Sour cabbage is also sold in large retail chains.

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<sup>10</sup> A Study of Production Process and Specific Characteristics of Futog Fresh and Sour Cabbage

<sup>11</sup> A Study of Production Process and Specific Characteristics of Futog Fresh and Sour Cabbage

<sup>12</sup> A Study of Production Process and Specific Characteristics of Futog Fresh and Sour Cabbage

Futog cabbage is primarily sold in the Republic of Serbia. 20% of the produced quantity is exported, mostly to Germany, Slovenia, Sweden and France. Lately, the Internet advertising, promotion and online-shopping have been rising.

According to producers, the largest barrier for expanding the production and including PDO production is that trade relations are not harmonized, which means that fake Futog cabbage, both fresh and sour, can often be seen in the market. Numerous merchants all around Novi Sad markets, as well as around other markets in Serbia, falsely claim the cabbage to be Futog cabbage. As the fines and inspection measures are not severe, producers are in difficult situation since they have to fight an unfair competition.

Yet another problem is that market conditions, as well as contract agreements, are unstable, so the producers cannot be sure when they are going to receive the payment for the sold cabbage. Furthermore, the price and the quantity of goods stated in the agreements with supermarkets is constantly changing. Those selling conditions do not offer stable perspectives to the producers.

**Table 2. SWOT analysis – Futog cabbage**

<b>Strength</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Well-known name both in Serbia and nearby countries – consumers are already well informed about the quality of Futog cabbage</li> <li>• Vicinity of Novi Sad – large market</li> <li>• Tradition – cabbage production in Futog dates back to more than 200 years ago</li> <li>• Favourable climate conditions - benefit to the production</li> <li>• Other institutions are involved in promotion – helping promotional activities and causing larger advertising impact</li> <li>• Experience of the producers – every cabbage producer can easily tell the difference between Futog cabbage and hybrid cabbage</li> <li>• Good quality and specific characteristics –certificated by Research Institute Laboratories</li> <li>• Good relationships between members of the association</li> </ul>	<ul style="list-style-type: none"> <li>• Small area of Futog cabbage production on households – average is 0.5 ha per a producer</li> <li>• Less resistant than hybrid cabbage - many producers keep producing hybrid cabbage</li> <li>• Hybrid cabbage yield is higher – many producers keep producing hybrid cabbage</li> <li>• Costs of Futog cabbage production are higher those of hybrid cabbage production - many producers keep producing hybrid cabbage</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Eating habits and tradition of Serbian population – eating sour cabbage in</li> </ul>	<ul style="list-style-type: none"> <li>• There is low willingness of producers to replace hybrid cabbage production with</li> </ul>

<p>winter period is habitual diet in Serbia</p> <ul style="list-style-type: none"> <li>• High domestic demand – as cabbage is part of habitual diet there is high demand for both fresh and sour cabbage in Serbia</li> <li>• High foreign demand – export can be increased which can bring higher income to the producers and making the name of Futog cabbage well-known abroad</li> <li>• Events and fairs – promotions can be made in order to increase the demand</li> </ul>	<p>Futog cabbage production – hybrid cabbage is more resistant and costs of the production are lower</p> <ul style="list-style-type: none"> <li>• Trade relations are not harmonized – there have been numerous frauds with using the name of Futog cabbage</li> <li>• Law regulation - there are frauds in the market with using the brand name of Futog cabbage</li> <li>• Payment periods are long – the producers have to wait for payments and they cannot make new investments</li> <li>• Low support of governmental institutions - as public bodies do not have special funds in the budget intended to help all the producers</li> <li>• Large hybrid cabbage production – hybrid cabbage has often been sold as PDO Futog cabbage</li> </ul>
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Source: Panin, B.: Research performed in 2013.

## Bermet

Bermet is a traditional name for aromatic sweet red wine, dark red in colour, clear in substance, of a specific sweet-sour taste and aromatic herbs scent. It is produced in the specific process of vinification from Fruška gora vineyards' species of grapevine adequate for coloured wine production.

