

SLOVAKIA CATCHING-UP REGIONS 4

UPPER GEMER:
THE ROŽŇAVA DISTRICT
RAPID-ASSESSMENT
OF THE TOURISM SECTOR



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DISCLAIMER

This report has been developed through collaboration between the Košice Self-Governing Region, the Government of Slovakia and the World Bank.

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ACRONYMS

BBSK	Banská Bystrica Self-Governing Region (Banskobystrický samosprávny kraj)
CBC	Cross-Border Cooperation
CuRI	Catching-up Regions Initiative
DG REGIO	Directorate-General for Regional and Urban Policy
DMO	Destination Management Organization
DMS	Destination Management System
DSP/DOS	Documentation for building permit / construction notification
DUR	Documentation for zoning decision
EC	European Commission
EIA	Environmental Impact Assessment
ERDF	European Regional Development Fund
ESF	European Social Fund
ESIF	European Structural and Investment Funds
EU	European Union
GIS	Geographic Information System
HPL	High Pressure Laminate
ICT	Information and Communications Technology
IROP	Integrated Regional Operational Program
IS	Information System
IT	Information Technology
ITI	Integrated Territorial Investment
KSK	Košice Self-governing Region (Košický samosprávny kraj)
LAG	Local Action Group
LG	Local Government
MICE	Meetings, Incentives, Conferences, Exhibitions
MIRDI	Ministry of Investments, Regional Development and Informatization of the Slovak Republic
NGO/NPO	Non-government / Non-profit Organization
No	Number
NP	National Park
OP	Operational Programme
POI	Points of Interests
PPP	Public-private partnership
PSK	Prešov Self-governing Region (Prešovský samosprávny kraj)
PT	Poloniny Trail
R&D	Research and Development
RDA	Regional Development Agency
SK/SR	Slovak Republic
SMEs	Small and Medium-Sized Enterprises
QR	Quick Response
TAIEX	Technical Assistance and Information Exchange Instrument of the European Commission
TD	Technical documents
ToR	Terms of Reference
TTCI	Travel and Tourism Competitiveness Index
UNESCO	United Nations Educational, Scientific and Cultural Organization
WB	World Bank

INTRODUCTION

The Upper Gemer Region with its Rožňava District, located in southern Slovakia, is a hidden gem that has been gaining popularity among tourists in recent years. The region is known for its breathtaking landscapes, rich cultural heritage, and outdoor recreational opportunities. The tourism sector in the Upper Gemer Region has been growing steadily, thanks to the efforts of local authorities and businesses to promote the area's unique attractions and activities. From hiking and cycling to exploring historic castles and visiting traditional folk festivals, there is no shortage of things to see and do in this charming region.

In addition, the Upper Gemer Region is home to several natural wonders that has a huge potential to attract visitors from all over the world. The Slovak Paradise National Park, for example, boasts a network of hiking trails that lead through canyons, waterfalls, and forests, providing a truly unforgettable experience for nature lovers. Another popular attraction is the Dobšinská Ice Cave, a UNESCO World Heritage Site that features stunning ice formations and underground lakes. The region is also dotted with thermal spas and mineral springs, offering visitors a chance to relax and rejuvenate in natural hot springs. With its unique blend of natural beauty, cultural richness, and outdoor adventure, the Upper Gemer Region has a potential to become a must-visit destination for anyone looking to experience the best of Slovakia. Whether a nature lover, history buff, or simply seeking a peaceful retreat, this region has something to offer to everyone.

Despite the potential benefits of tourism, the Upper Gemer region faces several challenges in developing this sector. One of the main issues is the lack of infrastructure and amenities to support tourism. The region's road and transportation networks, accommodation options, and tourist attractions are often underdeveloped, outdated or inaccessible, which can discourage visitors from exploring the area. Additionally, there is a need for greater investment in marketing and promotion to raise awareness of the region's unique cultural and natural assets. Without these improvements, the tourism sector in the Upper Gemer region may struggle to reach its full potential.

Another challenge is the seasonal nature of tourism in the region. While still low on the visitor numbers, the majority of tourists – domestic or international – come to the region during the summer months when the weather is favorable, but this means that businesses and attractions may struggle to remain profitable during the off-season. This creates a cyclical pattern of boom and bust, which can be difficult for businesses to manage and plan for. To address this issue, there is a need for diversification of tourism offerings, such as developing winter sports or cultural events, to attract visitors year-round. Additionally, partnerships with neighboring regions could help promote cross-border tourism and extend the seasonality of the sector. Overall, improving infrastructure, marketing efforts, and diversifying tourism offerings, coupled with capacity building activities for the provision of improved tourism services are crucial steps to ensure the long-term success and sustainability of the tourism sector in the Upper Gemer region. By addressing these challenges, the region can attract more visitors, create more jobs, and generate economic growth for the local communities.

To start tackling the aforementioned obstacles, the Ministry of Investment, Regional Development and Informatization, KSK, the city of Rožňava, and the European Commission with the World Bank embarked on the rapid assessment of the tourism sector in the Rožňava District to better understand what are the key issues impeding the development of the sector in the area.

The Košice Self-Governing Region (KSK) and the World Bank worked closely together to produce this report, which is divided into five main chapters:

The first chapter gives a broad overview of the tourism sector in the Rožňava area, outlines geographic boundaries, discusses the role of the tourism industry as the main engine of regional economic growth, and delves into the data to support the study's findings. Given its importance in the development of tourism in any location, the accessibility point is given careful consideration as well.

The second chapter describes the main governance and regulation principles related to the tourism sector. It discusses the institutional framework for the tourism industry, offers a brief overview of the tourism policies, guidelines, and laws that apply to the Rožňava District, and makes brief mention of regional, global, and international cooperation.

The third chapter covers tourism products, experiences, and offerings. This section of the report examines all forms of tourism that could be developed further in the Upper Gemer region, including soft adventure tourism and activities, nature-based and eco-tourism, cultural heritage tourism, regional products, and recreation.

The fourth chapter describes practices related to positioning of the area and the region, branding, marketing activities and communication with tourists.

The fifth chapter summarizes the strengths and weaknesses that have been revealed in regards to Upper Gemer and the Rožňava District as a developing tourist destination. It also delves into some recent global trends that could aid Upper Gemer in further enhancing their product development for improved marketing efforts.

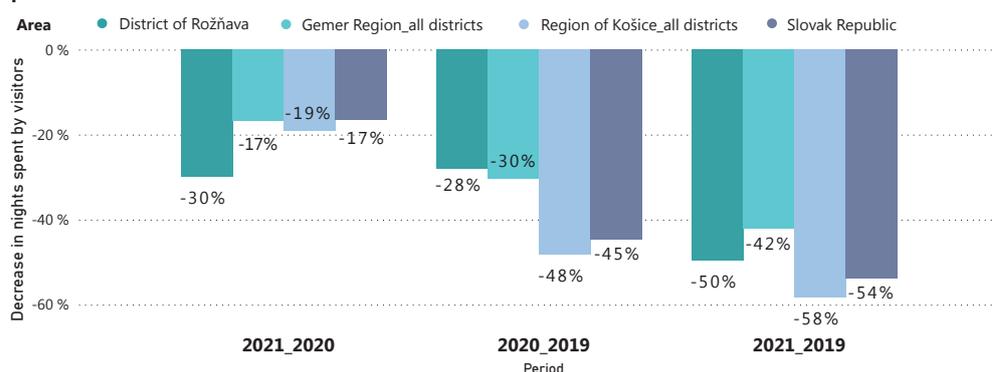
EXECUTIVE SUMMARY

The Gemer Region is located in the eastern part of Slovakia and extends partly in the Košice and Banská Bystrica Self-Governing Regions (KSK and BBSK, respectively). The Rožňava district, which is part of the Košice Region, covers a significant portion of the entire Gemer in terms of both area and population.

Gemer is currently one of the less competitive Slovak tourism destinations, but there are early signs of comprehensive destination development and marketing communication within the domestic market.¹ Low competitiveness is a result of a variety of factors, including inadequate transportation and accessibility, a weak infrastructure for tourism services, a lack of funding, and ineffective methods for promoting the area as a travel destination. The Gemer Region's destination management organization (hereafter DMO Gemer) was established in June 2018 as the first step towards establishing the Gemer Region as a tourism destination. In comparison to other destinations, DMO Gemer is one of Slovakia's local DMOs that is the youngest. After only three years of operation, Gemer Region is one of the most followed destinations in Slovakia on social media, even when compared to some of the most competitive locations in the country, including the High Tatras, Liptov, Košice, and others.

This proves that remote areas with a wealth of natural and cultural resources, such as the Gemer Region, which remind people of an important past and history and the region's pristine nature, can draw tourists with the help of effective communication, even if the area is also relatively underdeveloped in terms of infrastructure. The COVID-19 pandemic has shifted consumer behaviors and resulted in a growing trend of leisurely outdoor activities in less crowded (non-mass), slower-paced, and new locations. Day trips contributed to developing a new market segment, as people sought to escape the confines of their homes and explore nearby destinations. To cater to this trend, tourism businesses need to adapt and invest in outdoor recreational facilities and eco-friendly accommodations that offer a unique and authentic experience for visitors. Additionally, promoting responsible tourism practices can help preserve natural resources and protect local communities, which is becoming increasingly important for travelers who are mindful of their impact on the environment. In some periods of 2020 and 2021, the provision of tourism services was strictly limited or even canceled for several months. During the pandemic, destinations that cater to MICE, cultural, and urban tourists, like Košice and Bratislava, which receive the majority of inbound tourists from Slovakia, suffered the most. From an economic point of view, it was a hard time for all destinations. Destinations with less development, like Gemer, have run the risk of worsening structural socioeconomic issues. The district of Rožňava, which has the highest unemployment rate in the Košice region, has very little resilience in the tourism sector. The stabilization of the district through accelerated investments in infrastructure and human resource development is even more crucial now.

FIGURE 1: Annual change in overnight stays before, during and after the COVID-19 pandemic.



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

Following the opening of borders for outbound tourism, the biggest drop in tourism can be seen in Slovakian destinations in 2021 as compared to 2019. Compared to the majority of the member states of the European Union, Slovakia is more price competitive. This context emphasizes the importance of tourism infrastructure quality as a pillar for travel and tourism competitiveness, where Gemer Region lags far behind many Slovak destinations.

Influencing Factors of Tourism Competitiveness of Gemer Region (Summary)

Notably, Slovakia currently lacks a thorough methodology that would allow for regular evaluation of Slovakia's travel destinations' competitiveness. To compare Gemer Region and Rožňava District with some other locations and to assess the current competitiveness of the Gemer region overall, the framework of several Travel and Tourism Competitiveness Index (TTCI) criteria—which are organized into the following five pillars: Enabling Environment, Travel and Tourism Policy and Enabling Conditions, Infrastructure, Natural and Cultural Resources—was applied on a qualitative basis.

The entire Gemer region is considered to be one of Slovakia's least developed regions², suffering from a high unemployment rate and other structural issues in socioeconomic development. In the Rožňava district, the official unemployment rate was 15.19 percent in 2020, which is 13.54 percent lower than in 2011³. This situation has a negative impact on the enabling environment, a critical pillar of the competitiveness of the travel and tourism industries, which includes the business environment, human resources and the labor market, safety and security, health and hygiene, and ICT readiness, including poor mobile network coverage in comparison to other better-developed regions and locations in Slovakia.

According to an analysis by the district office, the Rožňava district's high rate of registered unemployment is caused by unbalanced economic development, a lack of capital resources, an insufficient demographic structure, a low level of qualification among the populace, and the exodus of skilled labor. People who have only completed their basic education (30 percent) or only a secondary education (55.4 percent) make up the majority of the unemployed and work primarily in temporary, supplemental, or seasonal positions. The COVID-19 pandemic had a significant impact on the district's unemployment rate as well; between March 2020 and March 2021, unemployment increased by more than 4 percent. Employees with lower qualifications and lower wages, who were mostly employed in occupations that could not be performed from home, were the most vulnerable to job loss. In April 2021, more than 2 percent of those employed in the sectors of accommodation, hospitality, art, entertainment, and recreation, as well as retail and transportation, visited employment offices. People with education and experience are leaving the district in search of better opportunities in other areas. Young people, those of productive age, are fleeing. They frequently travel to neighboring districts, particularly the Košice district⁴.

General socioeconomic development enabling factors, such as the labor market and human resources already mentioned, are conditional upon and coevolved with tourism. This fact is strongly supported within the **travel and tourism policy** in the Gemer region through the acceptance of the Development Plan of the Least Developed District of Rožňava for the period 2022–2026 according to the Act on the Lagging Districts⁵. The establishment of the local destination management organization, DMO Gemer as a public-private partnership according to the Act on Support of Tourism Development⁶ in 2018 was a breaking point in the prioritization of the travel and tourism industry in the Gemer Region in long-term coordinated development. The **destination governance conforms to the principles of sustainable development** (including environmental, social, and heritage sustainability), which has been the top priority and main philosophy of this organization since the very beginning. The existence of regional DMOs (Košice Region and Banská Bystrica Tourism Region, and the BBSK Regional Development Agency, NPO) at the regional level of each self-governing region attests to the high priority given to tourism in regional policy. They are carrying out networking and other umbrella activities within the respective regions (BBSK and /or KSK), including common tourism projects with the local DMO Gemer. This is gradually contributing to the region's stability and competitiveness from a destination management and marketing point of view.

Despite the fact that the strategic prioritization of tourism is a crucial component of the region's development, the undeveloped nature of the Gemer region necessitates significant funding sources to support infrastructure development. Otherwise, like all the other underdeveloped regions, it will continue suffering from a lack of resources for the construction, rehabilitation, and maintenance of basic infrastructure.

One of the factors contributing to the Gemer Region's low competitiveness is that it has the worst **transport accessibility** of any Slovakian destination. This is due to a combination of limited international air travel accessibility, insufficient first-class road coverage, deterioration of existing rail and road infrastructure and the gradual elimination of public passenger transport connections into the region.

Tourism services in the Gemer Region correspond to the early stages of tourism development; the process of networking among stakeholders has only recently begun, and the development of complex products is also in its early stages. As a result, the number of visitors and overnight stays is incomparably lower when compared to other destinations with more dynamic development or stakeholder collaboration. The fact that tourism in this area is underdeveloped in comparison to other more visited locations in Slovakia (High Tatras, Low Tatras, Malá Fatra) can be viewed as an opportunity to systemically set up sustainable development objectives in an early stage, before the negative effects of excessive development manifest themselves.

Despite poor destination accessibility and low-quality infrastructure, the region has an excellent geographical location for the promotion of international tourism due to its proximity to Hungary. To this end, the proportion of foreign visitors was very small and foreign visitors accounted for 15.2 percent of total overnight stays in the Gemer Region prior to pandemic in 2019, and then even dropped further to 4.8 percent in 2021.

Upper Gemer is rich in **cultural and natural resources**, which include three national parks and one protected landscape. Two cross-border territories on the UNESCO World Cultural and Natural Heritage List raise the prospect of international tourism development even further. The Aggtelek Karst and Slovak Karst Caves stretch across the District of Rožňava, presenting a unique and comprehensive territory not only for the Gemer Region, but also for Slovakia.

Another strength of the Gemer Region in terms of a **destination offer** is its cultural and industrial heritage, which is linked to mining history and the heritage of noble families of European importance and is spread throughout the region. This subject is already woven into the regional cultural routes. The cultural route – Gothic Route reflects cross-regional efforts in the sustainable development of cultural heritage in tourism offerings (including networking). In 2021, 12 sites along this route were awarded the European Cultural Heritage Label, four of which are in Upper Gemer.

To summarize, the identified challenges that negatively affect the tourism sector in the Upper Gemer Region can be grouped into the following categories:

1. **Limited mobility, isolated sites, and no public transit options.** While the area has several important sites and landscapes to offer its visitors, these are often hindered by the lack of connections to these sites. Public transportation is not available and there are no biking lanes that connect to these places. The bikers often use the roads that pose risks to their health and safety. The lack of transit options and biking lanes, resulting in limited accessibility, as one of the main prerequisites for tourism development limit the area's potential for economic growth.
2. Coupled with the above, the area is suffering from **fragmented cycling network**. Cycle tourism is one of the fastest growing industries globally and in Europe. Overall, while the cycling network in the area is improving, there is still room for taking it to the next level as the trails are often disconnected and segmented. This can make it challenging for tourists and cyclists to navigate and enjoy a seamless riding experience. Furthermore, the lack of connectivity between cycling trails can discourage people from using them as a mode of transportation and means to visit tourist attractions. Additionally, the segmented nature of the trails may discourage tourists from exploring the area on bike. Therefore, it is crucial for the local government to prioritize the connectivity of cycling trails in the area to promote cycling as a viable mode of transportation and tourism activity.
3. **Limited services available to visitors.** While there are places in the Gemer area and the city of Rožňava where visitors can enjoy their stay and enrich their experiences, their capacity is rather limited, as are their services. Tourism attractions do not offer high quality products and experiences, while the local service providers are unable to extend their offerings to a larger group of visitors, causing problems for organized tourism. For example, if a company wants to organize a team-building event in the Gemer area for a group of 50 people, they may struggle to find suitable accommodations and activities that can accommodate such a large group. As a result, the company may choose a different location for their event, resulting in lost revenue for local service providers.
4. **Shortage of qualified workforce and lack of training opportunities at the local level.** For instance, in rural areas where there are few job opportunities, many young people leave to seek work in urban areas. This perpetuates the cycle of a limited workforce and a lack of skilled workers in the area.
5. **Low level of networking linked to lack of interest and not sufficient involvement of local stakeholders into destination management and marketing activities.** Local stakeholders have limited capacities to share information and sources. Although there are pioneers in the destination whose mission is to build relationships and promote the products, awareness about joint and cohesive actions in general is low. This significantly affects effectiveness of marketing and promotion activities including annual calendar of events to help visitors with planning their trips to the Upper Gemer area and the town of Rožňava. Without networking, marketing and promotion efforts (including creation of calendar of events), it can be difficult for visitors to plan their trips and fully experience all that the area has to offer. It may be important for all groups of stakeholders (municipalities, businesses, cultural institutions, DMOs and other local organizations) to work together to address these issues and promote tourism in the area as well as develop destination products.

To validate the findings presented in this report, several consultative meetings and workshops with representatives from the public and private sectors were held in Rožňava and Košice.

The challenges described above were prioritized during the public consultations to identify important areas and help KSK and the city of Rožňava prepare a specific set of measures to address the corresponding shortcomings. The prioritization criteria were based on three factors: (1) importance of the identified gap; (2) urgency of the issue; and (3) availability of technical and financial resources to address the shortcoming.

The development of cycling trails and improving green connectivity were identified as a priority area by the stakeholders. Therefore, it is important to focus on this area to promote connectivity

leading to sustainable tourism development and enhanced quality of life for individuals in the community, all supporting local economic development. Investments in cycling trails, amenities and green connectivity can create a more environmentally friendly and healthy community for all, better operational environment for businesses, and development opportunities for SME – all resulting in improved economic activity and attraction of higher number of visitors from the domestic and targeted international markets.

