



Grant Agreement Enhancing the Understanding of European Tourism

Research on the Potential of the Western Silk Road Highlights

June 2017

WP3. Western Silk Road Tourism Development



Co-funded by the COSME programme
of the European Union

The Western Silk Road Brand Study has been prepared by UNWTO's Silk Road Programme, in the framework of the cooperation between UNWTO and the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) of the European Commission (EC) – Grant Agreement SI2.729496 – and has received funding from the European Union's COSME Programme (2014-2020).

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Executive Summary

This report contains the background and extracted highlights of the main research report, which focused on assessing the potential and transnational tourism appeal of the Western Silk Road. All supporting documentation and data produced by the stakeholder consultation process are annexed to this document.

What is the Western Silk Road Tourism Development Initiative

The research study is the first step of an innovative initiative created by the World Tourism Organisation (UNWTO) in cooperation with the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) of the European Commission (EC). It is being implemented by the UNWTO Silk Road Programme.

The Western Silk Road Tourism Development initiative aims to strengthen and diversify the tourism offer of the countries located along the Western link of the Silk Road through an innovative and strategic approach to transnational tourism.

Apart from two specific workshops, the first of which took place in Greece in April 2017 and the second is expected to take place in Bulgaria at the end of June 2017, the Western Silk Road will be further supported by a Western Silk Road Working Group aimed at engaging Western Silk Road tourism stakeholders eager to develop a transnational tourism initiative based on shared Western Silk Road heritage. By bringing together relevant tourism stakeholders, both from the public and private sector, it is planned that the implementation of a Western Silk Road brand will support economic development, especially for the SME sector, and increase length of visitor stay, regional dispersal and greater visitor spend across the region.

The Western Silk Road vs The Classic Silk Road – Ancient and Modern

The Silk Road is often recognised as the greatest and oldest trading development route in the world. It is certainly the most known historical route. It is seen as the first route that linked the great civilisations of the East and the West. The Silk Road did not only bring silk and its associated technologies from the East but was a conduit of people, goods, ideas, beliefs and inventions, many of which had a greater impact on Western civilization than silk. These included such major technologies as paper and gun powder, both of which shaped the world as we know it today. The route also carried food and agricultural products that have impacted on global tastes, including apples from the region that is nowadays known as Kazakhstan. Dumplings are another prime example of how food travelled the Silk Road and were integrated into the diet of many countries. In some countries dumplings even became an indispensable part of the local (food) tradition¹.

The exchange of cultural identity, arts and religious imagery along the route also greatly influenced the European creative sector. European artists and artisans were influenced by the exotic art coming from the East. The jewellery and pottery sectors developed using innovative and previously unknown techniques, designs, minerals and colours from China and Central Asia.

Knowledge of the Silk Road and its tourism assets have traditionally focused on an area ranging from China to Istanbul in Turkey. In the study and in this document the term 'Classic Silk Road' is used to describe this traditional vision of the historic routes, which has been reinforced over time, mainly due to academic research, and the portrayal of the Silk Road in

¹ UNWTO Silk Road Programme – Flavours of the Silk Road Conference, Baku, 2014

historical films and travel media. Even modern tourism marketing campaigns tend to build exclusively on classical Silk Road elements. To differentiate from this traditional approach, the term 'Western Silk Road', which focuses on the impact the Silk Road had on European destinations, is used.

The reality is that the Silk Road, as a trading route, was not simply a predefined highway but had innumerable ramifications. The movement of goods from the East took many directions across Central Asia and ended in diverse locations spread across Europe – from the Russian North and Scandinavia, all the way across the Mediterranean to Spain, and to many destinations in-between. The trade in silk, in addition to other goods and skills, was carried out by many civilisations and nations, and impacted on European heritage in a huge way. Similar to the great Silk Road trading centres in the East, such as Kashgar, Samarkand and Almaty, many European trading centres were heavily influenced by, if not dependant on, the flow of goods coming from the East. As a result of this influence, the Western link of the Silk Road is home to a rich heritage that, surprisingly, has yet to be fully developed for tourism. In geographical terms, the Western Silk Road potentially covers an area comprised of EU Member States, EU Enlargement countries and Eastern neighbourhood countries stretching from the Atlantic in the West to the Caspian Sea in the East.

In terms of modern trade, the Silk Road is receiving renewed international attention. The increasing strength of the Chinese economy and the desire to build an economic bridge between the East and the West has resulted in the development of one of the biggest international development and cooperation projects of modern times. The Government of China launched the "One Belt, One Road" (OBOR) initiative in 2013² with the stated aim to connect major Eurasian economies through infrastructure, trade and investment. The initiative was later specified to contain two international trade connections: the land-based "New Silk Road Economic Belt" and the ocean going "21st Century Maritime Silk Road".

The "Belt" is a network of overland road and rail routes, oil and natural gas pipelines, and other infrastructure projects, that will stretch from Xi'an in Central China through Central Asia to ultimately reach destinations as far as Moscow, Rotterdam and Venice.