Specific traits of Bermet include: red wine produced in the specific process of vinification from Fruška gora vineyards' species of grapevine adequate for coloured wine production, intensified by wine distillate or rectified herbal ethyl alcohol, with addition of acceptable scented and sour herbal extracts, containing at least 60% of wine, with the alcohol by volume of 15%-20% v/v, containing 12 gr/l of sugar-free extracts, dark red in colour, clear in substance, of a specific sweet-sour taste and aromatic herbs scent. (Registration Certificate, 2011).

Tradition of winemaking in Fruška gora dates back to centuries ago. The first written evidence of Bermet production is found in a book by Zaharije Orfelin entitled "An Experienced Winemaker", written in 1783. (Registration Certificate, 2011).

Altogether 12 winemakers have been registered for Bermet production. The quantity of production depends on the winemaker, and has lately shown a rising trend. This indicates a rise in demand as well.

### Table 3. Bermet production

year	2015	2016	2017
quantity (l)	6.000	8.000	10.000

Source: Research data, 2018., Kiš winery

The producers advertise and promote their products individually, each within their own winery. The promotion is conducted in festivals at home and abroad, in wineries, in client facilities. In addition, there has been evident promotion in social networks (Facebook, Instagram).

Export has been organized within each winery. The most frequent export destinations are the nearby countries (Bosnia and Herzegovina and Montenegro). There has been export activity to Slovakia, Austria, and Russia. Retail locations are generally wineries and retail facilities (wine shops, restaurants, hotels, supermarkets).

**Table 4. SWOT analysis - Bermet**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Brand name well-known in the region</li> <li>• Long production tradition</li> <li>• Specific taste</li> <li>• Wine tourism in Sremski Karlovci</li> </ul>	<ul style="list-style-type: none"> <li>• No unified production process – it depends on the winery</li> <li>• The producers advertise and promote their products individually, each within their own winery</li> <li>• Small quantity of production</li> <li>• No modern technologies are included into the promotion</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Rise in demand</li> <li>• Export</li> <li>• Events</li> <li>• Financial support of EU (rural tourism development)</li> </ul>	<ul style="list-style-type: none"> <li>• Foreign competition</li> </ul>

### **Petrovac sausage (Petrovska klobása)**

Petrovac sausage (Petrovska klobása) is a fermented meat product which has been gastronomic heritage of the Slovaks from Vojvodina and has been traditionally produced in rural households in Bački Petrovac County. Petrovac sausage is a sausage of pleasant, mild scent, reminiscent of smoke and of ripe aroma specific of such fermented products. It has pleasant flavour, mildly hot but not sour. It is produced in Bački Petrovac, using the meat of homebred white Landras pigs (either a sow or a castrate, 9-12 months old, weighing 135-200 kg), and following the

production process identical to the one described in “A Study of Specific Characteristics and Production Technology of Petrovska klobasa (Petrovac Sausage)”, <http://www.kulen.rs>. Tradition of Petrovac sausage (Petrovska klobasa) production dates back to the 18<sup>th</sup> century.

Specific trait of this sausage is that it contains no pepper but red hot paprika, which has become specific for the region and has been produced in almost all households. By crossbreeding different breeds of paprika in this limited area during a long period of time there has been a natural selection which has led to creation of a specific Petrovac paprika, a breed of exceptional traits. This breed of paprika gives special sensory traits to Petrovac sausage, such as intensive red colour and piquant hot flavour.<sup>13</sup>

Petrovac sausage is made by mixing the medium minced pig muscle and fat tissue with red hot ground paprika, salt, mashed garlic, cumin and sugar. After filling the sausages are left for a period of time to drain, than they are smoked in cold smoking procedure for 10-15 days with brakes using specific blend of wood (with inevitable presence of cherry tree wood). After the smoking procedure, the sausages are left in dry, airy space in order to dry and ripen until it reaches the optimum quality (A Study of Specific Characteristics and Production Technology of Petrovska klobasa (Petrovac Sausage)).