The second report – *The Gemer Trail: Taking It Forward* – offers specific recommendations on how to address connectivity issues to promote better access within and outside of Rožňava city and connect key tourism attractions with the city to promote better access to important landmarks and touristic sites of the area, yet improve connectivity with the bordering Hungary.

Finally, as part of this engagement with KSK, the World Bank team has provided a set of recommendations and priority actions that can assist in addressing issues such as service enhancement, product development, destination management, sector collaboration, marketing and promotion, and others. For example, to promote service enhancements and product development, KSK may consider better designing their annual grants program to target investments to help improve product development and service provision in the area. To address the issues of capacity building and lack of experience in destination management, the World Bank tourism experts, through the EC support, delivered a series of training sessions to over 30 participants to further enhance their knowledge of how to do business, create and manage destinations, innovate with tourism products, and collaborate for better outcomes. Furthermore, study tours⁷ and other capacity-building activities were made available to selected KSK participants to enhance their knowledge in tourism management from the leading European countries and industries, and further collaborative efforts were supported through various initiatives.

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CHAPTER 1: SECTOR OVERVIEW

1.1 REGIONAL BOUNDARIES OF THE GEMER REGION

For a very long time, Gemer was highly dependable and renowned for making use of mineral wealth. This area was among the most significant producers of the highest quality iron in the Hungarian Kingdom for many centuries. The iron industry's growth spurred important development throughout the entire region, including the growth of the arts, crafts, and educational sectors. These developments, along with the beauty of the surrounding landscape and the presence of technical monuments, contributed to the region's natural and cultural wealth. However, overtime, Gemer became one of the least developed regions due to the gradual decline and eventual extinction of the mining and iron-processing industries without a smooth transition to other economic activities. Such evolution established the primary parameters of the region's cultural, historical, and natural potential for tourism development. As a result, Gemer is widely regarded as one of Slovakia's culturally rich regions.

Composition of the Gemer Region

The Gemer region is made up of eight towns and 203 municipalities. In terms of self-government, the Gemer region comprises three integrated districts (Revúca, Rožňava, and Rimavská Sobota) and two self-governing regions (Košice and Banská Bystrica). Banská Bystrica region contains 71 percent of Gemer municipalities (42 municipalities in the Revúca district and 107 municipalities in the Rimavska Sobota district). Košice region is home to 29 percent of Gemer municipalities (62 municipalities in Rožňava district). Annex 1 offers a detailed list of municipalities and their names.

Gemer belongs to less populated areas of Slovakia. The share of all districts of the Gemer region in the total Slovak population is 3.25 percent. The population of this region has decreased by 4,73 percent over the last 20 years. The population density in the Gemer region is only at the level of 52.5 people per square kilometer and in the Rožňava District it stands at 50.15 people per square kilometer⁸.

TABLE 1: Population of the Gemer Region

Territory	Population ⁹ in 2022	Share on population of Slovakia in 2022	Change in number of inhabitants (from 2003 to 2022)
Gemer region	176 669	3,25 %	- 4,73 %
Rožňava District	58 695	1,08 %	- 5,02 %
Revúca District	37 993	0,70 %	- 6,85 %
Rimavská Sobota District	79 981	1,47 %	- 3,48 %
Slovakia (all districts)	5 428 792	100,00 %	+ 0,91 %
Other parts of Slovakia (excluding Gemer)	5 252 123	96,75 %	+ 1,11 %

Source: Own processing based on data of the Statistical Office of the Slovak Republic, 2023.

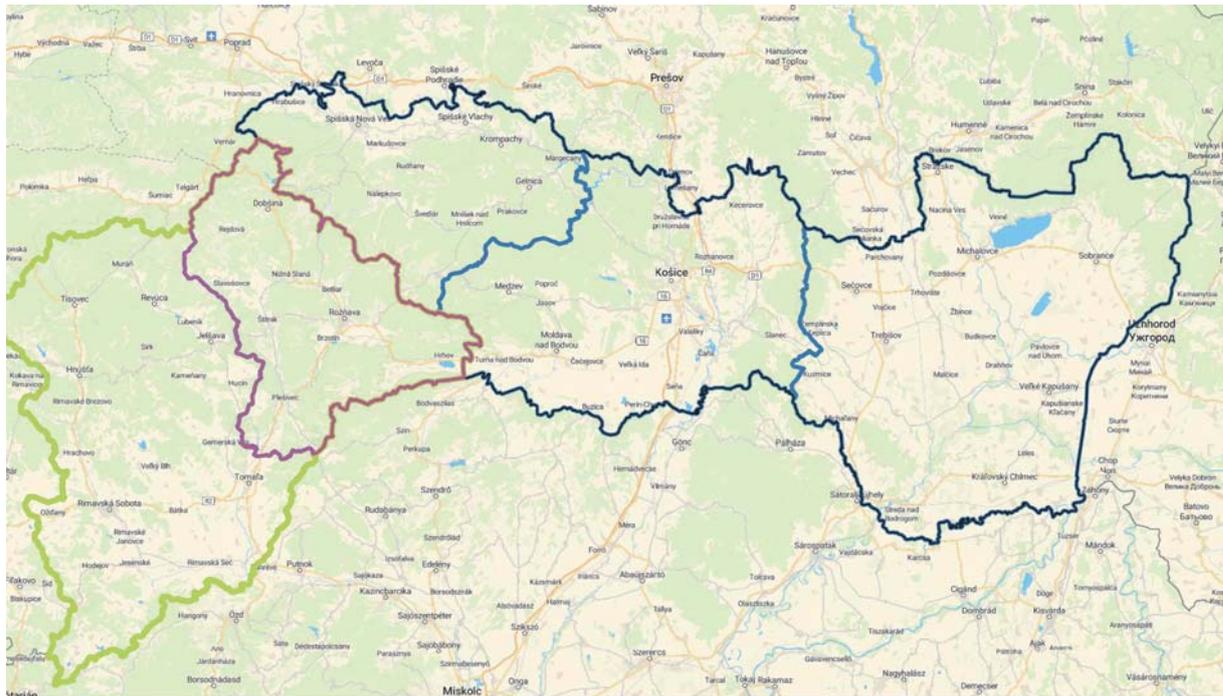
Positioning of the Rožňava District in the Košice Region and cross-border relations

The territory of Gemer lies in the southern part of central Slovakia. It belongs to two natural-settlement nodal sub-regions of Slovakia: Rožnavský and Gemersko-Malohontský. Today, it is split between two self-governing regions—KSK (Rožňava district) and BBSK (Rimavská Sobota and Revúca districts). Geologically, it belongs to the sub-province of the Inner Western Carpathians with the Slovenské Rudohorie mountains in the north and the Lucenecko-košická zníženina (lowland) in the south. The southwest of the region consists of the eastern part of Cerová vrchovina. The climate of the region is warm and moderately humid with cool winters. Its natural wealth is protected by nature conservation. Three national parks are located in the area — the Slovenský Kras National Park

and the parts of Slovenský Raj and Muránska Planina National Parks. The Rožňava district shares a 74-km-long state border with Hungary and the district is only 140 km from Budapest's metropolitan agglomeration.

From the destination point of view, the Gemer Region consists of three parts (the upper part is in Košice region, central and lower parts belong to Banská Bystrica region). The **district of Rožňava represents the Upper Gemer region**. Central Gemer is created by the District of Revúca and Lower Gemer is formed by the District of Rimavská Sobota¹⁰.

FIGURE 2: Map of the Gemer Region



Source: KSK, 2023.



1.2 IMPORTANCE OF TOURISM DEVELOPMENT FOR THE ROŽŇAVA DISTRICT/UPPER GEMER

The socioeconomic benefit of tourism is the most compelling reason for supporting and expanding the sector in the area. The entire Gemer area is one of Slovakia's least developed districts, with a high unemployment rate and other structural issues. Since 2001, Rožňava has had the highest unemployment rate in the Košice Region. All lagging districts in the Košice region face similar structural issues; however, of all Košice districts with a high unemployment rate, the district of Rožňava is undergoing the most rapid networking, resulting in specific forms of cooperation projects and products in the tourism sector.

Additionally, the Rožňava district in Upper Gemer contains seven of the top fifteen points of interests (POIs) in the Košice region.

TABLE 2: POIs in the Rožňava District with the highest visitations

Point of Interest/ Attraction No. of visitors	2019		2020		2021	
	Rank	No. of visitors	Rank	No. of visitors	Rank	No. of visitors
1. Slovak Paradise*	601 850	1.	590 650	1.	607 396	1.
2. Betliar Chateau	77 444	6.	44 185	7.	41 917	5.
3. Andrassy Mausoleum	14 709	12.	6 270	12.	6 407	11.
4. Dobšinská Ice Cave	82 176	5.	57 018	6.	39 253	6.
5. Domica Cave	22 485	9.	20 410	9.	13 580	8.
6. Gombasecká Cave	15 193	11.	11 830	11.	11 790	10.
7. Ochtinská Aragonite Cave	32 780	8.	29 709	8.	23 622	7.
8. Watchtower in Rožňava	2 799	15.	2 474	14.	2 126	14.

* Northern part of the Rožňava District, frequently assigned also to Spis region/destination

Source: Annual Reports of Košice Region Tourism.

In terms of natural values, the Rožňava District is the most diverse in the Košice region. The district's territory is located in the southern part of the Central-Carpathian zone of the Western Carpathians. The distinctive feature of this district is the wealth of underground karst spaces, chasms, springs, and ice caves. The district rules Slovakia and the entire Gemer region with this parameter. One of the most significant transnational nature protected areas in Slovakia is the complex of karst formations and accessible caves in the Rožňava District. This territory is shared by the National Park Slovak Karst in Slovakia and the National Park Aggtelek in Hungary. The caves of Aggtelek Karst and Slovak Karst are listed on the UNESCO World Cultural and Natural Heritage List. Four of them are TOP POIs in the region of Košice.

1.3 TOURISM IN NUMBERS

According to historical visitor numbers, Upper Gemer dominated the Gemer Region. At the moment, it only represents 25 percent of tourists visiting the Gemer Region. Despite once being one of the most frequented places in the Košice region, it now only accounts for 9 percent of all overnight stays there. Among the 11 districts of the Košice region, it is ranked sixth. This lagging is a result of urbanization processes and the widening regional disparities between rural and urban areas. The temporary loss of one of the most important POIs - Krásna Hôrka Castle - has had a significant negative impact on the region's ability to develop as a tourist destination. Krásna Hôrka Castle was considerably damaged in 2012 by a devastating fire¹¹ and closed to the public. Its reconstruction is currently underway. The completion of the castle restoration is planned for the coming years and the financing is envisaged under Program Slovakia 2021-2027. Even though this POI has been inactive for a while, one of the main attractions in Upper Gemer is the cultural legacy connected to the history of one of the most significant noble families in Europe, the House of Andrassy, whose legacy includes not only the Krásna Hôrka castle but also other mansions and other secular buildings and locations in the region that bear the legacy of the significant history of this area.

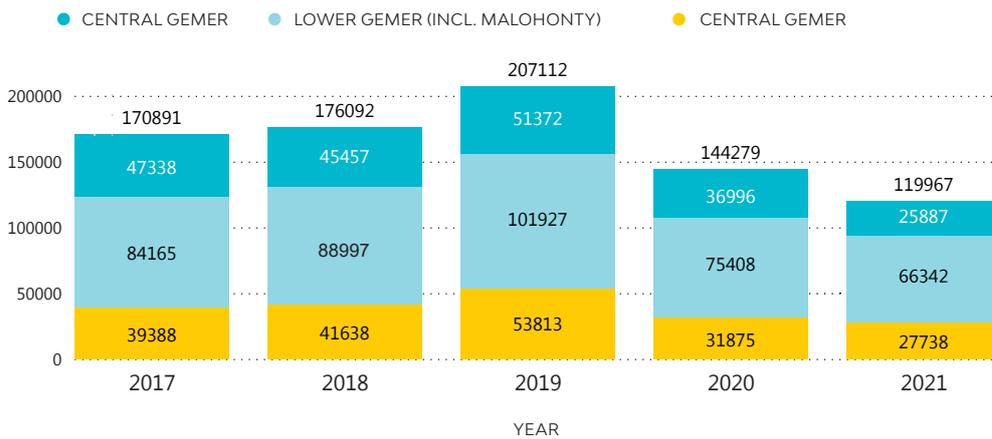
Tourism capacities and overnight stays

Upper Gemer has the highest capacity of accommodation facilities within the Gemer Region. A total of 74 accommodation establishments with a total capacity of 1,738 beds were registered at the Statistical Office of the Slovak Republic in 2021. According to the number of beds available, the District of Rožňava accounted for 9 percent of the Košice Region's and 43 percent of the Gemer Region's total lodging capacity. The average bed capacity of an establishment in Upper Gemer, including campgrounds, is 23 beds. Facilities with greater capacities can be found in the other two parts of the Gemer Region. The majority of them are found in the Lower Gemer, specifically

in the Town of Rimavská Sobota and its surroundings, where each establishment has an average capacity of 52 beds, including camping grounds.

Between 2014 and 2019, both national and global tourism experienced growth. All Slovak locations, including less developed ones, saw this growth as well. The number of overnight stays increased by 18 percent in the Gemer Region just in 2019 alone, outpacing the national increase of 14 percent and occurring before the COVID-19 pandemic. **The annual growth rate for Upper Gemer was about 13 percent, which was lower than the nation's annual average.** For the same reporting period of 2019, the number of overnight stays increased in Lower Gemer by 15 percent and in Central Gemer by 29 percent.

FIGURE 3: Number of overnight stays in the Gemer Region from 2017 to 2021



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

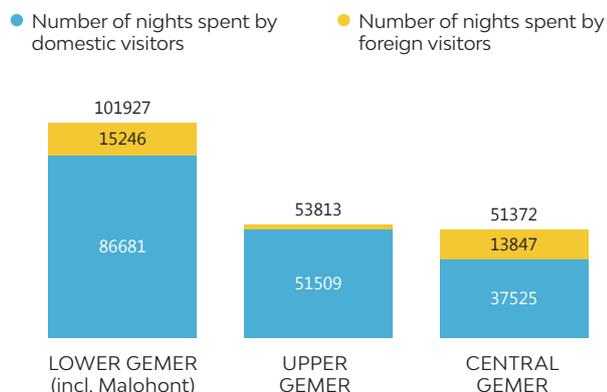
Upper Gemer had 51,400 overnight stays, and its share of the regional indicator decreased from 24.8 percent in 2019 to 21 percent in 2021. Lower Gemer has the highest percentage of overnight stays in the Gemer region, with 49 percent in 2017 and 2019 and a rise to 55 percent in 2021. This is partially a result of the differences in how destinations and tourism services are structured. Lower Gemer offers the only spa resort in the Gemer Region. This is evident in the tourism industry in a big way, especially in the longer average length of stay of visitors year-round compared to other regions of Gemer and the national average.

The average length of stay of visitors hasn't changed significantly in the Upper Gemer over the past five years; it only increased from 2.4 to 2.6 days from 2016 to 2021 and was lower than the national average of 2.8 and 3.1 days, respectively. In 2019, foreign visitors to Upper Gemer stayed an average of 2.4 days, which was less than the national average of 2.7 days.

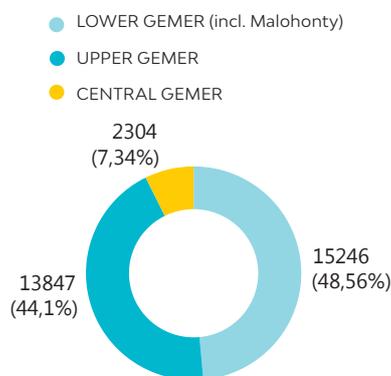
Although the length of stay for foreign visitors in Upper Gemer is shorter than in other areas of the Gemer Region, Upper Gemer still receives a sizable proportion of foreign visitors. In 2019, the number of overnight stays by foreign visitors to the Gemer region was mainly split between Upper Gemer and Lower Gemer, with Upper Gemer accounting for up to 44 percent of the total and Lower Gemer for 49 percent.

FIGURE 4: Number of domestic and foreign visitors and the number of nights spent by foreign visitors in the Gemer region in 2019

Graph: Number of domestic and foreign visitors in the Gemer Region in 2019



Graph: Number of nights spent by foreign visitors in the Gemer region in 2019



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

COVID-19 effects on accommodation capacities and foreign visitations. The Upper Gemer’s lodging facilities’ capacity was unaffected by the pandemic. In contrast, their capacity increased in 2021 compared to 2019 by 9 percent, and in other areas of the Gemer region by 11 percent. However, as in all of Slovakia, there was a decline in tourism activity during this time. Overall, overnight stays fell by 50 percent in Slovakia and by 58 percent in the Košice Region. Lower Gemer saw a decline of only 34 percent, while Upper Gemer saw a decline of 50 percent – the same as the nation’s average, and Central Gemer saw a decline of 49 percent. The pandemic had a significant impact on the decrease in overnight stays by foreign visitors throughout the Gemer region. Upper Gemer saw a drop in overnight stays from 27 percent in 2019 to 7 percent in 2021. Annex 3 offers a comparison of tourism capacities and overnight stays within the Gemer Region.

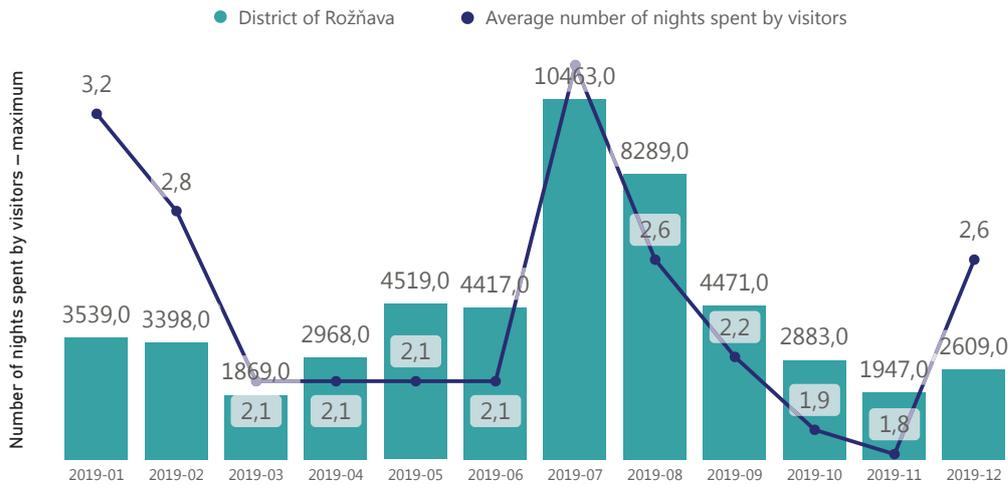
Tourism growth poles and seasonality of Upper Gemer

The majority of tourism-related activity in the Upper Gemer Region revolves around areas with a strong natural and cultural heritage, such as Rožňava and its immediate surroundings in the district’s central part, the territory of the National Park Slovak Paradise in the district’s northern part, and the National Park Slovak Karst and its caves in the district’s southern and western parts.

