Joint Action Plan of Bulgaria-Turkey Cross-Border Tourist Destination

(Edirne – Kirklareli – Burgas – Yambol – Haskovo)

INTRODUCTION

People travel for a variety of reasons: to escape, explore, understand, and participate. But at the core of the experience lies the destination — the place that hands something to the traveler to keep forever and share with others.

Tourism is an extremely important sector for the development of the economy of each region. The tourism industry can change the appearance of a certain region and the standard of living of the people of this region, and this is indicative of regions with developed infrastructure, facilities and promoting their product well. The available natural, cultural and historical conditions of the cross border region Bulgaria Turkey make them a promising tourist destination. Trends and analyses for the development of tourism on a global scale, statistical data and studies on the Bulgarian and Turkish tourist product, the profile of foreign, Bulgarian and Turkish tourists as compared to competitive markets during the period were taken into account in the preparation of the joint action plan for the development of tourism in the cross border region. The Joint Action Plan contributes to the development of tourism in the region, as it aims at concentrating on the consumer, at providing the best opportunities for increase of sales and consumption and the attainment of a stable competitive advantage in the long run. A key concept for the success of the Plan is the ***focus on customer satisfaction and the creation and development of tourist products in the regions***. Tourist products encompass the border regions in Bulgaria and Turkey. Existing tourist attractions, newly created attractions and opportunities for marine tourism, cultural, rural, green (eco) tourism, with a focus on rare and specific plant and animal species, as well as other kinds of tourism are included. It is necessary cultural and natural assets of Bulgaria Turkey cross border region as a tourist destination to be promoted, as well as the opportunities for exploring its rich culture and nature. Thus the foundations for regional cross-border cooperation between Bulgaria and Turkey in the field of sustainable development and promoting tourism are laid. The main reasons for the development of tourism in the region are: the expected benefits of tourism development as a whole; available opportunities, associated not only with local resources (attractions), but with market opportunities, too; the need for diversification of the existing supply and on regional and national scale of the development of new destinations (tourist spots - alternative products and alternative destinations). This Joint Action Plan was developed by taking into account: The competitive market environment in the field of tourism; Trends and forecasts for the development of tourism on national and regional level in the Republic of Turkey and the Republic of Bulgaria; Statistical information on tourism; The existing labour market; The depth and scope of the tourism product; The existing tourist infrastructure and services; The challenges and opportunities facing the tourist industry; Existing

strengths and weaknesses; National, regional and local strategies, plans and programmes for the development of tourism.
The **main highlights** of the JAP are: Creating and promoting ***strong regional brand*** with a focus on the tourism product, typical of the cross-border region Bulgaria-Turkey; Strengthening and increase of the presence on ***traditional target markets and attracting new*** prospective markets; Active use of ***online marketing tools***; Promotion of ***traditional products*** - summer sea, eco and cultural tourism; Development of ***specialized types of tourism*** - spa tourism, culinary and wine, eco and adventure tourism, business, festival tourism; creation of Management Destination Board (MDB).
The development of modern tourism is characterized by the ever-increasing competition between tourist destinations in the sphere of quality and prices, as well as by the growing diversity of the tourist products offered. Tourism is a priority because of the economic benefits. The cross border region disposes of various tourist resources, presented in the Analyses of the tourism potential of the cross border region Bulgaria - Turkey. This JAP has the following main aim:
Aim: Sustainable development of Bulgaria - Turkey cross border region as a year-round tourist destination with a focus on ecotourism, cultural and historical tourism and sea tourism, combined with the types of tourism, specific for the tourist region.
Objectives: Strengthening and increase of the presence on traditional target markets and attracting new prospective markets; Stimulating domestic tourism; Stimulating cross-border travel; Creating and promoting strong regional brand with a focus on the tourism product, typical of the region; Active use of online marketing tools; Promotion of traditional products - summer sea, eco and cultural-historical tourism; Development of specialized types of tourism - spa tourism, culinary and wine, eco and adventure tourism, business, festival tourism; creation of Management Destination Board (MDB).

The coming years present an unprecedented opportunity to bring the countries and citizens of the world together to embark on a new path towards a more sustainable future. On 1 January 2016, the 17 Sustainable Development Goals (SDGs) of the 2030 Agenda for Sustainable Development — adopted by world leaders in September 2015 at an historic UN Summit — officially come into force (Annex 1). Over the next fifteen years, these universal Goals should guide our collective action to end all forms of poverty, fight inequality and tackle climate change. ***Tourism, one of the most dynamic economic sectors, can contribute decisively to the achievement of the SDGs***, namely Goals 8, 12 and 14, where tourism is specifically included.
With 2017 being declared by the United Nations as the 'International Year of Sustainable Tourism for Development', we have an immense opportunity to advance the contribution of the tourism sector to the three pillars of sustainability – economic, social and environmental, while raising awareness of the true dimensions of a sector that is often underestimated.
The Joint Action Plan (JAP) of Bulgaria – Turkey cross-border tourist destination aims to combine the strengths and expertise of Bulgaria and Turkey and private sector stakeholders in the cross-border region and to set in motion pragmatic activities that will put the destination on the global stage.

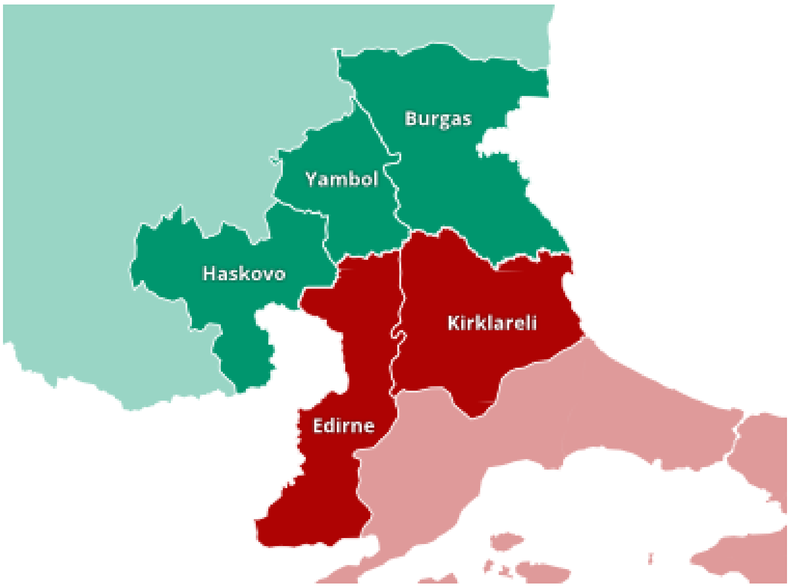


Figure 1. Map of Bulgaria-Turkey Cross-border Region

Bulgaria - Turkey cross border tourist destination is situated on the border between both partnering countries Bulgaria and Turkey and covers the following regions: **In Bulgaria: District of Burgas** (municipalities Aitos, Burgas, Kameno, Karnobat, Malko Tarnovo, Nesebar, Pomorie, Primorsko, Ruen, Sozopol, Sredets, Sungurlare, Tsarevo), **District of Yambol** (municipalities Bolyarovo, Elhovo, Straldzha, Toundzha, Yambol) and **District of Haskovo** (municipalities Dimitrovgrad, Harmanli, Haskovo, Ivaylovgrad, Lyubimets, Madzharovo, Mineralni bani, Simeonovgrad, Stambolovo, Svilengrad, Topolovgrad). **In Turkey: Province of Edirne** (municipalities Edirne, Enez, Havsa, İpsala, Keşan, Lalapaşa, Meriç, Süloğlu, Uzunköprü) and **Province of Kırklareli** (municipalities Babaeski, Demirköy, Kırklareli, Kofçaz, Lüleburgaz, Pehlivanköy, Pınarhisar, Vize)

Today over 1 billion international tourists now travel the world every year. By 2030, UNWTO forecasts international tourist arrivals to reach 1.8 billion. Today, the cross-border tourist destinations are an important vehicle for promoting intercultural dialogue, strengthening regional cohesion, solidarity and peace. By working together, we can build on our combined strengths and forge a bright future for all.

A simple policy recipe for ensuring a sustainable form of tourism development can be followed by remembering six steps:

- Promote sustainable development;
- Create products for specific visitor market segments;
- Gain and maintain competitiveness;
- Enhance visitor experience;
- Preserve local resources;
- Improve residents' quality of life .

By keeping these steps in mind, a destination is on the right track to a better future of sustainable tourism that will last through many future generations. The joint Bulgaria – Turkey tourist destination is the first attempt to manage and promote the tourist resources and attractions of two countries either at the Asian tourist market or at the local market of both countries. The potential of the area is big and diverse. Identified actions and tools will help the destination to position itself as an attractive area for tourists. The Joint Action Plan is elaborated with the involvement of main stakeholders in the cross-border region. It shows the actions and tools to be used in order to attract more visitors to the region.

METHODOLOGY

In an increasingly vibrant landscape, marked by new players, technological innovation and rapidly changing consumers, the need arises for European destinations to closely monitor others' effort to win market shares in the global tourism market.

The first activity was to make thorough analyses of the tourist resources, accommodation, tourist operators and travel agencies, attractions of the 5 districts in Bulgaria - Turkey cross border tourist destination. The analysis was presented at the Round table held in September 2017 in Kirklareli (Turkey). About 50 stakeholders from both countries discussed the presentations of the tourism experts and made their input to the analysis.

Two main tourist markets are focused as most attractive for Bulgaria - Turkey cross border tourist destination – local market (Turkey and Bulgaria) and Asian market (China and Japan).

Analysis of the main markets was done. The analysis followed a three step approach. ***The first step*** was to identify the key Asian markets for Bulgaria – Turkey cross-border tourist destination and the primary destinations competing with it in those markets. ***The second step*** consisted of assessing strengths and weaknesses of destinations, which are significant competitors to Bulgaria – Turkey cross-border tourist destination. The assessment has been based on the following indicators:

- the World Economic Forum Travel and Tourism Competitive Index (WEF TTCI);
- travel trade interviews and expert opinion;
- visa regimes and other visitor entry requirements;
- air connectivity and capacity;
- price competitiveness;
- political, economic and socio-cultural links;
- destination tourism development policy;
- destination tourism marketing strategy.

The third step consisted of identifying those destinations which are the strongest competitors for Bulgaria – Turkey cross-border tourist destination in each market, i.e. destinations which attract significant volumes of travellers and are actively investing in increasing their share in the market.

The Joint Action Plan is a comprehensive overview of national, regional and local strategies and initiatives designed to help the Bulgaria-Turkey cross border region tourism grow more robust, competitive and sustainable. The Joint Action Plan aims to foster collaboration between stakeholders to stimulate investment and poverty reduction in the region, while safeguarding its cultural and environmental resources.

The Joint Action Plan outlines goals and objectives that have been developed based on the priorities of the region to develop tourism. The priority actions are designed to be realistic and achievable short term steps that work towards the ultimate vision for Bulgaria-Turkey cross border region tourism.

Success of the Bulgaria-Turkey cross border region will rely on dedicated input, engagement and support from all industry stakeholders. Stakeholders are encouraged to address the priority actions by working in collaboration at the local, national and regional levels. Bulgaria and Turkey are invited to align their national tourism strategies and programmes with the priority actions outlined in this Joint Action Plan. All stakeholders are encouraged to take initiative and provide input on how these goals can be reached. This Joint Action Plan emphasizes the extensive opportunity for developing sustainable tourism in Bulgaria-Turkey cross border region.
The Joint Action Plan (JAP) can serve as a reference document for the Bulgaria-Turkey cross-border tourist destination to formulate marketing strategies to develop the area as an International tourist destination. The focus is put on two targeted tourist markets – (i) Asian - Chinese and Japanese, which are the most rapidly developing in Asia; (ii) local (Bulgaria and Turkey) . In addition, this plan also aims to inspire those institutions in the tourism and hospitality industry in both countries who have the intention to attract Asian (Chinese and Japanese) tourists. They will benefit from the detail information on the travel habits of the Asian tourists and their preferences.

This document presents some recommendations for Bulgaria-Turkey cross-border tourist destination to attract the Asian (Chinese, Japanese) and local (Bulgarian, Turkish) tourists to the area. These include: (1) Improving the image of the destination, (2) Designing tour packages to fit the different needs of each segment, (3) Strategic location of tourist information centers/offices, (4) Improving souvenir strategy, (5) Bridging Bulgarian and Turkish travel agencies to Asian (Chinese, Japanese) and local (Bulgarian and Turkish) travel wholesalers. (6) Promoting Bulgaria-Turkey cross-border tourist destination as an attractive all-the-year-round destination.

These recommendations will enable Bulgaria-Turkey cross-border tourist destination to become an international tourist choice destination, especially for the targeted Asian (Chinese, Japanese) and local (Bulgaria, Turkey) tourist segments. It will also serve as a reference for the Bulgaria-Turkey cross-border tourist destination hospitality industry with the intention of attracting Asian and local tourists.

WORLD TOURISM

Tourism is key to development, prosperity and well-being. An ever-increasing number of destinations worldwide have opened up to, and invested in tourism, turning it into a key driver of socio-economic progress through the creation of jobs and enterprises, export revenues, and infrastructure development. Over the past six decades, tourism has experienced continued expansion and diversification to become one of the largest and fastest-growing economic sectors in the world. Many new destinations have emerged in addition to the traditional favourites of Europe and North America. Tourism has boasted virtually uninterrupted growth over time, despite occasional shocks, demonstrating the sector’s strength and resilience. International tourist arrivals have increased from 25 million globally in 1950 to 278 million in 1980, 674 million in 2000, and 1,235 million in 2016. Likewise, international tourism receipts earned by destinations worldwide have surged from US$ 2 billion in 1950 to US$ 104 billion in 1980, US$ 495 billion in 2000, and US$ 1,220 billion in 2016. Tourism is a major category of international trade in services. In addition to receipts earned in destinations, international tourism also generated US$ 216 billion in exports through international passenger transport services rendered to non-residents in 2016, bringing the total value of tourism exports up to US$ 1.4 trillion, or US$ 4 billion a day on average. International tourism represents 7%

of the world's exports in goods and services, after increasing one percentage point from 6% in 2015. Tourism has grown faster than world trade for the past five years. As a worldwide export category, tourism ranks third after chemicals and fuels and ahead of automotive products and food. In many developing countries, tourism is the top export category.

International tourism in 2016

Key trends and outlook International tourist arrivals (overnight visitors) in 2016 grew by 3.9% to reach a total of 1,235 million worldwide, an increase of 46 million over the previous year. It was the seventh consecutive year of aboveaverage growth in international tourism following the 2009 global economic crisis. A comparable sequence of uninterrupted solid growth has not been recorded since the 1960s. Demand for international tourism followed the positive trend of previous years, with many destinations reporting sound results, while a few faced security incidents. Some redirection of tourism flows was observed, though most destinations shared in the overall growth due to stronger travel demand, increased connectivity and more affordable air transport. By UNWTO region, Asia and the Pacific led growth in 2016 with a 9% increase in international arrivals, followed by Africa (+8%) and the Americas (+3%). The world's most visited region, Europe (+2%) showed mixed results, while available data for the Middle East (-4%) points to a decline in arrivals. International tourism receipts grew by 2.6% in real terms (taking into account exchange rate fluctuations and inflation) with total earnings in the destinations estimated at US$ 1,220 billion worldwide in 2016 (euro 1,102 billion). France, the United States, Spain and China continued to top the international arrivals ranking in 2016. In receipts, the US and Spain remain at the top, followed by Thailand, which climbed to number 3 last year, and China, which is fourth. France and Italy moved up in receipts to 5th and 6th position respectively, while the United Kingdom, Mexico and Thailand moved up to 6th, 8th and 9th place in arrivals. China, the United States and the Germany led outbound tourism in their respective regions in 2016, and continue to top the expenditure ranking in that order.

Long-term outlook International tourist arrivals worldwide are expected to increase by 3.3% a year between 2010 and 2030 to reach 1.8 billion by 2030, according to UNWTO's long-term forecast report Tourism Towards 2030. Between 2010 and 2030, arrivals in emerging destinations (+4.4% a year) are expected to increase at twice the rate of those in advanced economies (+2.2% a year). The market share of emerging economies increased from 30% in 1980 to 45% in 2016, and is expected to reach 57% by 2030, equivalent to over 1 billion international tourist arrivals. International tourist arrivals (overnight visitors) reached a total of 1,235 million in 2016. This was 46 million more than in 2015, or an increase of 3.9%. The global pace of growth was slightly more moderate than in 2015 (4.5%), but in line with UNWTO's long-term forecast of 3.8% per year for the period 2010 to 2020. Demand for international tourism in 2016 followed the positive trend of previous years, with many destinations reporting sound results, although a few faced security incidents, either in their country or in their region. Some redirection of tourism flows was observed, though most destinations shared in the overall growth due to stronger travel demand, increased connectivity, more affordable air transport and simpler visa procedures in many countries. By UNWTO region, Asia and the Pacific led growth in 2016 with a 9% increase in international arrivals, followed by Africa (+8%), which rebounded after two difficult years. In the Americas (+3%) the growth momentum continued. Europe (+2%) showed mixed results, with double-digit growth in some destinations and declines in others. Available data for the Middle East (-4%) points to a decline in arrivals, although results vary across destinations. By subregion, the strongest results were recorded in Subsaharan Africa (+10%), followed by Oceania, North-East Asia and South-East Asia (all +9%), South Asia (+8%) and South America (+7%). Internat 2016 marks the seventh consecutive year of sustained growth in international tourism, with arrivals increasing by 4% or more every year following the global economic crisis of 2009. A comparable sequence of uninterrupted solid growth has not been recorded since the 1960s. The 1 billion international arrivals mark in a single year was exceeded for the first time in 2012. This has further increased to 1.2 billion in 2016, with 305 million more international tourist arrivals recorded compared to 930 million in the pre-crisis year of 2008. Slightly more travel by air than surface transport In 2016, slightly over half of all overnight visitors travelled to their destination by air (55%), while the remainder travelled by surface transport (45%) – whether by road (39%), rail (2%) or water (4%). The trend over time has been for air transport to grow at a somewhat faster pace than surface transport, thus the share of air transport is gradually increasing. Over half of visits for leisure purposes travel for holidays, recreation and other forms of leisure accounted for just over half of all international tourist arrivals in 2016 (53% or 657 million). Some 13% of all international tourists reported travelling for business and professional purposes, and another 27% travelled for other reasons such as visiting friends and relatives (VFR), religious reasons and pilgrimages, health treatment, etc. The purpose of visit for the remaining 7% of arrivals was not specified.

International tourism receipts

Tourism ranks as world's third largest export category. Expenditure by international visitors on accommodation, food and drink, entertainment, shopping and other goods and services in tourism destinations reached US$ 1,220 billion (euro 1,102 billion) in 2016. This represents an increase of 2.6% in real terms, i.e. taking into account exchange rate fluctuations and inflation. Tourism receipts followed the overall trend in international tourist arrivals, though at a somewhat slower pace. Growth in receipts is computed in real terms in order to avoid the distortions caused by exchange rate shifts between local currencies and the US dollar, although such fluctuations were fairly contained in 2016 (the average US dollar-euro rate hardly varied from 2015). In real terms, tourism receipts increased by 8% in Africa, 5% in Asia and the Pacific, 3% in the Americas and 1% in Europe, while they declined 2% in the Middle East. In macro-economic terms, expenditure by international visitors counts as exports for the destination country, and as imports for the country of residence of the visitor. For many countries inbound tourism is a vital source of foreign currency earnings and an important contributor to the economy, creating muchneeded employment and opportunities for development. In addition to the tourism receipts earned in the destinations (the travel item of the Balance of Payments), international tourism also generated US$ 216 billion in exports through international passenger transport services rendered to nonresidents in 2016. Added to the US$ 1,220 billion in tourism receipts in destinations, the value of tourism exports amounted to US$ 1.4 trillion, or US$ 4 billion a day on average. International tourism (comprising both earnings in destinations and passenger transport) represents 30% of the world's services exports. It also accounts for 7% of overall exports in goods and services. In fact, international tourism has grown faster than world merchandise trade for five consecutive years now. As a worldwide export category, tourism ranks third after chemicals and fuels, and ahead of automotive products and food. In many developing countries tourism is the top export category. For emerging economies as a whole, tourism represents 40% of services exports, well above the 30% world average. Tourism is increasingly an essential component of export diversification, both for emerging and advanced economies, and often shows a strong capacity to compensate for weaker export revenues in many commodity and oil exporting countries. World's top tourism destinations Thailand continues to rise in the rankings In 2016, four countries moved up in the Top 10 ranking by international tourism receipts and three in the ranking by international tourist arrivals (overnight visitors). Most notably, Thailand climbed further, up to 3rd place from 5th in terms of tourism receipts in its second year of double-digit growth, hitting the US$ 50 billion mark in 2016. It also moved up one place in arrivals to 9th position (33 million). When ranking the world's top international tourism destinations, it is preferable to take more than a single indicator into account. Ranked according to the two key tourism indicators – international tourist arrivals and international tourism receipts – it is interesting to note that eight out of the Top 10 destinations appear on both lists, despite showing marked differences in terms of the type of tourists they attract, as well as their average length of stay and their spending per trip and per night. It should be noted that changes in the ranking of international tourism receipts not only reflect the relative performance of the destinations, but also exchange rate fluctuations of the local currencies against the US dollar. The United States continues to top the international tourism receipts ranking, with US$ 206 billion earned in 2016. It is the second largest destination in international tourist arrivals with 76 million. Spain follows as the world's second largest earner with US$ 60 billion, and the third largest destination in terms of arrivals with 76 million, virtually equalling the US. China remains in fourth position in terms of both receipts (US$ 44 billion) and arrivals (59 million). France climbed one place to 5th position in tourism earnings, with US$ 42 billion, and remains the world's top destination in terms of international arrivals with 83 million. Italy moved up one place to 6th position in receipts (US$ 40 billion) and is still 5th in arrivals (52 million). The United Kingdom climbed two places to 6th position in arrivals, but moved down four places in receipts to 7th, partly due to the depreciation of the British pound, resulting in lower earnings in terms of US dollars. Germany remains 8th in terms of receipts and 7th in arrivals, while Hong Kong (China) continues to rank 9th in receipts and 13th in arrivals. Australia re-entered the Top 10 in terms of receipts at number 10, while moving from 42nd to 40th position in arrivals. Mexico climbed another place to 8th position in arrivals and moved up two in receipts to 14th. ***Turkey completes the Top 10 in arrivals***, moving down an estimated four places (data still pending for 2016) following the security incidents and failed coup last year. ***In terms of receipts, Turkey moved down five places to 17th position***.

Regional results Europe

Mixed results across destinations Europe welcomed 616 million international tourists in 2016, equivalent to half the world total, an increase of 13 million from 2015. This corresponds to 2% growth, reflecting mixed results across individual destinations, with some reporting a remarkable performance whilst others recorded weaker results due to security concerns. International tourism receipts in Europe grew 1% in real terms to US$ 447 billion (euro 404 billion), which represents 37% of receipts worldwide. Northern Europe led growth in the region, with a 6% increase in international arrivals, or 5 million more than in 2015. Iceland (+39%), Norway (+12%), Ireland (+11%) and Sweden (+8%) all boasted above-average growth. The United Kingdom (+4%), the subregion's largest destination, reported a comparatively more modest growth, despite the weaker British pound. In Central and Eastern Europe, arrivals increased by 4% in 2016. Many destinations enjoyed strong results, including Georgia (+19%), Slovakia (+17%), ***Bulgaria (+16%),*** Romania and Lithuania (both +11%). Hungary and Ukraine both recorded a 7% growth in arrivals, while Poland and the Czech Republic both reported an increase of 4%. By contrast, the decline in arrivals to the Russian Federation (-9%), the subregion's top destination, weighed down the subregional average. Growth in Southern and Mediterranean Europe (+1%) was modest, despite sound results in most countries, driven by Portugal (+13%), top destination Spain (+10%) and Croatia (+9%). Balkan destinations Serbia (+13%), Slovenia (+12%) and Albania (+8%) also enjoyed robust growth, as did island destinations Cyprus (+20%) and Malta (+10%). Greece reported a 5% increase in arrivals and Italy 3%. The subregional average was weighed down by the significant decline in arrivals faced by Turkey following various terrorist attacks and a failed coup. Results in Western Europe (0%) were rather mixed in 2016, as some destinations were impacted by security concerns. The Netherlands and Austria both reported a 5% growth in arrivals, and Germany a 2% growth. The world's top tourism destination, France (-2%), faced the aftermath of security incidents, as did Belgium (-10%).

Asia and the Pacific

Fastest-growing region in 2016 Asia and the Pacific recorded 308 million international tourist arrivals in 2016, an increase of 9%, or 24 million more than in 2015, the highest increase in both relative and absolute terms across the five UNWTO regions. International tourism receipts increased 5% in real terms to US$ 367 billion, US$ 17 billion more than in 2015. Asia and the Pacific accounted for 25% of the world's arrivals and 30% of the world's receipts. All four subregions enjoyed strong results in 2016. Growing purchasing power in emerging economy markets, increased air connectivity, more affordable travel and a relaxation of visa requirements continue to fuel tourism demand from within and outside the region. Asia's largest subregion, North-East Asia (+9%), recorded 12 million more international arrivals in 2016. The Republic of Korea (+30%) rebounded strongly after the MERS outbreak in 2015 and Japan (+22%) boasted its fifth straight year of double-digit growth. Arrivals in Macao (China) increased by 10%, with China, the subregion's largest destination, recording 4% growth and Taiwan (pr. of China) 2%. Hong Kong (China) experienced a slight decline in arrivals. In South-East Asia (+9%), results were driven by top destination Thailand (+9%), which enjoyed a second year of strong growth, and Vietnam (+26%). Archipelago destinations Indonesia (+15%) and the Philippines (+11%) also reported double-digit growth in 2016 after similarly strong results a year earlier. International arrivals in Singapore were 7% higher, while Cambodia reported 5% growth and Malaysia 4%. In Oceania (+9%), major destinations Australia and New Zealand (both +11%) reported double-digit growth in international arrivals, aided by increased air capacity. The Northern Mariana Islands and Guam enjoyed 11% and 9% growth respectively, while Fiji reported a 5% increase in arrivals. South Asia recorded an 8% increase in international tourist arrivals in 2016, driven by India (+10%), the subregion's top destination. Nepal reported a significant 40% increase in arrivals, rebounding from poor results in 2015 after the Gorkha and Kodari earthquakes. Sri Lanka (+14%) enjoyed its seventh consecutive year of double-digit growth, while island destination the Maldives reported an increase of 4%.

The Americas

South America leads growth International arrivals in the Americas grew by 7 million (+3%) in 2016 to reach nearly 200 million, equivalent to 16% of the world total. Travel demand remained robust, despite concerns over the zika virus in some destinations. By subregion, South America (+7%) led the results, followed by the Caribbean and Central America (both +5%), while North America welcomed 2% more arrivals. International tourism receipts in the Americas increased by 3% in real terms to US$ 313 billion (26% share), up US$ 8 billion from 2015. North America, which accounts for two-thirds of all arrivals in the region, recorded 2% growth in 2016. Both Canada (+11%) and Mexico (+9%) enjoyed strong travel demand from the US, supported by the favourable exchange rates of their currencies against the US dollar. In the United States (-2%) arrivals declined slightly. Results in South America (+7%) were led by Chile (+26%), which reported its third straight year of double-digit growth. Colombia (+11%) and Uruguay (+10%) also boasted double-digit growth, while Peru (+8%) continued to enjoy a strong momentum. Brazil, the subregion's largest destination, reported a 4% growth in arrivals after hosting the Rio 2016 Olympic and Paralympic Games. Ecuador suffered a moderate decline in the aftermath of the April earthquake, which affected some coastal areas. In Central America (+5%), growth figures were positive across virtually all destinations, with leading destination Costa Rica reporting a 10% increase in arrivals, Nicaragua a 9% increase and Guatemala 8%. Results in Honduras (+3%) and El Salvador (+2%) were more modest, while in Panama arrivals declined after a very strong performance in 2015. The Caribbean (+5%) saw a robust performance in 2016, led by Cuba (+14%) and the Dominican Republic (+6%). Arrivals in Puerto Rico grew by 5% last year, while Jamaica welcomed 3% more international tourists. The Bahamas reported flat growth and Aruba a decline, while results in the smaller island destinations were fairly mixed.