As the modern day Silk Road develops, the tourism potential along its whole length will also increase and create opportunities to reach new audiences and open up previously less known destinations. Generally speaking, this provides an exciting incentive for the development of the Western Silk Road as a tourism brand in its own right.

Western Silk Road Study Methodology

UNWTO prepared this research study in order to achieve a greater understanding of the existing Silk Road potential in Europe; that is, to firstly understand what is available throughout Europe in terms of Silk Road heritage and, secondly, to propose a new tourism development plan for the revitalisation of said heritage.

In order to collect the required data and reach the highest level of participation, a research method was created that could take into account the different policy levels, from international to local, involved. The data collection methods were both quantitative and qualitative in nature, including: an online survey; semi-structured interviews; SWOT analyses on a national level conducted by universities; and focus group reports. The participants were carefully selected regarding their involvement in or attachment to the Silk Road as a tourism development initiative.

² <http://blogs.worldbank.org/eastasiapacific/china-one-belt-one-road-initiative-what-we-know-thus-far>

The **online survey** aimed to collect mainly quantitative data, although some open-ended questions were also introduced as a means to collect more extensive or personalised responses. It was hosted on the SurveyMonkey platform and circulated to strategically selected participants. A total of 71 responses were received.

The members of the UNWTO Silk Road Task Force group, the responsible officers in charge of liaising between individual Silk Road Member States and the UNWTO Silk Road Programme, functioned as the initial contact points. After completing the survey, they were then asked to distribute the online questionnaire to relevant stakeholders within their countries (currently 33 Member States participate in the UNWTO Silk Road Programme, 6 of which are also EU Member States). The online survey was also supported by semi-structured interviews conducted during the World Travel Market in London in 2016. This was a specific request submitted by the involved participants who preferred a personalised interview.

In support of the questionnaire, additional research tools, primarily aimed at achieving a more profound understanding of available Western Silk Road heritage, were developed. These additional tools were also designed to support the development of a Western Silk Road SWOT analysis (WSR-SWOT).

Universities of participating countries were contacted to develop *Strengths, Weaknesses, Opportunities and Threats/ SWOT Analysis* focused on their country's Western Silk Road tourism potential. These individual studies were subsequently studied and integrated into the WSR-SWOT mentioned above.

In addition, seven **Focus Groups** were organised. The main aim of these Focus Groups was to achieve qualitative data of greater depth, especially in terms of creative tourism approaches, relevant case studies/ best-practice examples and possible insights regarding cooperation among Silk Road tourism stakeholders. The Focus Groups were organised at an interregional, national, regional and organisational level.

Online Survey Results – some highlights

Note: The main report contains the full results of the survey. For the purpose of the executive summary only some selected highlights are presented.

Participation:

Due to the specific nature of the questionnaire and the level of expertise requested, the online questionnaire was promoted in a highly targeted way. Silk Road Task Force representatives, official country representatives who liaise between the UNWTO Silk Road Programme and the Member States participating in the programme, were the first and main stakeholders mobilised. The Task Force representatives were then asked to distribute the online questionnaire to relevant stakeholders within their individual countries (museums, National Tourism Organizations, academia, tourism professionals, etc.). Silk Road expertise and/or relation to the development of the Silk Road as a tourism initiative were necessary conditions that had to be fulfilled.

In total, 71 stakeholders from 21 countries shared their insights and ideas. The highest feedback was received from Croatia, closely followed by Greece, Spain and Albania. France, Bulgaria and, to a lesser degree, Italy and Turkey, were among those countries who quantitatively contributed the most.

As to the areas of activity, the majority of the participants work on an international level, while a quarter of the sample worked on a national level. Regional and local levels, with 20% and 19% of the sample, were almost equally represented.

Perception:

When questioned about Silk Road awareness, the strongest responses focussed on Culture, Trade and History.

When asked about the most well-known Silk Road destinations, Turkey, especially Istanbul, and China received the most mentions.

Motivations:

As to the motivations for travelling the Silk Road, participants were asked to rank following key assets:

- Silk Road Culture
- Silk Road Monuments
- Natural Environment and Scenery
- The Gastronomy of Silk Road destinations
- Interaction with local Silk Road communities

The participants were asked to indicate how influential they considered each asset proposed by employing a Likert scale with the following rating options available: *Not at all, Slightly, Influential, Very, and Extremely.*

According to the sample received, Silk Road Culture, Silk Road Monuments, Natural Environment and Scenery, and the Gastronomy of Silk Road Destinations received very high rankings, between the categories of Very and Extremely influential.

Interaction with local communities along the Silk Road was considered an influential factor, reaching almost the Very Influential category.

The existing use of the Silk Road Brand:

This question assessed whether the participants were aware of the Silk Road being employed in the tourism marketing activities of their respective agency or organization.

Slightly over half of the respondents, 50.7%, recorded that their agency or tourism organization does not exploit the potential of the Silk Road brand.