The infrastructure of services and the available destination offer in Upper Gemer largely determine seasonality. The two months with the highest attendance are July and August.

The lowest attendance is recorded for an extended period of time in the spring, particularly in March, and in the fall, in October and November, when the average length of stay is the lowest. Even in the winter - December, January, and February - very few visitors stay overnight in Upper Gemer, but the average stay duration is still longer than in the fall and spring. The average length of stay in the winter is comparable to the number of overnight stays made by tourists in the summer and is close to the Slovakian annual average of 2.6 and 3.2 days.

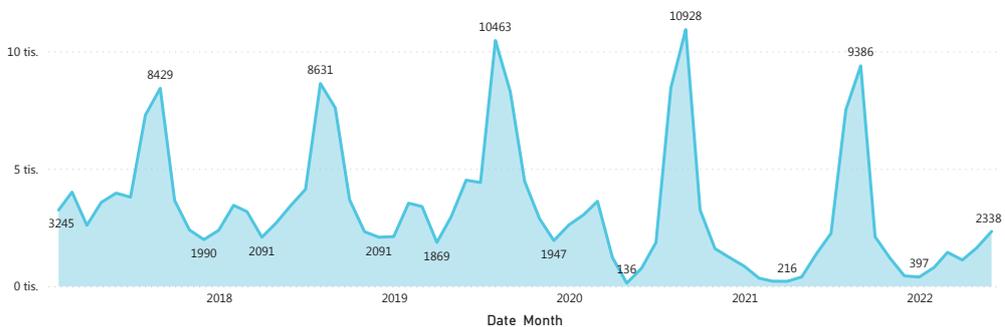
FIGURE 5: Seasonality according to the number of nights spent by visitors in Upper Gemer in 2019.



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

The COVID-19 pandemic caused a significant worsening of overnight disparities throughout the year, which was primarily brought on by the government's restrictive measures, including the complete closure of facilities. Only during the summer months, the restrictions became more lenient. This explains why summer attendance in the pandemic years of 2020 and 2021 was roughly at the same level as in 2019.

FIGURE 6: Number of nights spent by visitors in Upper Gemer from 2018 to 2021



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

The only communities in Upper Gemer with a winter destination offering cross-country skiing and winter tourism are those in the northern part of the region. When compared to autumn and spring, the average length of stay is higher here during the winter months.

Northern Part of Upper Gemer

The northernmost municipality in the Rožňava District, Dedinky, has the greatest percentage and number of overnight stays thanks to the ski resort and water reservoir Palcmanová Maša that are popular destinations. Visitors stay for 2.7 nights on average. In 2019, it accounted for 17 percent of all overnight stays in Upper Gemer with 8,500 nights spent by visitors.

The statistics of Slovak Paradise National Park include overnight stays in Dedinky as well as the municipalities of Stratená and Dobšiná. Its predominant area is in the Spiš region, which shares this national park with the Gemer region. With 361 beds available in local lodging facilities, those three municipalities account for 21 percent of the Upper Gemer region's total lodging.

One of the main entrances to the Slovak Paradise National Park in Upper Gemer is located in the municipality of Dedinky. One of the most popular hiking and climbing destinations in the Košice Region is the Geravy Plain, which is part of the region's natural landscape. The presence of the Palcmanská Maša water reservoir adds to the area's allure and uniqueness. However, it is the coldest area in Slovakia for summertime water recreation, and it is suffering from a lack of public infrastructure. The Palcmanská Maša water reservoir currently only performs ancillary roles in the destination's offer of ecotourism and soft adventure activities (hiking, climbing, and cycling).

The most significant POI in Stratená Municipality is the Dobšinská Ice Cave, which is managed by the Slovak Caves Administration and funded by the State Nature Conservancy of the Slovak Republic under the Ministry of Environment of the Slovak Republic. The Caves of Aggtelek Karst and Slovak Karst, one of the most significant ice caves in the world listed on the UNESCO World Cultural and Natural Heritage List, are among the 15 most popular POIs in the Košice Region.

Dobšiná's only real benefit to visitors is its proximity to the Slovak Paradise National Park. Although this town was founded in 1326 and later gained mining town privileges, it currently lacks monuments in good technical condition, and the historical center is underappreciated in terms of the condition of its cultural landmarks. This is primarily a result of the socio-demographic development's long-term decline. In 2013, a mining-themed educational trail with two routes was created with KSK's support and the Terra Ingognita scheme. There are tourist shelters, benches, tables, and signposts on both routes of the educational trail. The trail starts at the main square, Námestie Bankov, in Dobšiná. Information points offer the history of mining for silver, iron, copper, cobalt, nickel, mercury, and asbestos. The trail also leads to Lániho Huta, a large metallurgical complex.

Central part of Upper Gemer

Four nearby municipalities — Rožňava, Betliar, Krásnohorské Podhradie, and Krásnohorská Dlhá Lúka — combine for up to 55 percent of the region's lodging capacity. The town of Rožňava has the highest concentration of this capacity, which is also one-third of the district's total capacity. The number of overnight stays is another important factor that Rožňava influences. In 2019, visitors to this part of the region stayed over 20,300 nights, accounting for 40 percent of all overnight stays in Upper Gemer. In 2021, the city of Rožňava's tourism industry experienced a nearly 75 percent decline, and its percentage of overall visitors also fell precipitously, to just 17 percent. In 2021, the remaining 83 percent of overnight stays in Upper Gemer occurred outside of Rožňava in rural areas.

The Rožňava District's central area is home to four of the top 15 POIs in the Košice Region. They are connected to the cultural heritage of mining history as well as the history of important noble families in Europe, particularly the noble family Andrassy and their ancestral homes and other properties.

The Mining Museum in Rožňava is one of the most popular POIs. In its «Museum and Discovery Center Sentinel», contemporary and hands-on exhibits on mining and metallurgy in the Gemer Region, Steam Time, and Miners' Workplace are on display.

The Betliar Chateau is ranked fifth among the top 15 points of interest in the Košice region and helps to generate almost 6 percent of the overnight stays in Upper Gemer, which in turn helps to generate overnight stays in Rožňava, a nearby town, and the municipalities of Krásnohorská Dlhá Lúka and Krásnohorské Podhradie. The second most frequented tourist attraction in the entire Upper Gemer is the Andrassy Mausoleum, which is located in the municipality of Krásnohorské Podhradie. Krásna Hôrka Castle, another and the most significant heritage site of the Slovak National Museum, has been closed for reconstruction since 2012. The Andrassy Picture Gallery is another point of interest in this community.

There are many technical heritage sites associated with mining history, including locations of mines, smelteries, and forgeries that closed in the twentieth century but are permanently

closed to the public due to extremely poor technical conditions. In the north part of the Rožňava District, close to state road 1/67, mining sites can be found in the municipalities between Rožňava, Dobšiná, and Stratená. Some of them had closer ties to the Spiš region's mining and processing facilities.

Significant mining history, as well as technical and cultural heritage linked to the life and economic activities of noble families of European importance, are the reasons why the entire Gemer Region has been associated with the "Iron Heart" of the Hungarian Kingdom in the past.

South and South-West part of Upper Gemer

Development in this area of Rožňava District is linked to the natural heritage of the Slovak Karst National Park. Tourism infrastructure is concentrated in small villages that lead to caves and National Park entrances. Gemerskáá Hôrka village has the most overnight stays, accounting for 7.3 percent (126 beds) of the Upper Gemer's tourism capacity. Although there is no direct access to any of the Slovak Karst Caves from this village, it is strategically located at the crossroads to Ochtinská Aragonite Cave, Gombasecká Cave, and Domica Cave, all of which are on the UNESCO World Cultural and Natural Heritage List (The Caves of Aggtelek Karst and Slovak Karst). Those caves rank among the top POIs of the Košice Region. A smaller but unique Silica Ice Cave is also located in this national park and is open to the public.

The vast territory of National Park Slovak Karst, with its unique caves as nature monuments and reserves, is formed by extensive karst formations that pass through the territory of several municipalities. From the standpoint of environmental sustainability, tourism service development should focus primarily on inner village locations and surrounding municipalities. From this vantage point, however, the potential of this area to increase tourism revenues is far from being realized.

Despite the fact that the Slovak Karst's caves are among the most popular tourist attractions in Slovakia's Košice Region and throughout Central Europe, most visitors are daytrippers (excursionists) or overnight travelers who stay in various locations within the Gemer region.

The Gothic Route's communities, particularly those that received the European Cultural Heritage label in 2021, serve as important development anchors. European heritage site „Mediaeval wall painting in the Gemer and Malohont regions“ includes 12 locations in the Gemer Region, out of which four are in Upper Gemer –Štítnik, Ochtiná, Kocelovce, and Plešivec.

TABLE 3: Summary of current development poles of Upper Gemer

Area of Upper Gemer Main potential and tourism forms	Main POIs	Municipality	Number of available bed places in 2021	Share on service capacity of Upper Gemer
Northern part				
<p>Development is primarily related to the natural heritage of Slovak Paradise National Park. The remainings of important mining history (Iron Heart of Gemer) can be seen at some locations.</p> <p>Main forms of tourism and activities: Soft adventure tourism (hiking, cycling, cross country skiing) Nature based tourism/ ecotourism (inc. visits to the caves) Summer recreation at water (currently only marginal form)</p>	Geravy Plain and ravines Palcmanová Maša water area	Dedinky	256	14.7 %
	Dobšinská Ice Cave/ UNESCO , covering the remainings of industrial heritage (educational trails on walking and cycling routes in national park), horse breeding and riding (ranches)	Stratená**	52	3.0%
	Remainders of industrial heritage (educational trails); Gothic route	Dobšiná	53	3.1%
Central part				
<p>Development is primarily related to the cultural heritage of mining history and the history of noble families of European importance.</p> <p>Main forms of tourism and activities: Cultural tourism (museums belonging to the cultural route -Iron Heart of Gemer - and locations on gradually developing Gothic Route), Partially developed nature-based tourism/ ecotourism based on visitation of the caves of Slovak Karts National Park. The majority of accessible caves are located in the southern and south-west parts of the district).</p>	The area connecting central part and the northern part (line Rožňava - Dobšiná and from the spring of main river Slaná in Rejdová). Lutheran churches & Remainders of mining history.	Rejdová Vyšná Slaná, Vlachovo Nižná Slaná, Čučma, Gemerská Poloma	negligible amount*	n/a
	Museum and Discovery Center Sentinel of Mining Museum in Rožňava. Watchtower in Rožňava Gemer Cultural Center Cultural Center Kláštor Gothic route	Rožňava	588	33.8 %
	Betliar Chateau	Betliar	133	7.7%
	Andrassy Mausoleum Krásna Hôrka Castle (closed) Picture Gallery of Andrassy	Krásnohorské Podhradie	53	3.1%
	Krásnohorská Cave UNESCO	Krásnohorská Dlhá Lúka	180	10.4%
South and South-West part				
<p>Development is linked mainly to the natural heritage of Slovak Karst National Park.</p> <p>Main forms of tourism and activities: Nature based tourism/ ecotourism (visiting caves) Soft adventure tourism (hiking and cycling)</p> <p>High development potential exists for cultural tourism based on sites awarded the European Heritage Label (especially art tourism, creative industries, and religious tourism). Sites belong to Gothic Route.</p>	Municipality at the crossroad to caves of Slovak Karst	Gemerská Hôrka	126	7.3%
	Domica Cave/ UNESCO	Dlhá Ves,	negligible amount*	n/a
	Gombasecká Cave/ UNESCO	Slavec	0	0%
	Silica Ice Cave	Silica	0	0%
	Ochtinská Aragonite Cave/ UNESCO	Ochtiná	0	0%
	Gothic route/ Medieval murals/ European Heritage Label	Plešivec, Štítnik Kocelovce.	negligible amount*	n/a
	Small villages on the way to the caves and entrance points to Slovak Karst National Park	Bohunovo, Drnava, Jablonov nad Turňou, Jovice	negligible amount*	n/a

* Municipalities with less than 2 accommodation establishments

** according to the total number of available bed places in 2018.

n/a - not applicable count of share of capacity available in municipalities with selected confidential data.

Source: own processing, 2022.

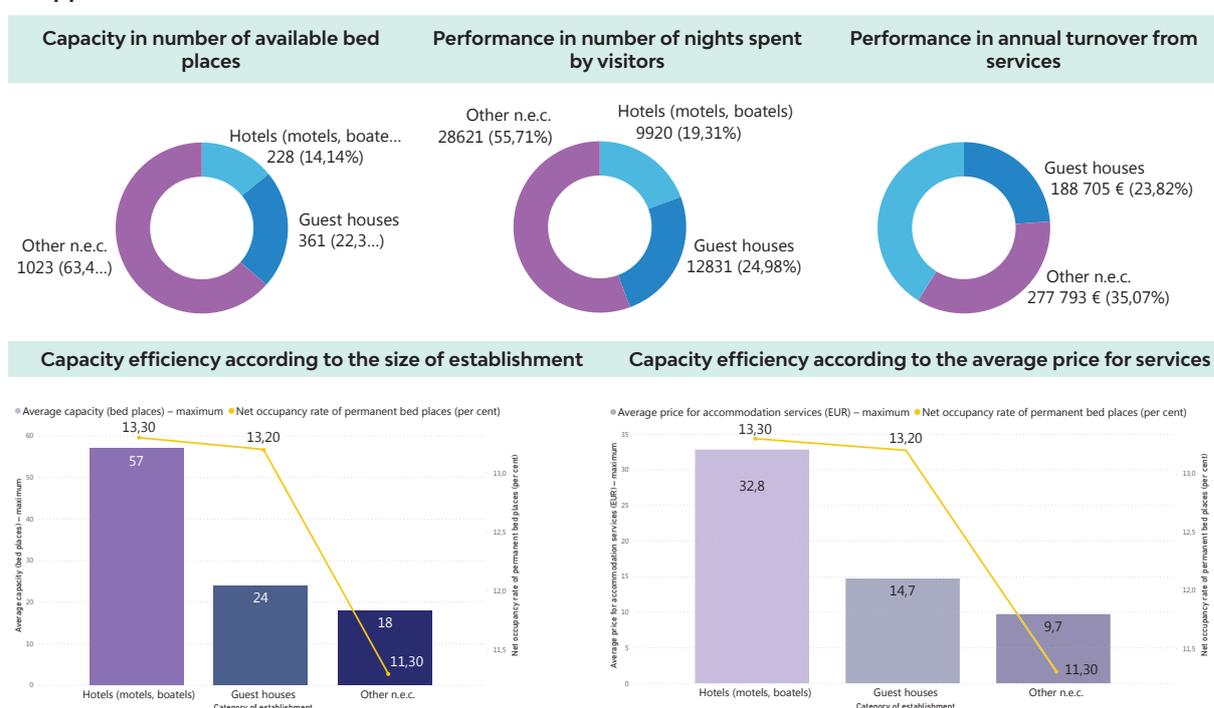
Structure and quality of services

Low-capacity family-style lodging is the predominant type of accommodation in the area. The majority of accommodations provide only basic lodging services, without catering or other supplemental services. They make up 64 percent of the capacity measured through the number of available bed places, including camping grounds.

Hotels, which offer the widest range of services, make up 14 percent of the total bed capacity, while guesthouses account for 22 percent of it. The region's tourism revenues are, however, most significantly impacted by the hotels. Even though this segment accounts for only 20 percent of overnight stays in the area, it accounts for 41 percent of sales.

Guesthouses account for up to 24 percent of overnight stays in the area, which is roughly the same as their income share from accommodation businesses.

FIGURE 7: Overview of the economic outcomes of accommodation establishments in Upper Gemer



Source: Own processing based on data of the year 2019 published by Statistical Office of the Slovak Republic, 2022.

● hotels/motels ● bed&breakfast ● others ● Net occupancy rate of permanent bed places (per cent)

Visitors spend an average of 1.6 days in hotels, 2.4 days in guesthouses, and 3 days in other types of facilities. This is largely influenced by their geographic location within the region and their offer for a particular market segment. According to the Airbnb offer, the facilities are organized into categories according to the main development poles, which also match the local data.

TABLE 4: Accommodation offered via Airbnb

Type	House	Apartment	Guesthouse	Hotel	Other
Share of each type	52 percent	16 percent	9 percent	4 percent	19 percent
Capacity in total	178 beds				
Top 3 areas (74 percent)	Mlynky/Dedinky* 29 beds		Rožňava 22 beds	Krásnohorské Podhradie 80 beds	

* Northern part of the region, frequently assigned also to Spis region/destination
Source: own processing, 2022.

Despite having a high potential due to its border location, the region is weak due to the low quality of services, which is also reflected in the shorter average stay of foreign visitors (only 2.4 days) than in other areas of the region, even falling below the national average. The low average spending of visitors in lodging facilities also reflects the poor quality of the services at accommodation facilities.

The region's weakness is also due to the lack of visitor-oriented information services and customer support. Tourist information centers are only available in the center of Rožňava and Dobšiná, in Dobšinská Ice Cave, Dedinky, and in Štítnik. These centers frequently offer little information and don't use technology to be innovative with the delivery of information. Furthermore, information stands for improved site comprehension, directional maps and signs are often missing at key remote areas.

1.4 ACCESSIBILITY

Transport services and accessibility are a weakness of the District of Rožňava and the entire Gemer region in relation to tourism development, as noted in the Tourism Development Strategy of the Košice Region. The Gemer region is one of only a few in Slovakia that is not connected to the highway/expressway network. The R2 highway, which is supposed to run through the entire territory to Košice, has so far only been built in two short sections in the Gemer Region, bypassing the districts of Tornaľa and Odany in Rimavska Sobota.

The Rožňava district's road network consists of Class I (98 km), Class II (90 km), and Class III roads (136 km). International road E 571 I/16 connects the Rožňava district to other international routes via state road I/67 (Rožňava - Dobšiná - Stratená) in the north-south direction.

The district has 135 kms of railway lines, with eight train sections, the most important of which is the southern railway line section to Košice. Others are mostly used on a local level. The issue lies in the lack of bus service from Rožňava to the surrounding areas, as well as tourist attractions and destinations. During the summer tourist season, weekends, and holidays, this issue becomes even more visible¹². The following table summarizes available lines to the towns of higher importance (from other districts):

TABLE 5: Direct daily connections to Rožňava via railway and bus services

To	From	Railway*	Bus*
Rožňava	Košice	7	12
Rožňava	Poprad	-	5
Rožňava	Zvolen	7	6
Rožňava	Banská Bystrica	-**	1**
Rožňava	Spíšská Nová Ves	-	2

* lines during working day in the summer season

** more options after changing from the train to the bus, or when travelling via Zvolen

Source: own processing, 2022.

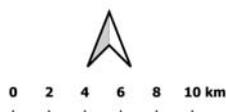
Upper Gemer connects with the regional center of Košice with the following railway connections:

- A line leading from Košice to Prešov and along the border of the region through Margecany, from where a branch runs along the Hnilec River to Dedinky,
- A line from Košice leading through Moldava and Bodvou to Rožňava, where it splits into Jelšava and Dobšiná. The line through Rožňava leads to Bratislava (express train Gemeran).