Africa

A strong rebound in 2016 International tourist arrivals in Africa increased by an estimated 8% in 2016 according to the comparatively limited data available to date, representing a strong rebound after a weaker performance in 2014 and 2015 in the wake of various health, geopolitical and economic challenges. The region welcomed 58 million international tourists in 2016 (5% of the world total), 4 million more than in 2015, earning US$ 35 billion in international tourism receipts (3% share), an increase of 8% in real terms. Subsaharan Africa (+10%) led the region's recovery, with the highest increase across all world subregions. South Africa, the subregion's top destination, enjoyed 13% growth in international arrivals, partly thanks to simpler visa procedures. Kenya (+17%) and Tanzania (+16%) also boasted doubledigit growth in 2016, rebounding from weaker figures in 2015. Island destinations Madagascar (+20%), Cabo Verde (+15%), Mauritius (+11%) and the Seychelles (+10%) also posted double-digit growth, supported by improved air and sea connectivity. In North Africa (+3%) the recovery started in the third quarter of 2016, thanks to a change in trend in Tunisia (+7%) and Morocco (+2%). The strengthening of security, as well as the gradual recovery of the Russian market and the redirection of tourism flows from other troubled destinations, contributed to these results.

Middle East

A small decline amid challenges International arrivals in the Middle East are estimated to have decreased by 4% in 2016, with mixed results across the region where solid growth in some destinations was not sufficient to offset decreases in others. The region welcomed 54 million international tourists in 2016, or 4% of the world total, and earned US$ 58 billion in tourism receipts (5% share), a 2% decline in real terms from 2015. Lebanon and Oman (both +11%) reported double-digit growth in arrivals in 2016, following strong results a year earlier. The United Arab Emirate of Dubai recorded a 5% increase in arrivals, while Jordan (+3%) started to rebound from its weaker performance a year earlier. Growth was flat in the subregion's top destination Saudi Arabia (0%). The region's average (-4%) was driven down by the sharp decline in Egypt (-42%) following the security incidents and negative travel advisories issued by some source markets. However, arrivals started to recover at the end of the year following important promotional efforts, and coinciding with the winter season in European markets.

Travel motivation

– Key points:

• People in the larger, more established source markets are increasingly seeing themselves as 'travellers', rather than 'tourists'. They are looking for immersion in a culture, an understanding of the destination's human and physical environment, and personal fulfilment from their holiday experience.

• Tourism is experiential: The total experience of the holiday has become larger than the sum of its individual parts and travellers are looking for new sensations and unique experiences, even at established traditional destinations.

• Tourism is experimental: Holidaymakers seek out adventure and "freedom from the limits imposed by things familiar and owned".

• Tourism is existential: Travellers are striving for purpose and selfrealisation, whether indulging in sporting challenges, learning a new skill, participating in an exciting new activity, or just searching for personal space in natural surroundings and an emotional reconnection with their own soul or with their partner.

• People are increasingly focusing on the personally regenerating fulfilling power of a holiday, and on the opportunity to reconnect with a partner and sometimes with the family.

• People are increasingly seeking escape, authenticity, emotional recharge and exploration, rather than passive sightseeing or just relaxing on a beach.

Outbound tourism

Most tourists visit destinations within their own region. The large majority of international travel takes place within travellers' own regions (intraregional tourism), with about four out of five arrivals worldwide originating in the same region. Traditionally the advanced economies of Europe, the Americas and Asia and the Pacific have been the world's major source markets for international tourism. Even so, emerging economies in Asia, Central and Eastern Europe, the Middle East, Africa and Latin America have shown fast growth over recent years, driven by rising levels of disposable income. Europe currently still remains the world's largest source region for outbound tourism, generating almost half of the world's international arrivals (48%), followed by Asia and the Pacific (26%), the Americas (17%), the Middle East (3%) and Africa (3%).

Top spenders in international tourism - Few changes in the Top 10 source markets

China continues to lead global outbound travel, following ten years of double-digit growth in spending, and after rising to the top of the ranking in 2012. Expenditure by Chinese travellers grew by 12% in 2016 to reach US$ 261 billion. The number of outbound travellers rose by 6% to reach 135 million in 2016. Tourism expenditure from the United States, the world's second largest source market, increased by 8% in 2016 to reach US$ 124 billion. Germany, the United Kingdom and France are Europe's top source markets, and rank third, fourth and fifth respectively in the world. Germany reported an increase of 3% in spending last year to reach US$ 80 billion. Demand from the United Kingdom remained sound last year, despite the significant depreciation of the British pound following the referendum on EU membership (Brexit). UK residents' overnight visits abroad were up by 5 million (+8%) to reach 69 million, with expenditure close to US$ 64 billion (+14%). France reported a 3% growth in tourism expenditure in 2016 to reach US$ 40 billion. The five source markets in the bottom half of the Top 10 all moved up one place as the Russian Federation moved down from 6th to 11th place, following a significant decline in spending abroad. Canada moved up to 6th place, despite flat growth in international spending (US$ 29 billion), while outbound overnight trips declined by 3% to 31 million. The Republic of Korea spent 5% more in 2016 (US$ 27 billion) and moved up further to 7th place, after having entered the Top 10 in 2015. The number of outbound travellers increased by 16% to reach 22 million. Italy climbed to 8th place with US$ 25 billion in outbound tourism expenditure, up 2% from 2015, while reporting a 3% growth in overnight trips to 29 million. Australia moved up to 9th place with a 6% growth in spending to US$ 25 billion, and a 5% increase in outbound trips to 10 million. Hong Kong (China) completes the Top 10 with 5% growth in expenditure to US$ 24 billion and 92 million outbound trips (+3%). Other source markets outside the Top 10, which showed double-digit growth in expenditure last year were: Spain, India, Argentina, Qatar, Thailand, Israel, Ireland, Ukraine, Vietnam and Egypt.

Social commentators often characterise the difference in travel motivation between travellers from the 'old' established markets and the 'new' emerging markets as a split between a search for spiritual and emotional refreshment and personal fulfilment in older established markets, such as Western Europe, North America, Australasia and Japan and a more materialistic or hedonistic motivation in newer markets such as Russia, South and Southeast Asia. This is a rather crude and simplistic characterisation, as there is a large swathe of people, particularly in Northern Europe, whose holiday motivation is quite hedonistic, materialistic and more devoted to physical pleasure than spiritual refreshment (e.g. beach, sun and sea holidays). And there are equally travellers from the newer markets who are seeking a more spiritually fulfilling type of holiday. Nevertheless, the increasing search for spiritual refreshment and personal fulfilment is a significant motivation for travel amongst the more affluent and experienced holidaymakers from older established markets, who currently represent the largest and most potentially lucrative source of visitors for many destinations. Whereas, amongst travellers from newer markets that have only recently opened to travel (e.g. Russia, China) and other fast-growing economies (e.g. India, Brazil), the emphasis tends currently to be on visiting iconic cities (e.g. London, Paris, Rome, New York) and on 'collecting' destinations; and it tends to be characterised by relatively ostentatious consumption and purchase of well-known brands (particularly from Russia, Brazil and India). It remains to be seen whether travel patterns in these relatively young outbound markets will follow the experiential direction of the longer-established, more mature markets as they develop, or whether their travel motivations and destination preferences represent a deeper rooted cultural preference that will remain as they are today. One of the big questions for the future is how travel motivations might change as more and more people travel from the newer economies: Where will the balance lie between the demand for spiritual refreshment, experiential travel and personal fulfilment versus the desire for off-the-shelf branded products, hedonistic holidays and manufactured vacation experiences?

Global trends affecting the development of international tourism can be summarized as follows: Newly emerging markets, especially those in Asia (India and China), as well as Brazil, maintain the high growth rates, both for inbound and outbound tourism; Economic indicators show strong performance of the largest European economies - Germany, Great Britain and France, which also affects the results of most destinations, which have registered growth from these markets; Russia is still a major generating market for most destinations in Europe, although during the first months of the year most destinations reported a decline of overnight stays and tourists from this market. The expectations are that the tourism performance from this market will be significantly negatively affected by the ongoing shrinking of the Russian economy and the devaluation of the ruble and the ongoing political conflict. The slowdown of the growth rate of the Chinese economy does not affect the willingness of Chinese tourists to travel around the world, while a reduction in demand in tourism is expected in Japan due to declining purchasing power. The incoming tourism from India still represents a relatively small part of journeys in Europe, but the long-term expectations are that India will catch up China as a distant generating market. The expectations are that the Asian economies will continue the trend of increasing rates in their outbound tourism. A tendency towards demand for effective public-private partnerships and transnational collaboration between European destinations in order to maintain their competitiveness in the conditions of continually growing competition and a dynamic market environment. Growth of tourists from America in most European destinations; There has been a reduction of trips in Europe as a whole and preference to cheap inner-european destinations; The demand for hotels is weaker, indicating interest in the other cheaper accommodation; The share of individual trips is increasing, which tour operators have responded to with the introduction of the service "do-it-yourself". Dynamic packages have developed; The trend for shorter trips continues, however with greater frequency within a calendar year; Increased influence of the mass media; Penetration of social networks and planning trips by their use; Rapid development of information technology, mobile platforms; Changes in the demand for and the type of tourism products and services because of the increase of the share of market segments, such as the group "50 +", working women with their own income, single men and women in active age, etc.; The share of travelling Europeans over the age of 65, who have leisure time and money, is increasing. This makes them an important market for tourist packages, which are preferred by this age group; Business trips have marked a decrease in exchange for the steady growth in travel for holidays and vacation; Decrease in the share of classic journeys of the type of "sun, sea, beach" in exchange for increased mobility and frequency of trips, interest in the topic "health and fitness", visits to sports and cultural events, visits of friends and relatives, adventure trips, search for authenticity and immersion in the local culture; Increase in the awareness and interest of customers in the environment; There is a tendency towards "escape" from the strenuous everyday life; Increased sensitivity towards the quality of life on a whole and health.

10 trends, which will affect tourism in the midterm period:

1. Greater concern for security and safety;

2. More mature and experienced travellers;

3. Ageing population;

4. Increasing competition;

5. Emphasis on "value for money";

6. Change from demand for services to demand for experience;

7. Need of constant investment in quality;

8. Introduction of new technologies;

9. Cooperation between the public and private sectors;

10. Importance of sustainable development.

A survey done in 2017 shows how digital tools are used in stages of planning, booking and experience during travel. The main conclusions are:

Planning of trip:

- 81% use responses of friends, relatives when planning their travel;
- 47% use voice search with devices such as Amazon Echo and Google Home when planning a trip;
- Almost 25% of 55+ year olds use smartphone during the exploratory phase of the trip

Booking the trip:

- Over 33% of tourists reserve their trip to a mobile device
- 61% avoided hotels where WiFi is paid

During the travel:

- 70% of tourists believe that digital boarding cards make traveling much easier
- 60% of tourists have the feeling that a good digital experience is important when choosing a flight
- 44% of tourists rely on their smartphone when on holiday

During the stay:

- Tourists use an average of 16 different categories of applications on a trip;
- 75% of tourists post reviews on relevant sites

There is a "love-hate" approach to digital devices: 60% of respondents say they are lost without their smartphone, while 43% say they want to get rid of the digital world and shut down during the holiday.

Ranking of the digital traveler

The first survey of the digital traveler is also published in the survey results, with the crown for India's most advanced digital tourists. The indicators are a combination of the main indicators for the use of digital technologies for travel purposes by representatives of each country. For example, Indians typically use smartphones to reserve and board an airplane; 82% say that digital boarding passes facilitate travel compared to the average 70% for the world.

The countries are arranged as follows:

The Digital Traveller

Rankings 2017

1. India
2. China
3. Indonesia
4. Brazil
5. Saudi Arabia
6. Mexico
7. South Africa
8. United Arab Emirates
9. Columbia
10. Italy
11. United States
12. Spain
13. France
14. Russia
15. Canada
16. Australia
17. United Kingdom
18. Japan
19. Germany

UNWTO Tourism Towards 2030 Long-term forecasts

Looking ahead, there are a number of global trends that demonstrate the potential for tourism. Success will rely on the ability of stakeholders to maximise these opportunities.

- **International tourist arrivals are forecast to reach 1.8 billion by 2030** which means that 5 million people will be crossing international borders for leisure, business or other purposes every day;
- **Asia and the Pacific will be the fastest growing outbound region** in 2010-2030;
- **Advances in technology,** such as increased internet accessibility and the expansion of smartphone usage and technology, will continue to impact tourism trends;
- **Improved connectivity on the Silk Road** via new transnational rail links and air route expansion will change the way people travel across the regions;
- **The rising affluence of Asia's middle class** will create huge potential for tourism growth;
- **Social media and user-generated content** are influencing consumers' travel decisions like never before, creating herewith new opportunities and risks;
- **Cruise tourism continues to grow,** with increasing demand from source markets Australia, Scandinavia, Finland, Germany and Brazil;
- **Young travellers represent one of the fastest growing segments of the travel industry** accounting for 20% of all international arrivals, generating an estimated 160 million visitors and a global market worth US$182 billion per year;

- **Increasing demand for cultural tourism** is growing at an unprecedented rate, now accounting for around 40% of global tourism;
- **Culinary tourism is an increasing motivation to travel** with tourists seeking local, authentic experiences linked intrinsically to the places they visit. Accounting for 30% or more of tourist expenditure, food plays an important role in the development of tourism services;
- **Heightened consumer sensitivity to climate and sustainability issues** has increased the demand for responsible business practices and corporate social responsibility in tourism.

Substantial potential for further growth UNWTO Tourism Towards 2030 is UNWTO's long-term outlook, and an assessment of the development of tourism over the two decades from 2010 to 2030. It is a broad research project, building on UNWTO's ongoing work in the field of long-term forecasting initiated in the 1990s. This study replaces the earlier Tourism 2020 Vision, which has become a worldwide reference for international tourism forecasts. A key output of Tourism Towards 2030 is a set of quantitative projections for international tourism demand over a 20-year period, with 2010 as the base year, and ending in 2030. The updated forecast has been enriched with an analysis of the social, political, economic, environmental and technological factors that have shaped tourism in the past, and which are expected to influence the sector in the future. According to Tourism Towards 2030, the number of international tourist arrivals worldwide is expected to increase by an average of 3.3% a year over the period 2010 to 2030. It is expected that the rate of growth will gradually decrease over time, slowing from 3.8% at the beginning of the period to 2.9% towards 2030, but it should be noted that this is on top of growing base numbers. In absolute numbers, international tourist arrivals will increase by some 43 million a year, compared with an average increase of 28 million a year during the period 1995 to 2010. At the projected rate of growth, international tourist arrivals worldwide are expected to reach 1.4 billion by 2020, and 1.8 billion by the year 2030.

International tourist arrivals in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa will grow at double the rate (+4.4% a year) of that in advanced economy destinations (+2.2% a year). As a result, the number of arrivals in emerging economies is expected to exceed those in advanced economies before 2020. By 2030, 57% of international arrivals will be in emerging economy destinations (versus 30% in 1980) and 43% in advanced economy destinations (versus 70% in 1980). The strongest growth by region is expected to occur in Asia and the Pacific, where arrivals are forecast to increase by 331 million to reach 535 million in 2030 (+4.9% per year). The Middle East and Africa are forecast to more than double their number of arrivals during this period, from 61 million to 149 million and from 50 million to 134 million respectively. Europe (from 475 million to 744 million) and the Americas (from 150 million to 248 million) are projected to grow comparatively more slowly. Thanks to their faster growth, the global market shares of Asia and the Pacific (to 30% in 2030, up from 22% in 2010), the Middle East (to 8% from 6%) and Africa (to 7% from 5%) will all increase. As a result, Europe (to 41% from 51%) and the Americas (to 14% from 16%) will experience a further decline in their share of international tourism, mainly because of the slower growth of the comparatively mature destinations in North America, Northern Europe and Western Europe.

Significant trends amongst more affluent and educated travellers in the larger, longer-established tourism-producing countries include: - An increase in long-haul travel. - A propensity to take more holidays, but of shorter duration. People have been taking an increasing number of short breaks in addition to the main annual holiday, with some of this growth being fuelled by the growth in 'low cost' airlines, particularly within Europe. This is likely to shrink during recessionary times, but grow again in times of economic prosperity. - Travel motivation is becoming increasingly characterised by a search for escape, emotional recharge, authenticity, fulfilling experience, outdoor activities/adventure, and a general desire to participate and explore, rather than merely relax. In particular, there is a profound need to 'get away from it all' and to use travel and holidays for discovery of places, of cultures and of self.

MARKETS AND MARKETING STRATEGIES

A. Marketing strategies for the **Chinese tourism market**

As China is the world's largest source market of outbound tourists, many destinations are seeking to improve their marketing and promotional activities in the Chinese market. There are two periods of the Chinese outbound travel market: the trial stage and development stage (2002-present) to describe the booming phenomenon of tourism in the Asian country.

According to a recent report of Business Intelligence Fung Center, the number of Chinese tourist travelling abroad is constantly growing and could be doubled in 2020 to reach 234 million of tourist, that's means 100 million more than last year. The number is growing and the tourist's expenses too. In 2010, the amount of expenses concerning the clothing, cosmetics and high tech products can reach 422 billions of dollars.

A desire to visit exotic scenery, tourist attractions and experience different cultures that offer them a fresh approach to daily life are all among the top reasons for travelling outside of China. By watching sumo or visiting the Pyramids, the Louvre and the Amazon Rainforest, they hope that these experiences can broaden their horizons, as well as give them stories with which to show off in front of friends and relatives upon their return home. Many Chinese people revere anything related to foreign countries or foreigners. For example, although Tibet is much farther than South Korea to a Beijing resident, he might gain a greater sense of pride if he chooses the latter as his holiday destination.

Cheaper luxury goods and high-quality products are another key factor when Chinese tourists are planning to go abroad, especially for women.

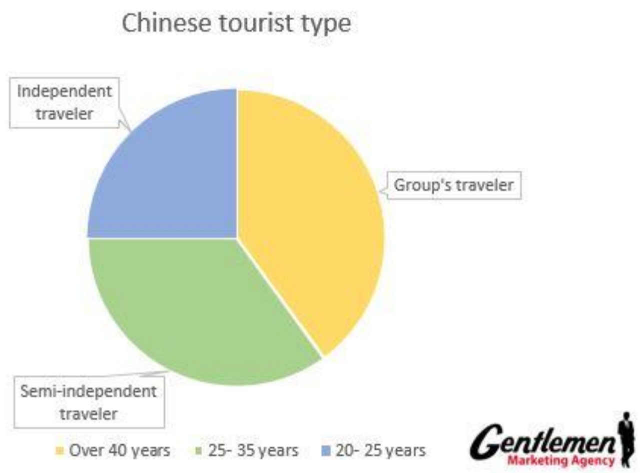
With the fast economic development in recent decades, more and more ordinary Chinese can afford luxury goods and foreign products. However, due to heavy tariffs, the price is much higher in China compared to foreign countries. Therefore, duty-free shops are the must-go places for most Chinese tourists visiting foreign countries. Besides satisfying their own daily needs, they may also be required by relatives, friends and colleagues to buy many goods there. In China, purchasing overseas products for others has already become a large business. One curious reason for many Chinese tourists preferring a good-quality holiday in foreign countries rather than at home is to avoid the overcrowded domestic tourism sites.

According to the 2017 National Day Golden Week Travel Trends report, released by Ctrip, one of China's leading online travel agencies, it is projected that some 650 million people will flood to tourist sites across China. Since the domestic tourism industry has been slowly developing over the past 30 years, services including communication and accommodation cannot satisfy the demands of tourists who have higher standards. It appears that the trend will continue as long as there are still exotic sceneries, tourist attractions and colourful cultural curiosities, plus cheaper luxury goods and high-quality products, to lure Chinese tourists, as well as make loved ones jealous upon their return.

What are the main characteristics of this new tourism wave? How can you attract these new Chinese tourist?

1) THEY SEARCH NEW EXPERIENCES

It exits different types of tourism in China. Here below, you can see a chart representing the segmentation of Chinese tourists' types. As indicated to the chart below:



- 40% are « group's traveler » travelling once every 2 or 3 years and aged of 40 years or more.

- 35% are « semi-independent traveler » travelling many times in a year and planning some organized programs but keeping independent. Most of the time, they have between 25 and 35 years old.

- 25% are « Independent traveler » travelling by themselves and aging between 20 and 25 years old.

We have all seen those Chinese Tourist cars with travels agencies in an organized trip, however the trend seems to be reversed. These trips are left to those who have planned themselves their own trip and travelling program. Chinese find by themselves specialized websites and platforms proposing travel tours and program for the duration of their stay.

WHY THIS NEW TREND?

According to the International Travel monitor Chinese report in 2014, about two third of Chinese consumers tends to travel independently. This not seems to be just the beginning of this new wave…the growth of standard living in China with the emergency of a middle class, an opening mind to the western cultures and the increase of direct flights between international destinations and China have enhanced this phenomenon.

Added to this, facilities concerning visa process. For example, in 2014, China and United States have agreed to lengthen the visa validity short term for the business travelers, tourists and students.

Chinese tourist could visit United States constantly during 10 years with a single and unique visa. According to a report from the business department in United States, from 2021, the number of Chinese's tourists could reach 7, 3 million with an economic impact at 85 billion dollars.

In this video below, we can see a women sharing its own experience about travelling abroad.

2) A DIGITIZED CONSUMER

There is a boom in the digital era in China with more than 620 million Internet user and more than 80% have a mobile device. This new trend change the tourism shape in China with an infatuation for booking their trips on Internet mobile.

According to the Center of Network Internet and information in China, 53% of Chinese tourists travelling abroad used mobile apps to book their trips online (hotels, flight ticket, attractions ticket). Most of the tourist like to travel on their own and organizing their own travel program.

3) HOW CHINESE PEOPLE PREPARE THEIR TRIP?

Social Medias have a huge impact in the decision making process of Chinese for their travelling destination. The majority of the population (80% of the population in China) is present on Social Medias. This is a tool which has a large influence on Chinese population and their opinions. Weibo and Wechat are the most used tools that allow to share photos, videos, brand experiences, and trips memories. Social network has this particularity to be really "viral" and to influence Chinese behavior. If you want to attract Chinese tourist, then you might optimized your presence on the social networks and catch the customer's attention.

For example Weibo can generate a lot of traffic in short timing. If you create Weibo post on your travel agency page, it can lead to a lot of "likes", comments and shares…etc.

Wechat can allowed you to get a proximity with friends and others by sharing videos moments, pictures, messages and videos calls. Official Wechat pages of travel agencies have their QR codes that allowing users to scan their codes and share this link with others Wechat contacts.

4) CHINESE GOVERNMENT'S EFFORT

The government has developed all the means to attempt changing the behavior of Chinese, to be adapted to other countries. There have been several scandals involving tourists who used public spaces as toilets or the case where a passenger has been kick out of the aircraft because he was fighting for a life jacket. Chinese government appears to support its citizens to travel more abroad. It is also a way for China to leave the feeling to give more freedom to Chinese people and reducing the gap between China and the other countries on the international level. Another subtlety that can be noticed is that China is trying to change the shape of international stage. Countries that want to attract these "Chinese wallets" would have to be more flexible concerning international policies between China and others countries. It could affect the Chinese tourist flow abroad.

5) TRAVELLING DESTINATIONS OF CHINESE PEOPLE ARE CHANGING

Chinese people seems to increasingly turning their interest towards travels outside of China. From the first ten months of 2015, the places such as Macau, Hong Kong and Taiwan have lost market shares dropping at 8% between 2014 and 2015. However, the more international destinations are jumping up to 42% during the first 10 months, that is means an increase of 15 million of dollars.

For example, Thailand is really popular among Chinese tourist, because of visas facilities given and because Chinese people cannot usually not find the same amazing beach place like in Thailand. We can notice an increase of 93%. The Japan has noticed an increase of 115% too. The list still long: Australia, New Zealand and Sri Lanka…etc.

135 million travellers a year, spending US$261 billion – numbers that will soon be smashed: Chinese tourists are having a huge impact on destinations everywhere, which welcome the money they pay but not always their ways. "Chinese tourists are the most powerful single source of change in the tourism industry.",Taleb Rifai. "Not only is it the biggest domestic market in the world, where 4.4 billion trips are made each year, but it's also the leading global outbound market, with over 135 million international departures in 2016. This number has been increasing in double digits since 2010 and it's merely the tip of the iceberg. The potential of the Chinese market is far greater, because only 6 per cent of Chinese people own a passport. So we expect 200 million Chinese to travel abroad in just a few years' time." The tourists from Hong Kong and Macau are not included in these statistics – is the fact that they lead the world in terms of expenditure: US$261.1 billion last year, according to the United Nations agency. Chinese travellers spend double the international average, so their impact in local economies can be huge. Chinese travel when Europe is not on holidays – the weeks of May and October 1, or the Lunar New Year – and many go to unconventional places. For instance, the place they visit the most in Germany is not Berlin or Frankfurt but a small town in the [Rhineland-Palatinate] region called Trier. Why? Because that's the birthplace of Karl Marx, a man who is in every Chinese student's textbook. It's difficult to see where the limit is regarding the number of Chinese tourists, because, generally, the cap is in the number in the middle income population and the Asian Development Bank forecasts that that will reach 1.1 billion by 2030 in China. This means that many new destinations can be developed and even niche markets will be enormous.

Nowadays, Germans are the fondest of it, with around 14 million ski lovers. That's about a quarter of the population. We estimate that only 1 per cent of Chinese people like winter activities, but that already equals the number of Germans.

A single wholesale travel agency in China can deliver up to 30,000 visitors to a destination. In Zimbabwe, where Chinese faces are already familiar as Chinese companies construct key transport infrastructure, the government wants visitors from China to also fill its national parks. They spend much more than the average US$1,250 per trip. If those dollars find circulation in the country, they can become a good tool to fight poverty in line with the UN's Sustainable Development Goals.

The first wave of Chinese tourists was interested in world-famous cities, luxury and shopping. But now we see a growing interest in nature destinations.

Long distance is a problem, and destinations are trying to get more air connections between the countries, so travel can be more comfortable. Some countries like Brazil are also introducing the five-year e-visa as an incentive. Many countries are making it easier for Chinese tourists to obtain visas, or have waived them altogether. This can also help in tailoring pan-American routes, because when they travel so far, the Chinese want to see the most famous sights of all Latin America. We need to coordinate among governments to make sure this is feasible. Changes in visa policy are possible because, the era of the Chinese illegal immigration is over and, although we understand the need to keep our countries safe, it's obvious that the Chinese are not terrorists. We need to make visa policies still more flexible for them. The world needs to become Chinese friendly and get ready to receive them.

But adapting to Chinese tourists doesn't mean you need to scrap all the rooms with the number four in a hotel because it sounds like death in Mandarin. We make a big mistake when we think of the Chinese as weird people with completely different customs. We want to take their money but we don't like them, and there is certainly a racist component in that. We must learn how to communicate with them, the same way we did before with the British or the Germans, who actually make much more trouble and generate less revenue in 'sun and beach' destinations like Spain.

The surge in the numbers of Chinese travelers is a great challenge even beyond the overcoming of racial prejudice.

Because of their sheer volume and homogenous shopping habits, Chinese tourists' demand can influence the domestic market of certain items they like, whether it's baby formula in Hong Kong or smart toilets in Japan, where they have also pushed up prices in the business hotel sector. And the fact that many are first-time tourists becomes a challenge because they are perceived as unruly. But in Japan they are also taken advantage of by unethical operators and businesses: they get cheated, overcharged or even denied service, just because they are Chinese.

Thailand is the Chinese outbound tourist's favourite destination and has seen its fair share of controversy, but the government has swiftly taken action. Last year, they received 8.7 million Chinese tourists out of a total of 32.85 million international arrivals. And in 2017, up to September, they have already received more than six million. China is, by far, No 1 source of visitors, but they are more interested in quality than in quantity.

They need to make sure that people who come to Thailand do so in an orderly and sustainable manner. That's why they banned the so-called 'zero-dollar tours' last year, referring to Chinese companies that offer package tours so cheap they are of little benefit to either the tourists or the Thai businesses catering to those tourists. They also discourage big tour groups, because they take tourists to the same old spots and treat them badly. In places like Chiang Mai University – famous among the Chinese for the movie Lost in Thailand [2012] – they have decided not to turn away visitors, which created tension with the local community. On the contrary, we have designed a route around the campus so they can visit the place in peace and without disturbance, even on a new tram. So everybody is happy.