Only a third of the respondents, 33.8% of the sample, replied that they were aware of the Silk Road being actively used as a tourism brand within their individual destinations.

Out of the 50% of respondents who declared that they are not aware of the use of the Silk Road in their marketing activities, only 2.8% stated that they did not want to be associated with the Silk Road. Only a considerably small percentage (13.9%) declared that they consider the Silk Road irrelevant to their marketing activities. More importantly, over 41% declared that the Silk Road is not actively used due to the absence of specific knowledge or promotional tools. Furthermore, over a third of the respondents underscored that they are now considering or would consider using the Silk Road in their marketing activities – a great potential to build upon.

When those who were using the Silk Road in marketing activities were asked if it had brought tangible benefits to their destination, almost 4 out of 5 (79.2%) replied positively.

As to specific tangible benefits, expanding the network of partners ranked highest. This was closely followed by the following key assets that were to be ranked according to the categories of *Not at all, A little, Somewhat, Very and Extremely*:

- Improving the quality of tourism products
- Strengthening the organization's brand
- Expanding the variety of tourism product
- Being able to reach new tourism markets

The increase of Earnings ranked lowest, with the rest of the benefits ranking between the categories *Somewhat* and *Very*.

The Western Silk Road:

A section of the questionnaire focused on outlining the differences in appreciation between the Western Silk Road and the Classic Silk Road. Provided with a list of attributes, the respondents were asked to rate potential differences between the two. According to the mean or average value, the respondents agreed that the Western Silk Road differs from the Classic Silk Road only slightly in Target Markets (3.5) and Historical Heritage (3.69), and to a larger extent in Type of Attractions (3.75), Arts and Crafts, and Natural Environment and Scenery (3.77).

Lastly and when compared with the Classic Silk Road, participants agreed that the Western Silk Road differed widely in terms of Gastronomical Experiences (3.9) and Tourism Infrastructure (4.06).

When asked about the usefulness of creating a Western Silk Road brand, respondents indicated, with a total result of 7.48 out of 10, that they would consider such an initiative to be highly useful (as background information, they were provided with a linear scale ranging from "0, Not at all useful" to "10, Extremely useful", with "5" being "Moderately useful").

When participants were asked if they would find the creation of a Western Silk Road brand tool-kit useful, the vast majority (97.2%) responded positively.

Additionally, and as a means to strengthen the Western Silk Road brand identity, survey participants were asked to indicate how useful they would consider establishing a Western Silk Road European Cultural Route. The mean value reached 7.48 out of 10, indicating that participants would find the inclusion of the Western Silk Road as a European Cultural Route *considerably useful*. Provided with a follow-up question, results determined that 79% of the respondents would be willing to link their destination to a potential Western Silk Road Cultural Route.

Untold Stories – the audit

The study was also a mechanism for auditing potential Western Silk Road destinations. Apart from a comprehensive list of relevant heritage included in the annexes, the overall report contains more detailed background information on 8 focal destinations: Armenia, Bulgaria, Greece, Italy, Russia, Spain and the Vikings Silk trading route.

Generally speaking, the potential of the Western Silk Road lies in its undiscovered nature: as the examples of Spain, Italy or Greece brought to light, European destinations harbour incredible Silk Road heritage, ranging from historical buildings and monuments to factories, museums and local businesses closely linked or related to the Silk Road. For a long time undiscovered or not actively promoted as Silk Road heritage, the conducted research has

mobilised support and awareness in this area. The untold stories offer valuable information on what is available and where, a first and necessary step in building a Western Silk Road tourism route of transnational appeal. While the research primarily aims to gather available information and to assess what is currently being done with said heritage, the next step, the development of a Western Silk Road Handbook, will be able to propose a more specific roadmap or development outline.

As the main research indicates, regions such as Valencia are already quite advanced in terms of mapping available Silk Road heritage and in proposing specific initiatives, for example, a regional Silk Road brand, Silk Road heritage walking tours and the renovation and re-opening of formally decayed buildings of historical importance. Similar initiatives are also currently being developed in Italy and Greece. The other European destinations assessed, while rich in Silk Road heritage, still need to develop a more structured approach in terms of promoting their connections to the Silk Road, both locally and internationally, and in developing tourist friendly activities.

While the different stages of development could be seen as a handicap for developing the Western Silk Road, such plurality also offers specific advantages: best-practice examples will be able to be replicated across Europe, interaction among destinations and stakeholders eager to develop the Western Silk Road on a national, regional or local level will be increased, a sense of common awareness among integrated stakeholders will be fomented, and finally, through regular meetings, business opportunities and/or transnational partnerships will be able to evolve.

It is worth noting that these untold stories are unique in their approach and results. Very little information was previously available on the Western Silk Road as a whole. By mobilising the support of destinations (national, regional and local level), European universities and targeted tourism stakeholders, an initial but clear picture of available assets has been created. Now, with this information available, project partners will be able to advance in a more structured and unified manner.