FIGURE 8: The Transport Infrastructure Map of the Košice Region and connections with Gemer



Source: KSK, 2023



GEO
PORTÁL
KSK

Transportation infrastructure

- First-class road
- Second-class roads
- Third-class roads
- - - Railways

Borders

- Region
- District
- Upper Gemer (KSK)

The train station in Rožňava, Upper Gemer’s administrative center, is located some distance from the city center (about 3+ kilometres), making it difficult for visitors to walk to/from their destination. According to the results of a visitor survey conducted during the 2018 summer season¹³, the majority of visitors arrive in the region by car or motorbike (87 percent), with only a small percentage arriving by train (6.3 percent) or bus (3.9 percent). One of the four main reasons why some visitors in the survey would not recommend the Gemer region to their friends and acquaintances is the state of transportation and accessibility of attractions. In the case of parking, general dissatisfaction has not yet been significantly reflected in the visitor survey (20 percent). Parking lots are mostly built near popular tourist destinations and attractions (e.g., caves and other locations at the entry points to national parks). However, they seem to be overcrowded during the high season.

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CHAPTER 2: GOVERNANCE AND REGULATION

2.1 TOURISM INSTITUTIONAL FRAMEWORK

In Slovakia, the performance of businesses in the tourism sector was significantly impacted by the extraordinary circumstances brought on by the COVID-19 pandemic in 2020 and 2021. Long-term effects may include a decrease in the region's labor pool due to residents' reluctance to work in this sector, a worsening of the scope and caliber of the services offered, a deterioration in the financial health of the businesses, and other structural issues. This statement can be supported further by the observation that the least developed areas of Slovakia, such as Gemer, are already feeling the effects of the exodus of young people and the workforce to more developed regions of Slovakia or abroad.

As a result, it is even more crucial that key actors collaborate for tourism development. This networking should include not only service providers but also institutions of higher education, the arts, and other types. A fundamental requirement for improving the position of the Gemer Region on the tourism market is effective destination management and marketing by reputable tourism organizations at the regional and local levels.

Destination Governance at Local and Regional Levels

The Gemer destination is managed by the Destination Management Organization (DMO) Gemer, while certain parts of the territory - selected municipalities in the northern part of the Rožňava District - are managed by the DMOs Slovak Paradise and Spis. Furthermore, there are local action groups (LAGs), civil associations, and various initiatives that are active in destination management and implement significant initiatives to support tourism development. Local DMOs are the primary entities responsible for good destination governance in accordance with the principles of sustainable development.

DMO GEMER

The DMO was established for the purpose of promoting tourism in accordance with Act No. 91/2010 Coll. on Tourism Development as amended. It was registered in the Register of DMOs managed by the Ministry of Transport and Construction of the Slovak Republic, Tourism Section, on August 29, 2018. DMO Gemer currently has 27 members, including 16 municipalities, 6 business entities, the Rožňava Tourist Information Centre, the Rožňava Mining Museum, the Slovak State Nature Conservancy, the BBSK Development Agency, and an NPO.

From the start, the Gemer Region was conceived as a complex tourist destination, despite its administrative boundaries of three districts and two self-governing regions¹⁴. The DMO has been growing and since 2018, the number of municipalities has increased from seven to sixteen, with the addition of two municipalities - Nižná Slaná and Betliar - from the Rožňava district.

In addition to implementing destination marketing strategies that make use of both internal and external marketing communication tools, DMO Gemer is concentrated on networking activities, small infrastructure projects, conditions for the development of tourism, and creating conditions for these initiatives.

Other Partnerships and Stakeholders in Regional Development

LAGs in the Gemer region are implementing the bottom-up approach of community-led development (CLLD) in accordance with the Regulation (EU) No 1305/2013 of the European Parliament and of the Council of 17 December 2013 on support for rural development by the European Agricultural Fund for Rural Development (EAFRD) and repealing Council Regulation (EC) No 1698/2005¹⁵¹⁶. LAGs are established in 33 municipalities in the Upper Gemer area.

LAG Gemer-Rožňava operates in Upper Gemer, and LAG Civic Association KRAS is focused on the development of the municipalities in Slovak Karst National Park.

TABLE 6: Local action groups operating in the Gemer Region

Upper Gemer The Rožňava District (Košice region)	Number of Municipalities	Central and Lower Gemer The Revúca and Rimavska Sobota Districts (Banská Bystrica region)	Number of Municipalities
LAG Civic Association KRAS	19	Partnership Muráňska planina- Čierny Hron	14
LAG Gemer - Rožňava	14	Public-private Partnership Stredný Gemer	34
		LAG Malohont	43
		LAG Cerovina, o.z.	28
		Public-private Partnership Južný Gemer	16
		Public-private Partnership Malý Gemer	23
Total	33	Total	158

Source: own processing, 2022.

LAGs were established as public-private partnerships based on the LEADER principles and in-line with local development strategies and awarded a status of LAG in the programming period of 2014-2020, later extended to 2022. They were approved by the Slovak Agricultural Paying Agency (APA) based on the results of evaluation of “Call for proposals 21/PRV/2017” in 2017.

Summary of key stakeholders from the public and third sectors engaged in the promotion of sustainable tourism principles in the Gemer Region

Nature Heritage

1. State Nature Conservancy of the Slovak Republic (Ministry of Environment of the Slovak republic); Slovak Karst National Park Administration, National Park Slovak Paradise Administration, National Park Muráňska planina Administration, protected Land Area Cerova Vrchovina Administration
2. Slovak Caves Administration and its local units (Speleo Rožňava, Arachnos Slovak Karst, Speleo Club Tisovec, Oblastná speleologická skupina Rimavska Sobota)
3. Aggtelek National Park Administration (Hungary)
4. Novohrad-Nograd geopark (UNESCO)/ Geopark Novohrad-Nograd, z.p.o.
5. Local Tourist Clubs (Slovak Tourist Club)
6. Cycling Club – Sklaná Ruža Gemerská Hôrka
7. Voluntary guardians of nature
8. Equestrian clubs of horse tourism

Cultural Heritage

1. Slovak National Museum Betliar (Ministry of Culture of the Slovak Republic)
2. Mining Museum in Rožňava, Gemer Cultural Centre (Gemerské osvetové stredisko) founded by KSK and other cultural institutions (e.g. libraries);
3. The Monuments Board of the Slovak Republic,
4. Church congregation of the Evangelical Church of the Augsburg Confession (ECAC) in Rimavske Brezovo and other Church congregations and administrators of national cultural monuments,
5. Association Gothic Route
6. Association Čierne diery
7. Association Gemerské grúne
8. Initiative “Po stopách Andrássyovcov” (In the footsteps of the Andrássy family)
9. Initiative “Coburgovci a Slovensko” (Coburg family and Slovakia)
10. Association Zubačka Tisovec
11. Association RODON Klenovec
12. Mining associations and other.

Organizations in the development of other sources, product components, infrastructure, services and in destination management and marketing

1. DMO Gemer, DMO Slovak Paradise & Spis
2. Regional DMO Košice Region Tourism, DMO Banská Bystrica Region Tourism
3. BBSK Regional Development Agency
4. LAG Civic Association KRAS, LAG Gemer-Rožňava
5. Educational institutions (including vocational schools)
6. Tourist Information Centre in Rožňava.

2.2 TOURISM STRATEGIES, LAWS AND REGULATIONS

Numerous different activities and areas of socioeconomic development are connected to tourism. The tourism legal framework in Slovakia is quite complex, and in-line with various European laws and regulations. The macroenvironment also includes the rules governing the private, public, and nonprofit sectors' tourism-related activities¹⁷.

The following are some of the most significant laws and regulations that have an impact on tourism and are related to strategic planning, the use of tools, and development competences:

- Act No. 91/2010 Coll. on support of tourism, as amended
- Act No. 539/2008 Coll. on regional development, as amended and Act no. 336/2015 Coll. on the support for the least developed districts, as amended
- Act No. 369/1990 Coll. on Municipal Establishment, as amended
- Act No. 302/2001 on the self-government of higher territorial units, as amended.

Act No. 50/1976 Coll on Land-use Planning and Building Order (the Building Act) sets forth the primary framework for territorial actions related to investment development. Other national legislative standards are also significant when it comes to the use of natural and cultural heritage in tourism¹⁸. They are closely related to the Slovak Republic's more important international obligations and the 2030 Agenda for Sustainable Development¹⁹.

The foundation for the implementation of the 2030 Agenda for Sustainable Development in the Slovak Republic is laid out in the Vision and Strategy of Slovakia's Development Until 2030 (Slovensko 2030)²⁰.

Legal Framework of Tourism in Socio-Economic Development

TOURISM POLICY

The main law governing the institutional framework in tourism at the national, regional, and local levels is **Act No. 91/2010 Coll. on support of tourism, as amended**. The primary objective of this law is to encourage the development of destination management organizations at the local and regional levels using a bottom-up methodology. The most important aspect of destination governance is the development of cooperative structures.

The law lays out the rights and obligations that apply to individuals who work in the tourism industry on a private and professional level, as well as to organizations that support the industry. The ministry (at the national level), self-governing regions, municipalities, regional destination management organizations, local destination management organizations, and tourist information centers are the main stakeholders that carry out tasks in the tourism industry.

The legal framework sets forth the specific parameters for the formation and operation of destination management organizations based on the public-private partnership model at the regional and local levels.

The primary goal of passing this legislation was to establish a framework for Slovakia to apply destination management and marketing, in line with the practices of other nations with robust tourism industries. Slovakia lagged far behind nations that have been using destination governance models for many years. The main objective of the law was to develop a financial instrument that would encourage participants to cooperate at the local and regional levels in support of tourism development. According to the law, regional and local DMOs are established on a voluntary basis as public-private partnerships (PPPs), with an equal relationship between all stakeholders in the decision-making processes. They are independent organizations with their own legal status. The self-governing regions and municipalities can be the members of these partnerships. This law does not prescribe membership types in DMOs. It does, however, define the basic management principles to which subjects can voluntarily subscribe by forming a partnership. The motivation for cooperation at the local and national levels is the state subsidy system of the Ministry of Transport and Construction, which is one of the sources of financing the needs of tourism development through these organizations. Another important source is the membership fee, the amount of which is precisely determined in this law (for obtaining a subsidy). DMO is a partnership that runs on the tenets of cooperative management and receives funding from both state subsidies and membership fees from stakeholders.

Since its adoption, this law has undergone several amendments, and over time, it has evolved into the primary framework for other national-source-financed instruments like recreation vouchers, state investment aid, etc.

The Ministry of Transport and Construction of the Slovak Republic (MTC SR) is responsible for overseeing tourism on the national level.

REGIONAL DEVELOPMENT POLICY

The Act No. 539/2008 Coll. on Regional Development, as amended, is the primary law that establishes the framework for the social and economic development of regions in Slovakia. In addition to setting the parameters for actors' participation in the development process and the requirements for coordination and implementation of the regional development agenda, it also establishes the objectives and terms of regional development support. Slovakia's growing structural issues lead to widening regional disparities. The main agency responsible for ensuring regional development in Slovakia and carrying out the provisions of the Act on regional development is the Ministry of Investment, Regional Development, and Informatics of the Slovak Republic (MIRDI). **Act No. 336/2015 on the Support for the Least Developed Districts**, as amended, applies a special framework for resolving regional disparities. In accordance with this law, MIRDI undertakes initiatives to support the

social and economic advancement of the least developed regions to create jobs, eradicate regional disparities, and promote investments and commercial ventures that can keep the young, educated workforce in the areas²¹.

According to Act No. 336/2015 Coll, all three of the districts in the Gemer Region are considered to be among the least developed districts in Slovakia. Due to the consistently high reported unemployment rate, the districts have been listed as one of the least developed districts since 2015²².

Strategic planning

The scope of the activities described in Act No. 91/2010 Coll. on Support of Tourism includes the creation of conceptual and strategic documentation in the tourism industry. It is crucial to integrate tourism into other line sectors as well, such as culture, the environment, and regional development plans, due to the cross-sectoral nature of the industry.

The primary strategic document “Sustainable Tourism Development Strategy until 2030” is currently being prepared. However, several strategic documents at the local and regional levels have outlined the Gemer Region’s advantages and disadvantages. They also cover the prioritization of requirements, with infrastructure and human capital ranking as the top areas in need of attention.

Regional strategies (Strategy for Development of Ecotourism in the Košice Region, Strategy for the development of cycling transport and cycling tourism of the Košice Region 2022–2027–2030) prepared for the Kosice Region cover the District of Rožňava. Tourism concepts for the Gemer Region (**Tourism destination concept and strategy for Gemer region by 2027, Cycling tourism Development Strategy for Gemer and Malohont**) are prepared from the destination point of view with respect to cultural and natural values and consider Gemer as one destination comprising three parts of this region splits between two self-governing regions. Concepts are developed by DMO Gemer operating in this territory in accordance with Act No. 91/2010 Coll. on Tourism Development as amended. These concepts assume that the visitors do not distinguish between the borders of the self-governing regions (political borders). Strategy is built on comprehensive tourism offer, cultural linkages between all three districts including historical name of the territory (destination brand Gemer). These destination concepts consider strategic documents at the regional level of both self-governing regions (KSK and BBSK). Below is the summary of main strategies and concepts that shape tourism development in the Rožňava District (Upper Gemer).

Tourism destination concept and strategy for Gemer region by 2027

Tourism Destination Concept and Strategy for the Gemer Region by 2027 is the main framework at the local level prepared by DMO Gemer in cooperation with the BBSK Development Agency, NPO for the period of 2021 to 2027.

The strategy is directly linked to three tourism destination concepts adopted as an action plan and approved by the Government of the Slovak Republic for all least developed districts - Rožňava, Revúca and Rimavská Sobota²³. The destination concept of the Gemer region contains a selection of activities in a form of a basic framework for the direction of tourism development in the Gemer destination for the upcoming programming period of 2021 to 2027. The measures and activities prepared for individual districts are summarized as a single unit for the whole Gemer destination.

The main goal of this document is to transform the Gemer Region into a well-known weekend getaway spot in Slovakia and on the border with Hungary by 2027, managed in accordance with the principles of sustainable development, offering basic services and established product lines.

Eight strategic goals were identified to help achieve this vision:

1. Adoption of high-quality tools for improved institutional management of the destination
2. Increase of the performance and innovation potential of the Gemer destination (except for measures in nature tourism, cultural tourism, and the development of cycling tourism, which are formulated as separate strategic goals).
3. Continuous improvement of the quality of tourism services provided.
4. Improving the accessibility of the destination and the accessibility of POIs (including information accessibility).
5. Making the offer of products in the natural environment more attractive, including natural tourism products of the Gemer destination.
6. Making the offer of cultural tourism products attractive.
7. Inclusion of regional products into the tourism product of the Gemer destination.
8. Effective marketing.

Strategy for Development of Sustainable Tourism in the Košice Region by 2027

The vision of this strategy²⁴ focuses on tourism development in line with economic and social development, prosperity of the local population and positive image of the Košice region. KSK focuses on creating stable conditions for the activities of tourism organizations (DMOs) that create attractive destinations with competitive tourism offers in accordance with the principles of sustainable development. Principles of sustainability are emphasized in four strategic goals, which are implemented through three development programs.

1. INCORPORATE TOURISM INTO THE REGIONAL DEVELOPMENT POLICY - the intention is to improve the coordination within the Košice Region, its institutions, and other actors in the region, international and cross-border cooperation.
2. INCREASE THE LEVEL OF TOURISM INFRASTRUCTURE – extension of infrastructure, continuous improvement of quality and support of infrastructure in underdeveloped destinations in the region. The objective is to provide services that meet expectations of the visitors to the Košice region.
3. DISTRIBUTE TOURISM DEMAND OVER TIME AND PLACE - prevent and solve over-tourism, overcrowding and effectively use tourism potential.
4. BUILDING INNOVATIVE AND EFFECTIVE MARKETING OF A SUSTAINABLE DESTINATION.

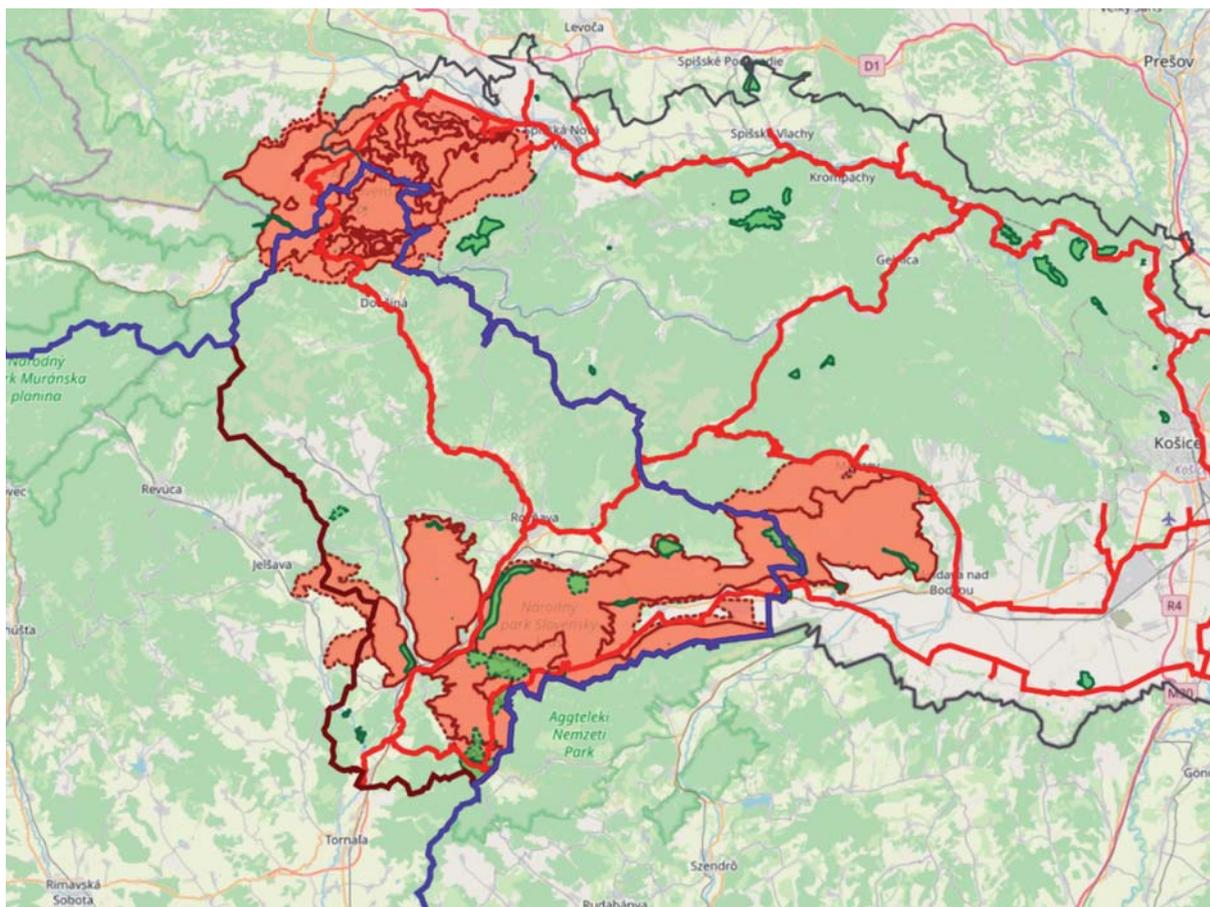
The proposed development programs focus on tourism supply, cooperation and coordination, and marketing and promotion.