Chinese tourists may not be considered violent but they do have a reputation for being noisy, rude and uncivilised. Photos and videos that have gone viral on social media underline that view. The arrival of Chinese tour groups has been key to compensating for the decrease in the number of tourists of other nationalities due to the global crisis. Some are new rich and treat people like animals. They give orders and never say thanks. Others seem to have just left the jungle: they shout, fight for food at the buffet and make everything dirty. Chinese travelers may overwhelm other visitors if they are not managed properly.

In Thailand now 60 per cent to 70 per cent of Chinese arrivals are independent travelers. They use the internet to arrange their own trips. They book the hotel and air travel first, and then they use their mobile devices to choose where to go and where to eat or shop.

Approved destination status (ADS) was first granted by Beijing in 1983, to Hong Kong and Macau. In November that year, citizens from Guangdong province were allowed to visit the still foreign cities on a trial basis. Five years later, Thailand was granted ADS, but it applied only to those Chinese who had relatives in the country. According to UNWTO statistics, just 10.47 million mainland Chinese crossed the nation's borders in 2000, most on official trips or family visits. Even students were closely monitored by political commissars. In 2004, the doors swung open and China awarded ADS to most of Europe and Asia.

Along with the country's astonishing economic development, Chinese tourism exploded in 2009 and the record mark of 100 million outbound travelers was broken in 2014. Now independent tourists account for about 25 per cent of the total in China and their number is growing way faster than organised tours.

A UNWTO report titled "Penetrating the Chinese Outbound Tourism Market", released in 2017, stresses that millennials perceive travel as more for enjoyment and gaining an authentic life experience than as purchasing a product. The main mistake European countries make in regard to Chinese tourists is to treat them as a homogeneous mass. There are huge differences between cities and across ages. The Chinese will travel in as many different ways as we do, and it will happen very soon. The UNWTO report adds that Chinese millennials "are the forerunners of mobile applications and revolutionary payment methods" and, the youngsters of China will bring a technological revolution to the tourism industry. In the tier 1 tourist-generating regions, there are increasing demands for high-end and luxury tour products. In-depth tours of single destinations are becoming popular among experienced tourists and repeat travelers who require a unique experience of local history and culture.

Tourism in China is booming. Domestic Mainland travel is booming, and a big increase in foreign tourists is expected for the next decade. China is a very popular country for foreign tourists. People are fascinated with the different culture, the natural highlights, ancient cities, and fast modernization. China ranks third as a tourist destination country after France and the US. But if Hong Kong and Macau are included, then China is the **world's number one tourist destination.** 98.8 million people traveled to China in 2015 for tourism, business, or work. 56 million foreign tourists came to China in 2014, and total inbound **tourism numbers have held basically steady** from 2007 to 2014.

Chinese people are the tourist majority: Most "foreign" visitors come from Hong Kong, Macau, and Taiwan. Travel is easy for them, and many come for work, business, education, or family reasons as well.

Tourists from non-Chinese countries and regions numbered about 26 million in 2013 and 2014. This number too has held steady from 2007. Asian tourists are increasing in percentage terms because intra-Asia travel has been booming recently with increased Asian disposable income.

The largest non-Chinese tourist nationality are South Koreans (about 4 million/year), followed in numbers by Japanese, Russians, Americans, Vietnamese, Malaysians, and Mongolians; mostly countries closest to China. About 20% of foreign tourists are European (half Russians).

The biggest segment of the Chinese tourism market is Mainland domestic tourism. Increasingly, Chinese have a surplus of spending money, time for travel, and a good transportation system. And they are using it!

Chinese domestic tourism has been **increasing about 10% per year**, and it is estimated that this contributes 4% of China's GDP of 9 trillion dollars or 360 billion dollars.

China is a powerful engine behind retail spending, but particularly in countries such as Japan, South Korea and Thailand, as millions of Chinese tourists travel to these markets every year. The influence of Chinese travelers, however, is expected increase across the globe, and we estimate that 192 million Chinese tourists will travel abroad annually by 2021, spending $457 billion in overseas markets.

Some of the more interesting trends we are seeing when it comes to Chinese international travelers:

- Chinese outbound tourists have quickly evolved into experienced and sophisticated travelers. Apart from shopping, they crave lifestyle experiences when they travel abroad.

- Tourists from lower-tier cities in China have become the growth engine for outbound tourism, spending 10% more on their last trip compared with their peers from tier-1 cities. They also travel as frequently as their counterparts from tier-1 cities, at an average of 1.9 times per year.

- Chinese tourists are very much reliant on mobile devices, with 98% of those surveyed saying they use their smartphone while abroad to keep in touch with others and to search for travel-related information. Some 72% of survey respondents said they use online resources such as travel websites, blogs and social media to plan their trips.

These descriptions resonate with the profile of the average international tourist, who has an unprecedented level of information at her disposal and an incredibly easy way to access it before and during a trip.

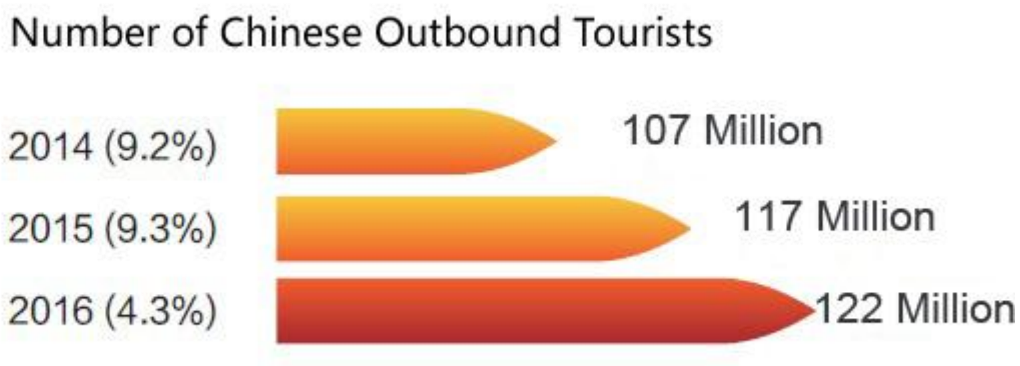
Traveling consumers are a particularly dynamic market segment to study, as tourists are increasingly reliant on technology to navigate the retail landscape and inform their spending, especially when traveling to new or foreign destinations. For example, our study of Chinese tourists showed that 28% of travelers ages 18–29 consider social media their major information source for trip planning, while more than half of all surveyed travelers regard mobile payment—a payment option that is almost ubiquitous in China—as important when traveling abroad.

For retailers, learning to cater to the expectations of tourists from markets such as China could be a path to innovation in its own right. More importantly, the ability to effectively communicate and engage with a global audience digitally before, during and after a transaction is one of the skills that will surely differentiate successful retailers in the near and distant future.

China Tourism Academy (CTA) , the official tourism research institute of China National Tourism Administration (CNTA), issued "Tribute to the Chinese tourists - 2016 China outbound tourists large data". The report shows that in 2016 the number of outbound tourism in China reached 122 million people, and Chinese visitors spent $109.8 billion (about 760 billion RMB) in overseas destinations.

1. 122 million Chinese tourists travel overseas

In 2016, with income growth and tourist consumption upgrade, as well as as well as visa, flight and other convenient factors, China's outbound tourism heat continued. The number of China's outbound tourists reached 122milion in 2016, increasing by 4.3% compared to the year of 2015 with 117 million outbound tourists. China has remained the world's largest number of outbound tourists for consecutive years.



China has been the largest source of outbound tourists in Thailand, Japan, South Korea, Russia, Maldives, the UK and the other countries. However, China's outbound tourists are still less than 10% of the country's total population, and only 10% of the population hold the passports, which suggests huge potential in China's outbound travel market.

1. **900 overseas per capita consumption**

Total consumption by Chinese travelers overseas reached $109.8 billion (about 760 billion RMB) and $900 per person on average last year, accounting for 16% of the country's total tourism consumption, though the number of outbound tourists only accounts for 3% of the country's total tourists.

From the statistics, in 2016, more than 65% of the consumption is for outbound travel and 35% is for domestic travel. This indicates the Chinese tourist are increasingly keen on outbound travel.

Statistics show that Thailand, Japan, South Korea, the U.S., Maldives, Indonesia, Singapore, Australia, Italy and Malaysia were the top 10 destinations where Chinese tourists spent the most money.

Top 10 Destinations Where Chinese Tourists Spent the Most Money in 2016
1. Thailand
2. Japan
3. South Korea
4. U.S.
5. Maldives
6. Indonesia
7. Singapore
8. Australia
9. Italy
10. Malaysia

For the overseas cities, the top ten cities with the most spending of Chinese tourists are Seoul, Bangkok, Tokyo, Osaka, Singapore, Chiang Mai, London, Moscow, New York, Rome and Sydney.

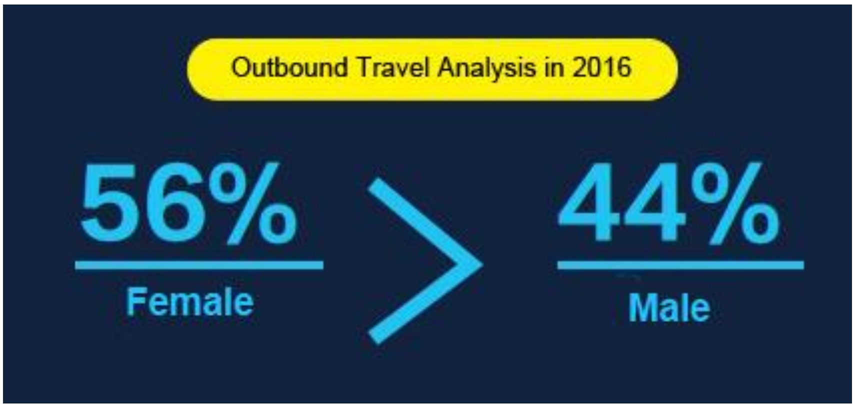
Top ten itineraries per capita consumption are Argentina, Chile, Madagascar, Ethiopia, La Polynésie française, Tahiti, Mexico, Brazil, Kenya, and l'Ile de la Reunion. Taking the itineraries in South America as example, the number of Chinese tourists increased by 200%, spending $7,224 (about 50 thousand RMB)

3. Chinese tourists like group travel, while individual and customized tours grow faster
It is estimated that Chinese travel agencies organized more than 50 million tourists to travel overseas, most of whom are follow the group in 2016. Among 122 million outbound tourists, group travelers account for 40%, and individuals are over 70 million accounting for 60%. Chinese tourists

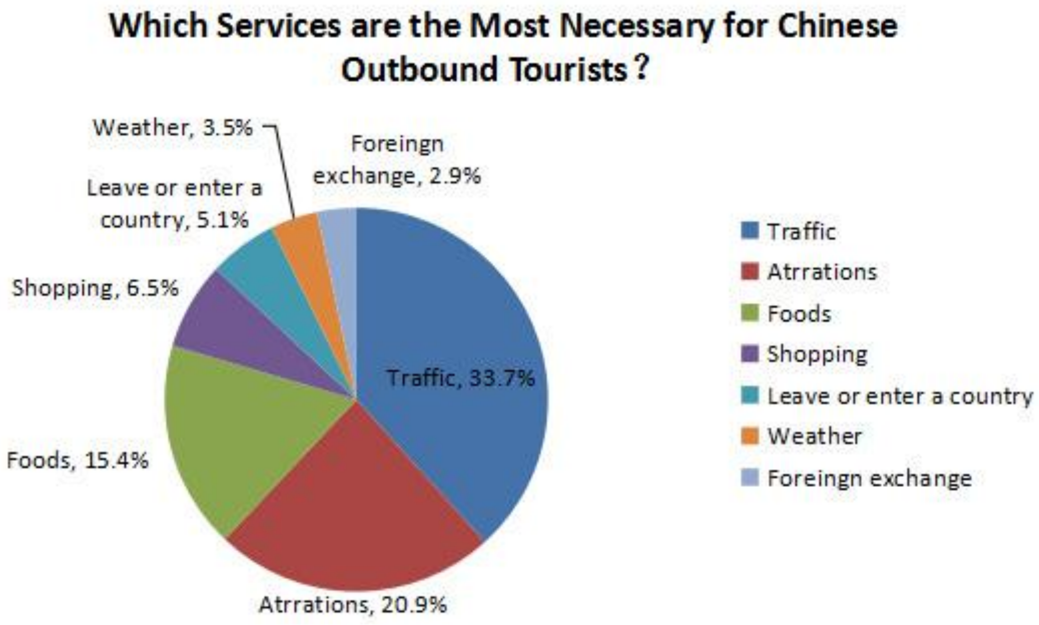
still endear to group travel, especially in second, third and fourth-tier cities and regions, but individual travel will be an irresistible main trend in near future.

Chinese outbound tourists are increasingly interested in the new tourism products, such as the customized itinerary of hiking in Yakushima and watching turtles spawning according to Japanese Animation, or the medical tour for Cancer Screening in Japan.
Statistics show that more and more tourists book the customized trips(400% increase), themed program(250% increase), entrance tickets(100% increase). In 2016, programs for outbound tourists become more diversified and convenient.

4. Women are more willing to travel abroad, 1970s and 1980s are the main consumers
Compared with men, female travelers are more likely to choose overseas destinations, with the latter making up 56% of China's outbound tourists. People born during the 1970s and 1980s made up nearly half of outbound tourists, but data shows that more and more younger people as well as the elderly have expressed the interests in overseas travel. In 2016, the oldest Chinese tourist is 101 years old.



5. Chinese tourists pay more attention on traffic, attractions, foods and shopping



6. A list of outbound departure cities: "New first-tier cities" Era

Shanghai, Beijing, Guangzhou and Shenzhen definitely are the four main doors to the outside world, while "New first-tier cities" also contribute numerous travelers whose consuming capacity are almost the same as the ones from first-tier cities.

Top 20 Outbound Departure Cities in China in 2016	
1. Shanghai	11. Xiamen
2. Beijing	12. Xi'an
3. Shenzhen	13. Changsha
4. Guangzhou	14. Kunming
5. Hangzhou	15. Qingdao
6. Chengdu	16. Shenyang
7. Nanjing	17. Ningbo
8. Tianjin	18. Zhengzhou
9. Wuhan	19. Nanning
10. Chongqing	20. Dalian

Top 10 Cities with the Fast Growth Outbound Tourists in China in 2016	
1. Zhuhai	6. Kunming
2. Nanning	7. Shenzhen
3. Hefei	8. Qingdao
4. Zhengzhou	9. Chongqing
5. Changchun	10. Xi'an

Top 10 Outbound Departure Cities With The Most Per Capita Spending Overseas In 2016 (RMB)	
1. Beijing	6203
2. Shanghai	6126
3. Changchun	5440
4. Shenyang	5361
5. Guiyang	5328
6. Kunming	5266
7. Xi'an	5116
8. Nanjing	4869
9. Chengdu	4866
10. Qingdao	4784

7. Popular destinations by Chinese tourists

It has become much easier for Chinese passport holders to travel abroad. There have been 151 countries and districts opened as Effected ADS Destinations to Chinese citizen so far. By January 2017, China has signed visa exemption and visa-on-arrival agreements with 61 countries, increasing by 9 countries compared to last year. Many more European countries also launched the visa free policies to Chinese citizens. Serbia begins waiving visa requirements for Chinese citizens to the country starting from January 2017. Followed by US, Canada, Singapore, Korea, Japan, and Israel, Australia also agreed that Chinese tourists apply for a 10-year multiple entry visa to the country.

Top 10 Most Popular Destinations by Chinese Tourists in China in 2016	
1. Thailand	11. Cambodia
2. South Korea	12. Russia
3. Japan	13. Australia
4. Indonesia	14. Mauritius
5. Singapore	15. Italy
6. U.S.	16. The United Arab Emirates
7. Malaysia	17. Sri Lanka
8. Maldives	18. UK
9. Vietnam	19. Egypt
10. Philippines	20. Germany

Thailand, South Korea and Japan become the top three popular destinations by Chinese tourists, attracting more than 8.77 million, 8.04 million and 6 million Chinese tourists respectively in 2016. The number of Chinese tourists to Southeast Asia and South Asia grow fastest. Because of the easing visa requirements, some of the countries become dark horse destinations receiving increasing Chinese tourists, such as Vietnam, Philippines, India, The United Arab Emirates, Sri Lanka, Japan, Singapore, Thailand, UK, and Canada.

Top 10 Dark Horse Outbound Destinations in 2016	
1. Vietnam	166%
2. Philippines	124%
3. India	81%
4. The United Arab Emirates	78%
5. Sri Lanka	72%
6. Japan	53%
7. Singapore	48%
8. Thailand	45%
9. UK	43%
10. Canada	22%

8. Not only for sightseeing and shopping, but also for islands, entertainment, museums and medical tour

As the air pollution problem in China has been serious, air quality and natural environment have become important factors for choosing destinations. Sunny beaches with fresh air attracted more and more Chinese visitors. Island travelers accounted for 30% of the total outbound travelers.

Top 10 Outbound Islands in 2016
1. Phuket
2. Bali
3. Jeju
4. Okinawa
5. Boracay
6. Maldives
7. Sabah
8. Nha Trang
9. Saipan
10. Sri Lanka

Family tours is very popular in outbound travel market. In 2016, Universal Studio in Singapore, The Coca Cola London Eye, and Universal Studio in Los Angles are among the top ten most popular family attractions.

Top 10 Outbound Family Attractions in 2016
1. **Disneyland Hong Kong**
2. Ocean Park Hong Kong
3. Universal Studios Singapore
4. Universal Studio Los Angles
5. The Coca Cola London Eye
6. Universal Studios Osaka
7. Disneyland Tokyo
8. Taipei 101
9. Lotte World
10. Burj Khalifa Tower

Metropolitan Museum of Art in New York, Musée du Louvre in Paris, Vatican Museum, The British Museum were listed as the top ten most popular foreign museums by Chinese tourists in China in 2016.

Top 10 Most Popular Foreign Museums by Chinese Tourists in China in 2016
1. **Metropolitan Museum of Art**
2. Musée du Louvre
3. Vatican Museum
4. The British Museum
5. The Uffizi Gallery
6. National Museum of Marine Biology and Aquarium in Kenting, Taiwan
7. Dubai Museum
8. Teddy Bear Museum in Jeju
9. Playk-pop Museum in Jeju
10. National Air and Space Museum in Washington, DC

Nowadays, medical tourism has become more popular among Chinese tourists. Wealthy Chinese spend huge money on medical tourism.

Top 10 Most Popular Medical Tourism Destinations by Chinese Tourists in China in 2016
1. Japan
2. South Korea
3. U.S
4. Taiwan
5. Germany
6. Singapore
7. Malaysia
8. Switzerland
9. Thailand
10. India

For the first half of 2017, Chinese outbound tourists totalled 62.03 million. A steady 5.1% increase over the same period last year. With only 10% of Chinese nationals having a passport, there is HUGE growth potential. Tourists travelled from 100 major cities with Shanghai, Beijing and Guangzhou as the top three exit ports in China.The biggest trend shift, is 58% of tourists travelled independently verses 42% travelling in a group. With the enormous growth in mobile usage, independent online travel itineraries is the biggest opportunity for British hotel and hospitality brands, looking to target the in-bound traveller. In addition to booking airlines and hotels, increasingly travellers are pre-booking experiences, planning shopping trips, booking theatre tickets and pre-booking restaurants.

The numbers of Chinese tourists in the world is growing at an amazing pace. Approximately 135 million outbound trips have been ventured by Chinese travelers in 2016, a number set to grow rapidly, reaching 200 million outbound trips in 2020.

The size of the Chinese middle class has risen steadily with the rise in average income. Per capita GDP has increased by 148% in the last ten years: between 2003 and 2013 it grew at an average annual rate of 5.5%. Moreover, **Oxford Economics predicts that by the year 2023 there will be another 61 million families who will be able to afford international travel** by strengthening China's role as the main market for international tourism.

The flow trend of the Chinese tourists is influenced by various factors including: long-distance monetary and time costs (this is why the destinations of the Schengen area are still a small segment of Chinese outbound tourism); the reduced number of days of leave available to Chinese workers; poor knowledge of European destinations, especially outside the main touristic cities; the availability of Chinese-friendly-facilities and the perception of safety (between October 2015 and March 2016, there was a contraction in the number of Chinese direct travelers in Europe, particularly in the central and southern areas, mainly due to concerns about security following the recent attacks that hit some European countries).

The Chinese tourism market is still largely based on organized tours. Only since 2013 self-organised tours have started developing, however this trend grows at 100% per year. This kind of travel is of particular interest to Europe and Italy more precisely, since on average this type of travelers stops for a greater number of nights, they have a greater propensity to spend, and are not induced by tour operators to make a “shopping stop” in France.

From the statistics, **we can infer that there has been a change in the touristic trends since more and more people, mostly millennials, now search for destinations outside the classic itineraries,** looking for exclusive experiences and trying to gasp the actual local lifestyle.
Online platforms are increasingly used by Chinese travelers to book the trip, or part of it, even directly via smartphones. For this reason, such platforms constitute the future of self-organised Chinese tourism. As a matter of fact, Chinese people make a large use social media even when they are travelling, to keep updated acquaintances and to show them the fantastic experience they are living. The increasingly importance of influencers must be really kept into consideration when dealing with Chinese tourists.

It is not a coincidence that **the year 2018 has been declared the “China-Europe tourism year”** as announced by the European Commission’s President, Jean Claude Junker. During the next period, we will be active spectators of a teeming activity, in the attempt to seize the moment starting new projects and activities. As an example, to capitalise on the China opportunity, many courtiers as Australia for example, are looking to roll out a 10 year visitor visa by end the of 2016 in order to simplify bureaucracy. Moreover, **to achieve the goal of promoting the touristic and cultural offer aimed at the best hospitality and travel experience for Chinese tourists, a Welcome Chinese Certification has been created.** It has been issued by the China Tourism Academy, the Chinese Tourism Ministry (CNTA) body responsible for the development of Chinese outbound tourism, in cooperation with China Central Television (CCTV), national television network, and China Union Pay (the only credit card circuit issued in China). The Welcome Chinese Certification is an exclusive standard that allows incoming tourism facilities to access a recognized network by allowing specific visitor visibility and competition from the market. Until now, the quality certification for Chinese tourists has been granted to 500 companies in the world, 321 of which in Europe and even 114 in Italy.
To conclude, everyone is rightly putting a lot of focus on the China market. However, what has been shown by the data is that **the tourist-receptive system of many countries presents some elements of weakness in the reception of Chinese tourists**: in particular, the shortage of Mandarin-speaking personnel, Chinese-language information on the Internet (increasingly used by Chinese to inquire about tourist sites) and personalized services (for example, water boiler or Chinese breakfast). There is still a long way to go, to fully understand this touristic trend and capture the most favourable opportunities.

Here are some recent (and growing) trends about the market

1. Chinese travellers are adapting more "Western" travel habits

2017 will witness the Chinese market maturing, showing more interest in "living like locals" and travelling as a lifestyle.

"The desire of seasoned Chinese travellers to experience authenticity and nature is getting bigger," said Wolfgang Arlt, director of the China Outbound Tourism Research Institute, in an interview with China Daily. "Consequently, for many service providers and destinations, the easy harvest of low hanging fruit seems to have come to an end."

This means tour and activity operators need to start developing more sophisticated offerings for a more matured travel market.

2. Less shopping and more experiences

In ITB's World Travel Trends report, Professor Zhang Guangrui, a tourism expert and Honorary Director of the Tourism Research Centre of the Chinese Academy of Social Sciences, said that the "crazy" spending habits of Chinese travellers will slow down "maybe sooner than expected".

Previously, Chinese travellers shopped a lot during their trips abroad because of significant price differences, better product quality and design. On top of that, "some foreign trips targeted at the mass market were priced very cheaply but included “a shopping trap”, resulting in high spending levels. However, the government, working together with destination country authorities, has now cracked down on such unsustainably cheap tours to solve this problem."

Another reason for the decline in spending power abroad is the rising costs in housing and education, which will take a toll on the disposable income of the younger travellers.

Just like everyone else, Chinese travellers are becoming more interested in spending money on exquisite local food, wine and other unique cultural experiences, rather than on things.

3. Growth of independent Chinese travellers

More travellers want to go off-the-beaten-path and many are avoiding massive bus tours that only bring Chinese travellers to "top-sights" and shopping malls. As travel becomes more accessible for the Chinese market, expect more independent travellers to explore a destination in small groups, with family or friends.

Strategic partnerships between Baidu Maps (aka the Chinese version of Google Maps) and Nordic tourism boards will make it even easier for travellers to venture down less popular paths. The partnership aims to allow Chinese-language mapping services in Sweden, Finland, Norway and Denmark. And this is only the beginning.

4. Family travel is gaining momentum

Over the Lunar New Year that took place last weekend, there was not only a surge in outbound travel, but also family travel. "As of December 30, 2016, there was an 18% rise in bookings made by families of up to four members for travel during this holiday season compared to last year," according to Forbes.

Who's footing the bill? On one hand, we've got young and affluent professionals living abroad who are flying their relatives out to spend the holidays; on the other hand, we have travellers older than 55 yearswho are taking their families on holidays abroad.

More and more families are also going on self-organised trips, looking for quality time for the whole family instead of enduring without the child the fast-paced sightseeing and shopping frenzy of mass market package tours.

5. Skiing is becoming more popular in anticipation of the 2022 Winter Olympics

Now that they've won the bid to host the 2022 Winter Olympics, the Chinese government is encouraging more of its citizens to get involved in winter sports.

For snowy European and North American countries, this opportunity to attract more winter sports enthusiasts is one that should be approached with caution. While Canada has begun fuelling non-stop flights between Beijing and Calgary, its European counterparts are struggling to meet the new demands.

Marketing to the Chinese traveller - The future for the Chinese market is pretty clear: it will become more segmented market with a lot diversity in travel habits. For 2017, we'll begin to see a clear distinction between first-timer travellers and matured travellers. As a tour or activity operator, it is up to you to decide who you want to cater to.

There is one key thing tour and activity operators can do to gain more business from the Chinese, and that is to translate your marketing materials into Mandarin. Bonus points if you can hire a Mandarin-speaking guide.

Of group travel, 61% were families favouring bespoke itineraries . CTrip offers a customer service function and the lack of WeChat groups for overseas players, was cited as one of the biggest frustrations. In terms of the duration of the trip, 58% chose 4-6 days, and 28% chose 7-10 days. It is easy to see that for many, the itinerary is pre-planned before even boarding the plane! Travellers increasing cite convenience, safety, stability and friendliness as the top reasons for visiting destinations.

So this brings us to the question of British brands marketing to Chinese tourists. All to often, the basics are overlooked by those brands listed on CTrip and Chinese OTA’s.

We have compiled a list of “Must Dos“ when targeting Chinese tourists:

1 Have a customer service function for questions, preferably on WeChat. This must be manned by Chinese speaking staff. Being able to answer simple questions will build confidence with your brand and is the biggest cause of high bounce rates at checkout.

2 Have a social media presence on Weibo. This will build credibility of your brand and act as a “shop window” to new customers.

3 Use positive testimonials and comments in your marketing.

4 Create compelling content to engage with your chosen Chinese tourism secgments. Make sure this content is relevant and resonates.

5 Thread “story telling” in all your marketing. Using emotive content is highly effective in this market.

6 Invest in marketing to support your CTrip or Chinese OTA channel. This could be rich media such as video, banner advertising or advertising at point of departure through WeChat. Have a plan to support this channel.

7 With WeChat pay being an intrinsic part of Chinese society, offer WeChat pay on bookings and at destination.

8 Offer supporting services and partner with experiences, that can be offered to your customer. Improving the experience will increase word of mouth opportunities – vital in this market.

Bulgaria has started an active campaign to attract Chinese tourists. In 2017 for the period January – August the country has been visited by 19 000 Chinese tourists, which is 50% increase in comparison with 2016. Most them visit Bulgaria as part of the initiative "2017 – Travel on the Silk Road". In 2017 Bulgaria opened Tourist Information Centre in Shanghai. It will promote the opportunities and advantages of Bulgarian tourism and creates excellent possibilities for partnership.