The Western Silk Road SWOT

In addition to the online survey results, important source material was also received from a global or generic Western Silk Road SWOT Analysis focused on the strengths, weaknesses, opportunities and threats surrounding the creation of a Western Silk Road tourism brand.

In general, responses highlighting strengths and opportunities featured more prominently than feedback relating to weaknesses and threats. Overall, this supports the results from the online survey in favour of creating a tourism brand focused on the Western Silk Road.

Strengths and Opportunities

At large but also within their individual destinations, most respondents felt that there is a strong wealth of relevant culture and heritage available that could justify the development of a Western Silk Road brand. Summarising, the Western Silk Road is seen as:

- A way of rediscovering an alternative history of existing western tourism destinations
- An asset capable of creating new and unique visitor experiences
- A project capable of improving the status and diversifying the tourism offer of participating countries, which, concomitantly, is seen as a great advantage in attracting global travellers, primarily from China

The East-West connection is seen as a strong opportunity with regard to the high desire amongst destinations to capture the major Chinese cultural tourism market. To a lesser

extent, and as a side-note, such a strategy could also help to engage the growing Halal tourism market.

By linking East and West, the Western Silk Road is seen as a strong tool to raise awareness on existing cultural connections. Such an awareness raising process could potentially create favourable conditions, as is briefly outlined below.

Enhance the intangible heritage sector, foremost the arts and crafts segments, and the gastronomy or service sector

The revised focus on silk related products could provide a real driver to revitalise decaying skills and traditions. Reviving silk related cultural heritage could be both a means of strengthening the creative industries sector and protecting lesser valued built heritage in the form of reconverting industrial heritage infrastructure.

Events and festivals were also seen as a strong attraction for Silk Road tourists, and encouraging local events/festivities based on silk traditions is seen as an excellent development opportunity.

With regard to the creative industries sector, the Western Silk Road could potentially promote an “*Ancient meets Modern*” and/or an “*East meets West*” themed approach. Whereas Classic Silk Road destinations often focus on ‘traditional’ Silk Road related products, European destinations could focus on how the Silk Road influenced modern skills, costumes and art forms such as architecture, jewellery or modern painting.

A similar interpretation or approach could be proposed for the gastronomy sector. Building on how Western Silk Road countries have incorporated ‘Eastern’ products and cooking traditions into their own culture would provide opportunities for the development of gastronomically themed products, food journeys or events.

A strong marketing and competitive tool for lesser known or developed tourism destinations

A Western Silk Road tourism brand could popularise significant but unknown destinations, and available cultural and historical sites. The new approach could also stimulate the diversification of tourism types within relevant markets (religious, business, ecological, rural, sport and extreme).

Several participants and focus groups saw a Western Silk Road tourism initiative as a valuable tool to disperse tourists away from more well-known destinations. There is an opportunity to develop a gateway approach promoting the dispersal of tourists to rural or less known destinations.

Connected to the above point, there was also a strong perception among respondents of better infrastructure and higher quality standards being available within Western Silk Road destinations. Generally speaking, the Western Silk Road has a greater strength in accessibility compared to the Classic Silk Road, both in terms of transport connections and other travel facilitation aspects, especially for Western travellers (visas, length of stay, etc.). This aspect or competitive advantage could also be used as an asset by destinations competing on a regional or global level.

Promotion of best-practice examples and lessons learnt

As the Western Silk Road Tourism Development Initiative moves forward in delivering one of its key outputs, a transnational working group, it is suggested that this collaboration between National Tourism Organisations (NTOs) be used to facilitate joint promotion of Western Silk Road destinations at trade fairs. Also, a specific rotating themed Western Silk Road fair or a

Western Silk Road fashion week event could also be studied. These are all achievable ideas – of course, if input and financial contributions are shared.

The study has also shown that participants feel a need for mechanisms that allow for easy exchange of knowledge and lessons learnt. Promoting best practice examples on destination management was seen as a key opportunity. A mechanism for Knowledge Exchange should be created and, potentially, regular annual events, such as a Western Silk Road Conference, held.

Some participants linked this idea together with the creation of a Western Silk Road Cultural Route: the Western Silk Road Working Group could be used as the vehicle to manage/coordinate this process. One participant highlighted the model of the Danube Competence Centre as relevant to creating an independent shared secretariat structure with human resources to deliver collaborative activities.

Threats and Weaknesses

The greatest threats and weaknesses centred on two key areas: the issue of creating a new brand alongside already existing destination brands, and the challenges of co-ordinating stakeholders across many different countries. As the main research points out, both of these concerns could be addressed by choosing the correct approach to brand positioning and by agreeing upon an appropriate management structure.

The greatest threat perceived regarded issues relating to cooperation, coordination and transnational development of a tourism product based upon shared identity. The issue of having two complementary Silk Road brands, which could potentially generate confusion amongst stakeholders, were repeated quite strongly. This potential weakness was also mentioned in connection with a lack of economic/financial resources to promote the brand at multiple levels, both national and international.