Petrovac sausage is famous for its sensory traits such as intensive red color, piquant hot flavour, and ripe pork meat aroma, with a hint of garlic, cumin and smoke.<sup>14</sup>

The producer of Petrovac sausage is an agricultural cooperative “Kulen” from Bački Petrovac. The cooperative was founded in 2005. The production process is organized in separate households of each cooperative member. An average production is 500 kg per a household. Since the moment Petrovac sausage was certified with geographical indication its production has doubled (comparing to the year 2008) as the market demand has risen.

Petrovac sausage market is mainly domestic, even though a share of the products is exported to Slovakia and Germany. Most of the products (2/3) are sold directly from the household, and the rest of it (1/3) is sold via the cooperative. Customers, restaurant and hotel representatives come directly to the producers to buy the product.

Petrovac sausage can be preordered, at a fixed price, during the production period from November to January either by telephon at the cooperative or in the Internet. Its price is 40% higher than the price of other sausages and kulen which are not certified with protected geographical indication.

### Promotion

Petrovac sausage promotion is usually spread by word of mouth. Members of cooperative believe that the best way for promotion is to spread the information of Petrovac sausage quality and customer satisfaction since they lack the capacity for greater supply in case of greater demand. Besides, they also use the Internet for promotion ([www.kulen.rs](http://www.kulen.rs); Facebook) and sometimes feature their products in TV or radio shows (Panin, B.: Doctoral thesis).

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<sup>13</sup> Source: “A Study of Specific Characteristics and Production Technology of Petrovska klobasa (Petrovac Sausage)”

<sup>14</sup> Source: “A Study of Specific Characteristics and Production Technology of Petrovska klobasa (Petrovac Sausage)”

Petrovac sausage is often exhibited in different fairs and events where tasting and selling is also organized. Such events include: Festival of Sausage, Slovak Traditional Days, Festival of Slovak Music and Folklore “Tancuj, tancuj”.

The most popular of these events is the Festival of Sausage, well-known as “Kulenijada”, which takes place every year on May, 24<sup>th</sup> -25<sup>th</sup> in Bački Petrovac. The main goal of the Festival is to use the specific cultural and art programme in order to reunite producers, buyers and other people interested in sausages and willing to take place in the sausage production and market placement process.

The largest fair where Petrovac sausage was exhibited was Novi Sad Agricultural Fair, the largest and the most prominent agricultural fair in the region (Panin, B. 2013).

There are some restaurants in the village of Bački Petrovac that include Petrovac sausage in their standard offer. Some of them are owned by the producers themselves, and they directly take their products from household to the restaurant. Other restaurants buy Petrovac sausage from the Cooperative, but the amount and frequency of purchases depends on the demand. They usually buy Petrovac sausage when special events are organized, so there are neither regular purchases nor official data for this (2.3) (Panin, B., 2013).

**Table 5. SWOT analysis – Petrovac sausage**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Tradition – an unchanged traditional sausage production exists for more than 200 years.</li> <li>• Experience – for years now sausage producer have been implementing the process of sausage production inherited from their predecessors.</li> <li>• Domestic ingredient production – households produce their own ingredients, so they are sure of the quality and do not need to search the market in order to buy them.</li> <li>• Quality and uniqueness – Petrovac sausage has received the Research Institute Laboratories certificate of quality and they has won medals in different fairs.</li> <li>• Reputation at home and abroad – word of mouth.</li> <li>• Good relationships between members of the cooperative.</li> <li>• Vicinity of Novi Sad – large market.</li> <li>• Developed agricultural region – crop</li> </ul>	<ul style="list-style-type: none"> <li>• Small, individual capacities for drying and preserving on all households which is why the demanded quantity cannot be produced in a single process.</li> <li>• Export management</li> <li>• Small quantity of production - approximately 500 kg/household.</li> <li>• Underdeveloped distribution channels – usually directly on the household or through the cooperative, without professional and well organized traders (larger market chains).</li> <li>• Low investment in promotion activities – only the Internet and local events.</li> <li>• Small number of households that breed pigs – just 50% of households breed their own pigs, and other producers depend on them, which results in small quantity of production, and can be a limiting factor for sausage production</li> <li>• There are no large capacities that would provide production in one place – it would be much more convenient</li> </ul>