Tourism strategies include some or all of the ***following product development, marketing, travel facilitation and technological developments***. There are some key solutions for destinations, such as ***the need to be aware of the characteristics of foreign tourists culture and the needs of travellers in order to provide diverse facilitation services that can add attractiveness and competitiveness for the market.***

Some of the recommendations to be successfull in the Chinese tourism market, namely:

- ✓ ***to study and understand the market and tourist characteristics;***
- ✓ ***prepare the destination to receive Chinese tourists;***
- ✓ ***develop targeted products and market plans;***
- ✓ ***and build relationships with Chinese trade partners and promote the media channels.***

B. Marketing strategies for the **Japanese tourism market**

The Japanese outbound travel market totaled 18.49 million trips in 2012, a sharp rise of 8.8% over 2011. Despite its recent faltering performance, Japan remains a very important tourist generating market. It ranks 12th in UNWTO's record of leading countries according to expenditure abroad though it fell from 9th place in 2012. The USA remains the main overseas destination of Japanese travelers. However, the majority of Japanese go to the North Pacific islands of Hawaii and Guam. In recent years there has been a shift in favour of short haul destinations. Over the past ten years, trips to Northeast Asia rose by 57% and those to Southeast Asia by 12%. By contrast, trips to North America fell by 41% and to Oceania by 44%. Over the period to 2019, an average annual growth in Japanese outbound trips of 4.5% is predicated, with long haul travel growing slightly more slowly at 3.9% a year. Total Japanese trips to Europe amounted to an estimated 4.84 million in 2014, a level that has risen by 12.8% since 2004 i.e. an average annual rate of growth of 1.2%. Europe accounts for almost one-in-three long haul trips taken by the Japanese.
Japanese spending on outbound travel is relatively high on a per trip basis. Figures presented at the JATA Forum 2013 and reported in ETC's Market Insights show they spent US$2,918 (EUR2,216) per

trip in 2011 - 40% more than citizen of the Republic of Korea spend on their overseas trips. On trips to Europe, the Japanese spent US$4,763 (EUR3,617) representing US$682 (EUR518) a night, these figures being understood to include transport costs. **Japan is Europe's third largest source of long haul visitors** after the United States and China.
The leading European destinations visited by Japanese tourists are Germany and France, followed by Spain, Italy, Switzerland, the United Kingdom and Austria, while the fastest growing destinations are **Turkey**, Spain, Croatia and Slovenia.
Prospects for the period 2014 – 2019 are for a steady growth of 17.5% over the period i.e. an average annual rate of growth between 2014 and 2019 of 3.3% by the end of which Europe will have lost a one percentage point market share.

Japanese tourists are unique and are different from the travellers of other Asian and western countries. They are discerning customers who share a philosophy of 'Consumer is King' in Japan. This leads to 2 important questions; (1) Which segments of the Japanese tourists group can be targeted for the tourism and hospitality industry at Bulgaria-Turkey cross-border tourist destination? (2) What are the most effective marketing strategies to attract potential tourists from the target segments?

Japan has the lowest fertility and highest longevity rates in the world, with the result that the population is reducing and becoming increasingly weighted toward older age groups. The current population is 127.3 million.
Japan's economy has suffered a 15 year, confidence-sapping period of stagnation and deflation followed by the global economic slowdown in 2008-09 and the Tohoku earthquake and tsunami in March 2011. Real incomes are high but have stagnated for many years. Consumer confidence remains negative.

About 90% of Japanese outbound travellers come from the island of Honshu, including over 40% from the Tokyo Metropolitan Area, 15% from the Kansai (Kyoto/Osaka) area and 12% from the Tokai (Nagoya) area.
Months with a higher than average share of outbound trips are March, July, August and September while the below average months are the winter months of November to February and the April-June period.
Virtually all Japanese outbound travel is by air. The Japanese took 217,000 cruises in 2012, 96,000 of which originated in home ports.

The Japan Travel Bureau Foundation's 2012 survey of travellers split outbound travel between business and personal at 21.5% and 78.5% respectively. MICE trips – 9.2% of total trips - rose slightly in 2012 but other business trips – 12.3% of total travel - fell back. The main component of pleasure travel is holidays which account for three –fifths of all Japanese outbound trips, having increased by 12.8% in 2012 to 10.6 million. This growth was principally at the expense of VFR trips the share of which fell to 2.3%. It is reported that many holidaymakers deferred their foreign travel after the Great East Earthquake of 2011 until the following year.

The types of holiday taken by the Japanese changed markedly over the past decade from beach resort-based to touring and city breaks.

Touring holidays are popular among the 20–30 and over 60s age groups; while city breaks are taken mainly by Japanese people aged between 30 and 60. Three quarters of Japanese holidays to Europe are touring, 15% city breaks and 10% other types. There is evidence that the trend changed in 2013 with beach demand growing and touring trips cut back, leading to a reduction in the average duration of trip to 6.1 nights.

The Australia Tourism Commission Japan Market Profile surveyed the important factors for the Japanese in choosing any tourism destination:

- safe and secure destination 77%,
- world class beauty and natural environments 52%,
- rich history and heritage 50%,
- good food, wine, local cuisine and produce 45%,
- a destination that offers value for money 37%,
- a family friendly destination 30%,
- a range of quality accommodation options 29%,
- clean cities, good road infrastructure with clear signposts 27%,
- flights with no stop-overs 24%
- friendly and open citizens, local hospitality 23%,
- romantic destination 17%,
- spectacular coastal scenery 17%,
- great swimming beaches 15%,
- native or cultural heritage or activities 11%,
- great shopping / world class brand names 11%,
- ease of obtaining visa 10%,
- luxury accommodation and facilities 7%,
- different and interesting local wildlife 6%,
- good leisure activities such as nightclubs, bars and casinos 5%.

Media sources are widely used by the Japanese in travel decision making i.e. television, newspapers, lifestyle magazines and the internet. Since television advertising rates are high, most travel promotion is via print, tour brochures and posters. The JTBF reports that the numbers of sources used for holiday travel information is reducing with the internet becoming the dominant source. From 2007 onwards a consistent 80% of travellers report that they use the internet for research. By contrast, the use of other sources has fallen over the last eight years by up to ten percentage points e.g. travel guide books 51%, tour brochures 39%, travel agency consultation 25%, national media 12%, airline and railway companies 10%, friends and relatives 11%. Use of information from national and regional tourist boards has, however, bucked this pattern and doubled to 22%.
The use of all sources, except the internet, is higher for trips to Europe as the Japanese plan their travel assiduously e.g. tour brochures 52%, travel agency consultation 31%.

In 2012, online travel increased its share of total trip volume to 61.5%, with holiday travel (including VFR travel) accounting for 70% of online bookings. The proportion of bookings to Europe that are made online is slightly lower, while for North American travel it is significantly higher.

Though in decline, the share of holiday travel arrangements made via travel agencies is still dominant at 80.1% in 2012. Direct bookings increased significantly from 16.5% in 2008 to 19.9% in 2012, the growth being attributable to the increased use of destination and airline websites, in particular the growing number of dynamic packages offered through airline websites. Full package tours are most popular among the over-60s, and women. A higher proportion of holiday trips to Europe than for all outbound holiday trips are booked via travel agencies with less than 9% of European holidays booked direct in 2010-12 when 51% were full packages, 22% were custom packages and 19% skeleton packages.

Most Japanese holiday travel is by married couples – particularly among middle aged and older age groups as well as honeymooners, and small groups of friends – particularly young women (the "office ladies" segment). Business travel is predominantly by men, either alone or with colleagues.

Japan is one of the few countries that have aggressively encouraged its people to travel abroad, evidenced by its renowned Ten Million Programs which geared the growth of outbound tourism as an 'export substitution' strategy for allaying criticisms about Japan's growing trade imbalance with the rest of the world while at the same time on the domestic front allowing the government to be seen to be doing something about the quality of life for its citizens. The target for the program had long been exceeded but this strategy to use the outbound travel to balance its foreign trade deficits is unlikely to change (Burns, 1996).

Europe accounts for almost one-in-three long haul trips taken by Japanese. Trips to Europe are increased by 3% in the ten years from 2000.

The Japanese tourism market is highly competitive. Its current market trends include: (1) A trend towards 'cheaper, closer, and shorter', due to the prolong recession of the Japanese economy, shown in the consumption pattern of the Japanese consumers; (2) Mainstream demand by more senior travellers have also shifted to other 'alternative choice' destinations which is less costly (Narisawa, 1995).

OUTBOUND TRAVEL AND COMPETITIVE ENVIRONMENT

Destination success in the Japanese tourism market comes from:

1. The provision both of Japanese language materials and Japanese speakers who are sensitive to Japanese protocols,
2. The provision of full and accurate information through all forms of media, including online sources, on the destination and range of activities/experiences available, in recognition of the Japanese practice of conducting detailed research in advance of making travel bookings,
3. The development of a variety of travel product/experiences, not only to cater for the different market segments/interest but also in recognition that the greatest growth is taking place among Japanese travellers who have already visited the destination and will be seeking something new,
4. Recognition of the increased share of Japanese FIT travel,
5. The utilisation of electronic technology to the full to inform and influence Japanese travellers of the attributes and attractions of the destination specific to their interests, and
6. Facilitation of travel to and around the destination.

Europe's primary competitors across all aspects of tourism according to the WEF TTCI are other industrialised nations e.g. United States, Australia, New Zealand, Republic of Korea.

In terms of overall price competitiveness in travel and tourism, European destinations are among the world's most costly.
The 2013 Bloom Country Brand Ranking rates the United States as the leading tourism destination brand, while nine of the leading 20 tourism destination brands are European.

PRINCIPAL COMPETING DESTINATIONS

COMPETING DESTINATION ORGANISATIONS

Four destinations are shortlisted as significant competing destinations to Europe in the Japanese market: Republic of Korea, Malaysia, Thailand, and the United States The United States is the most active and efective long haul competitor to Europe for the Japanese tourists. All four are making major efforts to support and increase the competitiveness of their travel and tourism industries by pursuing marketing strategies that:

1. focus strongly on their cultural heritage in developing brand images and positioning, in order to attract Japanese visitors on city tours and longer touring holidays,
2. seek to consolidate the potential from regional markets, in particular the fast expanding Chinese market, while growing long haul markets,
3. recognise that growth in the Japanese market will remain slow but will still be a major source market requiring maintenance of marketing and promotional activities,
4. are based on a clear understanding of the needs and expectations of the different market segments with products/experiences tailored to these requirements using a market:product "matching" approach, focusing on the unique aspects of natural and cultural heritage of destinations,
5. focus on a number of common segments across competitors e.g. city and touring holidays, MICE, medical tourism, shopping, festivals and events,
6. pay special attention to attracting high value/affluent tourists in a market that is increasingly price sensitive,
7. utilise digital technology and social networking sites to the maximum extent but not at the expense of traditional advertising and promotional methods given continued importance of travel agencies in Japanese travel booking arrangements.

One of the key challenges for destination marketers in Japan is persuading those Japanese who have not previously engaged in overseas travel to do so. The numbers of Japanese visitors to Europe who are strictly first time visitors is now small .
As mature destinations offering a wide range of cultural and natural attractions and activities, travel trade respondents indicate that the United States and Europe are direct competitors for the Japanese tourists.
Europe is disadvantaged in that its marketing support is less extensive than for the United States i.e. through Brand USA and the regional CVBs but scores strongly in respect of historic heritage. While the calibre of the range of attributes recognised by Japanese people in Europe is strong, the range of tourist product/experience offering is not well known. The challenge for European destinations, is to communicate the possibilities in a convincing manner to the potential traveller. To realise this potential, much of which will entail cross-border travel related to themed products and experiences, a Europe-wide marketing campaign can create awareness of the opportunities and facilitative measures (e.g. visa requirements, transportation options) that the European country DMOs – either individually or in small partnerships according to the optimal structure of the tour – can build on. Brand USA and its partners, along with the nation's CVBs, are already doing this for the United States.

Europe's potential is no less than that of the United States but at present lacks a Europe-wide positioning exercise to create awareness of the full spread of resources and visitor opportunities.

General characteristics of Japanese tourists (Narisawa, 1995).

a. Japanese as a man of curiosity. Japan is geographically isolated island, and had closed its doors for over 250 years till 1868. And overseas travel was actually prohibited after World War Two till 1964. That's why everyone is eager to know overseas places and things.

b. Japanese as a group-doer. Japanese people rarely travel alone since most of them do not have enough confidence to communicate in foreign languages and they are not used to reason about possible disputes.

c. Japanese as a defenceless tourist. Life in Japan is basically safe because society is of single nationality. So people are not ready for theft.

d. Japanese as a man of cleanliness. 'Safe and clean' has always been a Japanese way of life. This can be observed from the general living environment in Japan.

e. Japanese as a pacifist. Japanese has a preference for harmony over conflicts.

Segmentation of Japanese tourists. An effective way to gain competitive advantage is to divide the market and target one or more specific market segments that are unique and more viable than others. In order to better analyse and target the Japanese travellers, this paper identifies and segments eight stages of the Japanese Travel Life Cycle (JTLC). They are family trip, school excursion, language trip, graduation holiday, honeymoon, overseas wedding, in-company trip, and Silver trip. The eight stages of the JTLC comprise various institutionalized forms of overseas travel that a Japanese individual is likely to undertake through his or her lifetime. Why have these segments been chosen? According to Roger March (2000): firstly, Japan is a group-oriented society in which travel, no less than other forms of social interaction, has traditionally been undertaken in groups rather than individually. Second, Japanese people are related to the notion of group; many aspects of social behaviour are institutionalized. The following section is the stages of the Japan Travel Life Cycle and the possibility of visiting Bulgaria – Turkey Cross-border tourist Destination. This section will briefly explain the eight stages of the Japanese Travel Life Cycle (JTLC). This is done by comparing it with Bulgaria – Turkey Cross-border tourist Destination's merits and characters and allows the segregation of key customers and potential customers.

The Japan Association of Travel Agents (JATA) distinguishes the following sectors (in no particular order): Seniors, Family, Business/technical, Honeymoon, Incentive, Female office worker and Student.

1: Family trip (kazoku ryokô) The family trip segment which consists of parents and at least a child (usually under the age of 12 years old) represents about more than 20 percent of total outbound travel. There is an increase on overseas family travel and has become an integral part of many Japanese families. The parents with toddlers or very young children consider short-haul destinations. There is an emerging trend in the multi-generation family trip to include grandparents joining the family trips. The two major reasons cited for family trips abroad were the low cost of these trips and the opportunity for their children to experience things outside Japan. The analysis of this segment to choose the Bulgaria – Turkey Cross-border tourist Destination for their trips is as follows: (1) Bulgaria – Turkey Cross-border tourist Destination with its rich nature scenic and historical sites is bipolar from the top three choices 13 for family trip destinations, such as Hawaii, Guam, and Australia. Especially for families with toddlers or very young children, the Bulgaria – Turkey Cross-border tourist Destination is less likely to be chosen since it requires much travel, walking and relatively far distance can be regarded as inconvenience. (2) Families with teenagers will prefer to travel further and perhaps to destinations with cultural and historical sightseeing spots and such perception will be good for Bulgaria – Turkey Cross-border tourist Destination. They will be able to enjoy the wonderful view of nature wonders as well as a good opportunity to access to more historical knowledge. In addition, the lower pricing as compared to destinations such as Hawaii, Guam, and Australia will be another value factor for family trips with teenagers.

2: School excursion (shugaku ryokô) School excursions refer to organized school travel by junior and senior high school students to places of historical and cultural interest. 95 percent of students were from senior high schools. Currently, while the domestic shugaku ryokô are still more prevalent, increasingly schools are opting for an overseas school excursion so as to allow students to experience things out of Japan. The analysis of this segment to choose the Bulgaria – Turkey Cross-border tourist Destination shows that it is rather remote location and lack of reputation as a tourist destination must be overcome to attract this segment of Japanese tourists.

3: Graduation trip (sotsugyo ryokô) Graduation travel, or sotsugyo ryokô, refers to overseas travel taken by university students after completing their final year studies and before beginning full-time employment. They will usually travel in early March and U.S. mainland, Hawaii and Asian are the top three destinations. The analysis of this is as follows: this segment is unlikely to choose Bulgaria – Turkey Cross-border tourist Destination since the best time to visit it is during late spring, summer and autumn to enjoy the area. The early March period may be too cold to visit and deem unsuitable for this segment.

4: Overseas weddings One of the fastest growing new market segments in recent years is overseas wedding market. According to a research by industry provider Watanabe Wedding Company, approximately 40,000 couples had their weddings overseas. The top three destinations for this segment are Hawaii, Guan and Australia. Hawaii captures over 60 percent of the overseas wedding market followed by Australia with 14 percent. (Asahi Shimbun Newspaper, 1997) The advantages of an overseas wedding are the relatively lower cost, easier arrangements, and a more intimate and relaxed atmosphere which heightened the mood for romance. The analysis of this segment to choose the Bulgaria – Turkey Cross-border tourist Destination for their trips is as follows: weddings are usually seen as a ‘once-in-a-lifetime’ event and younger couples will prefer to choose destinations with ambience of romance, thus Bulgaria – Turkey Cross-border tourist Destination may not fit for this segment. If couples choose Istanbul, they can visit the destination in addition.

5: Honeymoon trip In Japan, approximately 750,000 couples tie-the-knot annually out of which 60 - 80 percent opted for an overseas honeymoon trip. These couples do not place budget as the utmost priority and are willing to spend more on accommodations, meals, tours and shopping compared to the other market segments. The analysis of this segment to choose the Bulgaria – Turkey Cross-border tourist Destination for their trips is as follows: Honeymoon trip is the most lucrative and sought after segment, similar to the overseas weddings segment. If couples choose Istanbul, they can visit the Bulgaria – Turkey Cross-border tourist destination in addition.

6: In-Company trip (shokuba ryokô) A custom in Japanese corporate life is for company workers to take a vacation with their co-workers once a year, called shokuba ryokô. The trip lasts between a few days to a week. The most popular traveling months are in the autumn months of October, November and followed by June. Japan's economic downturn during the 1990s sparked a decline in shokuba ryokô in both domestic and overseas markets. In 1996, according to a survey by the Sanro Research Institute, firms sponsored company trips have been down from 90 percent to 74 percent (Nikkei Weekly, 1997). In addition, only about a third of Japanese companies offer their employees overseas trips. Despite such decline, about 7 - 10 percent of overseas travellers each year reportedly travel with company colleagues. The top overseas destinations in 1996 were Hawaii, Hong Kong/Macau and Southeast Asia, followed by Guam/Saipan, Korea and Australia. The majority of such overseas trip lasted between 2 - 3 nights. The analysis of this segment to choose Bulgaria – Turkey Cross-border tourist destination for their trips is as follows: (1) the best season to visit Bulgaria – Turkey Cross-border tourist is in summer. June may be the most ideal period for this segment, but it is an alternative choice and quite remote destination.

Segment 7: Language study trip This segment is almost unlikely to choose, as part of their language study trip, Bulgaria – Turkey Cross-border tourist destination as a destination. In Japan, English has always been their first priority to learn a foreign language. However it is unlikely to form a substantial market segment for Bulgaria – Turkey Cross-border tourist destination.

Segment 8: Silver market The Silver market refers to travellers over the age of sixty. Japan has a most rapidly ageing society in the world, with 25 percent of the population expected to be over the age of sixty by 2020. In 1995, 1.75 million Japanese over the age of 60 had travelled abroad, an increase of 14.2 percent over the previous year, accounting for 11.5 percent of total outbound travellers. This figure increases to 26.8 percent, representing one in four of all Japanese travellers, when considering those of 50 years old and above. According to a JTB (1998) research, almost 4 out of 10 silver travellers are accompanied by their spouses, 24 percent travel 17 with family members and 20 percent with friends and acquaintances. The most popular destinations for Silver travellers are the U.S., followed by South Korea, mainland China, Taiwan, and Hong Kong. Recent trends show that Silver travellers are staying longer duration in overseas destinations and this explains the strong interest of the travel industry in this segment. Longer stays are growing because Silver travellers have more disposable income and time. The greater propensity to spend may be the result of the mandatory high inheritance taxes of between 20 - 25 percent. Many elderly prefer to spend on overseas trip and enjoy their retirement days rather than having their wealth diminished through inheritance taxes. The analysis of this segment to choose the Bulgaria – Turkey Cross-border tourist destination for their trips is as follows: (1) Bulgaria – Turkey Cross-border region is an ideal destination for this segment of tourists. The tranquil scenery, serene atmosphere, and diversity become an ideal place for them to enjoy the place. (2) The reasonable pricing is also a deciding point for the Silver travellers to extent their stay longer.

In the ETC 2010 study, Japanese travellers indicated that their top reasons for choosing their holiday destination were:

(i) visiting historical attractions,

(ii) experiencing an interesting culture,
(iii) affordability,
(iv) seeing something unique.

The preferred activities for Japanese travellers on trips to Europe are reported to be natural and scenic attractions, historical and cultural sites, art galleries and museums, shopping, theatre, concerts and movies, gourmet dining, rest and relaxation, hiking/trekking, and spa/beauty treatments.

The Canadian Tourism Commission divides the Japanese long haul market into three categories, each of which seek different experiences: (i) **Free Spirits** are attracted to exciting experiences they cannot find at home including learning about other cultures and customs and trying different cuisine. Travelling provides an opportunity to take a break from their daily lives and be a little more indulgent. (ii) **Personal History Explorers** are open to different cultures and want to experience what it is like to live as the locals do. They will carefully research the history of a destination before visiting. They are more comfortable travelling with a guide because of their security concerns. (iii) **Cultural History Buffs** travel as much as possible and tend to take longer holidays of at least two weeks. They immerse themselves in the local culture by learning the language and veering off the beaten path. They will avoid organised tours in favour of independent travel.
Mobile phone usage is extremely high - ComScore states that in June 2012 there were 79 million people aged 13 and older using 'feature phones' and 24 million using 'smartphones'. Mobile bar-codes, quick-response codes and payment systems are widely used. The Japanese have long been noted for their technical sophistication, readily adopting the latest technologies. They are as likely to access the internet from their mobiles as from a PC, a practice where Japan (along with the Republic of Korea) leads the world according to eMarketer, around two-thirds of mobile phone users accessing the internet in this way.
The adoption of ***social media*** has been slow in Japan but is growing extremely rapidly. eMarketer estimates that there were only 39.5 million social media users in Japan in 2011, including 7.6 million on Facebook. In February 2013, the corresponding Facebook figure was 16 million while there were 30 million users of Twitter, 25 million of Mixi, 29 million of Gree, 36 million of Line and 40 million of Mobage.

Visa Regimes - The detailed comparison of visitor entry requirements for the selected 13 destinations competing with Europe in all markets in this study considered three elements:
1. Whether the destination imposes a visa requirement for entry to the country,
2. The documentation and other details demanded for issuance of a visa,
3. A qualitative assessment of the "hassle" factor involved in obtaining the visa. There is no visa requirement for Japanese travellers to any of the four destinations chosen as representing primary competitors to Europe.

Air Connections - The scheduled air capacity from the airports of Japan's main metropolitan area of Tokyo to the shortlisted destinations competing with Europe was monitored on ETC's behalf by Amadeus. Two points in the year were examined – week 24 in 2013 (broadly corresponding to high season) and week 6 in 2014 (low season), though this can only be taken as an approximate measure given the difference in northern and southern hemisphere climates at the different times of the year.

Data for two years were considered in order to provide an indication of the trend in capacity on the various routes i.e. June 2008/June 2013, and February 2009/February 2014.
The destinations with the greatest frequencies of direct flights and capacities are, as to be expected, Asian destinations involving shorter flight times than to the United States or Europe. The weekly capacity of direct flights from Tokyo to Seoul is between 45 and 50 thousand on around 180 flights with a journey time of around two-and-a-half hours. For Bankgok, there are around 27 thousand seats (on just over 80 flights), with journey times of between six-and-a-half and seven hours.

For a favoured destination like France, direct flight capacity has grown substantially over the five-year period i.e. Tokyo-Paris capacity of between 13,000 and 14,000 seats, up by 35% (June 2008 to June 2013) to 38% (February 2009 to February 2014). For other European centres, there have been either modest increases or a reduction in capacity, with a greater reliance on connecting flights e.g. London is served by close to 10,000 seats a week but whereas there was a solid rise of 15% between February 2009 and the corresponding month in 2014, there was a 10% drop in June over the five years. Japanese direct flight capacity to Rome has been unaltered over the five years; but for Amsterdam there has been a significant cutback in seat capacity on direct flights i.e. February-to-February down 50%, June-to-June down 20%, with one-and-a-half times more connecting flights offered.

Political, Economic and Socio-Cultural Links - Japan has longstanding political relations and extensive trade with each of the four countries under study, as well as with Europe. There are a total of close to 2.5 million *nikkeijin* (Japanese descendants) and a further 1.14 million Japanese nationals living abroad.
Japan and the Republic of Korea have for many centuries had close relations through cultural exchange, trade, war, and political contact. During the ancient era, exchange of culture and ideas between Japan and Asia were common through migration via the Korean Peninsula or diplomatic contact and trade between Japan and the Republic of Korea. Cultivation of rice, Buddhism, Chinese foods, Chinese characters and other technology came to Japan via the Republic of Korea.
In recent years, however, the relationship between the Republic of Korea and Japan has soured over a range of disputes ranging from territorial issues to differing views of Japan's wartime history. The frayed ties are threatening to unravel a wider swath of the nations' economic relationship, including tourism, trade and investment.

The European Union and Japan have long-established strong and integrated political and economic relationships. At the 21st EU-Japan Summit in November 2013 a series of measures were agreed to further strengthen cooperation between the two powers under the following headings:

- realising the full potential of political and economic ties for mutual benefit,
- supporting global growth and stability,
- working together more closely to advance global interests,
- widening common ground on enhancing regional security,
- fostering growing cooperation on sectoral issues,
- individual European countries work and trade with Japan within this framework. Each country has major trade with Japan.

There are 185,000 Japanese nationals living in Europe and the former USSR57. The largest concentrations are in the United Kingdom 63,000, Germany 37,000, France 31,000, Italy 12,000, Switzerland 8,000 and the Netherlands, Belgium, and Spain each with 7,000.

Consumer Assessment (TripAdvisor) - This section presents an analysis of ratings provided by TripAdvisor users from Japan on three elements of a visitor experience: attractions, accommodation and eateries. While not representative of Japanese visitors' behaviour, TripAdvisor ratings allow for cross-destination comparisons on components of a holiday experience.

The analysis covers the four destinations competing with Europe in Japan (i.e. Republic of Korea, Malaysia, Thailand, and the United States), and four European destinations used as benchmark in this study (i.e. France, Italy, Spain and United Kingdom).

On average, TripAdvisor users from Japan rate accommodation lower than either attractions or eateries, a finding that is common to all destinations. Compared to quality of accommodation in their own country (3.9), TripAdvisor users from Japan are more satisfied with accommodation in Italy (4.0). Accommodation in Spain, Thailand, the United States and the Republic of Korea is rated marginally higher than in their home country, while the same ratings are given for Malaysia and France as in Japan, with the rating for the United Kingdom marginally less.

Average ratings for all destinations in Europe suggest that TripAdvisor users from Japan were in general satisfied with accommodation (4.0). These visitors were most satisfied with the location (4.2) and cleanliness (4.1). They tended to be slightly less positive when evaluating the quality of sleep (just below the overall rating), quality of service and quality/comfort of room (3.9). Value for money of the rented room received the lowest rating (3.8).

Japanese TripAdvisor users rate eateries in the eight destinations at just over 4.0 (half a point above the rating given to eateries in their home country). The highest ratings are given to Spain (4.2) and Italy (4.1), while the lowest ratings are for France and Malaysia, rated similarly to Japanese eateries at just below 4.0.

The other four destinations all score between 4.0 and 4.1 (i.e. Republic of Korea, Thailand, United Kingdom, United States).

TripAdvisor users from Japan assign the highest average ratings to attractions (average just under 4.2). The highest ratings are recorded for Spain and Italy (both at the midpoint between 4.3. and 4.4), followed by France, United Kingdom and United States (all between 4.25 and 4.28), and Thailand (4.1). The Japanese rate their own attractions at 4.0, with only those in Malaysia and the Republic of Korea falling below this level.