Lesser concerns focused on the political instability and the current threats of terrorism, either real or perceived. While security related issues have to be taken seriously, it is worth noting that no potential components of the Western Silk Road are located in close proximity to a major conflict zone.

Creating a Western Silk Road Brand – the Way Forward

In providing recommendations for the creation of a Western Silk Road tourism brand, the data collected by the study was utilised in combination with internal expertise and UNWTO guidelines contained in the Handbook on Tourism Destination Branding. The Brand Pyramid was used as a key tool in developing an initial brand concept in a structured manner. This initial concept should be further refined in conjunction with the Western Silk Road Working Group in order to ensure full ownership among potential users.

Following components were considered as part of the Western Silk Road Brand Pyramid:

Rational Attributes:

These are the main tourism assets of the Western Silk Road; that is, what visitors want to see and do: The following key points can be considered rational attributes:

- Cultural heritage attractions
- Gastronomy
- Textile Heritage, Tradition and Crafts, and Arts
- East meets West
- Tales of Great Explorers

Emotional Benefits:

After assessing the rational attributes, the next step is exploring the ‘emotional take out’; that is, what emotional reactions a visitor feels:

- Amazement upon discovering new stories, destinations, and linkages
- Cultural awareness and valuing diversity

Brand Personality:

The brand personality focuses on what is unique about the Western Silk Road compared to other competing brands. Major components of the brand personality would be:

- A Modern and Creative Cultural Experience that links East and West,
- Concept of *Ancient meeting Modern*

Positioning Statement:

This point relates to competitive features that would allow the Western Silk Road brand to stand out:

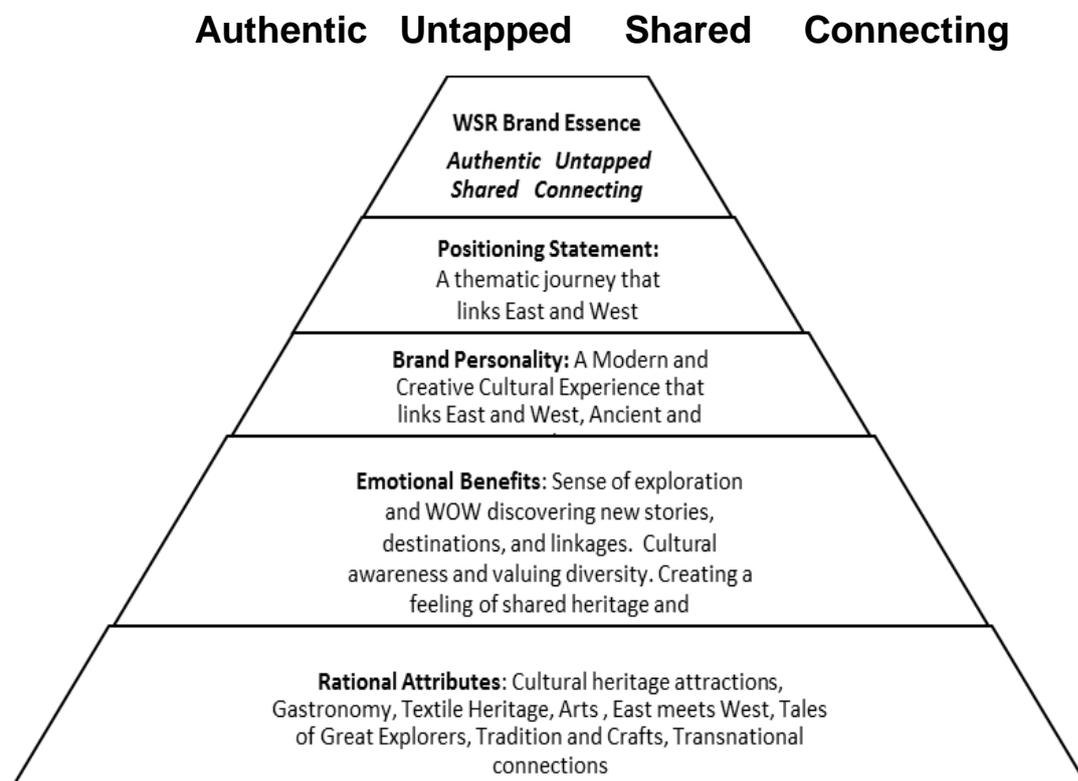
- A thematic journey that links East and West

Brand Essence:

The brand essence would be the 3 or 4 key values that make up the ‘DNA’ of the Western Silk Road. These values are captured in single word descriptors. The 4 values resulting from the work of this study are initially perceived as:

- Authentic
- Untapped
- Shared
- Connecting

The following is the graphic description of the brand pyramid:



The study then looked at the issue of positioning the proposed Western Silk Road brand against other existing destination brands, both local and national. Bearing in mind that existing tourism products normally have invested many years and money in developing their own identity, thought would need to be given to the positioning and role of a Western Silk Road thematic brand. This would need to be considered carefully in order to ensure synergies with already existing brand identities.

