



Report on Member State Priorities:

UNWTO Silk Road Action Plan Survey 2014-2015

Introductory note

This report analyses the results of the UNWTO **Silk Road Action Plan Survey for 2014/2015**. The purpose of this survey was to identify **Members' priorities** in order to prepare the 2014/2015 edition of the Silk Road Action Plan. The results of the Survey have been critical to determine the orientations of the UNWTO Silk Road Programme and the allocation of resources for the next two years. This exercise was conducted within the framework of the general Members' Survey which contributes to the overall UNWTO Programme of Work 2014/2015.

This survey targeted the 31 Member States participating in the UNWTO Silk Road Programme.* The Survey was developed in line with the decisions of the 2013 Task Force Meeting (Baku, Azerbaijan, 22-23 April 2013), and enabled Member States to prioritise proposed activities put forward by the Task Force. Respondents were advised that implementing many of the proposed activities would require seeking significant additional funding. Member States were also being asked to report on their current level of Silk Road activity as a means of measuring the impacts of the UNWTO Silk Road Programme's activities.

As to the methodology, Member States were given a total of four months to complete the survey – the initial timeframe of two months was extended by request of the Member States. 22 countries completed the survey which consisted of 40 questions divided into 4 chapters: (I) Marketing and Promotion, (II) Capacity Building and Destination Management, (III) Travel Facilitation, and (IV) Resource Mobilization. The questions asked were either dichotomous/ yes-no questions or interval questions measuring preferences on a scale from 1 ("Top Priority") to 5 ("Lowest Priority"), or 1 ("Top Priority") to 4 ("Lowest Priority"). In both cases a percentage calculation was used to measure the results. Additional Member State input has been included whenever possible.

This report outlines the results from the entire survey, and provides a short set of recommendations based on the findings. Member States are encouraged to review the survey to gain an understanding of the current status of activity along the Silk Road and the priorities set by the Silk Road countries.

*UNWTO Silk Road Member States include: Albania, Armenia, Azerbaijan, Bangladesh, Bulgaria, China, Croatia, DPR Korea, Rep. Korea, Egypt, Georgia, Greece, Indonesia, Iran, Iraq, Israel, Italy, Japan, Kazakhstan, Kyrgyzstan, Mongolia, Pakistan, Russia, San Marino, Saudi Arabia, Syria, Tajikistan, Turkey, Turkmenistan, Ukraine and Uzbekistan (as of November 2013)

Key Area I: Marketing and Promotion

Introduction

The mission of the Silk Road Action Plan is to 'work as a collaborative framework for marketing and capacity building, raising the profile of Silk Road tourism and driving development that is sustainable, responsible and internationally competitive.'

UNWTO research shows that the Silk Road has significant potential for growth as a destination brand, stimulating more discussions online than any other travel route, accounting for approximately 30% of all discussions globally. Nonetheless, the Silk Road faces many challenges with regards to marketing and promotion and respondents were requested to take into consideration when responding to the survey questions:

- The lack of cohesion in the promotion of the Silk Road destination brand
- Market research on the Silk Road is very limited
- Consumer awareness and understanding on the Silk Road is low due to inadequate information available and the nonexistence of one comprehensive online travel portal for the Silk Road.

1. How do Member States prioritise UNWTO's Marketing and Promotion activity on the Silk Road?

Since 2010, UNWTO has established an annual programme of events for the Silk Road at some of the world's top international tourism fairs. These promotional activities were ranked by the Member States as the most important marketing and promotional activities currently being carried out by UNWTO for the Silk Road.

Results below show that Silk Road promotional activities at ITB Berlin were rated well, with over half of respondents (55%) rating these activities as a high priority, and a further 20% as a priority. UNWTO Silk Road promotional activities at WTM London were also rated highly, with 50% of respondents rating this activity as a high priority and a further 35% rating it as a priority. 25% of respondents rated UNWTO Silk Road promotional activities at FITUR Madrid as a high priority and a further 30% rated these activities as a priority.