The three shortlisted Asian destinations competing with Europe for the Japanese tourist are pursuing marketing strategies that:

- focus strongly on their cultural heritage in developing brand images and positioning, in order to attract Japanese visitors on city tours and longer touring holidays,
- seek to consolidate the potential from neighbouring markets, in particular the fast expanding Chinese market, while growing long haul markets,
- recognise that growth in the Japanese market will remain slow but will still be a major source market requiring maintenance of marketing and promotional activities,

- ❖ are based on a clear understanding of the needs and expectations of the different market segments with products/experiences tailored to these requirements using a market:product "matching" approach,
- ❖ focus on a number of common segments across competitors e.g. city and touring holidays, MICE, medical tourism, shopping, festivals and events,
- ❖ pay special attention to attracting high value/affluent tourists, still a strong segment despite Japan becoming an increasingly price sensitive market,
- ❖ utilise digital technology and social networking sites to the maximum extent but not at the expense of traditional advertising and promotional methods given continued importance of travel agencies in Japanese travel booking arrangements.

Managerial implications - The Japanese has long been a primary target market for destinations, both within Asia and long haul. They have been increasingly competing for a market that is not expanding or responding as fully as expected to intensive marketing activities.

The factors that will determine the ability of a destination to attract significant flows of Japanese tourists over the coming decade will include:
1. Recognition of the limited linguistic skills of the Japanese and their natural inhibitions and shyness, the provision both of Japanese language materials and Japanese speakers who are sensitive to Japanese protocols,
2. The provision of full and accurate information through all forms of media, including online sources, on the destination and range of activities/experiences available, in recognition of the Japanese practice of conducting detailed research in advance of making travel bookings,
3. The development of a variety of travel product/experiences, not only to cater for the different market segments/interest but also in recognition that the greatest growth is taking place among Japanese travellers who have already visited the destination and will be seeking something new,
4. Recognition of the increased share of Japanese FIT travel,
5. Utilising electronic technology to the full to inform and influence Japanese travellers of the attributes and attractions of the destination specific to their interests,
6. Facilitation of travel to and around the destination.

The analysis of the aforementioned eight segments of Japanese outbound travellers had provided some answers to at least two important marketing questions: (1) Which are the target segments? (2) Which are the potential segments?

Japanese outbound travellers in the case of Bulgaria – Turkey Cross-border tourist destination The **Silver segment**, with the merits of large market share, accounts for 16 percent of the total Japanese outbound travellers in 1997. Since then, there has been a growing trend in this segment due to the rapid ageing society in Japan and will be the Stars and definitely our target segment. **School excursion trips** have a small market share of only 0.8 percent. School excursions will be the other potential customers where we can make efforts to this market. The **Family trip** accounts for a significant 25 percent of the market share which has less possibility for steadily growth and will be the the third group. The families with teenagers deserve our particular attention. The **In-Company trip** is another attractive segment in Japan. It accounts for 12 percent of the total market share while Bulgaria – Turkey Cross-border tourist destination may be suitable as their alternative choice for In-Company trip that is organized for June. Although the market size of this segment is not as large as

Family trip, they tend to spend more on accommodations, food and entertainment. This will be our potential segment for further nurturing.

Other considerations to penetrate the Japanese outbound market - In addition to the analysis on the Japanese travellers' habit, the other important factor is that Japanese travel market is very much controlled by a small number of large travel agencies. It is of paramount importance to co-operate with these agencies and jointly develop effective channel strategies by harnessing their knowledge on domestic distribution.

Marketing Strategies

Without significant investment in studies and surveys to more fully understand the attitudes, motivations and behaviour and characteristics of Japanese travellers, destinations targeting the Japanese market will not be able to develop fully effective communication strategies and campaigns to stimulate interest, and converting such interest into actual travel to their destinations. Europe – through ETC – and North America – through Brand USA, Tourism Canada and Tourism Australia are examples of destinations leading the way in this regard.

Another way of understanding market trends and tastes and catering for these through product/experience development and marketing communications is maintaining close relations with the outbound travel trade – still highly important for the Japanese market – and collecting information from social networks. Thailand has a strong travel agency network in Japan, while all destinations actively mine comments posted on social media and discern actionable trends. An example is the TripAdvisor poll of Asia's top hotels with exceptional service where two of Thailand's properties were rated in the top 5 – a fact that is being used by TAT to promote the country.

It is clear that Europe is being out-invested by Brand USA in the Japanese market, whose dedicated budgets for marketing and promotional activities in Japan are significantly higher as a proportion of its total budget than the Japanese market's share of total tourist arrivals in the United States. It should be noted that Brand USA's investment is on top of the efforts made in Japan by the US states and cities. By contrast, ***Europe has no overall presence in Japan and few European countries have tourist offices or marketing representatives in the market.***

Success for a destination is the development and communication to the marketplace of products and experiences to meet the requirements of visitors in each of these categories, or to specialise as a destination of excellence in one area within a category, through a process of market: product matching. In order to carry out this principle, destinations seek out: 1. what the trends are in terms of types of product/experience demanded, 2. how changes in society are influencing future tastes in travel and tourism, and 3. how the destination tourism offer should be developed and communicated to the market. Other than those attracted to beach holidays, Japanese tourists typically enjoy a mixture of features on their overseas holidays that combine natural and cultural heritage, historical and modern items.

One of the keys to success is to incorporate features and experiences that are unique to the destination, combining these with the iconic, "must see" components.

Europe, by being blessed with an abundance of cultural and natural resources, historic and modern features, and a wide variety of activity opportunities, is able to design products and experiences for many different market segments. While the calibre of the range of attributes recognised by Japanese people in Europe is strong, the range of tourist product/experience offering is not well known. The

challenge for European destinations, then, is to communicate the possibilities in a convincing manner to the potential traveller, exploiting digital marketing and social media to the full.
In consequence of Europe being comprised of many countries, the full European experience involves visiting a number of different destinations, each with their own history, natural features and cultures. While each European country has a rich range of resources of appeal to visitors, it <u>is the combination of countries on themed itineraries</u> that can provide the greatest set of experiences for the Japanese visitor whether on a touring trip of focused on urban centres.
A Europe-wide marketing campaign outlining the opportunities for, and relative ease of realizing, multi-destination trips (i.e. simple immigration process with no visa requirement, good inter-destination land and air transport services) provides the basis on which individual European country tourism marketing organisations can build on individually or in partnership with neighbouring countries. Creating greater market awareness of the extensive range, difference but complementarity of European countries' tourist features can assist the travel trade in putting together itineraries and packages of appeal to the Japanese traveller.
A Europe-wide positioning campaign to boost awareness in the Japanese market of the full range and diversity of tourist attractions and experiences available across the many European countries can markedly increase visitor opportunities and demand.

TOURISM IN BULGARIA AND TURKEY

Tourism in Bulgaria

In Bulgaria the Ministry of tourism (MT) conducts tourism policy in the conditions of publicity, openness, active dialogue and cooperation with the institutions, municipal administrations, non-governmental organizations, business and the media. The strategic goal is strengthening the competitiveness and efficiency of the tourism sector of Bulgaria through optimum use of the available natural and anthropogenic resources, in accordance with market requirements and consumer expectations for sustainable development of tourism: Diversification of the national tourism product through the development of integrated tourism products, specific for the various categories of tourists, ensuing from the natural priorities of Bulgaria; Promotion of the provision of quality services and protecton of the rights and safety of consumers; Attainment of effective coordination between institutions and integration of tourism into the sectoral policies, associated with it. Interaction with tourism business; Establishment of Bulgaria as a leader in the development of tourism in EU and the region and building of a positive attitude towards our country among the target groups; Raising the level of awareness in Bulgaria as a country with rich opportunities for summer and winter holidays, with ancient culture, rich in historical and architectural monuments, with mineral sources and a beautiful and preserved nature, as a destination, offering safety and tranquillity to its guests; Implementation of effective national marketing for positioning and promotion of Bulgaria as a year-round tourist destination, agreed with the branch organizations and major tour operators, operating on target markets for Bulgaria through targeted messages on various markets, aimed at the target groups.

According to data of the National Institute of Statistics (NIS) in Bulgaria the greatest positive change in the absolute value of flow of tourists from Greece (more tourists compared to the previous period) and **Turkey** (more tourists compared to the previous period) is reported for the period of 2014 as compared to 2013. The percentage change Turkey experienced the largest growth (14.8%) of visits to

Bulgaria in 2014 as compared to 2013. Also according to data of NIS the most preferred destination by Bulgarian tourists for 2013 was Turkey, whereas journeys from Bulgaria to Turkey were reported during the year in question. This shows that tourists from Bulgaria were the fourth largest group (of all tourists), who visited Turkey. These data illustrate **the importance of creating and promoting strong regional and national brands with a focus on the tourism product, typical of the cross-border region Bulgaria-Turkey.** In this respect the available statistical and other empirical information, directly (hotel facilities, visitors, number of overnight stays, number and distribution of restaurants, etc.) or indirectly referring to tourism (condition of roads, car parks, transport, etc.) has been studied. Even though this information is too scarce, it was useful for the assembly of the big picture and outlining the possible ways of development. As a member-state of the European Union, Bulgaria has established itself as a "close" and easily accessible holiday destination, offering a sense of stability and reliability. The easier border and customs control, the free movement of people, capital, goods and services and innovations are Bulgaria's advantages after our accession to the European Union. The rich tourist potential of the country, based on the combination of beautiful and varied nature, natural phenomena, excellent climatic conditions, mineral springs, the centuries - old cultural and historical heritage, authentic crafts and customs, delicious food and excellent wines, hospitality and geographic proximity to the main tourist markets, were a prerequisite for the creation of attractive tourism products, attracting the attention of various target groups. Among them and the partners in the industry, Bulgaria affirmed its image of a destination, offering a good quality/price ratio of the offered tourist product, as the main groups are families with children, mostly on the sea shore and in the mountains. Other products, which an increasing interest is observed towards, are the cultural, spa/wellness and adventure tourism. In recent years following 2005 international tourism in Bulgaria marked a stable trend of continuous rise both of the number of foreign tourists, who have chosen Bulgaria as a place for recreation, and the revenue from international tourism in the current account of the balance of payments. During 2014 there is an increase in visits by tourists from Greece (10.3%), Germany (4.6%), Turkey (14.8%), Macedonia (2.7%), Serbia (3%), Poland (7%), Austria (34.9%), Czech Republic (8.6%), France (7.8%), Belarus (5.6%), Israel (28.3%), Italy (19%), Moldova (76.9%), the Netherlands (10.4%), Belgium (30.7%), the United States (9.5%), Slovakia (33.1%), Spain (19%), Sweden (5%), etc. There is a decrease in visits from Russia (-3.7%), Ukraine (-8.7%), Great Britain (-4.2%), etc.

During the period January-December 2014 the countries of the European Union continued to be the most important generating market for international tourism of Bulgaria with a relative share of 60.6% and a growth of 6.1%. Revenues from international tourism in the current account of the balance of payments according to data of the Bulgarian National Bank for the period January-December 2014 is 1.9% more compared to the same period of 2013. There has been a significant growth in the revenue from tourism after the acceptance of Bulgaria in the EU, whereas in 2007 only it has increased by more than 25%. The data are indicative of the importance of the degree of freedom of travel and the visa-free regime for the tourist industry in Bulgaria. According to data of World Travel & Tourism Council the total contribution of tourism industry to the GDP of Bulgaria for 2014 is 13.1% of GDP of the country. Bulgaria has not reached the possibilities of the mature tourist destinations in Europe yet and has untapped potential and opportunities for the development of its tourism industry at a faster pace as compared to the competing European destinations.

Despite the significant growth of the inbound tourism, domestic tourism is developing much more slowly. Most regions in Bulgaria fail to create high-quality tourism products. This has two main consequences: the opportunities for further growth in traditional resorts and tourist regions (the Black Sea coast) have reached their limits and the trend of growth from the past decade may not be preserved if the existing approach to development does not change; the considerable potential of a large part of the area of the country remains unused or weakly used and businesses and the population there cannot benefit from the advantages of tourism. Compared to 2013 the total number of shelter facilities and accommodation increased by 7%, while the number of beds increased by 3.9%. The total number of actual overnight stays in all shelter facilities and accommodation in 2014 increased by 0.4% as compared to the previous year and reached overnight stays. In 2014 the number of actual overnight stays of Bulgarian citizens in shelter facilities and accommodation increased by 5.2% in comparison to 2013, while the number of actual overnight stays of foreign citizens in shelter facilities and accommodation decreased by 1%. Actual overnight stays of visitors from Russia overnight stays and a decrease of - 15% form the biggest volume, followed by Germany with overnight stays and a growth of 2.4%, Romania with overnight stays and a decrease of 17.2 percent, Great Britain with overnight stays and a decrease of - 3%, Poland with overnight stays and a growth of 11%, Ukraine with overnight stays and a decrease of -14%, etc. The citizens of the following countries have also marked very good growth rates of actual overnight stays: Poland with 11.5% growth, Israel with 26% growth, Czech Republic with 8.4% growth, France with 5.8% growth, Macedonia with 9% growth, Turkey with 13.8% growth, Austria with 14% growth, Belgium with 4.6% growth, Italy with 26% growth, etc. A decrease of actual overnight stays in shelter facilities and accommodation for 2014 is observed with the citizens of: Russia - by 15%, Romania - by 17.2%, Great Britain - by 3%, Ukraine - by 14.3%, Norway - by 2%, Denmark - by 9%, Netherlands - by 4.6%, Hungary by 16.8%, Sweden by 4.6%.

In 2014 there have been 21.6 million overnight stays in shelter facilities and accommodation with more than 10 beds, whereas a growth of 5.2% of overnight stays of Bulgarian citizens was observed. The largest part (41.2%) of actual overnight stays of Bulgarian citizens in 2014 took place in shelter facilities and accommodation with 1 and 2 stars, followed by 3-star ones with 30.2%, 4- and 5-star with 28.6%. 4- and 5-star shelter facilities and accommodation were the most preferred by foreign citizens in 2014, whereas 60% or of all overnight stays were in them, followed by 3-star ones with 30% or of overnight stays and lastly 1- and 2-star ones with 10% or overnight stays.

In 2014 the total number of persons having stayed overnight in the shelter facilities and accommodation increases too - by 1.7% compared to the previous year, reaching persons stayed.

The total number of occupied beds in shelter facilities and accommodation in 2014 was 35.3%, which is 1.5 percentage points below the occupancy. Revenues from overnight stay in shelter facilities and accommodation in 2014 is 10.2% more compared to 2013. Revenue from foreign nationals increased by 8.6%, while revenues from Bulgarian citizens increased by 14.2%.

Characteristics of trips in Bulgaria:

Foreigners plan early and Bulgarians decide at the last minute. Therefore the most active period for the supply of summer travel packages to foreigners must be between February and April and for Bulgarians between May and June. Bulgarians use mainly informal sources of information to plan their holidays. The practice of combining sources is relatively unpopular for them. The internet is increasingly popular as a source of information for Bulgarians in the less-active season’s spring and autumn, as well as winter. The feeling of Bulgarians that they know their country "like the back of my hand" is unfavorable to the development of the tourist business. Targeted efforts for promotion of more specific sites within the country and to bring adventure back in holidays in Bulgaria are needed. Foreigners use a greater number and more varied sources of information to make a decision about tourism travel. The dominant source for foreigners is the travel agency. Informal channels (family and friends), as well as the importance of previous experiences, must not be underestimated though. Foreigners, much more often than Bulgarians, use the internet as a source of information, and yet in all seasons. For them this is one of the most suitable communication channels. Bulgarian and foreign tourists have a different practice in organizing holidays - Bulgarians prefer to do everything themselves and foreign tourists usually use an intermediary in the organization of their vacation. Tour operators are deemed to be guarantors for the holidays according to the previously announced terms. A different approach is needed for the attainment of the two target groups - while the active presentation of Bulgaria at tourist fairs and the mass offering of the destination through intermediaries will bring success for foreign tourists, for Bulgarians a communications campaign, reaching potential tourists directly, would be more successful. There is a new lasting trend concerning the organization "customization" of holidays. Customization is a phenomenon, which, in the long term, will change the market. This means that it is necessary for travel agencies to change their approach to users in order to respond to changing patterns of demand for holidays at all. In a more distant perspective the possibilities to not only organize a trip online, but to "put it together" yourself, will be sought, i.e. the so-called "customized products". Bulgarian’ holidays are shorter than foreigners’. A trend towards decrease of the length of stay has been observed. The tourist business is confronted by the task to reconsider their proposals to tourists and to comply them with preferences for shorter vacations. The average number of persons travelling among Bulgarians is around 3 people. The proportion of family holidays (a partner with children and children (over 15 years) with parents varies between 21 and 29%, whereas it is highest during the summer season. Among foreigners the average number of persons travelling is about 2. The share of breaks with children is also highest during summer and winter seasons - between 16 and 20%. Bulgarians stay primarily with friends and relatives. In contrast, foreigners prefer 3- and 4-star hotels. The tendency for Bulgarians to rest mainly in places, where accommodation is not paid for, could become a serious threat to tourist sites. Further communication is needed to bring holidaymakers back to the hotels through exclusive and interesting proposals. Bulgarians are not used to buying packages in advance. The share of those having organized their holidays through an intermediary varies between 9 and 11 % for all seasons. Foreigners take advantage of the possibility to prepay a package five times more often than Bulgarians. The share of those using a package service is highest during the summer it reaches 58%, and relatively smaller during the rest of the seasons between 47 and 48%. The cost of Bulgarians and foreigners paid for vacation are proportional to the incomes of households. The funds spent for a summer break by tourists are approximately 26-28% of the average monthly income of the household, and those in other seasons about 13-18%. The average daily cost of one Bulgarian tourist is similar in all seasons and varies between 19 and 24 Euro, while that of a foreign visitor is between 71 and 88 Euro. The Bulgarian tourist is passive; he/she has no conscious need of diversity (the share of those who have combined more than one type of tourism is between 18 and 25%). Foreigners are more active they combine their experiences and derive the most from every holiday (the share of those who have combined two or more types of tourism ranges from 45-48% in the autumn and spring, 55-58% in the summer, up to 66% in the winter). During the active seasons for both groups a combination of the type of "mass with specialized tourism" is present and in the passive seasons a combination of two specialized types of tourism. The most common combination, and probably the combination with the biggest potential, is that between cultural and another kind of tourism.

The typical combinations between the four specialized types of tourism are: cultural tourism with culinary, mountain with seaside tourism; spa/wellness tourism with seaside, tourism with the purpose of treatment and culinary tourism; ecotourism with mountain, culinary and cultural tourism; and rural tourism with culinary, mountain and wine tourism. Active communication with the audience regarding specialized types of tourism is needed. On one hand in order to provoke the diversification of the holiday and the use of combined tourism products, and on the other, specifically regarding specialized types of tourism to improve the discern ability of the concepts.

The Black Sea tourist region attracts the largest share of foreign and Bulgarian tourists. If the Black Sea coast is excluded, it can be argued that holidays of foreigners are concentrated mostly in southern Bulgaria. The areas of Danube, Old Bulgarian capitals and Stara Planina mountain remain unpopular for this group, which is surprising considering the presence of interesting natural and cultural and historical sites. It is necessary to attempt to redistribute the tourist flows to the northern part of the country, too by offering special tourism packages and promotion of the attractions situated there with the aim of increasing revenue in these regions and reinvestment in the maintenance and improvement of the condition of tourist facilities.

Reasons for choosing Bulgaria as a tourist destination: Both for foreign and Bulgarian tourists the decision to go on holiday is price oriented. The trend is sustainable over time. Various forms of advertising have an impact on the decision to go on holiday, especially with less popular types of tourism such as eco and rural tourism. It is necessary for these types of tourism specialized promotional materials to be developed to satisfy the needs of tourists of additional specialized information. Regarding the specialized types of tourism, the main factors, which predetermine the choice of a destination, are similar for the four types studied: the attractive scenery, the feeling of uniqueness and special experience, the availability of health services, the easy access to the site and the possibility to use additional tourist services.

Satisfaction from the stay and loyalty to the destination: The satisfaction of those having been on holiday in Bulgaria is high and sustained throughout the seasons. The tourists have no remarks regarding the majority of the assessed components of the holiday. The country manages to satisfy most expectations and, consequently, to generate attitudes for repeated visits. The reasons for the high satisfaction of Bulgarian tourists are associated mostly with the peculiarities of the environment beautiful nature and fresh air, peace and quiet, natural attractions. The aspect, depending on the actions of the tourism business, which Bulgarian tourists are satisfied to the fullest extent with, and which is sustained throughout the seasons, is quality of service. With foreign visitors, the factors leading to the highest satisfaction are natural resources (including good beaches), relations with the local population, accommodation, local cuisine, cultural and historical landmarks, and in the winter - the ski slopes too. The most important indicators for the satisfaction from the holiday cleanliness, accommodation, services in the accommodation, the attitude of the local population - characteristics, the improvement of which would lead to improved appreciation of the country as a tourist destination. Source of frustration are infrastructure and roads, high prices, poor service and bad attitude, uncleanliness, accessibility for people with disabilities, and in the winter the bad conditions for ski and indoor sports are added to them, too. Survey data both quantitative and qualitative, does not provide reasons to assert that a specific, homogeneous, frustrated by its stay in Bulgaria group exists. Tourists build loyalty and emotional attachment to the country, even during the first holiday in Bulgaria. The reasons, which would stimulate Bulgarian tourists, to come on holiday in the country again are low prices and bargains. The motives of foreigners would be low prices, natural resources, and the kindness of the local population. Diversification of the stay of visitors would also neutralize some of the negative attitudes and would increase the likelihood of reentering the country.

Image of Bulgaria. Market barriers: Bulgaria has a positive image both among Bulgarian and foreign tourists. However, a uniform and consistent image of the country, through which it can categorically distinguish itself from rival tourist destinations, is still lacking. Among holidaymakers in Bulgaria the country is perceived as a peaceful destination with beautiful scenery, good food, good conditions for spa/wellness tourism in general, good accommodation. Summer tourists perceive it as a destination, which offers good conditions for sea tourism. Among foreign tourists Bulgaria has an image of a cheap destination. This attribute is its distinguishing characteristic compared to its competitors. The only other country, which meets that description, is Turkey. Both among winter and summer tourists (both Bulgarians and foreigners), the destination "Bulgaria" has formed key strengths, i.e. the characteristics, which its image is to be built on and which the supply of tourist products and services is to be based on. Untapped potential for improvement of the country's image is present with respect to alternative types of tourism, in case the performance of these characteristics is improved. Tranquility, beautiful nature and good cuisine are the basic features, with respect to which Bulgaria must not show poor performance in order to remain preferred destination during the active seasons. The possibilities to practice spa/wellness and alternative tourism in general have potential regarding preferences towards the country. The country was able to meet the expectations of tourists and create an emotional connection with them, which is a prerequisite for success in the assertion of the Bulgaria brand. The main physical barrier, which exists according to foreign tourists in front of Bulgaria as a tourist destination, is the lack of good infrastructure. This is a barrier, which the country shares with Turkey and Greece. It is necessary efforts to be made for the barriers to other countries to be turned into advantages of Bulgaria - as a member-state of EU the journey to it is free, it is exotic and interesting with its customs and traditions, accommodation is cheap and the prices of products and services are below and around the average for Europe. Despite the differences between the ten markets, they can be grouped into two types: Western European markets (Great Britain, Germany and Sweden), which usually have high purchasing power, high intensity of overseas trips and high expenditure abroad. What is also common for all three markets is their high affinity to holidays by the sea in a sunny and warm climate - something, which cannot be found in these countries. Another common feature is that until recently Bulgaria had a small market share on these three markets but that all three markets have the potential for interest, significantly exceeding the present volume of trips. The second group is formed by Eastern European, respectively neighbouring markets (the Czech Republic, Russia, Ukraine, Serbia, Romania, Greece and Turkey). These markets show significantly weaker performance regarding economic conditions, as well as the general behaviour during overseas trips, in comparison to Western European markets. Also, unlike the Western European markets, where the majority of the population can actually afford overseas trips or trips to Bulgaria, only a small part of the population of the Eastern European or neighbouring markets can afford travelling abroad (due to the lower purchasing power). However, Bulgaria also has a great potential for interest on all those markets, exceeding (in some countries even several times) the present volume of trips. Another common advantage on these markets is that they have certain "closeness" to Bulgaria, meaning either geographical proximity as a neighbouring country (which usually increases the number of trips) or similarity and familiarity, based on the similar culture, history and language. Image and reasons for travelling to Bulgaria: In all markets two aspects define the image of Bulgaria with particular clarity: good and reasonable prices, a cheap tourist destination respectively and a tourist destination for holidays by the sea (the latter, however, does not apply to Greece and Turkey). These two aspects dominate in Bulgaria's image among consumers, as well as among tour operators and journalists, writing about tourism. "Good prices," as well as "sea, beaches, sun" are also major reasons for customers in all markets surveyed to take a holiday in Bulgaria, (with the exception of Greece and Turkey). Other important positive aspects of the image of Bulgaria (but not on all surveyed markets) are related to "the hospitality and friendly people" and "the good supply of holidays with winter sports and skiing", while in the neighbouring and Eastern

European countries important aspects of the image are similarity, respectively the easy accessibility and the similar mentality and language, respectively lack of language barriers. However, the image of Bulgaria is negatively influenced by associations such as "country from the former Eastern bloc or a former communist country", which means lower standard and quality, older hotels, a less developed country, crime and lack of safety. The aspect "a country from the former Eastern bloc or a former communist country" and "safety and crime" were mentioned as reasons not to take a trip to Bulgaria to. One additional weakness of all ten market is that, as a whole, the Black Sea destinations (therefore Bulgaria, too) have disadvantages in their image and a lack of prestige as compared to Mediterranean destinations. Another problem is that sometimes consumers don't have information about Bulgaria as a tourist destination, respectively for what Bulgaria offers. Speaking generally, there is a relatively high correspondence between the responses of consumers, travel agents and journalists, who write about tourism as far as the image of Bulgaria is concerned. The summary of the positive and negative image associations in a comprehensive image of Bulgaria on the ten markets reveals that on all Eastern European markets, as well as in Turkey, Bulgaria has a mainly positive image, while on the Western European markets, respectively in neighbouring Greece, the image of Bulgaria is characterized by both positive and negative aspects. And yet on none of the ten surveyed markets has Bulgaria got a completely negative image among consumers, travel agents or journalists, who write about tourism.

The potential for a future interest in Bulgaria: In all ten surveyed markets, Bulgaria has the potential for interest, exceeding the present volume of travel. Nevertheless, on most of these markets the majority of the people comprising the potential for interest in Bulgaria have not taken a final decision to visit Bulgaria yet. Therefore, very active marketing, aimed at motivating the potential for interest in actually taking a trip to Bulgaria is needed, thus realizing the growth prospects, which Bulgaria has on all markets. Similar to the past, the future interest on all markets is also focused on holidays on the Black Sea (with the exception of Greece and Turkey). Nevertheless, there is also interest in holidays by the sea in combination with tours, oriented towards seeing cultural and natural attractions, tours for cultural tourism and sightseeing of landmarks, as well as holidays with winter sports (mostly on the markets Greece, Turkey, Romania and Serbia). Other types of holidays such as public holidays, spa, wellness holidays, summer holidays in the mountains or holidays with entertainment have the potential for interest too, but only on individual markets. Competitiveness of Bulgaria: Bulgaria has competitive supply of holidays by the sea on all surveyed markets except for Greece and Turkey (where their own supply of holidays by the sea is considered much more attractive). Besides, Bulgaria has a competitive supply of holidays with winter sports too, especially from the point of view of the neighbouring markets Greece, Turkey, Romania and Serbia. In contrast, on the other surveyed markets Bulgaria s supply of holidays with winter sports is less competitive because other famous ski areas (Alpine countries and the respective country too) are closer and are considered more attractive. The supply of cultural tourism and sightseeing by Bulgaria is regarded as less competitive compared to other European countries (primarily by the German, Greek, Turkish and Romanian nationals) or as averagely competitive at the most. In addition, on all surveyed markets the supply of summer vacations in the mountains and holidays with hiking, golfing holidays and rural or eco-tourism is valued as less competitive compared to those, offered in other countries (partly in comparison with the country s own supply). The same applies to the supply of spa and wellness holidays, which is also considered less competitive on almost all markets (with the exception of Greece and Ukraine). When all ten surveyed markets are summarized it is revealed that Bulgaria has important strengths, such as the image of a price-worthy vacation destination or its competitive supply of holidays by the sea and holidays with winter sports, but there are also weaknesses, such as the shortcomings of the image, which Bulgaria has on all ten markets, as well as the weak media presence and distribution. As far as the external factors are concerned there are opportunities, but there are threats too. The main threats to Bulgaria in that regard are primarily the high sensitivity towards prices, which exists on all ten market, the strong competition by Mediterranean countries (mostly from Turkey) and the global excess capacity in the field of accommodation, which intensifies price competition further. The continuing international financial crisis still poses a threat for Bulgaria too. Nevertheless, Bulgaria has great possibilities on the ten markets too, such as, for example, the generally high interest in holidays by the sea in a sunny and warm climate, as well as the great potential for interest in Bulgaria, offering prospects for growth, as well as the above average increase of purchasing power in the Eastern European countries (in combination with the increase in the volume of overseas trips), as well as the proximity and familiarity of Bulgaria with respect to Eastern European and neighbouring countries offer additional opportunities for Bulgaria too.