Consideration of other complimentary brands in the tourism sector brings a focus on quality certification schemes. Many of these certification schemes relate to sustainable tourism and other ethical tourism principles, which are intrinsic to the ethos of the Silk Road, along with policies promoted by UNWTO and the European Union (EU).

An approach that could integrate elements of quality certification into Western Silk Road brand would be an answer to many of the concerns and issues raised during the brand study. The study suggests the following potential criteria to be applied to the Western Silk Road brand:

Authenticity:

Guarantee that users of the brand would have a genuine link to the Silk Road.

Sustainability:

Guarantee that users of the brand adhere to a defined set of sustainable tourism standards.

Network:

Guarantee that users of the brand maintain an active connection within the Western Silk Road network.

Additional Sub Criteria:

Additional sub-criteria proposed could include product differentiation, the development of unique experiences, the promotion of intangible heritage, and gastronomy

The criteria would need to be created through a participative process amongst the members of the Western Silk Road Working Group. The criteria would also need to maintain a balance between brand strengths and achievability. Many proposed eco-certification schemes have failed due to unrealistic criteria or highly complicated administrative processes.

Western Silk Road Visual Identity

As to creating a Western Silk Road visual identity, it is proposed that this task should be undertaken by a graphic designer in conjunction with the Western Silk Road Working Group. In developing the visual identity package, variations would have to be created that could allow for a differentiation between product categories, such as Destination, Gastronomy, Cultural Attractions and Experiences. Building in this subtle differentiation would strengthen the brand by promoting the diversity of experience offered by the Western Silk Road.

The resulting visual identity package could then be promoted in a targeted manner to stakeholders and integrated into available destination/product marketing material. It could also be used for standalone Western Silk Road marketing initiatives. The key tool in

achieving this would be the production of a highly specific Western Silk Road Handbook focused on marketing and branding.

The need for a common and consistent communication strategy was a major highlight in both the Focus Group reports and the SWOT-Analyses. When asked, an overwhelming majority of participants, 97%, regarded the creation of a Western Silk Road Toolkit, including a logo, story guides, a branding handbook, a Facebook page and a Web Portal, useful.

The above mentioned handbook would ideally have to include a clear toolkit or set of guidelines orienting stakeholders on how to use the Western Silk Road brand in their marketing communications. These guidelines would ensure a consistent marketing usage of the brand.

Promoting the Brand

The final section of the study provides recommendations on steps that would need to be taken in order to promote a new Western Silk Road brand. These steps would take place once the brand and visual identity were defined. Whilst it is appreciated that resources and funding options are limited, several simple steps could be made in order to start building brand awareness. These would be:

NTOs should review their existing Silk Road presence, and then develop strategies for the incorporation of the new Western Silk Road identity. Simple first steps could be the creation of a page on their national promotion site and linking relevant sites to said page. This, in turn, could be linked to a proposed Western Silk Road Web Portal.

NTOs should integrate the Western Silk Road story into their media activities, especially in regard to the organisation of press and tour operator familiarisation trips. NTOs should also consider the potential of developing transnational promotional trips. These trips would be capable of creating linkages between partner Western Silk Road destinations, which would, furthermore, create story opportunities to be utilised by the media.

Creating a downward cascade of awareness-raising on the Western Silk Road amongst the private sector stakeholders would also be relatively easy, time efficient and low cost. Such a strategy could be delegated to relevant national industry associations.

UNWTO and the Working Group could support such initiatives by establishing mechanisms for wider public promotion.

Throughout the study, it was additionally recognized that technology and e-marketing is critical to promoting the Western Silk Road. Common good recommendations coming out from the study included:

- Creating a Western Silk Road Web Portal
- Using a unified hashtag and running photography contests that could be viewed both online and eventually as exhibitions touring Silk Road destinations,
- Developing a Western Silk Road App acting as a virtual guide, in addition to Silk Road apps for specific locations
- Creating online Western Silk Road teaching resources to enable common ownership among participants and host communities

A Western Silk Road Web Portal would enable the promotion of linked destinations and give an easier access to publicly accessible interpretation on available heritage. It would contain powerful stories on the Western Silk Road, information on individual destinations, cross links to national/local sites, and potentially collect and regularly update stories and images provided by modern day Silk Road travellers. The Web Portal, by containing consumer generated content, would promote traveller engagement and maximise output on available social media channels. Especially at the beginning however, the Web Portal would require promotional support, mainly via e-marketing campaigns.

The suggestions regarding the creation of social media generated competitions, such as photography contests, could be very powerful tools for generating awareness and content for the Western Silk Road.

The possible creation of a Western Silk Road Knowledge Exchange Network could also potentially enable easy exchange of ideas and Silk Road related knowledge focused on built heritage and intangible heritage, especially crafts and gastronomy.