<p>production for animal breeding as well as pepper production exist.</p>	<p>and the quantity of production could be higher if the production was organized in one place.</p> <ul style="list-style-type: none"> <li>• Low possibility of higher supply – because of the producers’ capacities.</li> <li>• No officially organized export – difficulties to sell the product abroad.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Higher demand than supply – the market is interested in the product.</li> <li>• Higher price comparing to other similar products – possibility for producers to reach higher profit.</li> <li>• Cultural events – ideal opportunity for the promotion of the product.</li> <li>• Tourism development – tourists from abroad that have never eaten Petrovac sausage increase the possibility of sale.</li> <li>• Well-known in some foreign countries (Slovakia and Germany) – opportunity for new market</li> </ul>	<ul style="list-style-type: none"> <li>• Unstable economic situation, Dinar - Euro ratio is ever changing – this influences the price fluctuations, decreases the purchasing power and is not favourable for profit.</li> <li>• Prices of pigs vary every year – unstable price predictions and income generation.</li> <li>• Variation in corn and animal food prices – makes production unstable.</li> <li>• Low interest from Ministries and public institutions to provide incentives – public bodies do not have special funds in the budget to help the producers.</li> <li>• Lack of personal resources and public subsidies – lack of possibility to increase production and tendency to decrease. Bank loans not accessible.</li> </ul>

Source: Panin, B. project team member, Research data 2013.

### 3. Quantitative and qualitative analyses of demand

#### 3.1. Features of tourist demand on a destination

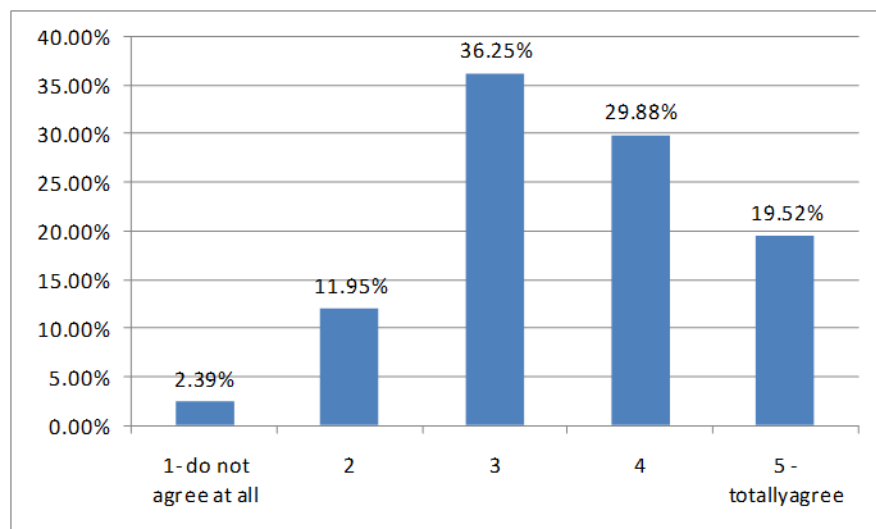
For the purpose of product demand analysis, 251 people, 83.7% of whom come from Vojvodina and 73.7% of whom come from Novi Sad, were questioned using a research questionnaire,.

**Attitude towards typical food products:** According to the questionnaire results, large part of the surveyed population (36%) responded “neutral” concerning their interest in typical food products (marking 3 on a 5-level Likert scale). By analysing further responses, it can be concluded that Serbian population is interested in typical food products concerning that 19.5% of the respondents declared extremely interested , and 30% of the respondents marked 4 on a 5-level



Likert scale, which altogether makes almost 50% of the surveyed population. High level of interest in typical food products gives the opportunity to increase the production and sale of such products (Panin, B. 2013).