The comparison of strengths and weaknesses, as well as the opportunities and threats, allows the following conclusion to be made: Bulgaria has important strengths but there are also weaknesses, which counteract these strengths - yet most of these weaknesses can be overcome by the application of appropriate measures for communication and distribution. For example, the elimination of the shortcomings of the image, considered to be some of the weaknesses, will automatically reduce the threat of "strong competition from Mediterranean countries". Similarly, the strengthening of the image of Bulgaria as "a vacation destination with the best prices" will counteract the threat "high sensitivity towards the price", which exists on all generating markets.

TOURISM IN TURKEY

Turkey is one of the most preferred destinations among foreign tourists. This trend persisted in recent years and turned it into the 6th in the world in the number of attracted tourists, according to the data of the World Tourism Organization (WTO) for 2014/39.8 million tourists, representing a growth of 5.3% compared to the previous year bigger than the average for the region. The main tourism product, which the supply of Turkey is focused on, is the mass seaside tourism. An increasing number of Bulgarian tourists take advantage of the opportunities, offered by the neighbouring country and prefer it for carrying out their summer holiday, making it a major competitor. Cultural and informative tours, shopping tours and city breaks are offered as accompanying products. Other well developed types of tourism are health, adventure, conference, and cruise and golf tourism. The main target markets are Germany and Russia. Turkey focuses on the effective use of PR tools and new communication technologies, as well as on the active participation in international events and diversification of products, aimed at attracting tourists with high income. An important focus is the cooperation between the government and the private sector. Its communication campaign is aimed at the third age group, in accordance with the changes in the world population. Special attention is paid to the East Asia and the Pacific region, which marked a remarkable growth regarding tourism activities, represented mainly by India and China; as well as on increasing the market share through promotional campaigns with a territorial range in the countries of the Near East, Iran and the Republics of Central Asia. Domestic tourism has been defined with the same degree of importance along with foreign markets, whereas information campaigns aimed at raising the awareness of the history, nature and culture of the country and projects, aimed at social tourism and disadvantaged groups with the collaboration of organizations from the public and private sectors, have been held. Tourist enterprises are encouraged and supported so that they can maintain tourist quotas at low prices and offer package tours for the domestic market. Tourism is one of the most dynamic and fastest growing sectors in the economy of Turkey. In 2012 the revenue from tourism accounted for about 2.8% of GDP. In 2012 Turkey attracted 35.7 million visits by foreign tourists, an increase of 3.0% compared to the preliminary indications for 2013 (from January through September) suggest that the growth was 7%. The revenue from international tourism increased by 3.2% in 2012 to USD 29 billion and there is a further increase of 13% for the period from January to September 2013 (compared to the first nine months of the previous year). Target tourist markets of Turkey are Germany, Russia, the United Kingdom, Bulgaria and Georgia. Domestic tourism, however, does not develop with the expected rate of increase. Domestic travel decreased after its maximum number was reached in 2012 the domestic travel with one overnight stay fell by 1.4% to 64.9 million, whereas the total number of these overnight stays was 556 million. The number of Turkish citizens, travelling outside the country, was estimated at 6.3 million. For more than four decades Turkey implemented five-year development plans, drawn up by the Ministry of Development. The Ministry is responsible for the creation of the basic policies in the development of the tourism sector in Turkey, as well as allocates the budget, needed for their application. It is also responsible for the coordination between the national and regional development of the tourism sector. The Ministry of Culture and Tourism is responsible for: the protection of the culture and development of tourism, tourist centres, historical and natural sites, special measures have been taken for their optimized operation and sustainable development. The provision of infrastructure and public services in accordance with the implementation of the annual programmes. Development and approval of plans for the use of land in areas with tourist centres; Promotion of Turkey abroad; conducting scientific research and generating statistical data; Coordination of interventions in tourism from other state institutions, local authorities, professional associations, unions and NGOs. The Ministry of Culture and Tourism, the Ministry of the Environment and Urbanization and the Ministry of Forestry and Aquatic Farms are responsible for land use in the respective tourist regions, as well as for the environmental impact assessment (EIA), so that it is ensured that the overall development of infrastructure in the country is in unison with the environment. The Turkish Tourism Board was established in June 2012 with the membership of representatives of the following organizations: Association of Turkish Travel Agencies; Turkish Hoteliers' Federation; Touristic Hotels and Investors; Federation of Turkish Tour Guides; Turkish Association of Investors in Tourism; Marine Tourism Association; and the Turkish Association of Private Aviation Enterprises.

The budget of the Ministry of Culture and Tourism for marketing and promotions of the tourism sector is approximately USD 100 million a year. It is spent to a large extent on advertising, visits of trade and tourism fairs, organising commercial travel and seminars. Marketing and promotions are one of the five main components of the budget of the ministry, and the rest is invested in monuments and museums, state operas and ballets and state theatres. The main source of funding for the needs of the tourist infrastructure (such as transport and technical infrastructure) is the common budget. In addition to the various programmes of the Ministry of Culture and Tourism, the construction of tourist roads is carried out by the General Directorate of State Highways; marinas and small harbours by the General Directorate of Ports and Airports; and marine meteorological stations by the General Directorate of State Meteorological Measurements. Other ministries and state agencies also invest in projects, related to tourism.

The current national policy for the development of tourism in Turkey focuses on: The increase in demand by traditional and fast developing markets, in particular the BRIC countries. Increasing the share of visitors with a high income. Increasing demand for tourism product outside peak periods. Growing demand for specialized tourist segments, such as cultural and sports tourism, conference and wellness tourism. Promotion of balanced development of tourism in various regions of Turkey, as well as ensuring sustainability in the long run. The tourist sector in Turkey is currently undergoing serious reforms for improvement of the efficiency and competitiveness of the sector, development of regional tourism brands; sustainable development of tourism through the development of policies and strategies for protection of the surrounding environment is a priority. The Ministry of Culture and Tourism makes efforts for the unification of tourism development with the social and economic goals of the government of Turkey in order to optimize and harmonize with international cooperation, policies and objectives of the national schemes for the development of the tourism sector. In accordance with the objectives of the 10th National development plan (encompassing the period 2014-18), the Ministry of Culture and Tourism is responsible for the implementation of the strategy for the future development of tourism in Turkey until 2023. The pre-prepared study defines a variety of long-term measures, related to the planning, investment, organisation, internal tourism development, scientific research, transport and infrastructure, education and branding on urban level, etc. According to the results of the study, there is a significant potential for development of the tourism sector in Turkey, especially through the combination of various tourism products of the historical, natural and cultural heritage with health tourism, as well as of winter and cruise tourism with the opportunities for cultural tourism.

BULGARIA-TURKEY CROSS-BORDER TOURIST DESTINATION SURVEYS

Two types of questionnaires were prepared and distributed among tourists in the region and among the local population.

Tourism Experts from the project partners in Bulgaria and Turkey, Ministry of Tourism in Bulgaria, as well as experts from Tourism Departments in Municipalities, District Administrations and Universities in the cross-border area were involved in the process to define the competitive environment, in which the cross-border destination operates. Based on a compound analysis of the relative importance of, and growth prospects for a large number of markets, two Asian market were identified as priorities for the Tourist Destination Bulgaria – Turkey – China and Japan.

MARKETING OF BULGARIA-TURKEY CROSS-BORDER TOURIST DESTINATION

Bulgaria-Turkey cross-border tourist destination is located in Southeast Europe on the Balkan Peninsula. It has 5 districts (two in Turkey and three in Bulgaria). Bulgaria-Turkey cross-border tourist destination is also blessed with many scenic natural and cultural heritage sights (which includes a UNESCO designated World Cultural Heritage Site), rich cultural events and local delicacies. Bulgaria-Turkey cross-border tourist destination is a tourist choice designation for many holiday makers on the Black Sea Coast in Bulgaria. The tourism industry has always been crucial to the economic development of Burgas Region (part of the destination) as it boosts local economy, creates employment opportunities and increases the income and standard of living of the local population.

In order to become an International tourist destination, as a first step, Bulgaria-Turkey cross-border tourist destination needs to identify the targeted groups of tourists and customize packages which cater to their needs.

Nature, culture, heritage and adventure are frequently cited by visitors as important elements in their ideal holiday destination. But most countries offer these in one form or another. Drilling down beyond the generic, identifying what truly motivates visitors and understanding what your destination offers that can match these visitor needs, is essential to identify your competitive position in relation to your nearest rivals. This needs to be based on a clear understanding of different visitor segments and their motivation for travel.

So, in an increasingly competitive environment, it is essential to know what your competitive strengths are, to understand your different customers and to identify where your destination sits in relation to your nearest competitors. This is the starting point for identifying what makes your destination different and for establishing your competitive identity. And this is the basis for developing a brand strategy.

This joint action plan is developed for Bulgaria – Turkey Cross-border tourist destination and the scope of the plan will be guided by the following three marketing questions: (1) Where are we now? (2) Where do we want to go? (3) How can we get there? To answer the aforementioned questions, this plan is divided into three major parts. ***First,*** is to analyse the situation internally and externally. The SWOT (Strength, Weakness, Opportunities, and Threats) analysis is the tool used for this part of the study, and it will focus on how to turn the Threats into Opportunities. ***Second,*** it is to define the mission statement, goals and objectives of this initiative. ***Finally,*** it will focus on developing marketing strategies to assist the Bulgaria – Turkey Cross-border tourist destination in developing a clear goal and workable action plan to promote the area to the target and potential travellers.

In this JAP, ***the first group - Asian (Chinese, Japanese) tourists*** are identified as the target group due to its potential large market size, power to consume, love for culture heritage and nature, and the potential to be repeat travellers.

Where are we now?

The destination is well known to the local (Bulgarian and Turkish) tourism markets. Although the visitors are taken to a small number of sights in the destination, their number is increasing. To the Japanese and Chinese tourists, Bulgaria – Turkey Cross-border tourist destination is not known at all and may not be as appealing as compared to Shanghai as 'The Pearl of the Orient' nor Hong Kong as 'Shopping Paradise'. The unique tranquillity and closeness to nature and culture experiences offered by Bulgaria – Turkey Cross-border tourist destination is above what Shanghai and Hong Kong have to offer. The proximity of the destination to Istanbul International Airports is another advantage that makes possible Asian tourists to spend a few days in it.

Sun Tzu said, 'know yourself and know your enemy, a hundred battles fought and a hundred battles won. This understanding is the start of the study.

Where do we want to go?

The joint action plan will be created in accordance with the policy of Bulgaria – Turkey Cross-border tourist authorities (regional and local government). The plan is developed to fulfil the aim to increase the number of tourists to Bulgaria – Turkey Cross-border tourist region.

Vision

A vision is an exciting picture of a destination's desired future intended to motivate stakeholders to work together to achieve this future. Visioning is most successful when it is participatory and creates an image that integrates all the separate visions of stakeholders. In order for a vision to mobilize resources — ultimately the purpose of a vision — it must find common, higher ground in which each stakeholder sees part of their future.
Tourism visions, in particular, involve the elaboration of the style of tourism the destination would like to host (ecotourism, culinary, cultural, etc.), and who the target market is for the destination. The vision may also include elements of a shared strategy although the *how* rather than the *what* often falls to the mission, objectives, and strategies elements of a process.

Since a vision is only as strong as those who share it, the team will want the broadest possible participation from a diverse set of community representatives. Some questions to ask during the visioning:
- How do you see your destination after tourism development?
- What do you want to see happen?
- What is an acceptable level of change in your community?
- How much of what type of tourism development fits with your image of your destination's future?
- What future state of tourism here really gets you excited to think about?

Bulgaria – Turkey Cross-border tourist destination Joint Action Plan works as a collaborative platform for marketing and capacity building raises the profile of Bulgaria – Turkey Cross-border tourist destination while driving development that is sustainable, responsible and internationally competitive.

The Joint Action Plan works towards implementing the following multi-faceted vision:

Bulgaria – Turkey Cross-border tourist region will be internationally renowned travel experience:
- Bulgaria – Turkey Cross-border tourist destination will be an established brand, supported by extensive cooperative marketing campaigns;
- Quality infrastructure will facilitate smooth travel across international borders.

The tourism sector will be prosperous across all Bulgaria – Turkey Cross-border tourist destination, stimulating ongong investment:
- Governments will value and support the tourism sector and gain significant return for their investment;
- Bulgaria – Turkey Cross-border tourist destination will offer quality tourism infrastructure;
- Tourism will generate direct and indirect employment.

Bulgaria – Turkey Cross-border tourist destination stakeholders will work closely together for mutual benefit:
- Strong co-operation between Bulgaria and Turkey;
- Profitable partnerships between public and private sectors;
- Increased visitor length of stay across all regions.

Tourism will drive improved cultural and environmental management:
- Advanced cultural management systems in place;
- Environmental sustainability will underpin every aspect of tourism development.

Bulgaria – Turkey Cross-border tourism will act as a vehicle for fostering peace and cultural understanding:
- Promotion of cultural pluralism and intercultural dialogue;
- Intercultural cooperation as a key instrument to strengthen social cohesion, solidarity and peace.

Key areas of work

- Marketing and Promotion;
- Capacity Building and Destination Management;
- Travel Facilitation.

Key Stakeholders

The input, endorsement and engagement from a variety of stakeholders are key to ensuring the success of the Joint Action Plan:

- Bulgaria and Turkey National Governmental Tourism Institutions;
- Regional Government Authorities;
- Local Authorities;
- NGOs;
- Educational Institutions;
- Private sector stakeholders;

The term "**stakeholders in tourism development**" includes, according to UNWTO, the following players:

- ❖ national governments;
- ❖ local governments with specific competence in tourism matters;
- ❖ tourism establishments and tourism enterprises, including their associations;
- ❖ institutions engaged in financing tourism projects;
- ❖ tourism employees, tourism professionals and tourism consultants;
- ❖ trade unions of tourism employees;
- ❖ tourism education and training centers;
- ❖ travellers, including business travellers, and visitors to tourism destinations, sites and attractions;
- ❖ local populations and host communities at tourism destinations through their representatives;
- ❖ other juridical and natural persons having stakes in tourism development including non-governmental organizations specializing in tourism and directly involved in tourism projects and the supply of tourism services.

Management Development Board (MBD) has to be established in order to implement the JAP and to monitor the achievement of its goals.

Goals

Goals are realistic, measurable targets for the destination's tourism vision. That is, every goal must be consistent with the vision established in the prior section. For example:

- ❖ How many tourists does the destination want to attract?
- ❖ What alliances do they want to create?
- ❖ How many jobs, for whom, at what pay scales, and for what seasons?
- ❖ What is the anticipated percentage increase of income for local residents?
- ❖ How many tourists are too many?

As mentioned above with vision, a participatory process should result in greater resolve and commitment to implement the goals. It also produces a broader range of ideas during the initial brainstorm. As such a group process composed of all stakeholders, at least all those in the foreseen value chain, should identify and prioritize project goals followed by small group work to agree on specific targets for each goal.

Once goals are agreed upon, the destination can identify actions, timelines, and responsible parties to achieve them. Furthermore, if managers set up a monitoring system and they have the capacity to learn from the data that that system generates, then they can adapt their strategy — including the goals and even the vision — based on their experience pursuing these goals.

The middle term goal is to increase the number of Asian (Japanese and Chinese) and local tourists visit to Bulgaria – Turkey Cross-border tourist destination by at least 5 percent annually for the next five years from the implementation of the JAP.

Objectives

The following objectives will assist Bulgaria – Turkey Cross-border tourist destination to achieve the mission and goals stated above.

- ❖ To ensure that tourism programs and initiatives are highly market-focused, developing specific tour packages for each segment.
- ❖ To build infrastructures to facilitate accessibility and amenities to increase the convenience and comfort level for tourists.
- ❖ To provide training for all service staff to enable them to provide a high level of service quality.
- ❖ To improve hygiene and sanitary level and amenities.
- ❖ To foster a positive perception among key visitors and potential visitors by improving quality standards and offering greater convenience.
- ❖ To establish partnership relationship with key travel wholesalers.

And how can we get there?

Market positioning Bulgaria – Turkey Cross-border tourist destination aims to position itself to Asian (Chinese and Japanese) outbound travellers and local tourists as a specialty destination with natural wonder, culture uniqueness and a leisure destination for a revitalizing holiday.

Core competency

Two products core competencies are prominent, they are:

- ❖ Priority focus on the closeness to the miracle of nature (sea – mountain – biodiversity).
- ❖ Value-add to the rich nature and culture heritage with various kinds of annual outdoor activities to provide both leisure and entertainment activities.

FOCUS AREAS:

Focus Area 1. Marketing and Promoting

Destinations must take a collaborative approach to marketing and promote messages defined by a shared set of values. Consistent marketing messages are required to enhance the brand image of

Bulgaria – Turkey Cross-border tourist destination and improve the efficiency of all marketing and promotion efforts.

Priority Actions 2018/2019

- **Engage with the industry and strengthen** Bulgaria – Turkey Cross-border tourist destination **presence at major international fairs** such as ITB Berlin and WTM London, while expanding activity into other regions;
- **Develop data, research and intelligence** to create an effective Bulgaria – Turkey Cross-border tourist destination brand strategy, to enhance collaboration between Bulgaria – Turkey Cross-border tourist destination stakeholders and to increase consumer awareness;
- **Increase the online profile of** Bulgaria – Turkey Cross-border tourist destination**,** through an established destination website and/or industry marketing portal;
- **Develop marketing strategies in line with key source markets' interests and expectations** both at the individual destination level and collectively;
- **Enhance international** Bulgaria – Turkey Cross-border tourist destination **festivals and events**;
- **Create new marketing opportunities through collaborating with other related international tourist destinations and thematic routes** such as the Silk Road, the Way to Jerusalem, Amber Routes, Great Tea Road, etc.

As a unique network of two-countries destination linked by a common natural and cultural heritage, the Bulgaria-Turkey cross-border region presents significant opportunities for collaborative marketing and promotional initiatives.

- Collaboration with international travel fairs to highlight the tourism potential of the region – participation at ITB Berlin, WTM London, International tourism fairs in Sofia and Istanbul;
- Social media activities – creation of blogs;
- Raise the profile of Bulgaria-Turkey cross-border region on the international stage by tackling important issues and exploring opportunities;
- Collaboration with major production companies over the years, to produce a number of television documentary series promoting travel in Bulgaria-Turkey cross-border region. These include: television series, documentary series, articles in travel magazines, travel guides, etc.
- Consumer survey -

Focus Area 2: Destination Management and Capacity Building Working together to deliver consistently high quality products

Effective destination management maximizes tourism value and strengthens the national brand identity. By applying effective management strategies, destinations can foster economic growth, safeguard local arts and culture, diversify business and reduce visitor seasonality. Training and development has an important role to play in this. Training can enhance service delivery, improve product quality, boost productivity and increase profitability.

There needs to be a more consistent approach to destination management across Bulgaria – Turkey Cross-border tourist destination. The destination's rich cultural heritage and nature and the distribution of interrelated tourism sites make it ideal for cross-border initiatives and regional investment opportunities. Yet a number of challenges are currently impeding its growth and development. The level of product offer, service delivery, hospitality and language skills vary greatly across the region. Tourist information services are sporadic and interpretation is non-existent in some areas. Poor heritage management has also placed intangible and tangible heritage under threat. Community based tourism is yet to reach its full potential.

Priority Actions 2018/2019:

- **Facilitate industry engagement for decision-making and strategy development** through established forums, such as Bulgaria – Turkey Cross-border tourist destination Meetings and Task Force Meetings
- **Promote the development of community based tourism in transnational initiatives** such as the Joint Tour project
- **Enhance industry training and development** through online courses, manuals and workshops
- **Implement capacity building programmes in regional areas** focused on destination management and heritage and nature conservation
- **Develop product delivers quality experiences, excellent service and innovation**
- **Raise the profile of** Bulgaria – Turkey Cross-border tourist destination **as an investment opportunity** by collaborating with national investment agencies
- **Improve interpretation** at natural, cultural and heritage sites, and through implementing tourist guide training programmes
- **Enhance public private partnerships** to create more opportunities for growth and sustainability

Capacity Building and Destination Management

Since Bulgaria – Turkey Cross-border tourist destination was launched in 2017, the first events are the Round tables organized through the Joint Tour project. Topics have ranged from tourism, rural development and destination marketing to heritage management, food tourism, investment, travel facilitation and product development.

- launched a Joint Action Plan, a guideline document which sets out the objectives and steps for maximizing tourism development for the region;

- the first three specialised information tours on promoting the tourist destination -

- developed 2 specialised Guides' Handbooks as a practical tool for improving the knowledge and standards of tourist guides.

Focus Area 3: Travel Facilitation Overcoming the barriers to boost growth

While the BG-TR tourist destination continues to be a hub for commerce and travel, barriers such as visa policies, border crossing procedures and customs regulations continue to hinder tourism growth in the region. There are extensive opportunities for enhancing connectivity by air, rail and sea.

Priority Actions 2018/2019:

- **Build on existing research** to raise awareness about the value of facilitating visas with regards to international arrivals, economic growth and job creation

- **Continue to monitor visa policy improvements and showcase best practices** to encourage the modernization of visa procedures
- **Increase connectivity between destinations and products** through developing travel routes
- **Establish a set of guidelines for signage along the routes** to develop signage that is welcoming, informative, consistent and attractive
- **Enhance connectivity and route development** through increased collaboration between airports, airlines and aviation ministries to make the destination more accessible, and to promote trans boundary travel and dispersal of visitors

Recommendations

i. Improving the image of the destination. Consumers' image of the destination is vital to their choice. Consumers' images are considered a crucial part of the product or the brand and the foundation for marketing efforts (Aaker, 1991). However, consumers' of the destination not only come from their own travel experiences, but also are influenced by other people's experiences and evaluation, general information and promotional campaigns. This knowledge will help us to understand the importance of branding and marketing Bulgaria – Turkey Cross-border tourist destination. For the distant and unknown destination like Bulgaria – Turkey Cross-border tourist area, the key question is whether its geographical names is meaningful to people that have not visited the place before and, further, whether there are any other types of attributes that should be used for creating positive images to increase meaningful activities to attract customers in the future. Based on this understanding, the governments in Bulgaria and Turkey should conduct a marketing research of Asian visitors' knowledge of Bulgaria – Turkey Cross-border tourist area, both common and unique. These findings can provide additional information to marketers in developing marketing branding and communication strategies.

ii. Designing various tour packages to fit different needs of each segment.

The strategic steps of attracting Asian visitors should be as follows:

(1) study the visitors traveling behaviour; and then find the basic dimension. We found that there are mainly eight purposes of traveling for most of Japanese people. According to this, we segmented Japanese visitors into eight groups.

(2) We should describe our key customers and potential customers in order to meet their demand, and offer what they exactly need.

(3) We can implement our findings and strategies.

Defining the Competitive Environment for Bulgaria-Turkey cross-border tourist destination

The rating of a country a destination as a brand in the perception of prospective visitors is an important travel decision making criterion in respect of choice of destination.
The impressions created in the minds of consumers in travel markets around the world are created through a large number of influences. The Bloom Consulting Group in its annual Country Brand Ranking identifies four variables as contributing to a destination's image and thereby establishing its tourism brand rankings i.e.

1. Tourism economic receipts and growth (a first indicator of a country's appeal),
2. The destination products and experiences researched online (measuring its online appeal),
3. The country's brand strategy (assessing the accuracy and effectiveness of its communication efforts),
4. Official website and social media performance.

The results of the 2013 Country Brand Ranking of 187 countries and territories show that the United States has the strongest tourism brand followed by Thailand, Australia, China, Malaysia, the Republic of Korea and Mexico which all feature in the top 20 destinations. Nine European countries are ranked in the leading 20 destinations, led by Spain, France, the United Kingdom and Italy.
The competitive strength of any country as a tourism destination is a combination of many factors, some of which are fixed or otherwise factual while others are subject to the influence of both product developments and marketing and promotional activities. No destination is outstandingly strong or weak across all parameters.

TARGET GROUPS

Bulgaria and Turkey have a relatively wide target group. This is due mainly to both countries similar main product - holidays by the sea (the so-called mass tourism product on the market), which typically attracts people of all age groups, as well as people with various levels of education and income. Unlike the target groups with summer sea tourism, those with the cultural and historic and winter ski tourism can be more clearly defined and targeted tourists from certain age groups, education levels and income. This creates favourable preconditions for the future development of a new area of cooperation, namely the building of a common tourist product between the regions in Bulgaria and Turkey, the success of which will depend on the quality development of projects and ideas, which will unconditionally provide additional financial resources for the development of tourism both in regional and national aspect.

Young people or families with children (25-45 years of age) with medium income travellers with the purpose classic "beach and sun holidays visitors to natural and cultural attractions information from friends, catalogues of tour operators and electronic media highly price-sensitive group tendency to early or last minute bookings and looking for the best value deal. Business visitors managers - 30-50 years of age with high income Small share trend for growth a shorter stay for a certain period of time, but relatively high expenditure for the duration of the stay interested in cultural events and shopping 50+ with average and above average income visitors to cultural sites tourists, who wish to experience the atmosphere of the country with traditional specialities and drinks or for treatment and spa programme. They plan their holidays several months in advance Social programmes tourists from Turkey and other countries, travelling with the purpose of rehabilitation, treatment and recouperation a segment with potential for development given the global trend towards ageing of the population Source: Ministry of Tourism of Bulgaria

MARKETING TECHNIQUES

In order to enhance the economic and social impacts of tourism and generate higher profits from local communities and enterprises, it is necessary to establish and promote the development of a cross-border product to support the faster development of the tourism sector in border regions of Turkey. Favourable conditions for this product are available in the cross border region, whose cross-border tourist product can lead to economic and social development of these cross-border regions. The marketing strategy recommends integrated development and sustainable use of natural, cultural, historical and geographical resources for the increase of the attractiveness of the cross-cross border region and for the facilitation of the development of alternative types of tourism and products for the mass market. Word of mouth marketing is the most affordable and used very often in past centuries still in the dawn of the private business. It can even be said that it has been a basic and favourite marketing technique. In those times when people, doing business, treated their customers as their own friends and as an important part of their lives. In this respect this marketing technique is the most suitable for promotion of tourist sites and services in the areas of cross border region. Direct marketing and its channels - most of the retailers and tourist facilities in the cross border region sell their products more or less from owned/rented shops, stalls, accommodation and restaurants. Direct marketing is also considered important for both sales to local people and to tourists. If the seller is the owner himself, this allows for a direct contact with the client, allows for feedback and, at best, leads to the development of a new product, in accordance with the requirements of the customer, to negotiation of the price. Direct sale of tourist products, packages and services on the internet, especially for international tourism, is possible too. This type of technique has an increasing importance since a large part of tourists use the internet when choosing a tourist destination. Retail - the specialized shops for souvenirs, hand-made products and gifts are also an important channel for retail of the local products as a part of the tourist services in the region. The specialized shops for jewelry, leather goods, ceramics, pictures galleries, shops for tourist souvenirs, museums, shops, specialised confectioneries, small restaurants for tava dzhiger and meatballs are the main channel for these goods.

Smart marketing tourist companies and restaurateurs, presenting travel products and services, are important, but the creation of a new product and the marketing for it require a solid investment by not just one entrepreneur. In this sense cooperation between entrepreneurs from the same industry, participation in networks, clusters with partners from the same or different industries, the use of joint external marketing services is required. The so-called "guerrilla marketing" allows for the achievement of remarkable results with small investments and "more brains". The essence of the method is the study of lifestyle and professional identity of the client and the connection with the process of design and production. Guerrillas most often focus on small target groups and pre-select their target groups. Marketing includes a range of methods, usually free of charge. Several marketing methods are combined in order to develop a relationship with the consumer, and this is usually performed by one person. For example, the production of t-shirts, made with manual screen printing. The products are well known and appreciated by a number of Bulgarian and European partners. A technology for printing a company logo, t-shirts for advertising campaigns, festivals, souvenir t-shirts, t-shirts with a printed photo effect, depending on the taste, wish and needs of customers.