As to UNWTO e-marketing and social media promotion, 57% of the respondents rated these activities a high priority, while a further 28% marked them as a priority. A similarly high approval rate was achieved for press and bloggers' trips, with 57% of the respondents stating that these activities were a high priority.

Results: Respondents rated the activity from 1-5, "1" being the highest priority and "5" the lowest priority

1. **UNWTO Silk Road promotional activities at FITUR Madrid** (eg. Gymkhana consumer treasure hunt campaign)
Results: High priority: 25% Priority: 30% Neutral: 15% Low priority: 20% Not a priority: 10%
2. **UNWTO Silk Road promotional activities at ITB Berlin** (eg tour operators' forum, pavilion branding, ITB Cinema Silk Road Hour)
Results: High priority: 55% Priority: 20% Neutral: 10% Low priority: 15% Not a priority: 0%
3. **UNWTO Silk Road promotional activities at WTM London** (Bloggers' challenge and Social Media events)
Results: High priority: 52% Priority: 33% Neutral: 10% Low priority: 5% No priority: 0%
4. **General promotion of Silk Road via UNWTO social media accounts** – eg. twitter, facebook, vimeo, linkedin, flickr
Results: High priority: 57% Priority: 28% Neutral: 5% Low priority: 5% No priority: 5%
5. **Press trips/bloggers' trips organized by UNWTO to promote the Silk Road**
Results: High priority: 57% Priority: 14% Neutral: 24% Low priority: 0% No priority: 5%

2. How do Member States prioritise the proposals set by the UNWTO Silk Road Task Force proposals for 2014/2015?

After submitting their feedback on current UNWTO activities, Member States were requested to prioritise proposals made at the Silk Road Task Force Meeting in Baku, Azerbaijan (April 2013), regarding possible initiatives to be implemented during the biennial 2014-2015.

As the results show, the development of a UNWTO Silk Road Marketing and Industry Portal and a Silk Road destination website were the top two priorities of the respondents. The establishment of an 'International Day of the Silk Road' and the development of a 'Guide Book on the Silk Road' were not considered primordial by Member States.

Results: Respondents rated the proposals in order from 1-4, “1” being the top priority and “4” the lowest priority.

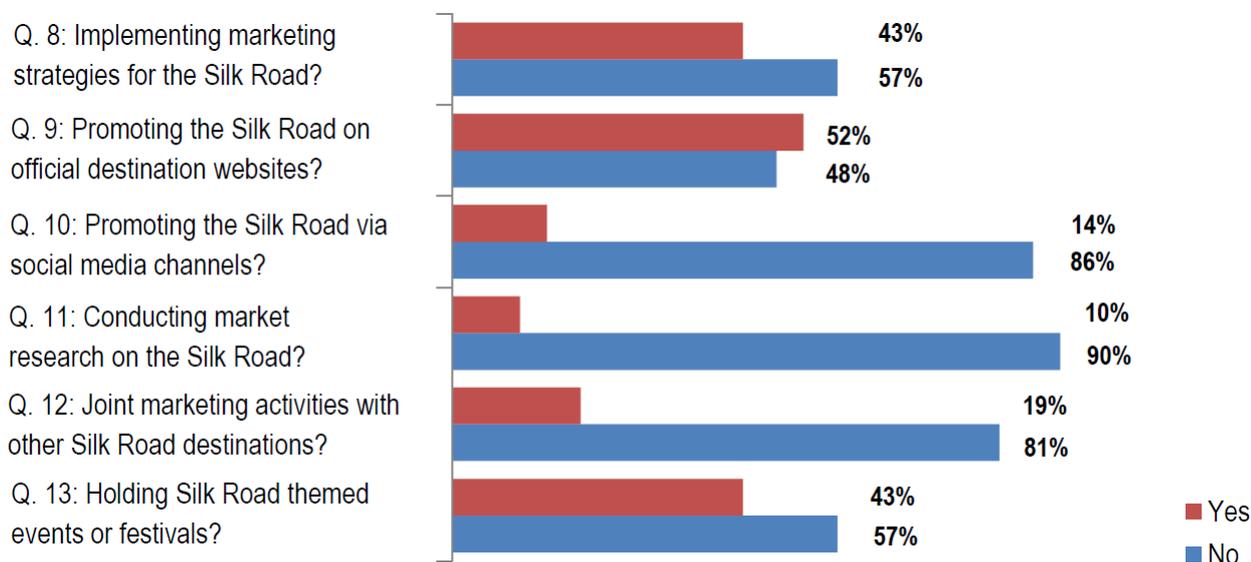
- **Priority 1: Development of a UNWTO Silk Road Marketing and Industry Portal** as a shared source of reference and resources to help destinations promote the Silk Road
Results: Rated the top priority by 40% of respondents
- **Priority 2: Development of a Silk Road destination website** providing general travel information for consumers
Results: Rated the top priority by 35% of respondents
- **Priority 3: Establishment of ‘International Day of the Silk Road’** to celebrate Silk Road tourism on an annual basis
Results: Rated the top priority by 20% of respondents
- **Priority 4: Guide Book on the Silk Road**
Results: Rated the top priority by 5% of respondents