Strategy for the development of cycling transport and cycling tourism of the Košice Region 2022–2027–2030

The strategic vision is primarily oriented towards increasing the number of cyclists and cyclo-tourists, as this is the main indicator of the effectiveness of funds spent on building cycling and cyclo-tourism infrastructure. The objectives to achieve this vision are:

1. IMPROVING THE CYCLING INFRASTRUCTURE - building safe and attractive segregated cycle tracks within the scope of the Core Network of Cycle Roads of the Košice Region.
2. BUILDING CYCLING DESTINATIONS - designing and implementing a complete offer for cyclists by building cycling routes and additional cycling facilities - a network of the KSK's Bike Points - and developing services suitable for cyclists. The strategy defines 10 cycling destinations on the territory of the Košice Self-Governing Region, one of which is Gemer.
3. ENSURING PROPER DATA COLLECTION - implementation of surveys and installation of automatic cyclist counters on cycle routes.

FIGURE 9: The Core Network of cycle roads in the Košice Region



Source: KSK, 2023

Conceptual framework identifies the main bicycle corridors of the Košice Region, which connect the cities and historical regions in the length of 853 km. Wherever possible, segregated cycle paths are planned or existing private roads are upgraded and the embankments along rivers are given a consideration. In the Rožňava district, three branches of the Core Network meet:

1. KE03 Gemerská with a planned length of approximately 97 km. The regional branch connects the Slovak Paradise and the Slovak Karst NPS, mostly running along the corridor of the Slaná river and the railway line.
2. KE05 Abovská, with a planned length of approximately 95.5 km, of which 45.373 km are on the territory of the Rožňava district. The southern regional branch connects the territory of the Slovak Karst National Park in the municipality of Čoltovo and the surroundings of Košice with a connection to EV11. It runs through interesting karst territory, along the plateaus and in valleys. The route has more tourist potential, as it leads exclusively through the rural landscape.
3. KE11 Gelnická is planned to be approximately 62 km long, of which 17 km are in the Rožňava district. The north-south regional branch connecting the town of Rožňava and Gelnica in the direction of Margecany.

The total length of the planned routes within the Core Network in the delimited territory of Gemer is 159.335 km.

Cycling tourism development strategy for Gemer and Malohont

The strategy was developed to meet the needs of DMO Gemer and was one of the activities included in the tourism destination concept and strategy for the Gemer region by 2027. It was prepared with

the involvement of local stakeholders, including cycling clubs and other partners at the local and regional levels. It includes an analysis of supply, demand, the current network of bicycle routes, as well as a comprehensive proposal for 48 new routes (with priority markings) linking all three districts that can create a comprehensive offer. In the proposal, connecting POIs, developing thematic circuits, and opening up cultural routes to cyclist tourists are given as a priority. The DMO plans to implement these 48 new routes in cooperation with stakeholders at the local and regional levels, including the use of its own resources, until 2030.

Development Plan of the Least Developed District of Rožňava for the period 2022-2026

Tourism has been identified as key area and a priority in the Development Plan of the Least Developed District of Rožňava for the period 2022-2026 (proposal, 2022), which is the main strategic document to secure financial support for infrastructure activities contributing to job creation according to the Act on the Support for the Least Developed Districts.

Community Led Local Development Strategy - LAG Gemer - Rožňava

The community-led local development strategy of LAG Gemer-Rožňava includes several actions, including those for tourism development, particularly those aiming at enhancing the area's attractiveness, state of infrastructure, and business environment.

Strategy for Development of Ecotourism in the Košice Region

Košice's Tourism Regional DMO²⁵ prepared a strategy to promote ecotourism in the Košice region [1]. It covers the Rožňava District and identifies four main product lines related to the development needs for the region's tourism infrastructure and services:

1. Sacred and secular secrets of region
2. Mysterious places in the national parks
3. Gothic Route in the Gemer region
4. Cycling by the River Slaná.

The plans of two regional DMOs in the Gemer area form the regional framework for ecotourism development in the region. Regional DMO Košice Tourism has developed a strategy for the development of ecotourism in the Košice Region, while the regional DMO Banská Bystrica Tourism is implementing the strategy for ecotourism development in the protected areas of Banská Bystrica Region by 2030²⁶.

There are also other regional thematic strategies in the Košice Region that can influence the tourism sector in the Upper Gemer area, including the Cultural Strategy of the Košice Self-Governing Region 2020-2025 (2030), Traditions inspire innovation - 2019, The Concept of Building a Skeleton Network of Bicycle Routes in the Košice region.

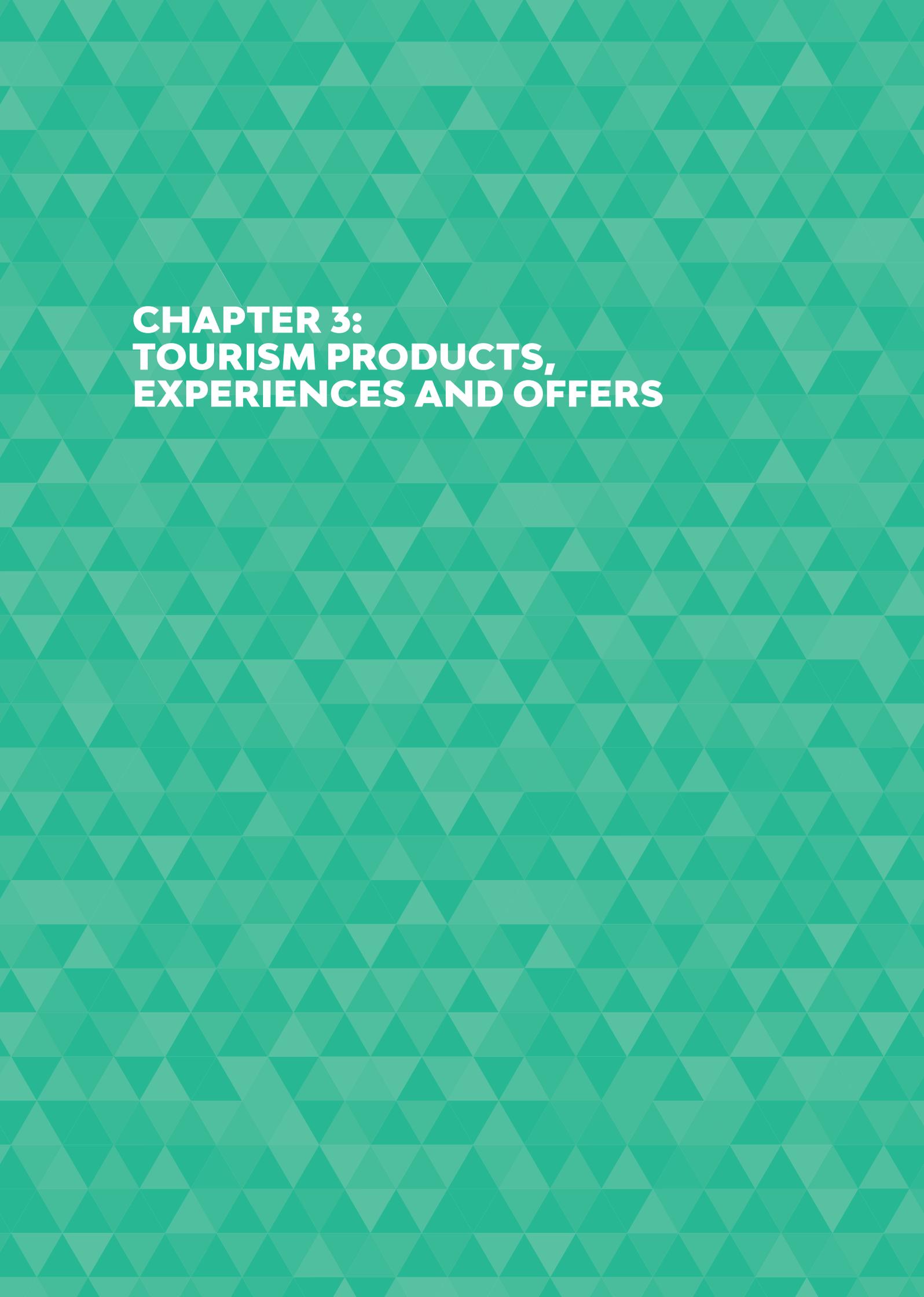
2.3 REGIONAL COOPERATION

The Gemer Region is more prone to the growth of cooperation at the regional, national, and international levels because its borders are constructed on historical grounds. The development of regional cooperation is probably best illustrated by the emergence and continued existence of DMO Gemer, which directly connects the stakeholders of the two regions.

The biggest accomplishment and outcome of many years of cooperation in the tourism industry in this region is the designation of “Medieval wall painting in the Gemer and Malohont regions” as a European Heritage Label site. This includes 12 locations on the Gothic Route, of which four are located in the Košice region and eight in the Banská Bystrica Region and are owned by Church congregation of the ECAC in Rimavské Brezovo.

Košice and Banská Bystrica with the Association Goticka Cesta, regional DMO Banská Bystrica Region Tourism and Košice Region Tourism, local DMO Gemer and the Church Congregation of the ECAC in Rimavské Brezovo signed a Memorandum of Cooperation in 2020 and committed to ensuring a long-term project management system. All 12 locations expressed their support to the project by signing the Declaration of Cooperation. At the same time, joint management was established to ensure a uniform presentation and coordination of activities. The basic coordination of the project is covered by the Evangelical Church Rimavské Brezovo.

Both self-governing regions, regional DMOs, and local DMO Gemer are responsible for project management, financial sustainability, and promotion of those European Heritage Label sites as part of a sustainable destination offer. The non-profit sector, represented by the Association Gotická cesta, is tasked with popularization activities.

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CHAPTER 3: TOURISM PRODUCTS, EXPERIENCES AND OFFERS

Given its abundance of natural and cultural heritage sites, the Gemer Region is best suited to promote soft tourism ventures associated with these assets. These include:

- hiking (all districts of Gemer Region)
- cycling (all districts of Gemer Region)
- horse riding (all districts of Gemer Region)
- rafting (Upper Gemer – Slovak Paradise national park)
- exploring caves and speleology (Rožňava District/Upper Gemer)
- exploring cultural and mining heritage (all districts of Gemer Region - each with specific topic)
- climbing (District of Rožňava/Upper Gemer, District of Revúca/Central Gemer)
- stay in a forest/mountain environment (all districts of Gemer Region)

Development of outdoor water areas has some potential, but the Gemer region is not currently in the best position to compete with other regions of Slovakia due to the extremely low level of tourism and public infrastructure at all four outdoor water areas of the Gemer Region, such as Teplý Vrch and Kurinec in the Rimavská Sobota District, the water area in Tornaľa in the Revúca District, and the Palcmanová Maša water area in the Rožňava District. The Palcmanová Maša water area, on the other hand, is considerably smaller but also has a very attractive location at the entrance to the Slovak Paradise National Park.

One of the most popular activities for tourists in Gemer is visiting places connected to its cultural, historical, or natural heritage, such as caves and other natural monuments and reserves. Other popular activities include hiking and camping. But most visitors to the area - 75 percent - only stay for one day, whether they are traveling with family, friends, or on other short trips. According to the findings of a visitor survey conducted during the 2018 summer season, only 13 percent of visitors cite a longer stay (for example, weekend trip) as their primary reason for visiting the area.

3.1 NATURE BASED TOURISM/ECO-TOURISM

The primary building blocks of natural parks are protected areas and significant localities, which foster conditions for the growth of nature tourism that go beyond the development of activities like hiking, cycling, and camping. In the Gemer Region, there are four large-scale protected areas, two of which are found in the Upper Gemer.

Slovak Karst National Park is shared by three districts - Revúca, Rožňava/Gemer Region and Košice - and is adjacent to the Abov Region. The Rožňava District is where it's primarily located. This particular region of Slovakia is special because it was the first in the country to be accepted into the global network of biosphere reserves as part of the UNESCO program in 1977. The park is home to more than 1,350 known caves and chasms. The Slovak Karst caves and the Aggtelek Karst in Hungary were added to the UNESCO World Cultural and Natural Heritage List in 1995 (<http://npslovenskykras.soposr.sk/>). Dómica Cave, Gombasecká Cave, Krásnohorská Cave, and Ochtinská Aragonite Cave (small-scale protected area in the Category National Nature Monument) are among the most popular.

The Slovak Paradise National Park is shared by three historical regions - Gemer, Spiš, and Horehronie - and is particularly appealing to hikers. The municipalities that are the entrance locations to this national park are members of DMO Slovak Paradise and Spiš. The Dobšinská Ice Cave, a small-scale protected area from the National Nature Monuments Category that was included in the UNESCO World Cultural and Natural Heritage List in 2000, is the most important natural site in the Rožňava District. Given its significance, it is one of the world's most important ice caves²⁷. It is crucial to open the Dedinky-Geravy Plateau cable car, which was renovated but is still closed, in order to promote tourism in the area and improve accessibility from the south to the north of this idyllic Slovak location.

3.2 CULTURAL AND HERITAGE TOURISM

Several museums in the Gemer region offer cultural and educational tourism services to visitors, including two in the Upper Gemer region. Compared to other parts of Gemer, these museums have a higher number of visitors. They are also among the most visited museums in the Košice region.

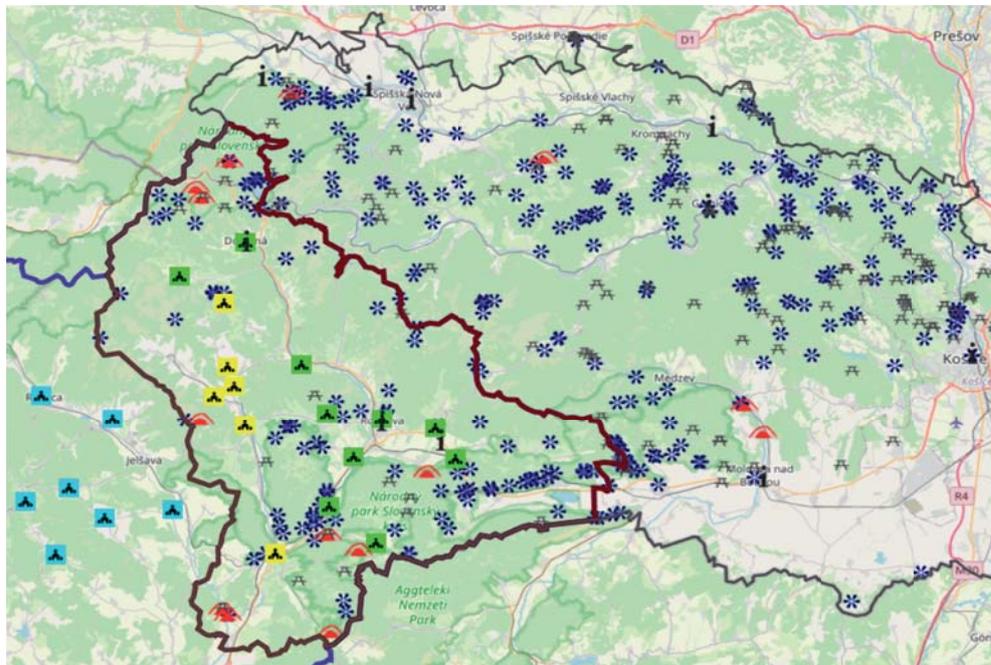
TABLE 7: Museums in Upper Gemer

Name of the Museum	Object/Heritage Site	Locality
Mining Museum in Rožňava (founded by Košice Self-governing Region)	Museum and Discovery Centre Sentinel	Rožňava
	Picture Gallery of Andrassy	
Slovak National Museum Betliar (founded by Ministry of Culture of the Slovak Republic)	Andrassy Mausoleum Krásna Hôrka Castle (closed due to renovation)	Krásnohorské Podhradie
	Betliar Chateau	Betliar

Source: own processing, 2022.

Visitors can also view a number of other important regional and local exhibits in the area, most of which have sporadic hours of operation (municipality operated museums): Andrassy museum/chateau (Vlachovo), Watermill (in Kováčová – once belonging to the Andrassy family with an exposition presenting local traditions), museum “Stará hyža” (Stratená), Pamätná izba Jura Hronca (Gočovo), and Banický dom (Dobšiná). The town of Rožňava has several cultural institutions, including the Cultural Center Klaster, the Gemer Library of Pavel Dobsinsky in Rožňava, the city theater “Actores Rožňava”, and the Gemer Cultural Center (Gemerské osvetové stredisko).

FIGURE 10: The Map of natural and cultural heritage sites in the Gemer Region



Source: KSK, 2023

Numerous historical sites in the Gemer area are connected to the history of Gemer. A complex destination offer can be created by combining the Upper Gemer's historical sites with those in other areas of the region. There are six main product themes in the Gemer region, with the first three being the most important for the Upper Gemer:

- I. Early Gothic churches and other objects of the Gothic Route locality.
- II. Mining monuments and the localities connected with industrial history (Culture route "Iron Heart of Gemer").
- III. Castles and secular buildings (mansions) connected with the origin of important noble families.
- IV. Important literary personalities, objects and locations associated with their activities.
- V. Locations and objects linked to the war history (dark tourism).
- VI. Railway history.

Gothic Route

The most developed thematic route is the Gothic one, which is overseen by the Association Gothic Route with the headquarters in Rožňava. The association is a significant contributor to the creation of this theme route and is in charge of coordinating, creating, and managing visitor-oriented products²⁸. The Upper Gemer is one of the four circuits on the Gothic route, which has four circuits in total.

The "Medieval wall painting in the regions of Gemer and Malohont" was awarded the European Cultural Label in 2021. It involves 12 Gothic Route locations.

TABLE 8: Localities of the European Cultural Heritage of the Gemer-Malohont Region

Rimava circuit - Banská Bystrica	1: Rimavské Brezovo, 2: Rimavská Baňa, 3: Kyjatice, 4: Kraskovo,
Jelšava circuit - Banská Bystrica	5: Chyžné, 6: Rákoš, 7: Sivetice, 8: Kameňany,
Štítňik circuit - Košice	9: Štítňik, 10: Ochťiná, 11: Kocelovce, 12: Plešivec.

Source: KSK, 2023.