EXPECTED RESULTS

The tools, which marketing works with, include the elements of the so-called marketing mix. The marketing mix includes 4 main components:

1. product

2. price

3. place (for realization, distribution)

4. communication (promotion)

This is the famous theory of the four "P"s: product, price, place, promotion. In the field of tourism, in addition to these four p s, two more components, demonstrating the features of marketing in tourism, have been adopted. People and service activities (people & service) are added to the four tools of the marketing mix too. The tools of the marketing mix are used for the impact on consumers (tourists), in particular for motivating them to buy or consume our tourism products (programmes) at prices attractive for them (with various types of bonuses and discounts), through various forms of distribution (supply). Including through direct or indirect intermediaries on the basis of a balanced communication (promotional and advertising) policy. People in the tourism business, as the leading factor, are carriers of the marketing impact, because the direct marketing of the so-called contact staff requires a number of marketing skills for all people, employed in the tourism business. The existence of a border has prevented the region Bulgaria-Turkey from being considered as one territory for tourist trips for a long time. All analyses carried out for the region emphasize on and identify the main problems, which start from infrastructure and spread to the quality of services in the tourism industry. Despite the rich natural and cultural and historical heritage, the region suffers from the lack of a single image built, by which a competitive, growing tourism sector can be identified and which can help improve the overall performance and income levels of the labour force in tourism. Theoretically the efforts to promote tourism are directed mainly towards distribution of more information about the destination and its attractions in an effort to make it better known on the international tourist market, which becomes increasingly competitive. This is especially true for regions, which are away from the main tourist areas. In view of the growing competition in the tourism industry, the saturation and globalisation of markets, preparation of a marketing approach for the positioning of the cross-border region is needed. The binding of the management of the tourism sector with the decision for establishing a competitive position of the offered products/services is defined as a task of the strategic positioning. The overall marketing concept suggests making concerted decisions on three levels - goals, strategies and mix. It is summarized that the marketing goals determine the direction of development; marketing strategies determine the road and the marketing mix the means for achieving the set objectives. The cross-border region is faced with a difficult market environment, with increased competition from neighbouring areas, with significantly higher levels of development of tourist services and products. The increase of investment in the sector, respectively of the accommodation during the last year, will put more pressure on employment and the economic viability and requires targeted actions for the promotion of the cross-border region and the achievement of growth in the tourism sector. For this reason a plan for development of a common cross-border destination is needed, especially after the occupation of the accommodation is so low. In this respect the marketing strategy pays attention to the positioning of the cross-border region at the level of objectives, strategies and mix. It is assumed that the decisions, related to the determination of the objectives, justifying the choice of target positions for the offered products, are in the basis of the marketing approach for positioning. The goals of the positioning are bound with the creation of the desired idea for the proposed offers in the minds for the selected segment. The specific qualities and benefits pointed out are essential for the attainment and maintenance of a competitive advantage as compared to tourist destinations, offering similar products and services. In this respect the creation of a tourist product aims at strengthening the regional cross-border cooperation between Bulgaria and Turkey and contributes to the accelerated development of tourism in both countries, which will not only revive the industries related to it, but can lead to the formation of a powerful tourism industry. This product focuses on the development of a tourist vision in the cross-border region, aims at stimulating and uniting the efforts of local and regional authorities, the private and non-government sector to promote entrepreneurship and economic development of the cross-border region. The marketing of the tourist destination is implemented on two levels: - 1st level: marketing of the destination as a whole and its products responsibility of the local authorities and the local tourist organization; - 2nd level: marketing activities of individual tourist companies. On this basis it must implement its marketing role in two directions: - by promoting the destination ("umbrella campaigns) by creating and imposing an attractive image of the destination as a whole and by sending messages to potential visitors, a needed basis for marketing activity of the individual tourist enterprises; - by supporting the tourism industry, by supporting the creation and imposition of new products, consulting activity, control over the quality of tourist services, providing information to visitors, etc. Expected results: The conduct of the successive and planned activities of the communications mix will help build a clear and sustainable cross-border product, which will be promoted in all communication channels through a single new vision. Through the implementation of the marketing activities in the programme, it is aimed at perceiving the cross-border region as a year-round destination with a rich cultural and historical heritage, providing opportunities for diverse forms of tourism. The successful implementation of the programme will have a positive impact on the development of tourist facilities and the discernibility of Bulgaria and Turkey on international level. More foreign, Turkish and Bulgarian tourists are expected to be motivated by performing the set tasks. Besides the establishment of a clearly recognizable brand, it is also essential to create and promote strong regional brands. An important result is increasing the share of domestic tourism by raising the awareness of visitors regarding the opportunities for tourism in the cross border region, including tourist sites and routes, specialized forms of tourism, as well as poorly known destinations in the cross-border region. The higher awareness of target groups regarding the possibilities for tourism and holidays is one of the most important results from the implementation of the activities of the tourism advertising of the region. The implementation of the activities, underlying the marketing strategy, will also contribute to the successful implementation of the strategic objectives, among which are the successful penetration on promising markets, promoting visits from markets, traditional for Turkey and Bulgaria, creating joint routes and products with the purpose of attracting tourists from distant markets.

MARKETING AND COMMUNICATIONS OBJECTIVES AND ACTIVITIES

The communication policy (promotion) in tourism is a complex of advertising and promotional activities, directed primarily towards consumers of the tourist product with the purpose of promoting awareness of the product, its testing and repeated consumption and of gaining loyal customers. The most important tasks of the communication policy are: To inform! To urge towards buying! To remind the target audience about the product! Each of these tasks is typical of the different stages of the development of the tourist product. There are different means of promotion and assertion of the product, of periodic reminding about it and stimulating sales. The most important tools for influencing potential consumers are: advertising; public relations; promotion of sales; personal sales; direct marketing; participation in tourist exhibitions and fairs. The use of just one of these tools can very rarely achieve the desired objectives. The communication strategy usually includes a combination of two or more advertising and promotional activities. The above-mentioned instruments have different efficiency at individual stages from the moment of learning and knowing about the product until the moment of realizing the consumption. For example, advertising proves to be most effective in the first two stages when the product is presented and and information is received about it, although it is useful in the subsequent stages too. Public relations are very effective in the first phase, when a certain level of awareness of the tourism product must be reached, as well as when formation of preferences in relation to the product must be assisted. Many organizations create a positive attitude among their potential customers by sponsoring events and programmes with socially significant goals. When planning and allocating the budget for communication activities, tourist companies and organizations are typically faced with two major problems, namely: What the size of the budget should be and how it should be allocated among the various communication tools. As a rule the budget should be bigger in the cases, in which tourists experience difficulties in identifying the tourism product, offered on the market; when the tourism product is not clearly discernible from that of the direct competition; when a new tourism product is placed on the market and when potential consumers have no previous experience in the purchase of this product. The way, in which the budget will be allocated, depends on many factors, the most important of which are: the location of the target market (remoteness of potential consumers); the development phase, which the particular product is in (what extent the product is known on the market to); the presence of communication problems (are there any difficulties in information about the product reaching potential tourists and of what nature). 6.1. Marketing and communication goals The lack of a uniform understanding of the region, bound in a tourist package in the form of destination, requires grading tasks in such a way as to contribute to the achievement of the objectives. The region has no clear positioning in terms of tourism supply and demand. The creation of the product should be based on the individual «brand» created and should combine activities, related to heritage and nature. The following connected basic marketing purposes are identified, as follows: Imposition of a common brand of the cross-border region and presence in the tourism distribution network; Information on the cross-border region as one offering good quality of tourist resources and services should be expanded; Increase of the average length of stay and expenditure of visitors in the cross-border region with a minimum of 10% over the next 5 years; The specific marketing goals are:

Objective 1 - Affirmation of Bulgaria – Turkey cross border region as a year-round destination in the cross-border region Bulgaria Turkey Tools: Promotion of the basic and specialized types of tourism - spa tourism, culinary and wine, eco and adventure tourism, business, festival, urban tourism, by conducting tours, attracting major events;

Joint actions for promotion of sales with big tour operators; Use of online advertising for the promotion of the various types of tourism banners, teasers, online games, etc.; Conducting journalistic and expedient tours on the developed cultural and historical routes, as well as on other thematic routes, which are yet to be created;

Objective 2 - Expansion of the portfolio of the brand Bulgaria – Turkey cross border destination by building joint tourist products Tools: Creation of common tourism products and information centres jointly with the neighbouring countries Bulgaria, Turkey and Greece to attract tourists from Europe and distant markets (China, India, Japan); Shared use of cultural centres abroad for promotion of tourist products.

Objective 3 - Promotion of Bulgaria – Turkey cross border region on markets, different from the traditional target markets Tools: Participation in international fora and travel and trade shows; Organization of journalistic tours with representatives of renowned media from the respective target markets; Active presence in the online space with special attention to social networks and advertising through internet banners.

Objective 4 - Innovative forms of advertising Tools: Organizing of tours with foreign celebrities, journalistic and expedient tours; Innovative forms of internet advertising; Joint participation in trade, farm and craft fairs; Focus on the target markets by organizing a mobile event; Broadcasting of image and product advertising in the international media of target markets; Partnership during major international sports events; Attracting major international events, conferences and meetings, which are to take place in the cross border region; Support of events, held by other organisations, associations and/or municipalities and cities; Active promotion of the attracted international events, as well as national ones, which are held in the cross border region.

Objective 5 - Increasing the share of the domestic market (Bulgarian and Turkish) to the cross border region Tools: Promoting domestic tourism through small thematic communications campaigns and use of the model of public-private partnership; Promotion of the supply of specialized forms of tourism and of poorly known sites and routes; Promoting the diversity of tourist routes through stage-by-stage and targeted promotion and partnership at cross-border fora and events;

Marketing activities

1. ATL activities

1.1. Television advertising - The well-planned TV advertising campaign ensures awareness of the offered tourism products and recognizability of the cross-border region. In order to achieve comprehensive development of the tourism product, activities in both national (Bulgarian and Turkish) and international TV channels are planned. The criteria, on the basis of which the televisions are selected, are: scope, thematic TV programs, TRP (target rating point), time and hour zones, preferred by the targeted audiences. Broadcasting of advertising films about the regions of Bulgaria - Turkey is planned in representations of the large tour operators, etc. Production of new thematic videos and films, presenting the cross-border region Bulgaria - Turkey as a year-round tourist destination with a focus depending on the promoted tourism product; Production of advertising videos and films; Production of a series of advertising videos, focusing on the cultural and historical routes, regional tourism products, diversification of the tourism product (in the various seasons of the year).

1.2. Print advertising - Print advertising, as one of the oldest and most traditional forms of advertising is an extremely important channel for reaching target groups from different markets. The dissemination of adverts and PR publications are planned on the basis of studies of the media mix in the countries of the target markets. The influence of various media (TV, press, internet, etc.) in a certain country is crucial when choosing the main communication channel. The purpose of printed advertising communication is to disseminate information about the tourism product, offered by cross-border region, presenting it as an attractive tourist destination. Specific tourist products will be presented too, whereas the focus will be not only on the mass tourist product summer, but mainly on cultural tourism and cultural and historical routes too. Advertising publications will be printed mainly in specialized tourism publications focusing on professionals and the general public, as well as in the more mass magazines, mainly oriented towards female audiences (in the main target group families with children, for example, on the Bulgarian and Turkish tourism market the decision for holidays is taken primarily by women), the so-called young pensioners - /55-60 years of age/ and people in older age, towards people with special interests and an expressed propensity to travel. On some of the major markets direct advertising will be published in the regional press of general character too, especially in areas, which traditionally send a significant number of tourists to Bulgaria and Turkey. The marketing strategy for tourism development in the cross border region encourages the preparation of topical printed materials for the various promoted tourism products and target groups, which mush have a uniform concept and vision. The printed publications must be planned on target and promising markets both in on-board editions of airlines, operating flights to Bulgaria and Turkey and other carriers, and in catalogues of tour operators, specialized travel publications.

1.3. Online advertising - The active use of this communication channel allows effective targeting and differentiation of tourism products and reaches a wider range of users. The advantages of the approach for communication with the audience chosen make it mandatory for every advertising campaign. With the planning of specialized sites and information portals we will reach those audiences, which are directly interested in a certain type of tourism. Development of a cross-border tourism portal, including in different language versions, except for Bulgarian and Turkish, e.g. - English, Romanian, Greek, Russian and Chinese languages; Constant updating of information and content of the portal and optimizing its functionality (for far-away markets by necessity); Developing mobile versions (ios, Android and Windows mobile) for the tourism portal; Active promotion of the official tourism portal of Bulgaria and Turkey via search engines, travel portals, related sites, use of flash technology and interactive applications, behavioural targeting, etc.; Joint e-marketing with foreign tour operators on target markets where increase of online bookings is observed; Advertising by means of banners of different format on sites of large tour operators, tourist sites, etc.; Developing, maintaining and further development of the profile of the crossborder tourism product in the social network Facebook; Development of an electronic marketing project of the destination - creation of an online 3D catalogue of tourism sites and destinations;

2. PR and BTL activities

2.1. Public and media events, aimed at promoting Bulgaria – Turkey cross border region as a uniform year round tourist destination - Organizing B2B meetings and fora, meetings with representatives of the electronic and print media, presentations, discussions, round tables and press conferences during participations in international travel fairs; Holding joint advertising campaigns, including online, and events with large tour operators on target markets; Holding a road show events on target markets and on markets with potential (presentations, B2B meetings and fora, etc.) Joint PR activities with embassies and tourism representations of Republic of Bulgaria and Republic of Turkey for the promotion of the cross border region as a tourist destination; Organizing conferences and fora with the participation of international tourism organizations and other EU structures; Implementation of discussion panels, round tables and other activities with representatives of the central and local government, regional tourism bodies and professional organizations and other stakeholders;

2.2. Organizing expedient, journalistic and thematic tours - Tours on cultural and historical routes with celebrities and teams, who generate great media interest and coverage in the international media with high ratings; Organizing tours on thematic routes, e.g. "Culture and folklore events"; Organizing meetings with representatives of the local authorities in a certain region, included in the cultural and historical routes with the aim of joint development and work on implementing the strategy; Conducting journalistic tours for media representatives and bloggers from target markets; Organizing expedient tours for representatives of major tour operators from target markets and markets with potential. The active financial and organizational assistance of tourist organisations, sectoral associations and travel companies will be sought in the organization of journalistic and expedient visits.

2.3. International events - Attracting big events, conferences and meetings of international importance; Partnership during major international sports events; Participation and support at public, media and business events and extraction of maximum media and PR effect (international sports events of competitive nature, contests, households, conferences, initiatives, festivals, etc.).

2.4. Participation in international tourism fairs, fora and other events - of general and specialized character - The marketing strategy promotes participation in leading international tourism fairs, fora and other events in Bulgaria and Turkey, as well as abroad. This includes participation with stands with a new uniform vision of the cross border region, as well as organizing accompanying events within the fairs. The following must be taken into account in determining the participation: affirmation of Bulgaria Turkey cross border region on the traditional target markets; imposing an image of promising new markets; the significance of the event and the accompanying events; the popularity of the cross-border region as a tourist destination; interest on the part of the tourist industry.

2.4.1. Participation with national stands in world tourism fairs. The presentation of the region with a joint tourism stand is an essential element of the integrated marketing communication for the promotion of the cross-border region as a year round tourist destination. The most significant exhibitions take place in three of the main target markets - Berlin, Moscow and London. They comply fully with the trends of development and demand on the respective market. The concept allows the cross-border region to emphasize on its identity, which increases the extent of its recognition among end consumers, partners, etc.

2.4.2. National fairs and events - Participation in national tourism fora in Bulgaria and Turkey, aiming at sustainable development of tourism in the cross border region and in particular at cultural and historical sites, promotion of traditional products summer sea, ecotourism, promoting domestic tourism, etc. Participation in tourist exhibitions in Istanbul, Sofia and Burgas is planned.

2.5. Sales promotion events - Joint campaigns with major tour operators; Online collaborative campaigns with tour operators on the target markets, as well as broadcasting videos, films, interior advertising in the agents offices; Advertising and issuing special addenda in catalogues or individual ones just for the destination in Germany, Great Britain, Russia, China, Japan, India, the Near and Far East, etc.; Organizing FAM (familiarization) trips for foreign tour operators jointly with regional and sectoral organisations from the target and promising markets to promote the supply of new and combined tourist products; Organizing workshops and presentations in target and promising markets, together with tour operators for the presentation of new tourist products; Joint events with professionals from Germany, Great Britain, Russia, Ukraine, Central Europe, the Scandinavian countries, France, Romania, the former CIS countries and the Far East; Participation in the campaigns of Bulgarian and Turkish sectoral and other organizations to promote the cross-border tourism product.

2.6. Other marketing activities. Other marketing activities will be developed in the process of following the basic parameters of the overall marketing concept too. They will develop key promotion activities further and will contribute to the building of the positive image of Bulgaria – Turkey cross border destination. They will be included not only in the basic communication but also in each individual campaign, in creating new print advertising materials and the organization of various events. Thus a uniform vision will be created and it will be applied in every aspect of the advertising communication. Organisation of training seminars and specialized courses for travel agents, experts in the destination Bulgaria-Turkey and certification of professionals aimed at increasing professionalism within the tourism industry and creating standards for the quality of the tourist product. Destinations for alternative forms of tourism by conducting a campaign for their promotion, consisting in video clips, production of print advertising material, conducting information tours and promotion in online media.

PRODUCT POLICY PRIORITIES IN THE REGION - TYPES OF TOURISM AND TOURISM PRODUCTS

The potential of tourism in the cross border region is assessed as very good. Whereas the most important factors for the development of tourism in the future are the variable natural resources sea, mountain, varied relief, mineral springs, historical sites/resources, hospitality and the well-preserved villages and towns. The extremely favourable geographical position, the variable relief, the presence of protected areas, rich flora and fauna, museums, the unexplored history and culture, the unique folklore and cultural events, customs, music, dances, cuisine, etc. are the unique part of the tourism product of the cross border region. The region disposes of tourism resources, which are not sufficiently developed at present and can be developed for tourist activity in the future in the following types of tourism of priority cultural, rural tourism, folklore and ethnotourism and eco (green) tourism. The following types of tourism have a good potential for development in the future: Cultural tourism cognitive, folklore, festival and ethnological tourism, religious tourism (visits to religious sites - churches/mosques and other places and sites); Sea recreational tourism Black Sea and Aegean Sea including campsites, yacht tourism, water sports, etc. Rural tourism visits to villages, agricultural activities and agro tourism; Spa tourism (based on the existing natural springs); health/wellness tourism (in general); Eco (green) tourism, ornithological tourism; Mountain tourism - hiking, bicycle routes; Hunting and fishing tourism. Improvement of public services (communications, sewerage, cleanliness), updating and installing marking / traffic directing signs, development of new or additional tourism products and packages, providing initiatives to the small- and medium-size business, creation of capacity for accommodation and dining in the region, conservation of natural and protected areas and conservation of local culture / heritage is required for full supply of tourism products and services in both regions. Expanding the spectrum of tourism services in the municipalities and introduction of new forms of service is required. The supply of vegetables and fruit, grown locally, eco-friendly and beneficial to the health is very popular. The region has enormous potential for this. Menus in restaurants have to be diversified. Competence and skills of the staff are a major problem for the quality of the tourism product. Enhancing vocational training of employees (in restaurants, entertainment, accommodation, museums, etc.) in the following areas - sales and marketing, foreign languages, information technologies (work with computer), customer service, booking, concept of the tourism product, laws and legislation, human resource management, etc. is needed.

Tourism product

Product (good or service) is anything, which can be marketed to attract attention, acquisition, use or consumption, satisfying a desire or need. For the hotelier products are the hotel room, which is rented for temporary use, as well as the set of services, provided to tourists during the period of his stay in the hotel. For the transport company these are the places in the vehicle and the set of services for the transport of tourists. For restaurateur the product are meals, which are offered, as well as service in the restaurant. Tourism product means different things depending on the perspective: For the tourist company this is the product of labour with the respective consumer value. It is a set of goods and services, resulting from the production activity of tourism and other businesses, which the tourist pays for. For tourists these are goods and services, which they are interested in and willing to buy under certain conditions: transport services, accommodation and dining services, services towards achieving the purpose of the trip (entertainment, education, business, etc.), information services, utilities, souvenirs and other goods for subsequent use in a tourism location or the place of residence. Travel agencies have to consider the following levels while assessing the consumer value of the product or planning the market offer: (1) actual benefit from the product the main benefit, which the customer buys. For example the guest in a shelter facility buys "rest and sleep". (2) primary product - the basic version of the product or the material preconditions for its creation. For example the shelter facility is a building with rooms, rented for short-term use. (3) anticipated product - the conditions, which tourists expect and negotiate when buying the product. For example guests of any shelter facility expect a clean bed, soap, towels, a wardrobe and serenity. (4) additional product - additional services and benefits, making the other different from that of competitors. For example the standard product can be supplemented with the provision of a TV set, telephone, shampoo, fresh flowers, express service, etc. (5) potential product - transformations, which the product might undergo, i.e. its possible future development. The tourism product is created to satisfy the needs and expectations of tourists. The elements of the tourism product through the eyes of tourists are: Tourism resources - natural and anthropogenic, including various events and activities; General infrastructure - airports, roads, railway network, electricity supply, water supply, sewerage, treatment plants, communications, etc.; Tourist infrastructure and tourist services (accommodation, catering, tourist transport, etc.), as well as provision of information; Activities, which tourists can practice during their stay, as well as landmarks, which they can visit; Image and other characteristics, related to the degree of development of the tourist location, the own lifestyle of the tourist, his social status, his opinion about himself, imitation of fashion, etc.; The tourism product must offer benefits to a particular group of tourists with similar needs, as well as motivation for taking a tourist trip. The prerequisites for successful realization of the product are several: It must be commercialized - the availability of resources does not mean that the flow of tourists will head towards the destination, even in the presence of information. The product must include not only natural resources, but also basic and additional services with a specific price. The materialized image of supply is the tourist offer, discounts and bonuses. Most often the offer is in the form of a package, by uniting several services in a total price, but it is not the total of the unit prices of individual services; Information about it must be promoted - it must reach potential consumers in an appropriate way; It must correspond to the requirements and expectations of the selected target group in the market; It must be distinguishable from other similar products; It must have sufficiently high quality of all components, so that it is accessible and does not disappoint tourists. The analysis of tourist resources shows that Bulgaria – Turkey cross border region can currently promote the following types of tourism:

1. Sea recreational tourism

MEASURES: stimulating demand for holiday tourism in the international and domestic tourist market on the Black Sea and the Aegean Sea, as well as for a combination of holidays on the two seas (a few days on each); improving and expanding the supply of additional tourism services (sports, entertainment, thematic); introduction of innovations in hospitality; improving the quality of tourist services; improving the qualification of tourism personnel; implementing a series of measures to attract year-round staff in the seaside resorts of the region and year-round use of facilities for tourism.

2. Health tourism (mud treatment, spa, wellness)

MEASURES: creating opportunities for multi-functional year-round use of resort areas with combined inclusion of their resources; strengthening the role of marketing research and providing adequate, timely and reliable market information; development of high-quality tourism product in the field of mud treatment, spa and wellness tourism; programme. increasing the qualification of staff; expanding the range of additional services in a package with basic ones; offering health programmes as a part of the overall tourist entertainment

3. Cultural and religious tourism

Cultural tourism includes the following types of tourism: Cultural and historical, with an interest in history and the monuments, associated with it, sites and places in the visited destination. It includes visits to architectural, artistic, archaeological, historical and religious monuments, architectural and ethnographic reserves and complexes, museums and galleries (outdoor), etc. Event and festival, with an interest in traditional or modern reproductions of cultural events (celebrations, festivals, commemorations, etc.), as well as participation in them. Most often these events and festivals are subjected to certain types of arts. They may also include traditional industries, visits to fairs, bazaars, as well as various sports holidays. Religious, with an interest in religion(s) of the visited country, with visits to holy places, places of worship and pilgrimage. It also includes familiarization with religious canons, rites, rituals and traditions (processions, parades, etc.); seeing religious buildings and monuments of historical, architectural, artistic and cultural value. Archaeological, with an interest in archaeology, visits to archaeological sites, locations of excavations, participation in archaeological expeditions, etc. Ethnographic, with an interest in the ethnicity of the people(s), objects, tools and phenomena of the ethnic culture, way of life, traditional apparel, language, folklore, traditions, customs, ethnic art, etc.

MEASURES: carrying out assessment and providing recommendations for transformation of cultural monuments in a finished tourist product; evaluating and implementing changes (updating) in museum exhibitions in order to increase their attractiveness; use of cultural resources - cultural monuments, museums, festivals, ethnographic complexes, etc. - to invigorate the tourism industry; promotion of the development of souvenir industry; organizing training and retraining of personnel for work in the field of cultural tourism: organizers, entertainers, managers, curators, etc.; conducting regular market research of tourists and their specific travel interests and needs when visiting cultural institutions and sites of the cultural and historical heritage.

4. Ecotourism / nature tourism

Extremely rich biodiversity, unique natural attractions, unique river terraces - it is difficult to describe in a few words how diverse and wonderful the nature of the cross border region is. Every lover of beautiful views and closeness to nature can find their paradise here. There are conditions for environmentally friendly activities in the regions - hiking, trekking, bird watching, animals and plants, visiting landmarks, etc. The thought of preservation and conservation of nature, however, is always fundamental and leading.

MEASURES: ensuring keeping the impact of ecotourism within the permissible use and change through management plans for protected areas and plans for the conservation of cultural heritage; elaboration of mechanisms for generating revenue for the conservation of biodiversity and cultural monuments; improving the capacity of entrepreneurs for doing business and training local communities, providing tourism services; targeting the development of ecotourism to the domestic market, as well as to residents of the border region Bulgaria - Turkey and expansion of the target segments of the international market.

5. Rural tourism

Rural tourism is the best way to explore the traditions in Bulgaria and Turkey. By staying in a rural area tourists can experience the traditional lifestyle and culture of the country. The hospitality of Bulgarians and Turks, the unique local cuisine, preserved folklore, customs and crafts, the architectural reserves of settlements and beautiful scenery make this kind of tourism the preferred way to spend your vacation. Usually guests are welcomed in an authentic house and food, which the hosts prepare from organic products - tomatoes, cucumbers, peppers, picked from the garden at dawn, or aromatic spices, harvested from nearby forests and fields, is a part of the experience. There are many interesting activities in villages - you can help the hostess in the preparation of a certain special meal using an old recipe, to get involved in agricultural work, rent a horse or donkey and stroll through the nearby attractions, collect a bouquet of fragrant herbs and a basket with wild strawberries or mushrooms, tour rural roads with a mountain bike and many others. Tourists have the opportunity to participate in manual milking, making of yoghurt, production of home-made cheese and yellow cheese, making jams, etc. Home-made brandy and wine are prepared in almost all houses. Trips to antique mills, riding a donkey and walks with donkey carts can be offered. Tourists can observe authentic folk dances and songs, costumes, crafts here. Visitors to the largest Black Sea resorts have the opportunity to visit the nearby villages and experience the hospitality of the villages, as well as to get acquainted with the traditions and customs of the Turkish and Bulgarian villages.

6. Hunting and fishing tourism

Hunting and fishing are still popular forms of specialized tourism, despite the concerns of environmentalists and ecologists that they are detrimental to ecosystems. Currently Burgas region is well-known for its hunting tourism and ranks second in the world by the quality of hunting trophies (e.g. deer, wild boars and lynxes). More than 2500 hunters a year can stay in the hunting lodges and houses. There are hunting reserves, which are under the control of the Ministry of Agriculture and Food. The hunting areas in Burgas region are in Strandzha, Eastern Stara Planina, Ropotamo, Elhovo. Fishing in the Aegean Sea and in ponds in the area can be practiced in the region of Edirne province.

MEASURES: to specialize and certify hunting and fishing farms for the needs of tourism; to offer fishing gear rentals and fishing tourism.