What is the current level of Member States’ marketing activity for the Silk Road?

Member States were asked to indicate if they were currently implementing or participating in any specific Silk Road marketing and promotional activities at the destination level, and the results obtained produced mixed results:

The results showed that around half of the Member States were promoting the Silk Road on official destination websites (52%) and implementing Silk Road marketing strategies (43%), such as holding Silk Road themed events and festivals (Question 13). A stronger effort could be done to promote the Silk Road via social media channels, and additional efforts could be made to collaborate closer on joint marketing initiatives (Question 12). The results also showed that the Silk Road brand might require additional tools and support to differentiate itself from its competitors and to increase its attractiveness among potential travellers and consumers. An extensive marketing study, as assessed in Question 11, could help all involved actors target potential groups through specific channels and so raise the effectiveness of marketing and awareness campaigns.

Results: Respondents were asked to indicate if they were currently implementing or participating in Silk Road activities outlined below. It was further mentioned that the results could be used to showcase best-practices in the field of marketing and promotion.



Recommendations

Based on the results and input received, following recommendations have been elaborated which could help increase the visibility and attractiveness of the Silk Road brand:

- Member States could use part of their individual exhibition space to promote the Silk Road brand by distributing relevant material and Silk Road consumer information. An alternative option could be to establish a common Silk Road exhibition space, with material from all participating Members, at the main international tourism and trade fairs
- A number of countries mentioned that Silk Road themed festivals were already taking place in their destinations, such as the Silk Road festival in Gilgit-Baltistan (Pakistan), the Silk Road Sport Festival in Iran, and international

conferences with a focus on the Silk Road (6th International Silk Road Meeting in Gansu, China, and the First International Culture Forum in St. Petersburg, Russia. Also, Croatia and San Marino submitted the following:

- The tourist board of Korčula, a destination with important Silk Road heritage, offered its location for a future Silk Road meeting
- San Marino proposed to host a Silk Road music festival featuring and showcasing the specific heritage of Silk Road countries
- Research the possibility of developing a Silk Road Destination Website or a Silk Road Industry and Marketing Portal as a supportive information site for Silk Road related news, offers and events which could function as a shared information and promotion platform

In addition, Member States were asked in question 7 if they had any other individual marketing proposals that they would like to see discussed at upcoming Silk Road meetings. Please find below the activities proposed by the respondents:

- Annual Silk Road tourism fairs
- Annual Silk Road Travel Exchange – *Travex*
- Rotating Silk Road Festival and/or Silk Road Expo Tourism Fair
- Development of Silk Road packages supported by marketing campaigns
- Support the development of specific Silk Road trails

Key Area II: Capacity Building and Destination Management

The Silk Road's rich cultural heritage and the distribution of interrelated tourism sites make it ideal for cross-border initiatives and regional investment opportunities.