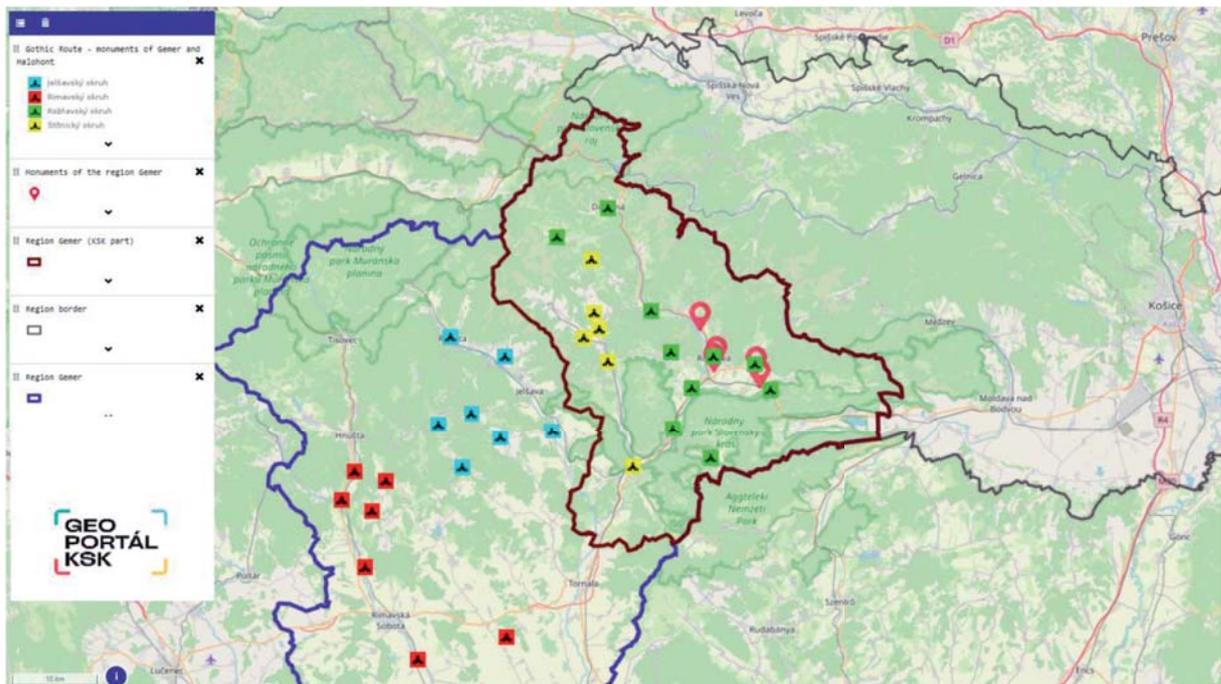
Mediaeval wall paintings in the Gemer and Malohont regions were created using the Italian fresco technique. With the exception of Hungary, this method is rarely used outside of the Alps. The wall paintings were created during the mediaeval era of Gemer ore mining and the eminent influence of Gemer nobility members at the Hungarian royal court of the monarchs of the Anjou family and the Luxembourg family. The artwork produced under the influence of Italian art serves as a record of an exceptional artistic development within the context of European culture. They have endured to the present day in Gemer, unlike other sites. The artwork serves as a reminder that European art was influenced not only by the magnificent pieces found in wealthy cities and palaces, but also by the rural churches' decorations, which expressed the spiritual wealth of the common people.

Iron Heart of Gemer

This proposed thematic cultural route, thanks to the mining of ores and the processing of metals, is currently being mapped across all three parts of Gemer. For many centuries, the Gemer-Malohont region was one of Hungary's top iron-producing regions. In the past, this development led to the flourishing of art, culture, and education, and as a result, the locations linked by a century's worth of history also include the homes of notable families who benefited from mining (such as Krásna Hôrka, Betliar, and others).

Greater ties to noble families can be found in Upper Gemer than in other parts of Gemer. The "Iron Heart of Gemer" is intended to be a comprehensive cultural route product available on the tourism market, including supplemental products. DMO Gemer is developing this thematic route, which includes actor networking for product and brand development. Some of its pilot products are already included in the tourist offer for 2022, thanks to collaboration with the Regional DMO Banská Bystrica Tourism Region²⁹.

FIGURE 11: The map of thematic connections of cultural heritage of the Gemer Region



The map above does not cover all the products offered in the Upper Gemer. For example, Regional DMO Kosice Tourism organize “Ice Express” linking Košice with Dobšinská Ice Cave and Telgárt, which is a great offer to attract higher number of visitors.

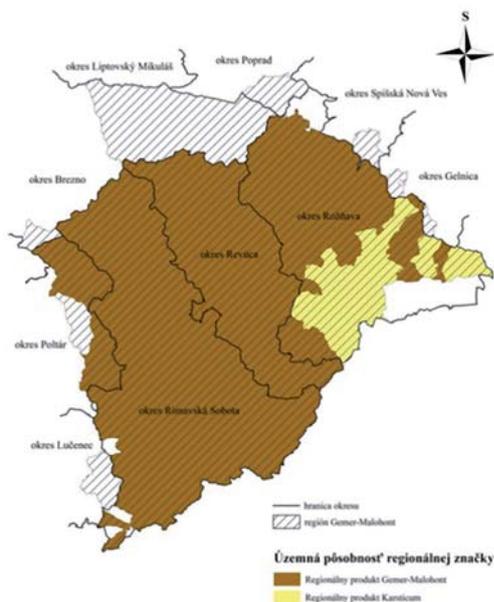
Source: KSK, 2023

3.3 REGIONAL PRODUCTION POTENTIAL IN TOURISM

A specialized form of support to folk craft and traditional art production is offered in the Upper Gemer region. Rink-Craft Incubator Gemer (Rink – Remeselnícky incubator Gemer)³⁰ is a unique tool for creating favorable conditions for the development of traditional craftsmanship. It provides specialized services to the beginners and the experienced craftsmen from the Košice region, who want to improve their skills in the modern marketing and communication tools, successful presentation of their products, gain knowledge in legal issues of doing business and sales. The mission of this institution is to strengthen local identity and form the relationship of locals to intangible cultural heritage and arts. It helps to enhance the producers’ skills with traditional techniques of technology regarding the aesthetics and functionality of products. The incubator is operated by “The house of traditional culture of Gemer” (Dom tradičnej kultúry Gemera) in Rožňava and currently it serves more than 50 beneficiaries.

There are also two other concepts of local trademarks as quality and networking systems for agricultural, alimentary, and handicraft producers in the Gemer region. These are regional products “Gemer-Malohont” and “Karsticum”.

FIGURE 12: The map of the territory of regional product Gemer-Malohont and regional product Karsticum



LAG Malohont manages the regional product Gemer-Malohont. Its geographical scope includes the districts of Rimavská Sobota, Revúca, a portion of the Poltar district (8 municipalities in the historical region Gemer-Malohont), and a part of the Rožňava district. The municipalities in the Rožňava district fall under the territorial scope of the Regional Product Karsticum brand, which is coordinated by the Civic Association ALMA - Center. The historical definition of the Gemer-Malohont region was upheld, and participants in the process of brand creation (the bottom up approach) from the eastern part of the region identified themselves as a part of the Slovak Karst National Park.

Source: LAG Malohont, available at: <https://www.produkty.gemer-malohont.sk>.

Agricultural products, food products, traditional crafts, and other goods and services with a regional connection all have quality standards under which they are marketed. A regional brand ensures a product's local origin, a high proportion of manual (craft) labor, as well as other advantages for the product's producer/service provider and the region's growth and preservation of its traditions in the fields of agriculture and craft. These goods have a great deal of potential because they introduce the area to tourists. They encourage collaboration and networking among local stakeholders, which creates excellent conditions for the development of a comprehensive offer and the sale of regional goods to tourists, either directly or by way of the development of supply chains between local producers and tourism facilities.

3.4 RECREATION AND SOFT ADVENTURE TOURISM AND ACTIVITIES

Due to the area's natural beauty and the presence of protected areas, there is a significant opportunity for the growth of hiking, cycling, and horseback riding tourism in the area. These activities can serve as a promoter for longer stays in the area as well as a means of getting to and from POIs and protected areas. Hiking is one of the most developed soft adventure tourism activities, connecting the region's major attractions and locations, especially with its natural potential, and making it accessible from almost all nearby regions (destinations).

Hiking Trails

The Upper Gemer currently has the greatest number of hiking trails out of all the areas of the Gemer Region, thanks to three significant protected areas being situated there. The Slovak Karst National Park has the most trails, followed by Slovak Paradise National Park and Muránska Planina Park. Furthermore, the routes around the city of Rožňava have also been developed. National parks are interconnected by tourist routes, including connections to routes in neighboring regions.

FIGURE 13: The map of hiking trails in the Gemer Region



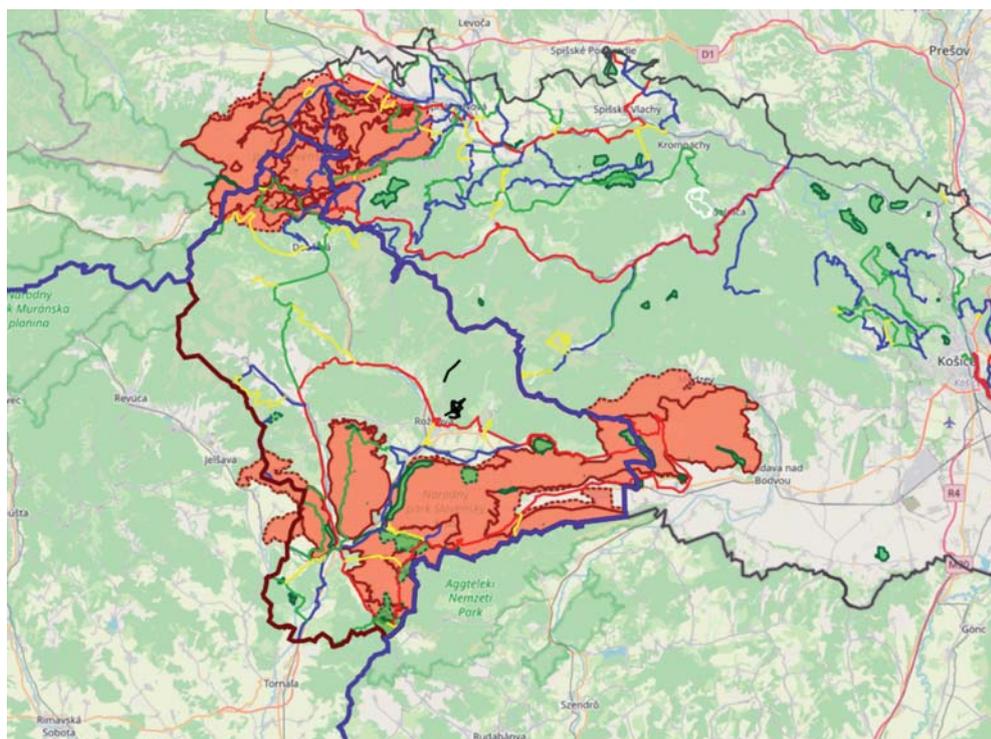
Source: KSK, 2023

The most significant tourist route in Slovakia, the Road of the Heroes of the Slovak National Uprising, and the shorter Ore Route, which connects the towns in central Slovakia with active mines, both pass through the area. The majority of Slovakia's Road of the Heroes of the Slovak National Uprising runs parallel to International Tourist Road E8³¹, a 4,390 km long European tourist route that connects Ireland and Istanbul. The Road of the Heroes of the Slovak National Uprising (leads from Dukla mountain pass to Devín) connects with the Gemer Region near the Slovak Karst National Park and continues through the eastern border of the **Rožňava** district to the Slovak Paradise National Park. From there, it continues to the Horehronie region (Telgart).

Cycling-tourism Routes and Trails

Similar to hiking trails, national parks have the largest cycling networks. The network of trails in the Slovak Paradise National Park is connected to the Muránska Planina National Park, and also to the Low Tatras National Park through the Horehronie region (adjacent destination to the Gemer region from the north). There is now a network of “Cycling Highway Slovak Karst” on the grounds of the Slovak Karst National Park. Due to this, Upper Gemer, in contrast to other areas of the region, has ties to Hungary, a neighbor, and enjoys better circumstances for the growth of inbound tourism. The Gemer region doesn’t have any international Eurovelo cycle routes that go through it. Upper Gemer is not crossed by a bicycle highway of national or regional significance. Although the national parks have extensive cycling networks, the Rožňava district lacks adequate cycling trails that can connect the top sights and link to Hungary to draw in more tourists and cyclists.

FIGURE 14: The map of cycling-tourism routes in the Gemer Region



Source: KSK, 2023

CROSS-COUNTRY SKIING TRAILS

Cross-country skiing has thrived in the northern region of the Rožňava district thanks to favorable climatic conditions. Cross-country trails are clearly marked near Dobšinská Ice Cave and on the cross-country skiing loop around Kráľova hora (Mlynky-Biele Vody), both of which are located inside the Slovak Paradise National Park. In addition to the designated cross-country trails, the national park allows skiing on designated hiking trails³².

TABLE 9: Cross-country Trails in Upper Gemer

Area	Trails and infrastructure description
Cross-country skiing area Dobšinská Ice Cave (Stratená)	Groomed cross-country skiing area Marked tracks in the length of: 2.4; 2.8 ; 3.5 and 4.5 km. In the start/finish area, visitors have a bridge, a gazebo with the possibility of storing things, waxing skis or it serves as a resting place.
Cross-country skiing area Mlynky – Biele Vody (Mlynky)	Groomed cross-country skiing area suitable for beginners. Marked circuits in the length of: 1, 2, 3, 6 and 12 km.

Source: Slovak Paradise National Park, 2022.

HORSE RIDING

Due to its historical development (horse breeding) and proximity to Hungary, the Gemer Region has a significant potential for equestrian tourism, including horseback riding, horseback trekking, and horseback sightseeing. These soft adventure activities would encourage the diversification of activities in the region's rural areas.

There are several horse-riding service providers in Upper Gemer³³, their services also include horse stables and care. The area is not specifically mapped for horse trails or their potential, though. The region's rich natural and cultural heritage are not currently accessible due to a lack of designated, legal horse trails or supporting infrastructure. In the Lower and Central Gemer, this product development is at a more advanced level³⁴.

WATER SPORTS

The natural environment fosters the growth of soft tourism activities like rafting on the Slaná River, the main river in the Upper Gemer. It comes from the Stolicke Vrchy and feeds Hungary's Tisa River. It flows through the Slovak Karst, where it also collects karst waters from the most important caves. However, a significant issue is the river Slaná's pollution, which is brought on by the discharge of mine waters from the iron ore mine in the vicinity of the former mining firm Siderit in the village of Nižná Slaná³⁵. Other prominent locations for water activities with a high potential include Prielom Hornádu Canyon, Palcmanská Maša, Prielom Hornádu, and Palcmanska Masa.

The background of the entire page is a repeating pattern of teal-colored triangles. The triangles are arranged in a grid-like fashion, with some pointing up and some pointing down, creating a textured, geometric effect. The color is a consistent shade of teal or seafoam green.

CHAPTER 4: POSITIONING, BRANDING, MARKETING AND COMMUNICATING WITH TOURISTS

In the early stages of tourism development, the establishment of the local DMO Gemer in June 2018 was a pivotal moment for beginning marketing management of the Gemer Region as a travel destination. DMO Gemer debuted the destination brand GEMER in 2020.



Regional tourism organizations also provide support with the marketing of the Gemer destination and the distribution of its products. The Gemer region is one of the five destinations listed on the website for the Košice's regional DMO (<https://www.kosiceregion.com/en/destination/>).

The products listed in the tables that follow are examples of those that various stakeholders support.

TABLE 10: Activities of DMO Gemer activities in 2019-2021

Type	Activities of DMO Gemer	Supported by
Products related to history	Legionary train Historical festival	
	The Iron Road through the Gemer Region	
	The Literary Journey through the Gemer	
	Gothic Road Opened	BBSK Development Agency
Products related to hiking and cycling	Tourist and cycling map of the Gemer region	Ministry of Transport and Construction
	Bike rental Scooter rental	BBSK Development Agency BBSK Development Agency
	Treasures of the earth	BBSK Development Agency
Supporting activities related nature tourism	Shelters for horses	BBSK Development Agency
	Educational trail	BBSK Development Agency
Supporting activities related to industrial heritage	Local mining exposition	BBSK Development Agency
Promotion	ITF Slovakia Tour (part of exhibition of Košice region and Banská Bystrica region too)	
	Candidacy of early Gothic churches from the region to be awarded by the European Cultural Heritage label	Ministry of Transport and Construction
	Permanent Facebook and Instagram promotion	Ministry of Investments, Regional Development and Informatization
	Permanent destination webpage	Ministry of Transport and Construction
	Printed promotion materials	Ministry of Investments, Regional Development and Informatization
	Mobile application Region Gemer	
	Promotional video and photos database from the region, rollups, presentation tent, photo wall	

Source: Own processing

TABLE 11: Activities of the Košice Region Tourism 2019-2021

Type	Activities of Košice Region Tourism
Products related to nature tourism	Ice Express Gemer Express Train to Paradise Reconstruction of Geravy cableway Adventure trips Zip-line Gombasek By bike to the monuments Route marking in Rožňava region
Products oriented on history	Bus trips – Following the tracks of Andrassy family, Pearls of Gemer, Gemer Odyssey Train trips – The beauty of Karst, Relax on the ranch Adventure trips
Promotion	ITF Slovakia Tour TV spots (Slovak and Czech television), radio spots Video spots Instagram, YouTube, Twitter, LinkedIn Mobile application PR and press releases

Source: Own processing

**CHAPTER 5:
ROŽŇAVA DISTRICT
AND UPPER GEMER AS
AN EMERGING TOURISM
DESTINATION – EXPOSED
STRENGTHS AND WEAKNESSES**

In Slovakia, adventure tourism activities, which are also connected to sightseeing, are based primarily on the country's natural and cultural resources. The sustainable use of these resources presents the greatest opportunity for less developed areas, which are also impacted by a lower socioeconomic level of development and low investor attractiveness. These locations frequently lack significant recreation hubs for the summer and winter seasons, ski resorts, water parks, areas with developed infrastructure, and mineral and thermal springs.

From a social and environmental perspective, the absence of mass tourism presents a significant chance for sustainable tourism development. There are many distinctive locations in Slovakia that are surrounded by beautiful natural scenery and a long history, making them ideal for soft adventure tourism activities. The region of Upper Gemer holds a huge potential to continue striving for excellence in this direction.

As the first location in Slovakia, Upper Gemer has both a natural heritage of global significance (UNESCO) and a cultural heritage of significance to Europe. This heritage has been recognized by the awarding of the European Heritage Label since 2022. The Upper Gemer destination recognizes its comparative advantage within the cultural and natural heritage segment and a significant potential to develop it into a competitive product for a particular target market. This refers to a methodical understanding of a particular subject and its offer on the tourism market in the experiential form of "the story of the Gemer Region," a story of secrets.

Upper Gemer is both distinctive and has a comparative advantage in **nature tourism**. The Aggtelek and Slovak Karst Caves are on the UNESCO World Heritage List. They provide the area with a comparative advantage in Slovakia's nature tourism industry. When compared to the areas of Slovakia's other national parks, the Slovak Karst National Park offers a space for the growth of soft-adventure tourism activities like hiking, cycling, mountaineering, horseback riding, and nature-based sightseeing tours. The weakness, however, is the lack of a contemporary visitor center, which is a necessary condition for the creation of a competitive product. It is a modern visitor center that presents the natural values of the area in a contemporary and interactive manner rather than a traditional center for tourism information with basic information and maps. A modern visitor center at the entrance of the national park must offer basic public infrastructure to its visitors such as parking spaces, communal and basic spaces, and other amenities.