Figure 1: Level of interest towards typical food products



Source: Panin, B. Research data 2013.

Attributes that people associate to typical products are linked to tradition and are in support of local economy. Opinions that typical products have better taste and are healthy are on the low level of the scale (Panin, B. 2013).

**Awareness of PDO/PGI products' existence:** 46.2% of respondents know what PDO/PGI products are. Besides, 31.1% have heard of such products but are not sure what they are. These answers obviously indicate that people in Serbia are familiar with the existence of PDO/PGI products (Panin, B., 2013).

Most respondents would pay the same price for PDO Petrovac sausage and PDO Futog cabbage as for a non-PDO product. More than half of the respondents would pay higher prices for PDO products than for non-PDO products. Such a situation makes it possible to include PDO products into the gastronomic offer of the restaurants in this region (Panin, B. 2013).

Analysing the gathered research data one can come to a conclusion that there is an evident interest in typical products in Vojvodina and that such products are typically connected to tradition. For that reason, these products should be promoted in exactly such a context.

People are aware of the products with protected geographical indication, although not many know the exact meaning of such a label. As these products are exactly what represents the tradition,

they should be included into tourist and gastronomy offer of Vojvodina and for such matter should be better promoted.

As there is a demand for PDO Petrovac sausage, and an opportunity to increase its price because of PDO certification, one can come to a conclusion that a similar demand would emerge for other PDO processed meat products from Bačka and Srem. These products include: Srem kulen, Srem homemade sausage, Srem salami and Lemeš kulen. What goes in line with this situation is the adopted Act on Small Quantities of Primary Products for the Supply of Consumers, the Area for Performing such Activities as well as Aberrations Related to Small Entities in the Business of Animal Origin Food (Official Gazette of the Republic of Serbia, no. 111/17, December 11<sup>th</sup> 2017).

According to the data gathered on the occasion of product description, it is evident that the production of Bermet is in increase. This means that there is a higher demand for this product both at home and abroad. As this is a unique and very aromatic wine, its promotion should highlight the specific traits pinpointing the differences from other wines and stressing the sorts of dishes that it should be served with. Along with the promotion of Bermet, other wines of the same winemakers could be promoted.

### **3.2. The share of local products in tourist offer**

“Gastronomy“ tourist product is an added value to all the other tourist products. Local products own economical as well as traditional and cultural values which are an important element of experience tourism and as such enlarge the overall quality of every destination. Modern tourists and consumers, that represent global and almost unified society, express a constant demand for special experience of a destination either by consuming the typical products i.e. the food and beverages of the destination or by visiting events and buying authentic souvenirs. Local product placement in the local market offers an added value to the tourist demand and lowers the costs of promotion and transport for small and medium producers, ultimately rising profitability.

Typical products of North Bačka, South Bačka, West Bačka and Srem districts are under-represented. Wines own the highest share in the market. For that matter in 2010. Ministry of Tourism together with the Tourist Organization of Serbia started a project “Wine Routes of Serbia” with the idea of promoting wine tourism and autochthonous breeds and rising the quality of products. Nine wine routes were marked altogether and their GPS tracking was completed. This led to a significant rise in the number of tourists in wine tourism. As far as food products are concerned, apart from numerous food-related events not much has been done for the valorization of these products and with the aim of better availability and recognizability in the tourist market.

## **4. Key obstacles to local (typical) products entering the tourist market and the measures for overcoming the identified obstacles**

The results of local products demand and supply analysis were tested using the focus group method. The focus groups comprised employees from hospitality industry, producers, tourist organisations, and local self-government.