Nonetheless the following challenges exist:

- Inconsistency of standards and quality across the Silk Road in heritage management, hospitality, language skills, etc
- Inconsistent interpretation and management across the Silk Road
- Community engagement in tourism has not reached full potential
- Lack of tourist information services across the route
- Poor heritage management in some areas means some intangible and tangible heritage are under threat

1. How do Member States currently rate UNWTO's capacity building / destination management activity on the Silk Road?

Since 2010, UNWTO has been implementing capacity building programmes focussed on destination management and heritage conservation in various Silk Road locations with the central aim of increasing sustainable growth through tourism route development.

According to the results, the annual UNWTO Silk Road Task Force Meeting was identified as an important forum to discuss issues relating to capacity building and destination management projects, with 80% of the respondents ranking the event either as a high priority or a priority. These results are aligned with the main functions of the Silk Road Task Force, which are to discuss and endorse the short and long-term strategies outlined in the Silk Road Action Plan, and to share and exchange know-how and best-practices. The UNWTO Silk Road Ministers' Meeting at ITB Berlin, the annual gathering of tourism ministers where policy-measures and best practices are discussed, received a similarly high level of support with 55% of the respondents rating the meeting as a high priority and 20% as a priority. Around half of the respondents rated the remaining meetings and events organised by UNWTO as priorities, as the results show below:

Results: Respondents rated the activity from 1-5, "1" being the highest priority and "5" the lowest priority

14 Annual UNWTO Silk Road Ministers' Meeting (at ITB Berlin)

Results: High priority: 55% Priority: 20% Neutral: 15% Low Priority: 10% No priority: 0%

15 Annual UNWTO Silk Road Task Force Meeting

Results: High priority: 60% Priority: 20% Neutral: 20% Low priority: 0% No priority: 0%

16 Biennial UNWTO International Meeting on the Silk Road (6th edition most recently held in 2013 in Dunhuang)

Results: High priority: 33% Priority: 19% Neutral: 38% Low Priority: 10% No priority: 0%

17 Thematic conferences and workshops on the Silk Road (such as heritage management, food tourism investment, cities, etc)

Results: High priority: 24% Priority: 28% Neutral: 24% Low priority: 24% No priority: 0%

18 Silk Road academic research programme in collaboration with international universities (new initiative aimed at implementing academic research projects for the Silk Road)

Results: High priority: 35% Priority: 5% Neutral: 25% Low priority: 15% No priority: 20%

2. How do Member States prioritise the proposals set by the UNWTO Silk Road Task Force for 2014/2015?

The Silk Road has the potential to become one of the world's top touristic attractions. The rich cultural heritage and the distribution of interrelated tourism sites across the region make it ideal for cross-border initiatives and regional investment opportunities. The development of specific Silk Road products and itineraries requires, however, an agreement on common standards and guidelines. The survey results showed that both the 'Development of a guides training handbook' and the 'Development of Silk Road Capacity Building Standards and Guidelines' were positively received by the respondents. The importance of engaging local communities, tourism stakeholders and visitors to safeguard common Silk Road heritage was also highly rated, with the 'Promotion of a Silk Road Responsible Travel Code' being rated as a high priority by 48% of the Members.

Results: Respondents rated the activity from 1-5, "1" being the highest priority and "5" the lowest priority. Proposals below were suggested at the 2013 UNWTO Silk Road Task Force Meeting

19 Development of a guides' training handbook for the Silk Road aimed to enhance interpretation and improve the quality of guides

Results: High priority: 38% Priority: 38% Neutral: 10% Low priority: 14% No priority: 0%

20 Development of Silk Road Capacity Building Standards and Guidelines for tourism stakeholders and local communities, which would include: standard training programs for tourist guides and interpreters, the promotion of locally distinctive products (crafts, food, culture, etc.), and the development of excursions and products that underline the added value of the Silk Road