Several resources demonstrate Upper Gemer's comparative advantage and distinctiveness in the field of **cultural tourism**. Early Gothic churches and sacral heritage are included in the Gothic Route, four of which are in Upper Gemer and have been recognized with the European Cultural Heritage Award. In comparison to other cultural routes in Slovakia, it benefits from a high level of networking and coordination, which will result in the opening of the sites to visitors and support the growth of both religious and art tourism.

The "Iron Heart of Gemer" cultural route, which is currently being developed by DMO Gemer, includes the mining history and heritage of one of the most important noble families in Europe, the House of Andrássy. The uniqueness of Upper Gemer along this cultural route, which travels through all areas of the Gemer region, is solely due to the heritage associated with the Andrássy family. These locations are currently among the top POIs in the Košice region. Another significant POI on this route is the Mining Museum in Rožňava, which stands out from many other Slovakian museums thanks to its fresh, contemporary exhibit on mining history and the use of interactive

elements. The route also passes by Krásna Hôrka Castle, which was the most popular attraction in the Gemer region until it was heavily damaged by fire in 2012. The state has set its restoration as one of its top priorities and Krásna Hôrka Castle is scheduled to reopen for public in 2024.

Out of all the soft adventure tourism activities it offers, cycling tourism has the greatest potential to support the growth of the region's cultural and natural heritage tourism industries. This not only offers the chance to draw in more visitors to the area, but it will also make it easier for visitors to reach the area's major attractions, which could have a multiplier effect on different types of tourism.

The use of sustainable tourism development approaches in destination management will be strengthened by cycling routes that connect important points of interest (POIs) for the natural and cultural heritage of Europe and the world. As a result, the competitiveness of the destination will increase as well.

Due to a lack of high-quality roads, insufficient train service, and poor connectivity to popular POIs and urban areas, the Rožňava District in Upper Gemer has poor destination accessibility. It is likely that this region will continue to experience this structural issue in the long run due to high costs and the increased demand for public financing. Cycling mobility and cycling tourism appear to be the most practical and cost-efficient ways to achieve some level of sustainable tourism mobility for climate neutrality, in line with positive trends all across Europe.

Due to poor infrastructure and supplementary services, such as a dearth of higher-quality accommodation and catering options, the Upper Gemer area experiences low levels of tourism-related income. As a result, the local economy suffers, and the potential for growth and development in the tourism industry remains untapped. Efforts to improve the infrastructure and services in the area could attract more visitors and boost the economy, creating new opportunities for businesses and residents alike. It is important at all levels of government to consider creating attractive investment packages to propose private capital mobilization. This may include the partnerships with private investors and the offer of stimulus measures to build new hotels and restaurants in the area. This would not only improve the experience for visitors but also create jobs and stimulate economic growth within the community.

In order to improve the tourism industry in the Upper Gemer region, the local government and stakeholders in the tourism sector, including DMOs, have begun putting strategies into place. These initiatives must be strengthened by building capacities in destination management and marketing resulting in joint actions and effective promotion (including coordination, networking and communication activities and strong relationships within the destinations).

The Gemer region is a market leader in the supply of labor with lower skills. The locals, for instance, hardly speak any foreign languages, which makes it difficult for them to find jobs in the tourism industry. It is important for the public sector to collaborate with the private sector and address the needs of human capital through VET and other educational opportunities. The likelihood that the local population - especially those in their prime years - will emigrate to other countries or regions will be significantly reduced by the district's ability to draw private capital and provide adequate labor.

Today's tourism globally is characterized by certain trends that Upper Gemer can use as a guide when creating new goods to market the location more effectively.

Environmentally friendly practices, such as using eco-friendly transportation, increase the likelihood of attracting a higher number of visitors to destinations. For example, a destination that uses electric buses or bicycles for sightseeing tours may appeal to environmentally conscious travelers who are looking for sustainable travel options. This can lead to an increase in bookings and positive reviews, ultimately boosting the destination's reputation.

The tourism of today is characterized by a **rising interest in outdoor recreation**, traveling by bicycle, and a desire for destinations and goods where the concentration of tourists is lower. This trend has largely emanated from the COVID-19 pandemic and continues to grow. For example, in the

United States, national parks have seen a surge in visitation as people seek out opportunities for outdoor recreation and natural beauty. Additionally, bike touring and bikepacking have become increasingly popular ways to explore new destinations while avoiding crowded tourist hotspots.

SMART solutions-based interactive elements and exhibits are used by well-known destinations to create products related to cultural heritage and natural assets. For example, the visitor center at the Hohe Tauern National Park in Austria offers its visitors a 360° unique natural spectacle through all seasons and altitudes of the National Park. Thanks to elaborate time-lapse photography, changing weather, light and shadow conditions, as well as an impressive soundscape, the visitors feel like they are in the middle of the national park, surrounded by mighty peaks, deep crevasses, rushing mountain streams and forests with ancient trees. A specially designed room with multidimensional effects takes visitors on a journey through the evolution of earth through an experiential movie show. Yet another better-known example is the Louvre in Paris that implemented an interactive exhibit that allows visitors to explore the museum's collections with a digital guide. The guide provides detailed information on each artwork and allows visitors to customize their experience based on their interests.

A global trend towards **integrating cultural and creative industries** into tourism offers has drawn increasing attention to emerging destinations. For example, in Bali, Indonesia, traditional Balinese dance and music performances are showcased in hotels and restaurants to attract tourists seeking an authentic cultural experience. This has led to the growth of small businesses that produce Balinese handicrafts and souvenirs, contributing to the local economy.

ANNEXES

ANNEX 1:

ADMINISTRATIVE UNITS OF THE GEMER REGION

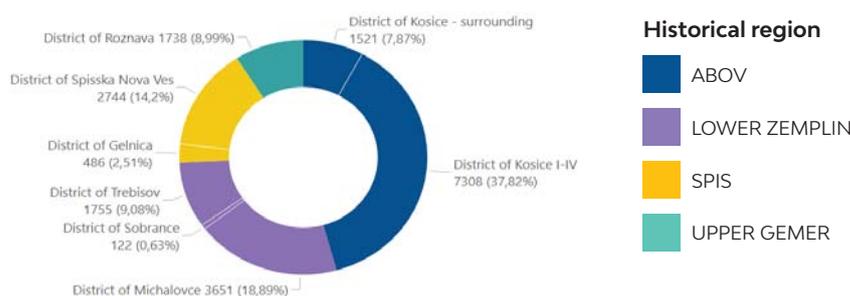
Rožňava District (Košice Region)	
Towns	Rožňava, Dobšiná,
Other municipalities	Ardovo, Betliar, Bohúňovo, Bôrka, Brdárka, Bretka, Brzotín, Čierna Lehota, Čoltovo, Čučma, Dedinky, Dlhá Ves, Drnava, Gemerská Hôrka, Gemerská Panica, Gemerská Poloma, Gočaltovo, Gočovo, Hanková, Henckovce, Honce, Hrhov, Hrušov, Jablonov nad Turňou, Jovice, Kečovo, Kobeliarovo, Kocelovce, Kováčová, Krásnohorská Dlhá Lúka, Krásnohorské Podhradie, Kružná, Kunova Teplica, Lipovník, Lúčka, Markuška, Meliata, Nižná Slana, Ochtiná, Pača, Pašková, Petrovo, Plešivec, Rakovnica, Rejdová, Rochovce, Roštár, Rozložná, Rožňavské Bystré, Rudná, Silica, Silická Brezová, Silická Jablonica, Slavec, Slavoška, Slavošovce, Štítnik, Stratená, Vlachovo, Vyšná Slana
Revúca District (Banská Bystrica Region)	
Towns	Revúca, Tornaľa, Jelšava
Other municipalities	Chvalová, Chyžné, Držkovce, Gemer, Gemerská Ves, Gemerské Teplice, Gemerský Sad, Hrlica, Hucín, Kameňany, Leváre, Levkuška, Licince, Lubeník, Magnezitovce, Mokrú Lúka, Muráň, Muránska Dlhá Lúka, Muránska Huta, Muránska Lehota, Muránska Zdychava, Nandraž, Otročok, Ploské, Polina, Prihradzany, Rákoš, Rašice, Ratková, Ratkovské Bystré, Revúcka Lehota, Rybník, Sása, Sirk, Šivetice, Skerešovo, Turčok, Višňové, Žiar
Rimavska Sobota District (Banská Bystrica Region)	
Towns	Rimavska Sobota, Hnúšťa, Tisovec
Other municipalities	Abovce, Babinec, Barca, Bátka, Belín, Blhovce, Bottovo, Budikovany, Cakov, Čerenčany, Chanava, Chrámec, Čierny Potok, Číž, Dolné Zahorany, Dražice, Drienčany, Drňa, Dubno, Dubovec, Dulovo, Figa, Gemerček, Gemerské Dechtáre, Gemerské Michalovce, Gemerský Jablonec, Gortva, Hajnáčka, Hodejov, Hodejovec, Horné Zahorany, Hostice, Hostišovce, Hrachovo, Hrušovo, Hubovo, Husiná, Ivanice, Janice, Jesenské, Jestice, Kaloša, Kesovce, Klenovec, Kociha, Konrádovce, Kráľ, Kraskovo, Krokava, Kružno, Kyjatice, Lehota nad Rimavicou, Lenartovce, Lenka, Lipovec, Lukovišťa, Martinová, Neporadza, Nižný Skálnik, Nová Bašta, Orávka, Ožďany, Padarovce, Pavlovce, Petrovce, Poproč, Potok, Radnovce, Rakytník, Ratkovská Lehota, Ratkovská Suchá, Riečka, Rimavská Baňa, Rimavská Seč, Rimavské Brezovo, Rimavské Janovce, Rimavské Zalužany, Rovné, Rumince, Šimonovce, Širkovce, Slizké, Španie Pole, Stará Bašta, Stránska, Štrkovec, Studená, Sutor, Tachty, Teplý Vrch, Tomášovce, Uzovská Panica, Valice, Včelince, Večelkov, Veľké Teriakovce, Veľký Blh, Vieska nad Blhom, Vlkyňa, Vyšné Valice, Vyšný Skálnik, Zacharovce, Zádor, Žíp.

ANNEX 2:

COMPARISON OF ACCOMMODATION FACILITIES OF THE ROŽŇAVA DISTRICT (UPPER GEMER) WITH OTHER DISTRICTS OF THE KOŠICE REGION

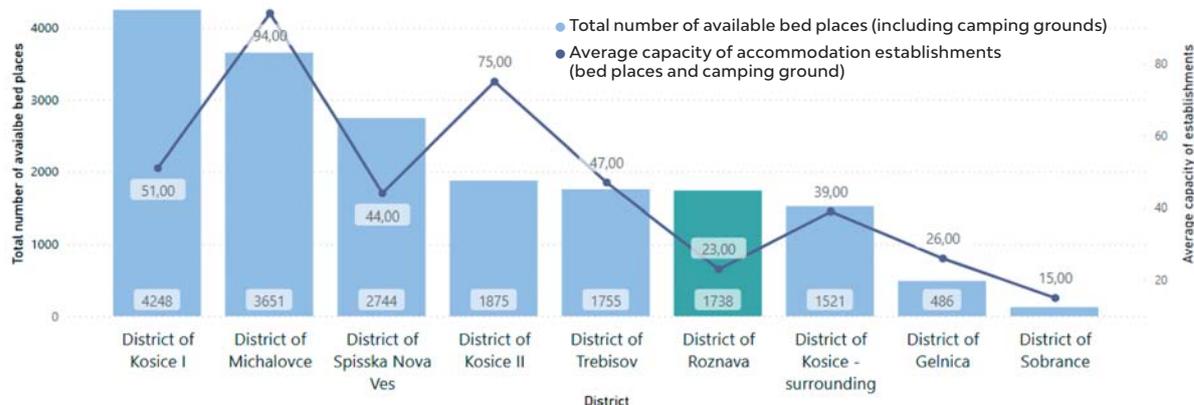
The second-highest number of officially registered lodging establishments in the Košice region is found in the Rožňava District. However, the average capacity (including campgrounds) is only 23 beds, which represents only 9 percent of the total accommodation capacity of the Košice Region. As a result of a significant reduction in capacity (up to more than 5,000 beds) in the Michalovce District, the total capacity of establishments in the Košice Region was reduced by 20 percent from 2019 to 2021.

FIGURE 15: Accommodation capacity in the Košice Region (number of beds including camping grounds) according to historical regions/destinations in 2021



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

FIGURE 16: A total number of available accommodation establishments and the average capacity of establishments in the Košice Region districts in 2021



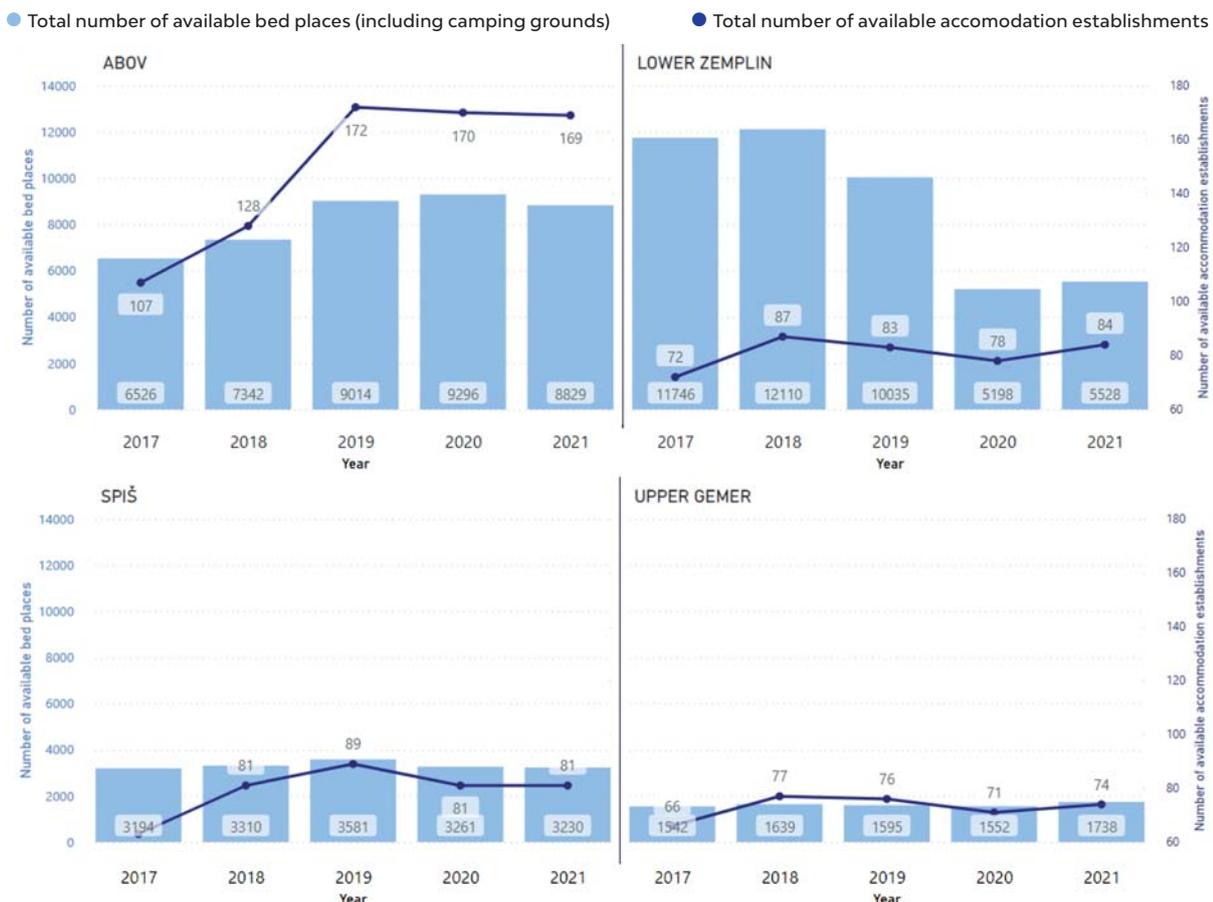
Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

Note: The graph presents districts in Košice Self-governing Region with data published by the Statistical Office of the Slovak Republic. Data about Districts of Košice III and Košice IV are confidential. Service capacity of districts of Košice I-IV is 130 accommodation establishments with 7,308 bed places in total. Five districts of the Košice Region (Districts of Košice I, Košice II, Michalovce and Spišská Nová Ves) are better equipped with beds than the Rožňava District.

It is important to note that **districts of Košice I-IV and Michalovce are significantly different from the Rožňava District** in terms of the destination offer which determines the nature of accommodation facilities and their capacity too. In districts of Košice I-IV the main offer is made up by cultural and urban tourism. The town of Košice is oriented on the MICE segment. This segmentation is closely related with higher economic level of the area, its economic structure, direct accessibility of the town by air and also developed transport service infrastructure. The average capacity per facility in the districts of Košice I-IV corresponds to 56 beds on average. The districts of Košice I-IV are the most significant contributors to the total visitation in the Košice region. In 2019, nearly 53 percent of all overnight stays in the region took place in Košice. However, this territory suffered the most significant decrease in the overnight stays in the region during the COVID-19 pandemic (67 percent decrease in 2021 compared to 2019), which is also related to the nature of the destination offer and restrictions affecting the inbound tourism during pandemic.