Five ethno-gastro workshops were held to identify the obstacles to product placement, i.e. their share in the tourist market:

1. The offer is not based on the tourists' needs and expectations
2. Low level of cooperation among the local service providers
3. Underdeveloped synergy among gastronomy and other tourist market niches

The next category of identified obstacles relates to the competitiveness of the products, i.e. disadvantages of the products themselves:

1. Low level of standardization and inconsistency of the quality
2. Absence of declarations and other necessary certificates
3. Low level of standardization and inconsistency of the quality
4. Small or insufficient quantity of products
5. Inadequate packaging

Some of the possible measures for overcoming the identified obstacles are as follows:

Local tourist services providers are advised to organize events for meeting the local tradition, both for tourists and local service providers in tourism. For the purpose of better promotion of the local products, restaurants should diversify their gastronomic offer and incorporate such ideas as "Typical Local Products Day" into their weekly menu, as well as give clear description of the traditional value of the products the guests consume. It is inevitable to organize a professional development course on the value of local products, the importance of adequate packaging, and the standardization and certification of the products. Through specific workshops service providers should create a few dishes containing typical products presented in a modern way in order to attract the attention of the consumers. Concerning trade tools it is advised to use labels such as: organic production, gluten-free, health food etc.

Producers should unite in the effort to deliver the demanded quantity of typical products to hotels and restaurants, as well as to rise the overall quality of typical products. These measures are of crucial importance for the placement of the tourist market.

It is inevitable to improve and intensify the promotion of the local products within the tourist promotion of the destination using methods such as creating souvenirs inspired by typical products and presenting them in a modern way.

Apart from the above mentioned obstacles to the placement of products in tourist market, until not long ago there was also a prohibition of selling the products "at the household threshold" i.e. a prohibition of direct selling of the animal origin products. The mentioned prohibition is eliminated by the adoption of Act on Small Quantities of Primary Products for the Supply of Consumers, the Area for Performing such Activities as well as Aberrations Related to Small Entities in the Business of Animal Origin Food (Official Gazette of the Republic of Serbia, no. 111/17, December 11<sup>th</sup> 2017).

The mentioned Act was adopted in December 2017. and has been in act since January 1<sup>st</sup> 2018. By this Act small producers of the traditional food of animal origin are free to sell their products at

their households. This opens the opportunity for the products to be placed in the tourist market legally. On one hand this Act has enabled the standardization of traditional production and market exposition to small households, on the other hand it motivates the producers to pay more attention to standardization in facilities availability, food business management, and different phases of production, storage, management and trade. This is not to say that small producers will have to follow the rules applied to large industries, but they will be listed in a separate register.

From the point of view of tourist market, adopting such an Act opens the possibility for connecting local production, gastronomy and rural tourism into a new multidisciplinary sector. This sector enables new profit for the local inhabitants through developing the possibility for the consumption of the local products in the place of their origin – the idea that certain food and wines can be better enjoyed and “understood” if prepared and consumed at the place of their origin, using typical local ingredients and by the people from the local community.

Apart from the food, the culture of winemaking has become increasingly attractive to both public and the media. Food and wine have become a global phenomena, studied by the professional authorities, multinational companies and an increasing number of tourists.<sup>15</sup>

At the same time, food and wine tasting is usually organized at the same facility where production is performed, giving tourists the opportunity to become familiar with the techniques of production and preparation.

## **5. Marketing of the local products and rural tourism of Vojvodina together with the transboundary destination of Central Danube region**

Certain characteristics of Vojvodina such as its geographic and traffic position, wide range of natural and social traits, biodiversity, flora, fauna, climate, cultural and historical heritage, adequate events, anthropogenic factors, and other characteristics make a solid foundation for Vojvodina joining the most important segments of rural tourism. For that matter, rural tourism is highlighted as one of the most important tourist potentials not only in Vojvodina but also in all of the transboundary destination of Central Danube region. In order for rural tourism to develop successfully it is necessary for a region to possess not only attractive resources, capacities and quality product, but also effective organization and marketing. The significance of marketing conception, as well as the creation of a recognizable tourist product and rural tourism brand of Vojvodina and transboundary Central Danube region is of the utmost importance within long-term rural tourism developmental strategy. Rural tourism of this region could be established in both domestic and international markets.