The background research brought to light that the Western Silk Road story is underrepresented in the Travel Media. It is recommended that the Western Silk Road Working Group and the UNWTO Silk Road Programme lobby for the production and development of travel programmes centred on the Western Silk Road. There is a sufficient wealth of stories and destinations to generate interest, and if the respective National Tourism Organisations commit to creating the supportive conditions, the chance of getting media interest is high. Moreover, experience shows that once a successful pilot programme is produced, interest is immediately raised among competing networks.

The UNWTO Silk Road Programme, through its strong media relations, is in a powerful position to support awareness raising activities and campaigns. To coincide with the launch of the brand, it is suggested that specialised events packaging Western Silk Road destinations together are held at the major travel fairs. These events should preferably have a marketing and promotional focus destined to engage tour operators and the media through powerful stories.

To conclude, the long-term promotion of the Western Silk Road will require a more strategic approach. Once the agreed management structure, be this the European Cultural Route model or similar, is in place, and the direction of the Western Silk Road is agreed upon, a structured promotional and marketing plan should be envisaged and funding sought/allocated.

Creating a Sustainable Management Structure for the Western Silk Road

The final section of the main research study looks at a possible approach for creating a sustainable management structure for the Western Silk Road. As a development initiative, the UNWTO Silk Road Programme currently has the initial capacity for developing and managing the start-up phase, in coordination with the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) of the European Commission (EC). However, in the long term, a more sustainable approach would be needed. It would also be very important for the brand to have an effective management and support structure. This could ultimately imply transferring the responsibility away from the UNWTO / NTOs to a structure with a greater presence and involvement of the NGO sector.

Regarding this priority area, a possible approach could be to develop a Western Silk Road European Cultural Route or to utilise the model of a successful tourism oriented Cultural Route. This would provide a proven format for the long term management and sustainability of the brand.

The study reviewed the potential eligibility of a Western Silk Road Cultural Route based on criteria contained in the Council of Europe resolution - Council of Europe CM/Res(2013)67.

By its very nature, the Western Silk Road fits all of the primary thematic certification criteria of the Council of Europe. The Cultural Route should be:

- Representative of shared European values,
- Researched and developed by multidisciplinary experts from different regions of Europe,
- Illustrative of European memory, history and heritage and contributes to an interpretation of the diversity of present day Europe,
- linked to cultural and educational exchanges for young people.

The second part of the certification criteria focuses on the proposed route delivering activity in a set range of priority fields of action and fulfils certain criteria regarding each. The Western Silk Road easily fulfils these in that it facilitates enhancement of memory, history and European heritage as well as contemporary cultural and artistic practices and contributes to the sustainable cultural development.

The full results of the compliance exercise are included in the main body of the study along with the Council of Europe Resolution - CM/Res(2013)67.

Based on the feedback gained in this survey and the experience of the project team, there is strong support for the development of the Western Silk Road as a European Cultural Route. In the online survey, 78% of respondents stated that they, as destination representatives, would consider taking part in the development of a possible Western Silk Road European Cultural Route.

Utilising the European Cultural Route approach brings many benefits, a major one being the requirement to create a Network association. The appointment of a route manager, a formal requirement in order to achieve official certification, would also be a beneficial option in terms of managing the Western Silk Road as a Cultural route. The Network Association model, by establishing an effective public-private management system, would also be able to guarantee the long-term and sustainable management of the Western Silk Road.

The Western Silk Road has the potential to be one of the largest and most complex Cultural Routes in terms of geographic range and potential membership. However, this also means that the Western Silk Road would require an extremely effective governance structure in order to manage the brand and the route as such.

*The UNWTO Global Report on Cultural Routes and Itineraries*³ states that a key element in the effective tourist management of cultural routes is the presence of 'an organisation managing the route, generally with an executive secretariat with a political and managerial council, and a consultative advisory body formed by academics and professionals'⁴. It also

³ <http://media.unwto.org/press-release/2015-12-23/world-tourism-organization-presents-global-report-cultural-routes-and-itine>

⁴ UNWTO Global Report on Cultural Routes and Itineraries 2015 p69

recommends the preparation of both a short/medium term management plan and a longer-term strategy.

Furthermore, the report highlights that the success of a cultural tourism route lies in a Public-Private Partnership model capable of assisting in the structuring of participative and inclusive public policies. Another relevant and necessary criterion mentioned is that the route would also have to respond to the needs of the communities it travels through⁵.

During the initial route/brand creation, the Western Silk Road Development Initiative has resources to develop the Western Silk Road Working Group. A key role of the members of the Working Group will be to promote the Western Silk Road concept and to encourage participation in their respective countries. As the route develops and a critical mass of membership is reached, a move to a more formalised Network Association, in line with the rules of the Council of Europe, could be agreed upon.