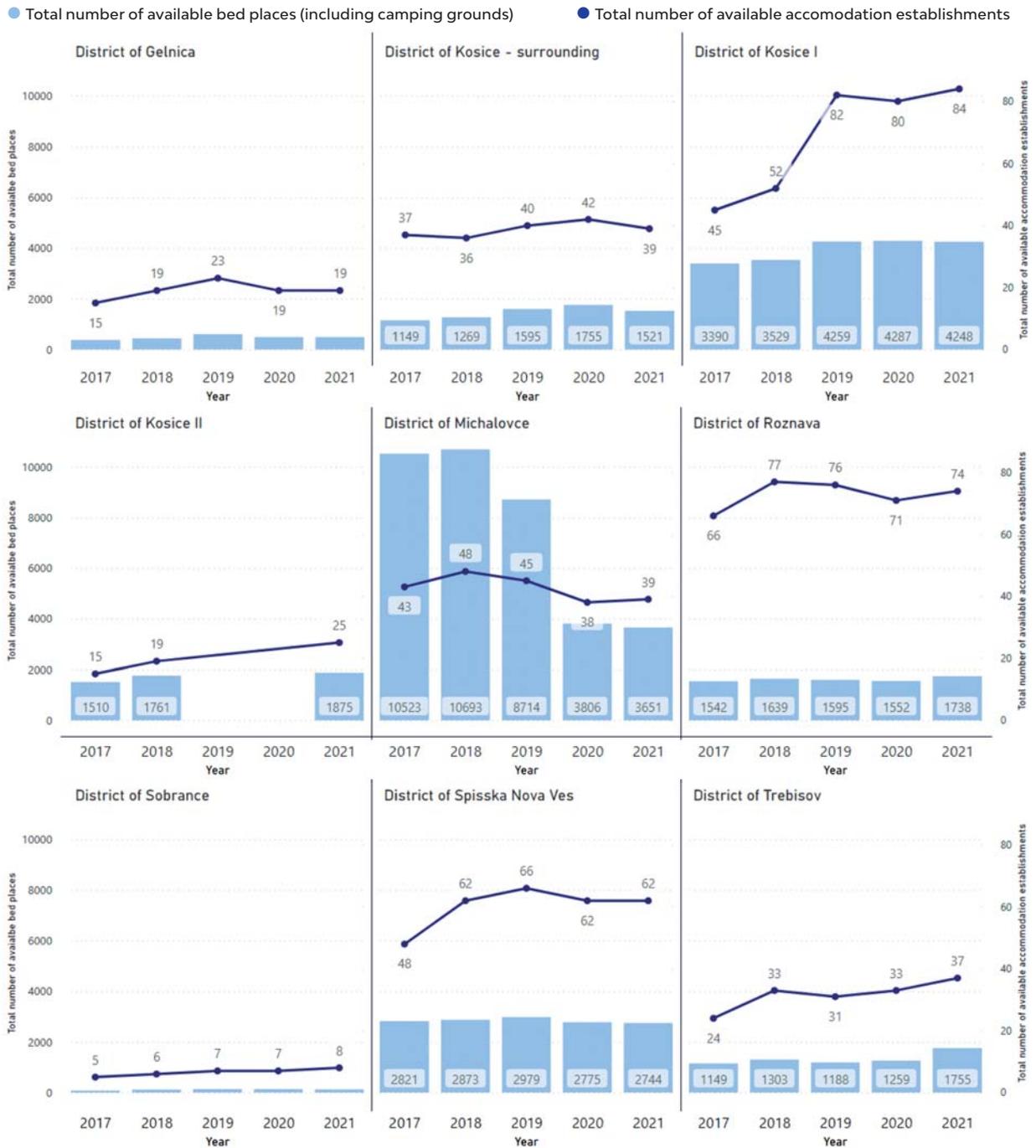
The Michalovce district also differs from the Rožňava district in terms of the nature of its services, as the summer recreation at the water is one of its key forms of tourism in this district. The average capacity of one facility in this district is 94 beds, which is also related to the higher capacity of camping sites at the Zemplínska Šírava reservoir covering the area of 33 km². The Rožňava district also has the potential for summer recreation at the water in the Dedinky municipality near the Palcmanska Masa water reservoir (the area of 0,85 km²), however it is incomparably smaller in size than Zemplínská Šírava. Michalovce District reached 17 percent share in the total number of overnight stays in the Košice Region in 2021, and during the COVID-19 pandemic (2021 compared to 2019) it recorded a decrease of 43 percent.

FIGURE 17: Accommodation capacity available in the Košice Region according to historical regions since 2017 to 2021



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

FIGURE 18: Accommodation capacity available in the Region of Košice according to districts since 2017 to 2021



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

Note: The most significant decrease in the number of accommodation establishments in the Košice Region can be seen in the Michalovce District. Between 2019 and 2021, this district recorded a decrease of almost 58 percent in the number of beds (including camping places). Accommodation capacity decreased by 20 percent in 2019, however, it did not affect the number of overnight stays. The capacity significantly increased in two lagging districts (Rožnava and Trebišov) in 2021 compared to 2019. In other districts of the Košice Region it either remained at approximately the same level or decreased only minimally during the pandemic.

TABLE 12: A total number of available accommodation establishments in the Košice Region

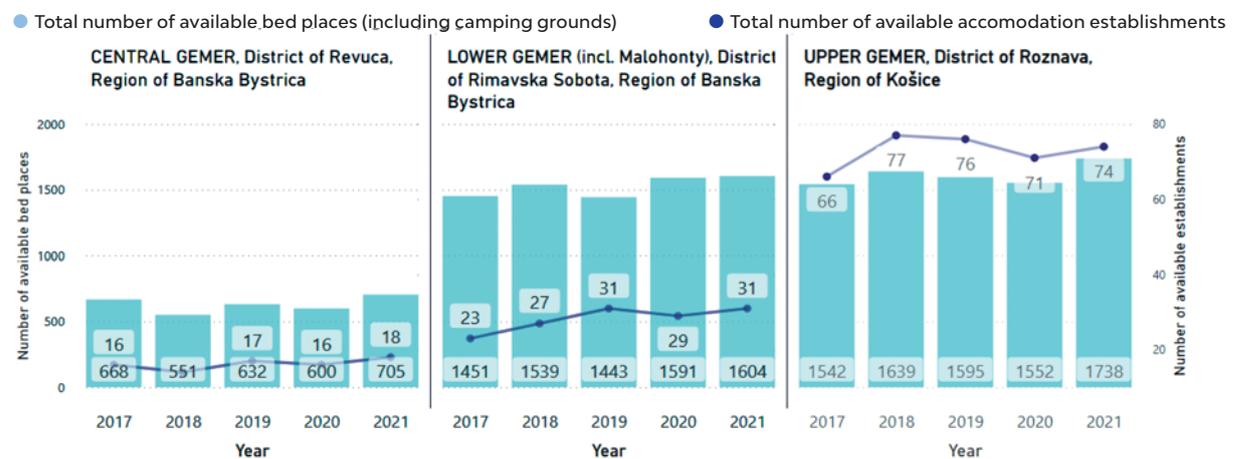
Destination (Historical region)	District	Total number of available accommodation establishments	Total number of available bed places (including camping grounds)
Region of Košice - all historical regions	Region of Košice - all districts	408	19,325
ABOV	District of Košice I-IV	130	7 308
	share on Košice Region	31.86 %	37.82 %
	District of Košice - surrounding	39	1 521
	share on Košice Region	9.56 %	7.87 %
	Districts of ABOV Region	169	8,829
	share on Košice Region	41.42 %	45.69 %
LOWER ZEMPLIN	District of Michalovce	39	3,651
	share on Košice Region	9.56 %	18.89 %
	District of Sobrance	8	122
	share on Košice Region	1.96 %	0.63 %
	District of Trebisov	37	1,755
	share on Košice Region	9.07 %	9.08 %
	Districts of LOWER ZEMPLIN Region	84	5,528
	share on Košice Region	20.59 %	28.61 %
SPIS	District of Gelnica	19	486
	share on Košice Region	4.66 %	2.51 %
	District of Spisska Nova Ves	62	2,744
	share on Košice Region	15.20 %	14.20 %
	Districts of SPIS Region	81	3,230
	share on Košice Region	19.85 %	16.71 %
GEMER	District of Rožňava	74	1,738
	share on Košice Region	18.14 %	8.99 %
	share on GEMER REGION (incl. districts in the Region of Banská Bystrica)	62.16%	42.25 %
	ALL DISTRICTS OF GEMER REGION	123	4,047

Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

ANNEX 3:

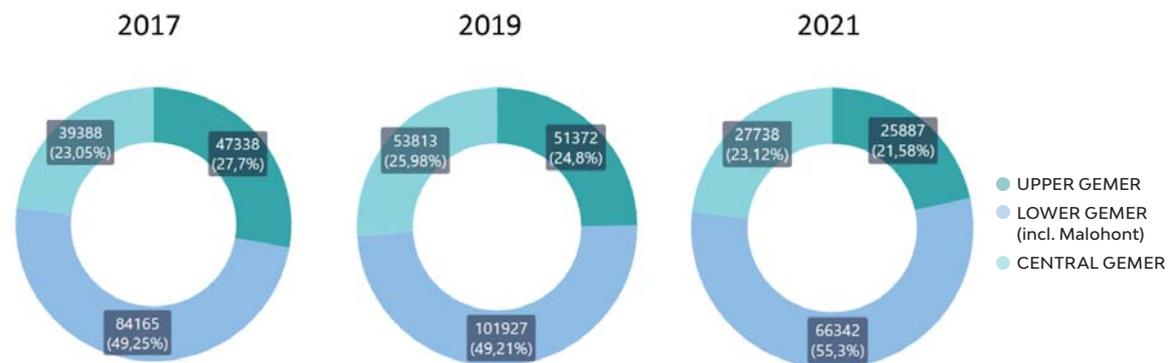
COMPARISON OF ACCOMMODATION CAPACITIES AND OVERNIGHT STAYS IN THE GEMER REGION

FIGURE 19: Accommodation capacity in Gemer Region from 2017 to 2021



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

FIGURE 20: Number of nights spent by visitors in the Gemer Region from 2017 to 2021



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

Note: The share in overnight stays of Upper Gemer in the Gemer Region is decreasing (27 percent in 2017, 25 percent in 2019, and only 21 percent in 2021), which can be attributed to the faster growth rate of Central Gemer until 2019, even though Central Gemer has the smallest capacity of accommodation establishments in the number of all beds among all the Gemer regions.

FIGURE 21: Number of nights spent by domestic and foreign visitors in the Gemer subregions between 2017 and 2021



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

TABLE 13: The Number of nights spent by domestic and foreign visitors in the Gemer subregions between 2017 and 2021 (in thousands)

Subregion District SGR	CENTRAL GEMER, District of Revúca, Region of Banská Bystrica					LOWER GEMER, District of Rimavská Sobota, Region of Banská Bystrica					UPPER GEMER, District of Rožňava, Region of Košice					GEMER REGION (ALL SUBREGIONS) All districts				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Nights spent by domestic visitors	37,5	39,8	51,5	30,4	27,1	75,4	74,6	86,7	68,8	63,2	35,5	33,9	37,5	32,8	23,9	148,4	148,3	175,7	132,0	114,2
Share of domestic visitors on number of visitors in subregion	95,3 %	95,6 %	95,7 %	95,2 %	97,6 %	89,6 %	83,8 %	85,0 %	91,2 %	95,3 %	75,0 %	74,5 %	73,0 %	88,7 %	92,3 %	86,9 %	84,2 %	84,8 %	91,5 %	↑ 95,2 %
Share of domestic visitors on number of domestic visitors in Gemer region	25,3 %	26,8 %	29,3 %	23,0 %	↓ 23,7 %	50,8 %	50,3 %	49,3 %	52,1 %	↑ 55,4 %	23,9 %	22,8 %	21,4 %	24,9 %	↓ 20,9 %	100,0 %	100,0 %	100,0 %	100,0 %	100,0 %
Nights spent by foreign visitors	1,8	1,8	2,3	1,5	0,7	8,8	14,4	15,2	6,6	3,1	11,8	11,6	13,8	4,2	2,0	22,5	27,8	31,4	12,3	5,8
Share of foreign visitors on number of visitors in subregion	4,7 %	4,4 %	4,3 %	4,8 %	2,4 %	10,4 %	16,2 %	15,0 %	8,8 %	4,7 %	25,0 %	25,5 %	27,0 %	11,3 %	7,7 %	13,1 %	15,8 %	15,2 %	8,5 %	↓ 4,8 %
Share of foreign visitors on number of foreign visitors in Gemer Region	8,2 %	6,6 %	7,3 %	12,4 %	↑ 11,7 %	39,1 %	51,8 %	48,6 %	53,8 %	↑ 53,9 %	52,7 %	41,7 %	44,1 %	33,8 %	↓ 34,4 %	100,0 %	100,0 %	100,0 %	100,0 %	100,0 %
Total number of nights spent by visitors	39,4	41,6	53,8	31,9	27,7	84,2	89,0	101,9	75,4	66,3	47,3	45,5	51,4	37,0	25,9	170,9	176,1	207,1	144,3	120,0
Share of overnights stays in subregion on overnights stays in Gemer region	23,0 %	23,6 %	26,0 %	22,1 %	↓ 23,1 %	49,3 %	50,5 %	49,2 %	52,3 %	↑ 55,3 %	27,7 %	25,8 %	24,8 %	25,6 %	↓ 21,6 %	100,0 %	100,0 %	100,0 %	100,0 %	100,0 %

Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

FIGURE 22: Average length of stay in subregions of Gemer Region since 2017 to 2021

● Upper Gemer ● Lower Gemer (incl. Malohont) ● Central Gemer ● Average Slovak Republic



Source: Own processing based on data published by Statistical Office of the Slovak Republic, 2022.

NOTES

1. Source: Kučerová, J. – Gajdošík, T. – Elexová, L. 2020. Tourism Development and Policy in Slovakia. In Tourism development in post-soviet nations: from communism to capitalism. - London: Palgrave Macmillan, 2020. ISBN 978-3-030-30714-1. - Pp. 87-106.
2. According to the Act no. 336/2015 Coll. on the Lagging districts, as amended.
3. Statistical Office of the Slovak Republic, 2022. Registered unemployment rate [pr3108rr]
4. Development Plan of The Least Developed District of Rožňava for 2022-2026 (proposal), 2022.
5. Act no. 336/2015 Coll. on the Lagging districts, as amended.
6. Act.no 91/2010 Coll. on support of tourism, as amended.
7. A study tour to Austria for five participants from PSK and KSK was organized in June 2023. The event was financed by TAIEX/EC and organized by the World Bank in close collaboration with Gratz Turismus, a regional DMO in Austria.
8. In 2022, the population density in Slovakia was 110.79 people per sq.km (based on the calculation of permanently living mid-year population and area size in square kilometres of the Statistical office of the Slovak Republic, 2023).
9. Population as of the end of 2022 (Statistical Office of the Slovak Republic, 2023)
10. Lower Gemer was in the past represented mainly by the territory from the town of Rimavska Sobota and its surroundings to the south. Northern part of this district was Malohont county. Within this analytical report the entire territory of the District Rimavska Sobota will be marked as Lower Gemer).
11. <https://www.bbc.com/news/av/world-europe-17330120>
12. Development Plan Of The Least Developed District Of Rožňava for the period 2022-2026 (proposal), 2022.
13. The survey was carried out by DMO Gemer in cooperation with the BBSK Development Agency, NPO as a part of processing the Tourism destination concept and strategy for Gemer Region by 2027. The survey covered visitors in all three districts of the Gemer region, including the Rožňava district in the Region of Košice and 238 respondents took part in it (source: DMO Gemer & Regional Development Agency of Banská Bystrica Self Governing region, NPO - Tourism destination concept and strategy for Gemer region by 2027).
14. After several years of work by the regional stakeholders, a bottom-up strategy was successful in establishing a membership base of local governments that would meet the criteria for DMO creation under Act No. 91/2010 Coll. on support for tourism development. DMO Gemer was founded by seven municipalities (Revúca, Tornaľa, Jelšava, Hnúšťa, Muráň a Jesenské from the Banská Bystrica Region and the town of Rožňava as the only municipality in the Košice Region) and five tourism-related businesses.
15. Regulation (EU) No 1305/2013 of the European Parliament and of the Council of 17 December 2013 on support for rural development by the European Agricultural Fund for Rural Development (EAFRD) and repealing Council Regulation (EC) No 1698/2005.
16. The Common Provisions Regulation (CPR) EU No 1305/2013 Articles 32 – 34 sets common basic requirements for LAGs and Community-Led Local Development. The Rural Development Regulation EU No 1305/2013 Articles 42 – 44 makes additional specific provisions for LEADER LAGs (The European Network for Rural Development).
17. e.g., Act No 513/1991 Coll., Commercial Code, as amended; Act No. 455/1991 Coll. on Licensed Trades, Act No. 170/2018 Coll on package travel, linked travel arrangements, certain conditions of engaging in the tourism business, as amended; and other in the field of tax administration and social payments, in the field of investment support; protection of cultural and natural heritage; education etc.
18. E.g. Act No. 49/2002 Coll. on the protection of monuments and historic sites, as amended; Act No. 206/2009 Coll. on museums and galleries and the protection of objects of cultural significance as amended; Act No.189/2015 Coll. on cultural and educational activities; Act No. 543/2002 Coll. on Nature and landscape protection, as amended.
19. United Nations (2015). Transforming our World: The 2030 Agenda for Sustainable Development
20. The Ministry of Investment, Regional Development and Informatization of the Slovak Republic - Vision and Strategy of Slovakia's Development Until 2030.

21. The Ministry of Investment, Regional Development and Informatization of the Slovak Republic – Regional development.
22. According to the Act no. 336/2015 Coll. on the Lagging districts as amended the list of least developed districts includes districts in which the rate of registered unemployment, calculated from the available number of job seekers (reported by the labor office) was higher than 1.6 times of average rate of registered unemployment rate in the Slovak Republic for at least nine calendar quarters for the same period. Currently, there are 20 of the total number of 79 districts in Slovakia on this list. Six of them are in the Košice region. More information available at: The Ministry of Investment, Regional Development and Informatization of the Slovak Republic – Regional development.
23. Tourism development concept of the Rožňava District for the period of 2019-2025 (2028); Tourism development concept of District of Revuca as a part of the Gemer Destination (2017).
24. KSK: Strategy for Development of Sustainable Tourism in the Košice Region by 2027
25. Košice Region Turizmus. Stratégia rozvoja ekoturizmu v Košickom kraji,
26. Banskobystrický kraj Turizmus – RABBSK, n.o. Konceptia rozvoja prírodného cestovného ruchu v Banskobystrickom kraji do roku 2030.
27. <http://www.ssj.sk/sk/clanok/147-svetove-prirodne-dedicstvo-dobsinska-ladova-jaskyna>.
28. The aim of the Association Gothic Route (founded in 2006) is to work for the benefit of cultural monuments located along the Gothic Route in the Gemer Region. Activities include organization of cultural events, excursions, lectures and conference, publishing tourist materials and popularization of the monuments. Members are professionals, dealing with the protection and restoration of cultural heritage, representatives of the municipalities in which the monuments of the Gothic Route are located, as well as the representatives of the Lutheran Church and Roman Catholic Church as owners of these cultural monuments (Source: Gothic Route, available at: <http://gotickacesta.sk/en/about-us/>).
29. <https://www.zahoramizadolami.sk/podujatia-zazitky/objavte-zelezne-srdce-uhorska/>
30. Dom tradičnej Kultúry Gemera: Rink – Remeselnícky incubator Gemera
31. Source: https://ldwa.org.uk/ldp/public/e_routes.php
32. Source: Slovak Paradise National Park.
33. E.g. in Stratená (Ranč pod Ostrou skalou) and Jovice (Ranč Jovice in the village near Rožňava)
34. The routes are gradually legalized as a part of the development of the thematic cultural route “Huculská magistrála” with a focus on the Muránska planina - Čierny Hron region. It has 36 km of routes in total, 9 stations (boarding or transfer stations or stops), which connect the sites of the Muránska Planina National Park and the Poľana Protected Landscape Area (region Podpoľanie a Horehronie) (<http://www.huculskamagistrala.sk/>). At the same time, the potential of the introduction of horse trails in the territory of the Muránska Planina National Park is mapped in detail, and the effort is to introduce a profiling product in this area as well.
35. <https://www.enviroportal.sk/clanok/v-rieck-slana-bola-12-nasobne-prekrocena-hodnota-zeleza>