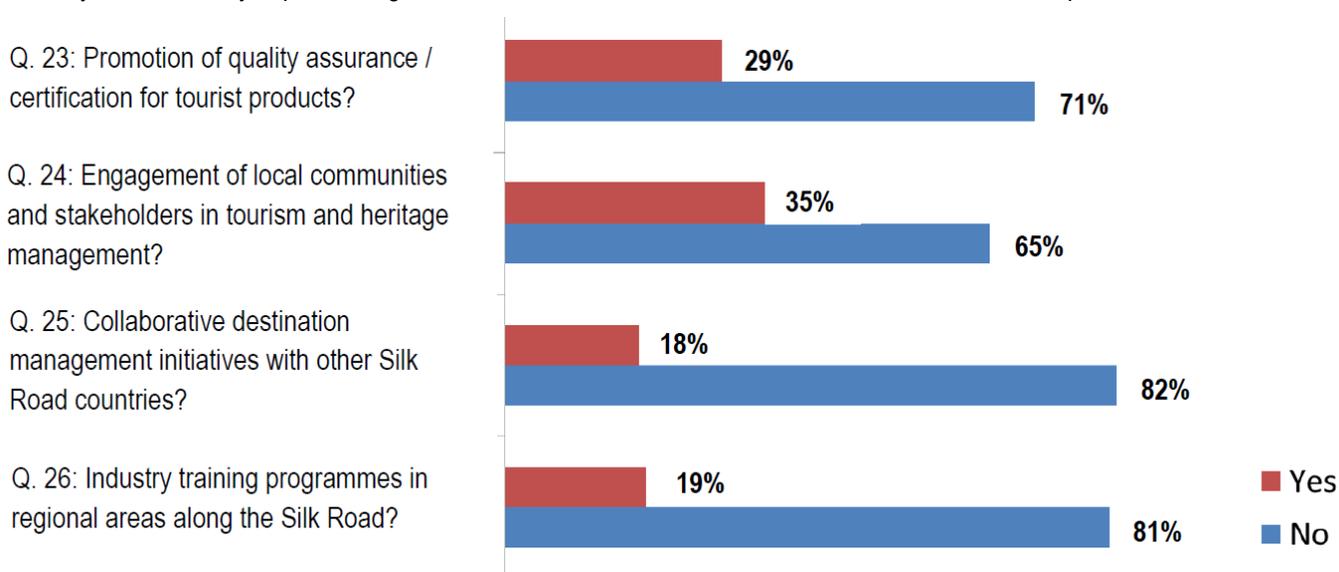
Results: High priority: 52% Priority: 29% Neutral: 14% Low priority: 5% No priority: 0%

21 Promotion of a Silk Road Responsible Travel Code uniting local communities, tourism stakeholders and visitors to safeguard common Silk Road heritage

Results: High priority: 48% Priority: 24% Neutral: 24% Low priority: 4% No priority: 0%

3. Review of your NTA's current activity on the Silk Road

Finally, Member States were asked to indicate if they were currently implementing or participating in activities that could help implement and market Silk Road products more efficiently. According to the input received, 35% of the Members currently engage local communities and tourism stakeholders in initiatives destined to preserve the cultural and natural heritage of destinations. Additionally, 29% of the Silk Road Members stated that they were promoting quality assurance certifications for tourist products as an effective instrument to increase visitation and consumer satisfaction. As to collaborative destination management initiatives and industry training programmes along the Silk Road, only approximately 20% of the Members stated that they were currently implementing related activities, an area that could be addressed and developed in the future.



