

BRANDING AND MARKETING STRATEGY

Community-based Tourism in Central Asia

PREPARED WITHIN THE PROJECT: SWITCH-Asia
“PROMOTING ENERGY EFFICIENCY AND RENEWABLE ENERGY PRODUCTION IN THE
COMMUNITY-BASED TOURISM SECTOR IN CENTRAL ASIA”

BRANDING AND MARKETING STRATEGY Community-based Tourism in Central Asia



SERVICE PROVIDER

mascontour GmbH

Matthias Beyer, Managing Director

Schwiebusser Str. 9

10965 Berlin, Germany

Tel +49 (0)30 61 62 57 47

Fax +49 (0)30 61 20 25 84

Mail beyer@mascontour.info

www.mascontour.info



ORDERING PARTY/PRINCIPAL

ACTED Kyrgyzstan, Uzbekistan and Tajikistan

Contact: Zarina Sagynbaeva

15 Malydyaev str., House 1

720055 Bishkek, Kyrgyzstan

Mail zarina.sagynbaeva@acted.org

TABLE OF CONTENTS

List of Figures.....	4
List of Abbreviations	4
1 Context	5
2 Product Portfolio.....	6
2.1 Tourism Products Lines in Uzbekistan	6
2.2 Tourism Products Lines in Kyrgyzstan	6
2.3 Tourism Products Lines in Tajikistan	7
3 Branding	7
3.1 Branding: An Introduction	7
3.2 Brand development for Community-Based Tourism (CBT) in Central Asia	8
3.2.1 Online-Survey	8
3.2.2 Rapid Assessment of European Tour Operators	9
3.2.3 UNWTO Brand Pyramide	9
4 Source Markets: Market segments and Most Promising players	13
4.1 Market Segments	13
4.1.1 Nature Tourism	13
4.1.2 Adventure Tourism	14
4.1.3 Rural Tourism	15
4.1.4 Cultural Tourism.....	15
4.1.5 Conclusion	15
4.2 Market segments and their importance in source markets	16
4.3 Key players within CBT and related segments	16
5 Communication and Sales	19
6 Business-to-Business Marketing (B2B).....	19
6.1.1 Market Intelligence	19
6.1.2 Cooperation with Tour Operators.....	20

6.1.3	Travel Agencies	21
6.1.4	Promotional Mechanism by Tourism Entities	21
6.1.5	Sales Information and Sales Manual	22
6.1.6	Distribution and Commission	23
6.1.7	Trade Fairs	24
7	Business-to-Customer Marketing (B2C)	26
7.1	Digital Marketing.....	26
7.1.1	The Digital Customer – Customer Journey	27
7.1.2	Storytelling and Content Creation	27
7.1.3	Social Media Channels	28
7.1.4	Hashtag Campaigns	29
7.1.5	Social Media Management	30
7.2	Public Relations	31
7.2.1	Press Trips in Cooperation with Ministries	31
7.2.2	Consumer Fairs	32
7.3	Travel Brochure	33
8	Transversal Marketing Activities: B2B and B2C	34
8.1	Word-of-Mouth	34
8.2	Website Presence	34

LIST OF FIGURES

Figure 1: UNWTO Brand Pyramid.....	9
Figure 2: Brand Personality CBT Central Asia	11
Figure 3: Positioning Statement CBT Central Asia	11
Figure 4: Brand Essence CBT Central Asia	12
Figure 5: Overview of Major B2B and B2C Marketing Activities	19
Figure 6: Trade Structure for long-haul tourism.....	24
Figure 7: Overview of Digital Marketing Options	26
Figure 8: Digital Customer Journey	27
Figure 9: Social Media Calendar Template	30
Figure 10: Website Visit Central Asia	35

LIST OF ABBREVIATIONS

CBT	Community-based Tourism
e.g.	for example
USP	unique selling proposition

1 CONTEXT

This branding and marketing strategy has been developed as part of project “Promoting energy efficiency and renewable energy production in the community-based tourism sector in Central Asia” being implemented in the three countries Kyrgyzstan, Uzbekistan, Tajikistan in the timeframe from June 2020 until December 2022. The project has been funded under the Switch Asia Grants Programme by the European Union and has been implemented and managed by ACTED.