In the long term, the potential size of the Western Silk Road as a Cultural Route could possibly require a two-level approach: a core Network Association steering the route at a transnational level, and a national approach with appropriate representatives or members coming from national level. This would enable devolved responsibilities to make activities achievable.

A strength and benefit of potentially joining the European Cultural Routes network is that the Western Silk Road would become part of a co-operation network that would make it possible to exchange best practices and share experiences. This means that the Western Silk Road would benefit from the huge amount of lessons learnt across the Cultural Routes network, especially in terms of generating sustainable funding. A well thought out Western Silk Road Cultural Route project, due to the available assets described, would be well placed to secure donor funding coming from the European Union and/or other donor sources.

The diversity of economic strength across potential members could support the hosting of the Route Secretariat within existing institutions, if necessary even in a rotating manner.

Long term financing for the route and its management would be achievable through the combination of following options: a membership programme (as used by the Vikings Route), plus project based funding provided by donor(s), Corporate Social Responsibility (CSR) or grant making sources. The development of a viable business plan for the route should be integral to its creation process.

Conclusion

The overall conclusion from the study is that the creation of a Western Silk Road brand would be valued by tourism stakeholders and would become a solid tool for strengthening the economic potential of the Silk Road along its Western region. It is perceived as a good mechanism for fostering transnational cooperation and raising awareness of the impact that Eastern culture has had on modern day Europe. Raising awareness of the shared heritage and the major influence of Eastern and Middle Eastern cultures on modern Europe can support an intercultural dialogue and understanding.

A Western Silk Road brand would open new opportunities for lesser known Western Silk Road destinations through the untold stories and new tourism products.

⁵ UNWTO Global Report on Cultural Routes and Itineraries 2015 p78

In highlighting lesser known Western Silk Road destinations, it particularly brought to light Silk Road connections beyond the obvious Caucasus, Turkey and the Mediterranean basin links. The Russian segment of the Silk Road and the Vikings connections with the Silk Road are relatively unknown but present immense tourism potential. Greece, Italy and Spain presented a diversity of less known connections with the Silk Road which should be further uncovered in future.

The diversity of intangible heritage – traditional and modern - is the real strength of the Western Silk Road. Within the creative industries sector, the Western Silk Road provides access to modern arts and crafts and generally to creative industries, whereas the Classic Silk Road destinations often focus on 'traditional' products.

Another valuable area of Silk Road heritage that has high potential is gastronomy. The Western Silk Road countries have adopted Eastern recipes and products, which journeyed over time along the ancient routes of the Silk Road and offer good tourism development opportunities.

The Western Silk Road has a greater strength in accessibility compared to the Classic Silk Road, both in terms of transport connections and other aspects of travel facilitation (especially for Western travellers) and regarding the issues of 'access for all'. Along with a perception of better infrastructure and higher standard destinations, this can make the Western Silk Road more attractive for less adventurous, less experienced, physically limited and time-poor travellers who may avoid the more demanding Classic Silk Road destinations.

The creation of a Western Silk Road brand is seen as a powerful tool for sustainable economic development. By promoting lesser known destinations and bringing the higher spending cultural tourists, it could stimulate local economies and bring employment across the value chain.

Regarding brand development, this study has reviewed various data sources and proposed a relevant brand model utilising best practice tools as recommended in the UNWTO Handbook on Destination Branding.

The Brand Essence – the DNA of the Western Silk Road was distilled down into 4 words – has been defined as: **Authentic, Untapped, Shared, Connecting.**

The study provides clear recommendations for creating the brand's visual identity and for proactive first steps in promoting the Western Silk Road brand.

The development of the Western Silk Road within the context of a living network is critical for success. As a transnational network, it opens opportunities to promote new cross-border cooperation and business partnerships that could bring mutual benefits. There is greater strength and value in a joined up promotional programme.

This is especially true bearing in mind the upcoming 2018 EU-China Tourism Year. The study provides recommendations on how to potentially develop a marketing campaign focused on the rapidly growing Chinese market. In short, the European Travel Commission/EU Pilot Joint Promotion Platform Initiative could provide a useful mechanism, and a potential source of funding, for initial Western Silk Road marketing activities. With the Platform currently being developed, it is advised that the Western Silk Road Working Group, supported by the UNWTO Silk Road Programme, make full use of this arising opportunity by engaging with the responsible counterparts in charge of the Platform.

As a development initiative, the UNWTO Silk Road Programme has the initial capacity for development and management of the start-up phase within the framework of the cooperation with DG GROW, however a sustainable approach is needed for the longer-term development. It is crucial for the brand to have an effective management structure, an initial step being the Western Silk Road Working Group. The study makes solid recommendations for a governance structure based on good practices including the Cultural Routes of Europe model.

Whatever steps are finally agreed upon, they should take place in a participative manner, primarily led by the management structure created, rather than imposed through this report.

In overall summary, the study identifies and illustrates the excellent potential of a Western Silk Road brand, along with showcasing some excellent destinations and providing a roadmap for the next steps.