Recommendations

The Silk Road boasts a plethora of cultural and natural attractions across its regions, yet supporting infrastructure is often modest and management systems limited. A central factor in future destination management projects will surely be to ensure inclusiveness. Engaging all relevant stakeholders – public, private and local communities – will not only strengthen the partners involved and the collective vision, but also foster a common sense of ownership that is vital to delivery. As has been mentioned in previous Silk Road documents, destinations could profit from the knowledge of tour operators to identify problem areas hindering the development of certain areas. Also, to ensure a bottom-up approach, authorities could further empower local communities by providing and/or contributing to relevant training and capacity building programmes. Improved skills and services in the tourism sector are required to ensure visitor return which, along with investment in sustainable infrastructure, will be necessary in guaranteeing the long-term attractiveness and appeal of the routes.

Furthermore, Member States were asked, in question 22, if they had any additional ideas for capacity building/ destination management activities that they would like to see implemented by UNWTO. Below please find the suggested actions submitted:

- Silk Road Product Development Workshops
- Capacity Building training for tourism authorities and stakeholders
- Support the creation of a network of tourism education and training institutions throughout the Silk Road

Key Area III: Travel Facilitation

Multiple barriers continue to impede the smooth cross-border movement making it difficult for tourists to undertake multi-destination tourism along the Silk Road. Challenges include:

- Complicated visa and border crossing procedures
- Lack of comprehensive and up-to-date information on visas and border crossing procedures
- Lack of air connectivity between Silk Road cities

Review on how Member States prioritise UNWTO's Travel Facilitation activity on the Silk Road

The Silk Road is a tourism asset collectively shared by the countries along its route. Collaboration and coordination are essential from the outset if the potential value of this asset is to be realized. Member States were asked below to rank their level of interest in activities aimed at advancing in the key area of travel facilitation.

According to the results, there is a very high inclination towards collaboration, be this either through specialized studies, strategic meetings or awareness raising events and conferences. Travel facilitation studies, such as the recently published 'Tourism Visa Openness Report for the Silk Road Countries, received a high level of support, with 57% of the Members ranking such an activity as a top priority, and a further 29% as a priority. The exact same positive approval rate was registered for strategic meetings on travel facilitation and awareness raising conferences and events, with 86% of the Members considering such activities either a high priority or a priority.

Results: Respondents rated the activity from 1-5, "1" being the highest priority and "5" the lowest priority. Questions assess the interest in on-going or proposed UNWTO Silk Road activities.

27 UNWTO research on the impact of visa facilitation and openness of Silk Road destinations

Results: High priority: 57% Priority: 29% Neutral: 9% Low priority: 5% No priority: 0%

28 Strategic meetings organized for high level officials to address issues relating to travel facilitation

Results: High priority: 67% Priority: 19% Neutral: 9% Low priority: 0% No priority: 5%