The basic aim of marketing in rural tourism is the creation of such an offer that will present a wide range of different options to fulfill all the tourists’ wishes and needs. In order for that to happen it is inevitable for all the tourist subjects to cooperate in the first place and to coordinate with state bodies and institutions that are responsible for the mentioned development on macro level. All tourist politics subjects coordinating tourist development in all levels should be organized

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<sup>15</sup> Sidali, K.Laura., Spiller, A. & Schulze, B.,2009

so that their activity reflects the current and expected wishes of home and foreign tourists to the maximum.

Market research is of a special importance in the approach to rural tourism development planning in Vojvodina and transboundary destination of Central Danube region. Tourist values are highly coordinated with ever-rising trend in foreign and domestic tourist demand. For all these reasons it is important to define aiming markets i.e. their niches in which rural tourism of Vojvodina and transboundary region of Central Danube would be highly positioned. In domestic market that refers to city population or certain number of provisional tourists from the surrounding places who are all of certain age, education and financial ability. When it comes to foreign markets, the offer of a holiday in villages has to be much more straightforward and able to meet the needs for customization.

Rural tourism offer is most often promoted by a tourist organization whose aim is to promote a certain area, county, region, or cluster, or for that matter an agency that organizes travels. It is important to understand that most of the agrotourist travels are individual and customized so web sites and IT technologies in marketing are of the utmost importance. Additionally, there is an offer of supplementary services provided by different subjects in rural area. This offer includes traditional products sold at the households, trading, local traffic, cultural institutions, associations and organizations that support eco-, ethno-, traditional, and natural activities, sports organizations, etc. All these subjects meet the needs of tourists for different products and services.

It is important to decide which media and advertising channels are the most effective, and than to conduct measuring and controlling according to key success indicators. Advertising channels should be chosen according to the dynamics of tourist products development as well as according to the key markets and market segments and their media consumption manner. After a revision is conducted, there has to be a demand for new types of print advertising materials in the region. These materials can include product brochures (wine, gastronomy, events, culture, travel breaks, health and wellness, river cruising/nautics, etc), topic cards, wine and gastro cards, etc.

Web page is most often the first contact a potential guest has with a destination and local products and that is a place to inspire and inform every visitor. The contents of a good tourist destination has to be relevant, informative, and contemporary, as well as attractive in the manner of its presentation. Web pages have to be interactive, visually user-friendly, easy to navigate, and mobile-friendly. Web page has to be the centre of all the relevant information that links to other Internet pages of service providers, attractions, and other contents depending of the visitors' interests.

Apart from the widely popular and omni-present Facebook page, the guests have to be inspired by photos and videos. For that reason, Instagram profile and YouTube channel are the two most appropriate options. Social networks are channels of information gathering, contents creation and users' engagement. They offer fast and personalized communication, as well as specific marketing campaigns. Communication via social networks has to be constant, inspiring, relevant, and in support of the guests' engagement and contents sharing.

For the purpose of contents creation, there is a need for blogging. A blog is a basic place of inspiration. It is written and managed by local inhabitants on different topics in an interesting, innovative, creative, and fun way. The blog offers all the relevant information that create the awareness of the destination, inspire guests and make them wish to visit the destination. The

contents can at the same time be shared via social networks which enlarges visibility and market breadth.<sup>16</sup>

There is a constant battle over each and every guest among tourist destinations today. It's not only enough to have a quality and attractive offer, it is also necessary for the offer to reach the potential guests. Effective marketing is of the utmost importance. The general rule in marketing is that the advertisement should be presented where the customers are. That is why traditional tourist marketing models – fairs, brochures, catalogues, magazines – are accompanied by the Internet.

The Internet and social networks are a completely new ground for numerous managers and hoteliers, as well as for numerous tourist organizations employees. Most of them do not yet manage through that new ground efficiently.