The overall objective of the project is to contribute to the reduction of the carbon footprint in Community-Based Tourism (CBT) Industry in Central Asia, in particular in Uzbekistan, Kyrgyzstan and Tajikistan, by raising awareness, creating green market linkages and value chains, and promoting an enabling environment for the development of eco-tourism. The main activities for implementing the project are fostering market linkages between the renewable energy/energy efficiency (RE/EE) sector, the CBT sector, and financial institutions, improving access to finance for micro-small and medium-sized enterprises MSMEs in the RE/EE and CBT, building the capacity of governments to foster Green Tourism development, and the development of a regional branding and marketing strategy for Central Asia Green Tourism.

Improved access to microfinance products and services can stimulate the accelerated development of CBT, which in turn will affect incomes of local population, especially alleviate the negative impacts of the COVID-19 pandemic affected the tourism sector.

This branding and marketing strategy has been developed throughout a two-year participatory process with important public and private tourism and CBT stakeholders Uzbekistan, Kyrgyzstan and Tajikistan, including workshops and a survey on branding and marketing of CBT in Central Asia as well as research of catalogues of European tour operators. The strategy combines elements of destination marketing with the marketing of individual tourism businesses.

After introducing the most relevant tourism product lines in Uzbekistan, Kyrgyzstan and Tajikistan, the brand development for Community-Based Tourism in Central Asia is outlined. Further, important market segments, respective promising players, their importance in the European source markets as well as key players within CBT and related segments are pointed out. Moreover, the concept of communication and sales is explained followed by diving deeper in Business-to-Business (B2B) and Business-to-Customer Marketing (B2C). It concludes with a short introduction into transversal marketing activities of B2B and B2C.

The branding and marketing strategy provides a framework for implementing CBT focused marketing activities, but it needs to be aligned with the available budget in each circumstance.

2 PRODUCT PORTFOLIO

Uzbekistan, Kyrgyzstan and Tajikistan have a diverse product portfolio. The major product lines of each country are being described briefly in the following:

2.1 Tourism Products Lines in Uzbekistan

Cultural and Ethnic Tourism

Due to its rich cultural and historical heritage, Uzbekistan has a very strong cultural tourism characterized by unique architecture and art. The ancient historical monuments of Tashkent, Samarkand, Bukhara, Shakhrisabz, Khiva, Urgench, Termez, Karakalpakstan are the main foundation of historical and cultural tourism in Uzbekistan. Khiva, Bukhara, and Samarkand are all UNESCO World Heritage Sites capturing the exotic atmosphere of the Silk Road. Cultural tourism is not only presented through tangible heritage, but also through intangible heritage such as textiles, ceramics, patterns and festive colours. In addition to arts and crafts, Uzbekistan preserves its rich cultural heritage in regular festivals and sporting events. Ethnic tourism embraces a national heritage which has been developing for centuries and is still evident in 21st-century life. This includes lifestyle, customs, traditions, folklore, festivals, cuisine and applied arts.

Culinary Tourism

Besides Uzbekistan's national dish, plov (pilaf), each region has its own signature dishes. Shivit oshi and tuhum barak are found only in Khiva, while Bukhara is home to a particular type of plov that's cooked in layers. For the tourism experience, different cooking classes are offered to learn how to make the most famous dishes.

Nature and Adventure Tourism

Uzbekistan isn't all cities and historical sights. In fact, much of the country is covered in mountains and the vast Kyzylkum Desert. Nature experience give tourists a completely different perspective on Uzbekistan. Options for adventure and nature tourism in Uzbekistan including spending the night in a yurt, experiencing how nomads have lived for centuries, or hiking through the narrow canyons of the Chimgan Mountains not far from Tashkent. Increasingly, hiking and biking become more popular.

Religious and Pilgrimage Tourism

Located at the crossroads of several religions, Uzbekistan is rich in religious sights and monuments. Mausoleums of important personalities can be visited throughout the country. No less notable are the many mosques and madrassahs that supported spiritual life in Uzbekistan and can be found in any city.

2.2 Tourism Products Lines in Kyrgyzstan

Nature and Adventure Tourism

Kyrgyzstan - the land of "celestial mountains" – offers a wide range of outdoor and adventure tourism including hiking, trekking or mountain biking in the Tian-Shan Range and Pamir Mountains. Surrounded by an untouched nature, outdoor and adventure experiences become alive – on a horseback through mountains or in a whitewater raft through remote canyons, to name but a few.