29 Awareness raising on travel facilitation issues at major conferences and events (eg T20, Ministers' Meetings)

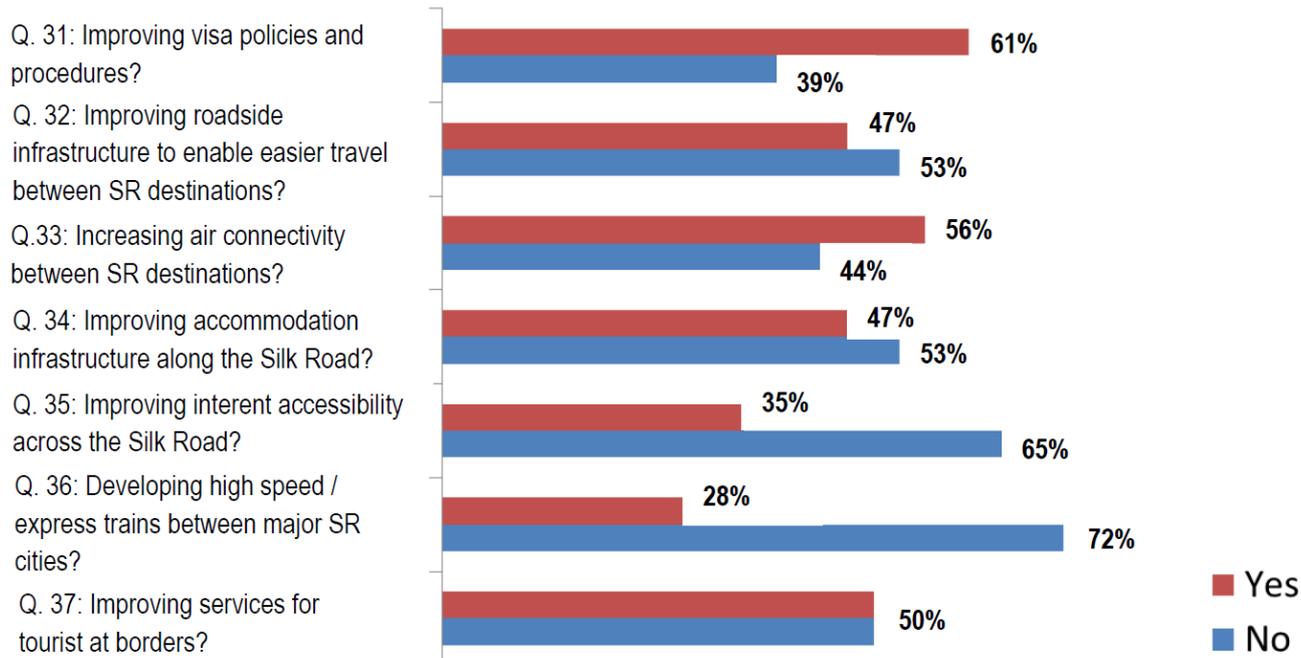
Results: High priority: 57% Priority: 29% Neutral: 14% Low priority: 0% No priority: 0%

Review of your NTA's current activity on the Silk Road

As a complex network of routes spanning over three continents, the success of Silk Road tourism relies heavily upon the ability of tourists to cross borders. By reviewing NTA's current activity on the Silk Road this study could help find innovative approaches to cross-border management, supporting herewith the many economic and cultural benefits arising from improving procedures. As the results show, a majority of Silk Road Member States are working towards improving visa policies and procedures, with positive developments being registered in the improvement of roadside infrastructure, air connectivity between Silk Road destinations and in services aimed at tourists (accommodation infrastructure and border services). While results measuring the improvement of internet accessibility across the Silk Road and the development of high speed/ express train connections between major Silk Road cities were not as common, several best-practice examples were submitted by Member States that indicate a strong tendency towards improvement.

(Results on next page)

Results: Member States were requested to indicate which of the following activities they were currently implementing or participating in.



Recommendations

The UNWTO Silk Road Programme will continue to publish case studies and best practices in travel facilitation and continue talks with Heads of State and Ambassadors on the importance of travel facilitation in stimulating demand in tourism and contributing to economic growth and job creation. Member States are encouraged to share details on their policy improvements to ensure that all Members can leverage from the initiatives and best-practices carried out within the Programme. As was already mentioned, a ‘Tourism Visa Openness Report for the Silk Road Countries’ was published in early 2014, in both English and Russian, with interesting input on the economic benefits of closer cooperation and its positive effects in areas ranging from marketing, product development and tourism route development to cross border initiatives and, particularly, travel facilitation.

Furthermore, Member States were asked, in question 30, if they had any further ideas or proposals on the key issue of travel facilitation that they would like to see addressed by UNWTO:

- Closer collaboration between Members on borders and visa
- Studies measuring the impact of visa regimes and travel facilitation issues

Key Area IV: Resource mobilization

Finally, as many of the proposed activities along the Silk Road outlined above would require additional funding, Member States were asked if they would be willing to provide supplementary financial support, with 32% of the Members responding affirmatively. Similarly, 38% responded that they were currently implementing tourism projects at least partly funded by an external agency or donor. As to the question of whether Member States could suggest third party funding agencies which could prove helpful in implementing future initiatives, the main organizations mentioned were:

- Asian Development Bank
- China Development Bank
- Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
- European Union
- USAID
- World Bank