More than 80% of tourists all around the world start their travelling in the Internet. Traditional tourist agencies have been changed by Google homepage and social networks. These days tourism cannot be imagined without the Internet. The Internet has caused a revolution in the sector's development. It is a real challenge to present one's tourist offer in the Internet, and it requires devotedness and professionalism. It is a never-ending task, a continuous process, and must not be stopped.<sup>17</sup>

A new wave of the Internet usage has been introduced by the social networks, and tourism is a sector where social networks show undoubtedly the most potential. Sharing photos, videos, statuses, locations, and advice is all very fun and interesting, which is the most important reason for people using Facebook, Twitter, Instagram, etc. In that way, through interesting content in the social networks, the attractiveness, recognizability, brand strengthening and above all new guests and larger profit could be achieved.

High target directedness means easy contact with target groups. In that way the promotion is organized according to the market segmentedness. The results are measurable and the achieved goal is obvious from the statistics. Affordability and low prices are the advantage of online marketing. Using social networks is absolutely free of charge. If a local product or services are to be advertised, the most important step is to get to know the target group of the consumers, and to direct the advertising towards them. Most of the Internet users visit a social network at least once a day, and a large number of them spend a few hours a day in the social networks. Using smart mobile phones people can constantly be online, using social networks among other things. Mobile phone users visit the Internet to read daily news, check emails, and most often to visit Facebook, Twitter, Instagram, and other active social networks. The above mentioned few hours are slowly becoming 24 hours of online availability a day.<sup>18</sup>

Advertising and promotion in the Internet are still the cheapest way to present the rural tourist offer and the local products to the potential guests. What is necessary is the content that will attract the attention of the tourists and awaken their wish to travel. Additionally, there has to be the content to provide all the necessary information about travelling to, staying in and activities to do in the destination. What tourists want to know are the interesting events, weather conditions (especially in

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<sup>16</sup> More detail in: Stojković M. (2013): Primena društvenih mreža u turizmu i ugostiteljstvu, Tourism Management and Consulting, Beograd

<sup>17</sup> More detail in: Stojković (2013): Primena društvenih mreža u turizmu i ugostiteljstvu, Tourism Management and Consulting, Beograd

<sup>18</sup> 2018-2022 Autonomous Province of Vojvodina Tourism Development Programme

skiing centers), and traffic conditions. They should also be regularly informed on the discounts, new dishes in the menus, famous people who have visited the destination, etc.

Facebook is certainly the most popular social network in Serbia, but Twitter is definitely advancing up the ladder of popularity, and the number of Twitter users is getting bigger every day, while in some parts of the world Twitter is even more popular than Facebook. Just like Facebook, Twitter is a social network, too. Users make their own profiles, set their cover and profile photos and interact with other users. But this is where all the similarity between these two networks stop. Facebook is more entertainment-directed, there are more photos, stickers, videos. On the other hand, Twitter is information-directed. Each Twitter status is limited to 140 characters, which includes links that can be inserted. There are no pages in a Twitter profile, which is why it is allowed to create a profile named by a hotel, a destination, an agency or a restaurant. It is important that one pays attention to the way of business communication in the network. Twitter is one of the least formal social networks. That means that strict corporate way of communication should be avoided. This is especially so in tourism as it is a sector based on holidays, fun and entertainment. Twitter users prefer a more casual communication.<sup>19</sup>

Instagram is a social network for sharing photos, and it is especially mobile-friendly. From the marketing point of view, Instagram could be an excellent means for connecting the sellers with the buyers, as well as for brand and image creation. Of course, it all depends on the sector of industry, but there is no doubt that tourism is one of the best sectors to make the most of the usage of Instagram. In Instagram there is a possibility of uploading less formal photos, which are at the same time more natural, more formal and more realistic than professional ones. Instagram has recently started to support short videos as well. A short video has become a real hit. It is a form that has in a way been lacking and is a potential to be well used in promotional activities of tourist offers.<sup>20</sup>

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