7. Camping tourism

There are campsites in Burgas region, which attract tourists from Bulgaria and abroad, seeking an alternative holiday in touch with nature. They are located mainly on the southern Black Sea coast, next to some of the most beautiful Bulgarian beaches. Such are the camping sites "Arapya" - a cult place for supporters of holidays under the stars, "Garden", "Goldfish", "South", "Dolphin", "Silistar", "Aheloy", "Fig", "Coral", "Dawn",,"Oasis",,"Kavaci",,"Kiten", etc. Qualified persons, who have received vocational training, work in these accommodation places. Thus the accommodations places strive to provide the highest quality of service to tourists and holidaymakers. There aren't any licensed camping sites in the region of Kirklareli and Edirne, the future development of which would contribute to the diversification and sustainable development of this type of tourism in the region. According to a study from 2011, Edirne and Kirklareli regions have favourable conditions for development of camping tourism.

MONITORING AND EVALUATION

The monitoring and evaluation of the JAP should be subordinated to the logic of achieving efficiency and effectiveness. Monitoring will be performed by the MDB, based on collecting and analysing information from the received survey data, data from official sources, etc. The preparation of the detailed marketing action plans is also performed on this basis. The collected information will be accessible via the built information system. The assessment includes information from the monitoring and other sources of the effects from the implemented interventions and the results from them. The evaluation will provide the management with mechanisms of control through information on costs and results. One extremely important step, so that quality monitoring and assessment of the impact of tourism in the border region can be carried out, is identifying indicators, by which success or failure could be measured. Upon taking into account the interdisciplinary nature of tourism and the various effects from it, it has proved impossible to measure all variables and therefore selection and use of secure indicators is necessary.

CONCLUSION

The Joint Action Plan for tourism development in the cross border region of Bulgaria and Turkey is a common, targeted and coordinated marketing policy in the field of tourism. Currently, the cross-border region hasn't got a built image, by which it can be identified as a tourist destination. The main tourist products are mainly focused on several sites with high level of importance, but there are no integrated products, based on common tourism resources. Tourism development is still divided by the border between Bulgaria and Turkey, as there are no clear and visible steps towards building an image of the cross-border region as a uniform destination. The main target markets are: the domestic markets of the region (Bulgarian and Turkish) and the European market. The JAP provides guidelines for this development. The relevant institutions to be responsible for the implementation of this document need to be identified. The coordinating role can be of NGOs in the region. Identifying the region and presence in tourist distribution networks requires a strategic and commercially oriented approach to marketing. The implementation and achievement of this objective should be considered and requires cooperation between the main parties in the planning and implementation of activities, related to the development of tourism in the cross border region. This JAP is designed to be dynamic, which allows its adaptation in a way, which can deal with situations, arising in the future. The region requires recognition and identification by travel agents as a common destination, developing after a certain philosophy. This requires positioning of the tourism product by setting the parameters for the successful positioning of offered products and services in the minds of actual and potential tourists.

Creation of BG-TR MDB

- A MDB is a working group that increases destination competitiveness composed of participants from all points of the tourism value chain, including government agencies, tourism promotion authorities, private sector associations and individual firms, tourism and hospitality training bodies, and NGOs.
- MBD can mobilize many more resources than its members can alone.
- MBD longevity depends on quality leadership.
- Communication and collaboration between all members can lead to a successful cluster.

MBD works closely with the tourism businesses and organizations interested in the destination, including hotels, attractions, parks, travel agencies, tour operators and guides, outfitters, restaurants, retail outlets, and conference venues. MBD should meet the needs of destination, whether marketing, coordinating stakeholders, influencing business climate, or assisting human resource development. The MBD should heavily influence the destination's final export — the visitor experience.

Common characteristics of a DMO include:

- Being an independent, non-profit organization
- A membership-based organization comprised of a mixture of public, private, non-profit, and academic tourism stakeholders from the region
- Governed by a board of directors or executive committee (MBD) reflective of the membership and the composition of the destination
- Comprehensive and detailed set of regulations and by-laws published and available to any interested party
- Diverse set of revenue streams: membership dues, hotel taxes, retail opportunities, online booking commissions, advertising in publications and websites
- Services mostly provided free to end users

MARKETING ACTIVITIES OF A DMO

Marketing is often most successful when part of a comprehensive strategy. A marketing plan helps the DMO to prioritize a destination's assets with respect to competitors, identify preferred audiences, and develop an action plan on how to reach those audiences. Many of these activities may extend previous exercises completed in the visioning and overall strategy of DMO development.

Note that marketing and sales, although closely related, are two different activities. Marketing increases customer awareness and delivers a message; sales are the direct action taken to solicit and procure customer orders. Thus, marketing includes activities such as advertising, creating brochures and collateral materials, and public relations; sales encompasses telemarketing, calls, and direct-mail solicitations.

Marketing generates understanding of audiences, necessary to mount any kind of promotion. It clarifies what are current travel trends and perceptions visitors have of the destination compared to other places, among many other kinds of data. The research component of marketing draws on many different sources. Consider the following list.

- Desk research of secondary sources
- Sales, bookings, and reservation records
- Visitor information records, e.g., guest registration cards, booking form data, call center or website data
- Government publications
- Trade association data
- Intergovernmental organizations reports (UNWTO, WTTC)
- Commercial analysis available from subscriptions
- Press clippings about competitor activities
- Qualitative or exploratory research
- Focus group discussions to identify perceptions
- Attendance at trade shows
- Observation of visitor behavior at or around a site
- Trends in the external operating environment of travelers
- Quantitative research
- Traveler behavior pattern studies
- Surveys of visitor perceptions
- Customer satisfaction surveys
- Industry surveys of perceptions and challenges

BRANDING AND POSITIONING

Travellers form perceptions of a destination long before they ever arrive. These perceptions derive from news stories, affiliation with products, experiences with cuisine, portrayal in movies, childhood stories, word-of-mouth, and a wide variety of individual biases. A DMO can generate visitation to a destination by creating and managing a brand that influences people's perception, ideally making it more favorable toward the destination. The *brand* is the psychological, emotional, and motivational link between tourist and destination. A destination's brand is a collection of elements, including messages and values, designed to provoke a positive perception in the minds of visitors. An ideal brand will position tthe destination among potential competitors and attract target market travelers. This can be done through:

- Identifying unique selling points that separate the destination from the competition
- Producing and prioritizing clear motivational messages for tourists that address positive characteristics of the destination
- Crafting a market positioning statement that describes the destination
- Creating a theme line or slogan and graphic logo for the destination that supports the positioning statement

Logos convey some aspects of a broader brand. They also trigger poositive affect toward the destination when seen by visittors who already have a positive impression of the place.
Messaging that proves successfull are often supported by detailed customer understandings. These messages generate public awareness, customer interest, and ultimately the intention to visit.

A particular destination may have a hierarchy of messages targeting different market segments. These messages should be crafted for use in websites, publications, direct mail programs, trade show displays, media pubblicity, advertising, and sales solicitation programs. Once developed, the message and the overall brand become the face of the destination in the eyes of the consumer.

Because travelers have so many destinations frrom which to choose, destinations must differentiate themselves, partially through branding, in order to be seen among the crowd, let alone selected. As a result an entire sub--industry of consultants and business management firms has arisen to assist destinations and companies in this endeavor. It can be a challenging exercise to combine a diverse set of people, places, and emotions into one notion. As with all destination planning, all planning in general, including a broad set of stakeholders provides important perspective and buy-in of the final product. Remember, to brand a place is also to brand those who live there.

Table Stages in Successful Destination Brand Management STAGE	STEPS
Research	Establish destination's core values (durable, relevant, communicable, salient) and experience
Study contemporary visitor preferences	
Compare current destination image with that of competitors	
Identify personality and positioning	Define what the country represents (for example New Zealand represents "landscape, people, adventure and culture")
Determine how this should be translated into a "brand personality" that interacts with the target market and generates an emotional relationship.	
Craft the brand essence represents the destination's identity and is based on the values and culture of the destination – it is communicated to and energizes those inside the organization)	
Position - create a tagline representing the brand position (communicating with outside audience – there can be multiple taglines for multiple segments if its appropriate and the destination is large enough)	
Implement the brand	Use different channels to communicate the brand: advertising, interactive media, direct marketing, events, and Internet
Market the brand through events and media	
Long-term brand maintenance	Long-term marketing to retain brand personality while values are refined and modified through regular research, long-term planning and consistent positioning
	If appropriate, expand the role of the country brand to other agencies — foreign investment agencies, economic development agencies, etc.

Common marketing tools used by DMOs, include:

Brochures. Leaflets, flyers, or other descriptive circulars; these are particularly useful for tourism and service businesses **Print media.** Newspapers, magazines, and specialty publications **Broadcast media.** Radio can be targeted to specific markets; cable television can likewise target specific markets; network stations can be very expensive. **Online advertising.** Paying for visibility on other websites; these can be banner ads, sponsorship of other sites, purchasing key words and phrases (tags) for search engines. **Advertising specialties.** Items imprinted with the organization or destination logo and given to customers (calendars, caps, desk sets, pens, and gifts) **Direct mail.** Flyers, catalogues, brochures, and coupons. **Emailings.** Regular or infrequent mailings to email lists; these can be direct advertisements or online newsletters. **Events**. Showcasing the destination through themed parties, informational workshops, and performances of local culture **Public relations**. Free feature and news articles in the media and other publicity, usually secured by public relations specialists **Informal marketing/networking.** Activities such as public speaking or attending conferences and trade shows **Website**. A very effective way to describe products or services in depth for customers everywhere at all hours **Social media**. A way to increase word-of-mouth marketing by using online networks to share information about the destination

Major alliances could create joint-marketing alliance programs:
- Co-op ad programs
- Web site advertising
- Annual meetings
- Convention sales
- Event hosting
- Publication sales

Thus a destination web portal should be an integral component of the marketing strategy. Destination websites generally act as the main gateway for tourism information, but can provide a number of services such as promote local attractions and activities, list local tourism businesses, suggest itineraries, and provide relevant regional history and geography. Perhaps most important, the website marks, for many travelers, the beginning of their travel experience.

In destinations with a significant number of SMEs or with poor internet connection, the website may offer the only opportunity for certain tourism businesses to market their products. Through collective accommodations listings and centralized booking systems hosted on the DMO web portal, SMEs can access a much larger market than they ever could dream of by themselves. By centralizing resources, whether convenient online lodging reservations or links to other regional and municipal websites, the portal can become an integral extension of the destination itself. In the digital age, a sense of place is no longer restricted to the physical landscape.

Ideally, a visitor information program enhances visitor enjoyment, entices them to stay longer and spend more money by providing more information about the destination’s offerings. Moreover, collaboration with the business community, public sector, and attractions necessary to establish and operate a visitor information programs serves to strengthen the DMO’s value to the local community.

Tourism professionals also contribute to the tourism information process, both as providers of information and as recipients of knowledge. These are the secondary recipients of information, as well as a primary distribution channel. They include:

- Hotel concierges and staff
- Tour operators
- Tour guides
- Travel agents
- On and off-line publishers of tourism information
- Tourist boards and CVBs
- Visitor information staff (see kiosks in Recommended Distribution Methods)

Visitor information centers (VIC) play a front-line role in the visitor-destination interface. VIC facilities range from commercial buildings, heritage buildings, chambers of commerce, city council offices, purpose-built buildings, or as an annex to museums or other attractions. In smaller destinations, the VIC is a service offered in conjunction with other businesses.

Because VICs are often staffed, they can provide more than static destination information. They can offer personalized interpretation for respective communities by exploring history, industry, arts, and crafts. Some VICs even incorporate community meeting spaces such as picnic areas, meeting rooms, and playgrounds.

A VIC supports the perception that the destination is visitor-friendly and encourages community ownership of tourism. All visitor centers should provide tourist information that is current, accurate, trustworthy, and delivered in a high quality manner. At a minimum, any visitor center should offer digital kiosks, a master guide to the destination, and a local city guide in which the center can be found.

Touch screen kiosks are a simple and effective way of allowing visitors to navigate large quantities of information. Strategic and safe locations for kiosks include hotels airports, and at visitor information centers. Ideally staff could assist anyone with questions or difficulties. In many cases, the system provides the same information that is available online and via mobile. The kiosks should also have a telephone with a direct toll-free connection to tourism businesses or services operated by the DMO.

Mobile devices represent a fast growing mechanism of information distribution. Any instructions on the system published on- and off-line must make it clear to visitors that they should check pricing with their home network prior to using the service.

Since local usage is usually free, local tour guides, hotel staff, and other members of the tourism industry who regularly interface with visitors could make regular use of the technology. A local tour guide has immediate access to highly detailed information that he can share with his travelers.

With such a system, any guide, no matter how new, can access extensive information about his or her area. This will help them meet visitor expectations ("a nice Italian restaurant nearby that isn't too expensive").

Technology is improving quickly. Tourism-related apps for smartphones are available in online marketplaces such as the Apple Store (www.apple.com/webapps/travel/) and the Android Market (http://market.android.com). Features such as augmented reality allow a user to use the device's camera to view geolocated information, by pointing your camera at an item and then receiving information layered over it through the on-screen display. Numerous venues have installed interpretive stops that trigger GPS-enabled personal devices to play interpretive a/v recordings when the tourist reaches specified GPS coordinates, such as a viewpoint in front of a monument. Additionally, social networks continually integrate themselves with handheld devices such that customers can review places and leaves tips in real time during their visit.

ANNEX 1

The 17 goals of United Nations

There are 169 targets for the 17 goals. Each target has 1-3 indicators used to measure progress toward reaching the targets. In total, there are 304 indicators that will measure compliance. The United Nations Development Programme has been asked to provide easy to understand lists of targets and facts and figures for each of the 17 SDGs. The 17 goals listed below as sub-headings use the 2-4 word phrases that identify each goal. Directly below each goal, in quotation marks, is the exact wording of the goal in one sentence. The paragraphs that follow present some information about a few targets and indicators related to each goal.

Goal 1: No Poverty

"End poverty in all its forms everywhere."

Extreme poverty has been cut by more than half since 1990. Still, more than 1 in 5 people live on less than the target figure of $1.25 per day. That target may not be adequate for human subsistence, however. It may be necessary to raise the poverty line figure to as high as $5 per day. Poverty is more than the lack of income or resources. People live in poverty if they lack basic services such as healthcare and education. They also experience hunger, social discrimination and exclusion from decision making processes.

Gender inequality plays a large role in perpetuating poverty and its risks. Women face potentially life-threatening risks from early pregnancy and frequent pregnancies. This can result in lost hope for an education and a better income. Poverty affects age groups differently, with the most devastating effects experienced by children. It affects their education, health, nutrition, and security, impacting emotional and spiritual development.

Achieving Goal 1 is hampered by growing inequality, increasingly fragile statehood and the impacts of climate change.

Goal 2: Zero Hunger

"End hunger, achieve food security and improved nutrition and promote sustainable agriculture."

Globally, 1 in 9 people are undernourished. The vast majority of those people live in developing countries. Agriculture is the single largest employer in the world, providing livelihoods for 40% of the global population. It is the largest source of income for poor rural households. Women make up about 43% of the agricultural labor force in developing countries, and over 50% in parts of Asia and Africa. However, women own only 20% of the land. Poor nutrition causes nearly half (45%) of deaths in children under five – 3.1 million children each year.

Goal 2 targets state that by 2030 we should end hunger and end all forms of malnutrition. This would be accomplished by doubling agricultural productivity and incomes of small-scale food producers and ensuring sustainable food production systems and progressively improve land and soil quality. Other targets deal with maintaining genetic diversity of seeds, preventing trade restriction and distortions in world agricultural markets to limit extreme food price volatility and eliminating waste with help from the International Food Waste Coalition.

A report by the International Food Policy Research Institute (IFPRI) of 2013 stated that the emphasis of the SDGs should not be on ending poverty by 2030, but on eliminating hunger and under-nutrition by 2025. The assertion is based on an analysis of experiences in China, Vietnam, Brazil and Thailand. Three pathways to achieve this were identified: 1) agriculture-led; 2) social protection- and nutrition intervention-led; or 3) a combination of both of these approaches.

Goal 3: Good Health and Well-Being for people

"Ensure healthy lives and promote well-being for all at all ages."

Significant strides have been made in increasing life expectancy and reducing some of the common killers associated with child and maternal mortality. Similarly, progress has been made on increasing access to clean water and sanitation, reducing malaria, tuberculosis, polio and the spread of HIV/AIDS. However, only half of women in developing countries have received the health care they need, and the need for family planning is increasing exponentially as the population grows. While needs are being addressed gradually, more than 225 million women have an unmet need for contraception.

A related need is for reducing maternal mortality to less than 70 per 100,000 live births Goal 3 aims to achieve universal health coverage to include access to essential medicines and vaccines. By 2030, Goal 3 proposes to end preventable death of newborns and children under 5 and end epidemics such as AIDS, tuberculosis, malaria and water-borne diseases, for example.

Attention to health and well-being also includes targets related to the prevention and treatment of substance abuse, deaths and injuries from traffic incidents and from hazardous chemicals and air, water and soil pollution and contamination

Goal 4: Quality Education

"Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all."

Major progress has been made in access to education, specifically at the primary school level, for both boys and girls. However, access does not always mean quality of education, or completion of primary school. Currently, 103 million youth worldwide still lack basic literacy skills, and more than 60% of those are women. Target 1 of Goal 4 is to ensure that, by 2030, all girls and boys complete free, equitable, and quality primary and secondary education.

Goal 5: Gender Equality

"Achieve gender equality and empower all women and girls."

Providing women and girls with equal access to education, health care, decent work, and representation in political and economic decision-making processes will fuel sustainable economies and benefit societies and humanity at large. A record 143 countries guaranteed equality between men and women in their Constitutions as of 2014. However, another 52 had not taken this step. In many nations, gender discrimination is still woven into the fabric of legal systems and social norms. Even though SDG5 is a stand-alone goal, other SDGs can only be achieved if the needs of women receive the same attention as the needs of men. Issues unique to women include sex trafficking, sexual exploitation, traditional practices against all women and girls in the public and private spheres, such as forced marriage and female genital mutilation.

Achieving gender equality will require enforceable legislation that promotes empowerment of all women and girls and requires secondary education for all girls. The targets call for an end to gender discrimination and empowering women and girls through technology

Some have advocated for "listening to girls". The assertion is that the SDGs can deliver transformative change for girls only if girls are consulted. Their priorities and needs must be taken into account. Girls should be viewed not as beneficiaries of change, but as agents of change. Engaging women and girls in the implementation of the SDGs is crucial.

Goal 6: Clean Water and Sanitation

"Ensure availability and sustainable management of water and sanitation for all."

Main article: Sustainable Development Goal 6

The Sustainable Development Goal Number 6 (SDG6) has eight targets and 11 indicators that will be used to monitor progress toward the targets. Most are to be achieved by the year 2030. One is targeted for 2020.

The first three targets relate to drinking water supply and sanitation. Safe drinking water and hygienic toilets protect people from disease and enable societies to be more productive economically. Attending school and work without disruption is critical to successful education and successful employment. Therefore, toilets in schools and work places are specifically mentioned as a target to measure. "Equitable sanitation" is called for and calls for addressing the specific needs of women and girls and those in vulnerable situations, such as the elderly or people with disabilities. Water sources are better preserved if open defecation is ended and sustainable sanitation systems are implemented.

Ending open defecation will require provision of toilets and sanitation for 2.6 billion people as well as behavior change of the users. This will require cooperation between governments, civil society and the private sector.

The main indicator for the sanitation target is the "Proportion of population using safely managed sanitation services, including a hand-washing facility with soap and water". The current statistic in the 2017 baseline estimate by the Joint Monitoring Programme (JMP) is that 4.5 billion people currently do not have safely managed sanitation.

The Sustainable Sanitation Alliance (SuSanA) has made it its mission to achieve SDG6.[31][32] SuSanA's position is that the SDGs are highly interdependent. Therefore, the provision of clean water and sanitation for all is a precursor to achieving many of the other SDGs.

Goal 7: Affordable and Clean Energy

"Ensure access to affordable, reliable, sustainable and modern energy for all."

Targets for 2030 include access to affordable and reliable energy while increasing the share of renewable energy in the global energy mix. This would involve improving energy efficiency and enhancing international cooperation to facilitate more open access to clean energy technology and investment in clean energy infrastructure. Plans call for particular attention to infrastructure support for the least developed countries, small islands and land-locked developing countries.

Goal 8: Decent Work and Economic Growth

"Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all."

World Pensions Council (WPC) development economists have argued that the twin considerations of long-term economic growth and infrastructure investment weren't prioritized enough. Being prioritized as number 8 and number 9 respectively was considered a rather "mediocre ranking and defies common sense"

Attaining at least 7% gross domestic product (GDP) annually in the least developed countries is the economic target. Achieving higher productivity will require diversity and upgraded technology along with innovation, entrepreneurship and the growth of small- and medium-sized enterprises (SMEs). Some targets are for 2030; others are for 2020. By 2020 the target is to reduce youth unemployment and operationalize a global strategy for youth employment. Implementing the Global Jobs Pact of the International Labour Organization is also mentioned.

By 2030, the target is to establish policies for sustainable tourism that will create jobs. Strengthening domestic financial institutions and increasing Aid for Trade support for developing countries is considered essential to economic growth. The Enhanced Integrated Framework for Trade-Related Technical Assistance to Least Developed Countries is mentioned as a method for achieving sustainable economic growth.

Goal 9: Industry, Innovation and Infrastructure

"Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation."

Manufacturing is a major source of employment. In 2016, the least developed countries had less "manufacturing value added per capita". The figure for Europe and North America amounted to $4,621, compared to about $100 in the least developed countries. The manufacturing of high products contributes 80% to total manufacturing output in industrialized economies and barely 10% in the least developed countries.

Mobile-cellular signal coverage has improved a great deal. In previously "unconnected" areas of the globe, 85% of people live in covered areas. Planet-wide, 95% of the population is covered.

Goal 10: Reduced Inequalities

"Reduce income inequality within and among countries."

One target is to reduce the cost of exporting goods from least developed countries. "Duty-free treatment" has expanded. As of 2015, 65% of products coming from the least developed countries were duty-free, as compared to 41% in 2005.

The target of 3% was established as the cost international migrant workers would pay to send money home (known as remittances). However, post offices and money transfer companies charge 6% of the amount remitted. Worse, commercial banks charge 11%. Prepaid cards and mobile money companies charge 2-4% but those services were not widely available as of 2017 in typical "remittance corridors."

Goal 11: Sustainable Cities and Communities

"Make cities and human settlements inclusive, safe, resilient and sustainable."

The target for 2030 is to ensure access to safe and affordable housing. The indicator named to measure progress toward this target is the proportion of urban population living in slums or informal settlements. Between 2000 and 2014, the proportion fell from 39% to 30%. However, the absolute number of people living in slums went from 792 million in 2000 to an estimated 880 million in 2014. Movement from rural to urban areas has accelerated as the population has grown and better housing alternatives are available.

Goal 12: Responsible Consumption and Production

"Ensure sustainable consumption and production patterns."

Using eco-friendly production methods and reducing the amount of waste we generate are targets of Goal 12. By 2030, national recycling rates should increase, as measured in tons of material recycled. Further, companies should adopt sustainable practices and publish sustainability reports.

Goal 13: Climate Change

"Take urgent action to combat climate change and its impacts by regulating emissions and promoting developments in renewable energy."

The UN discussions and negotiations identified the links between the post-2015 SDG process and the Financing for Development process that concluded in Addis Ababa in July 2015 and the COP 21 Climate Change conference in Paris in December 2015.

In May 2015, a report concluded that only a very ambitious climate deal in Paris in 2015 could enable countries to reach the sustainable development goals and targets. The report also states that tackling climate change will only be possible if the SDGs are met. Further, economic development and climate are inextricably linked, particularly around poverty, gender equality, and energy. The UN encourages the public sector to take initiative in this effort to minimize negative impacts on the environment.

This renewed emphasis on climate change mitigation was made possible by the partial Sino-American convergence that developed in 2015-2016, notably at the UN COP21 summit (Paris) and ensuing G20 conference (Hangzhou).

Goal 14: Life Below Water

"Conserve and sustainably use the oceans, seas and marine resources for sustainable development."

Oceans cover 71% of the earth's surface. They are essential for making the planet livable. Rainwater, drinking water and climate are all regulated by ocean temperatures and currents. Over 3 billion people depend on marine life for their livelihood. Oceans absorb 30% of all carbon dioxide produced by humans.

The oceans contain more than 200 000 identified species, and there might be thousands of species that are yet to be discovered. Oceans are the world's largest sources of protein. However, there has been a 26% increase in acidification since the industrial revolution. A full 30% of marine habitats have been destroyed and 30% of the world's fish stocks are over-exploited. Marine pollution has reached shocking levels: each minute 15 tons of plastic are released into the oceans. 20% of all coral reefs have been destroyed irreversibly and another 24% are at an immediate risk of collapse. Approximately 1 million sea birds, 100 000 marine mammals and an unknown number of fish are harmed or die annually due to marine pollution caused by humans. It has been found that 95% of fulmars in Norway have plastic parts in their guts. Microplastics are another form of marine pollution.

Reducing ones energy consumption and use of plastics can be done by individuals. Nations can also take action. In Norway, for instance, citizens can work through a web page called finn.no to be paid for picking up plastic on the beach. Several countries, including Kenya, and various communities around the world have banned the use of plastic bags for retail purchases.

Improving the oceans contributes to poverty reduction as it gives low-income families a source of income and healthy food. Keeping beaches and ocean water clean in less developed countries can attract tourism, as stated in Goal 8, and reduce poverty by providing more employment.

The targets include preventing and reducing marine pollution and acidification, protecting marine and coastal ecosystems, and regulating fishing. The targets also call for an increase in scientific knowledge of the oceans.

Goal 15: Life on Land

"Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss."

This goal articulates targets for preserving biodiversity of forest, desert and mountain eco-systems, as a percentage of total land mass. Achieving a "land degradation-neutral world" can be reached by restoring degraded forests and land lost to drought and flood. Goal 15 calls for more attention to preventing invasion of alien species and more protection of endangered wildlife.

The Mountain Green Cover Index monitors progress toward target 15.4, which focuses on preserving mountain ecosystems. The index is named as the indicator for target 15.4. Similarly, the Red Index (Red List Index or RLI) will fill the monitoring function for biodiversity goals by documenting the trajectory of endangered species.

Goal 16: Peace, Justice and Strong Institutions

"Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels."

Reducing violent crime, sex trafficking, forced labor and child abuse are clear global goals. The international community values peace and justice and calls for stronger judicial systems that will enforce laws and work toward a more peaceful and just society. By 2017, the UN could report progress on detecting victims of trafficking. More women and girls than men and boys were victimized, yet the share of women and girls has slowly declined. In 2004, 84% of victims were females and by 2014 that number had dropped to 71%. Sexual exploitation numbers have declined but forced labor has increased.

One target is to see the end to sex trafficking, forced labor and all forms of violence against and torture of children. However, reliance on the indicator of "crimes reported" makes monitoring and achieving this goal challenging.

Goal 17: Partnerships for the Goals

"Strengthen the means of implementation and revitalize the global partnership for sustainable development"

Increasing international cooperation is seen as vital to achieving each of the 16 previous goals. Goal 17 is included to assure that countries and organizations cooperate instead of compete. Developing multi-stakeholder partnerships to share knowledge, expertise, technology and financial support is seen as critical to overall success of the SDGs. Public-private partnerships that involve civil societies are specifically mentioned.

Annex 2

Management Destination Board

1. **Necmi ASAN – director Kirklareli Culture and Tourism Directorate**
2. **Ahmet HACIOGLU – director Edirne Culture and Tourism Directorate**
3. **Fikret MACIT – Deputy director of Kirklareli Culture and Tourism**
4. **Meltem YALCIN – Kirklareli University Tourism Faculty researcher**
5. **Emine Gurver CETIN – Director Department of Culture and Social Works – Kirklareli Municipality**
6. **Aysegul KUTLUK – Kirklareli University Tourism Faculty researcher**
7. **Sonya Enilova – Chairperson of Bourgas Regional Tourist Association**
8. **Maria Patronova – director of Directorate Culture in Malko Tarnovo Municipality**
9. **Jana Ivanova – senior expert in Tsarevo Municipality**
10. **Ioana Filipova – PR of Directorate of Natural Park Strandzha**
11. **Vanya Mandova – Tourist Information Centre of Primorsko Municipality**
12. **Krasimira Kostova – Director of Museum Deultum in Sredets Municipality**

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