Cultural Tourism

The current territory of Kyrgyzstan served as the main bridge on the Silk Road connecting the East and West. Some routes are still used in the country as highways. By visiting the historical sites along the route of the Great Silk Road, one can delve into the past and feel the spirit of antiquity and the Middle Ages. The Kyrgyz have been traditionally nomadic people up until the second quarter of the 20th century.

Today Kyrgyzstan is one of the few countries where a certain part of the population still practices a semi-nomadic lifestyle. Tourists can stay in an authentic yurt, experience traditional way of life and help setting up a traditional nomad's house bozui.

Culinary Tourism

Nomadic life has left an indelible mark on the culinary heritage of the Kyrgyz people. Ownership of livestock was the primary indicator of material wealth among Kyrgyz nomads, and, accordingly, meat was and still is the star of Kyrgyz cuisine. A variety of dishes is offered given an insight in the traditions of Kyrgyzstan. Tourists can try out a diversity of dishes in an authentic atmosphere.

2.3 Tourism Products Lines in Tajikistan

Nature and Adventure Tourism

Adventure and outdoor tourism play the major role in Tajikistan. The country boasts the Pamir Mountain range, sometimes called "The Roof of the World". From here spread the three great ranges of Central Asia –the Hindu Kush, the Karakorams, and the Tien Shan. Tourism offers include trekking, hiking, and biking in the Pamir and Fann Mountains. The regions can be appreciated on a day trip or by an overnight stay at local family-run guesthouses to immerse into the authentic lifestyle and to experience long-lasting traditions and customs.

Cultural tourism

Tajikistan itself is an ancient state, home to Sogdiana and Bactria, and conquered by Alexander the Great and the Russian Empire – thus, it offers some historical and cultural sights. From fortresses to Buddhist temples to mosques and madrassas, Tajikistan has plenty of stories to tell. In addition, three major routes of the Silk Roads ran through Tajikistan. These ancient routes were mentioned in contemporary Persian, Greek, Chinese and Arabic sources which highlighted Tajik contributions to the commerce and culture of the time, especially between the 5th and 12th centuries. This represents the high cultural value of Tajikistan.

Handicraft

Handicraft plays an important role. Entire neighborhoods of weavers, potters, coppersmiths, blacksmiths, carvers of tree and gancha (alabaster) existed in the cities. Until now some ancient types of craftsmanship have been preserved from one generation to another. Unique and colorful jars, cases, and decorated dishes are used as exhibits in the art salons of Dushanbe and are still the proof today of this ancient craftsmanship

3 BRANDING

3.1 Branding: An Introduction

Branding has always been a vital part of destination marketing, but it may be more important now than ever before. The tourism market is quite saturated, and consumers are flooded with promotional messages. In addition, with social media, consumers get exposed to new offers and products every day. This can be great for consumers who have plenty of options and are able to do research to find the best one, but it makes it harder for destinations to compete against their competitors. As there is a huge amount of competition today, destinations need to go the extra mile of ensuring they stand out in a crowd. If a destination wants to enter such a market and to successfully reach customers, it is essential to identify what makes a destination different being distinguish from competitors. Key element is the

identification of a destination's unique selling proposition (USP). A USP can be built on unique attributes, special culture and traditions, customs, history, landscape, and many other elements. It will help to reach the ideal target audience. Relevant questions to be answered are: Why should your customers choose your offering over your competitors? What makes your product different from your competitors' products? What makes your destination unique from every other tourism spot in the world?

Having identified the USP, it is essential to invest in creating a strong brand that will get and keep people's attention. With the right branding, there is a chance to influence how people perceive a destination. Through branding, destinations will be recognized and people will naturally take note of it more than they would a destination without it. Without any cohesive branding, a place won't be staying in someone's mind for very long.

Destination branding supports crafting, developing, and nurturing a unique identity for the destination according to key elements. It is aimed to position the destination brand attractively, credibly, and distinctly in the tourism market by means of a clearly defined brand identity. It brings a multi-layered range of services containing the individual performances of very different stakeholders to one common brand level. A brand refers to the essence, or core characteristics, of a product or destination, which constitute its personality and make it distinctive and different from all its competitors. But branding is NOT only about giving a name and visual symbols a product or place, it is the sum of multiple elements all converging into one narrative which we call the brand. The brand exists in the eyes of the beholder: it is a dynamic relationship between the products and services, and it is perceived by potential customers and visitors. And it is the fundamental building block from which all marketing communications and behavior should flow.

Thematic branding will heighten a region's distinctiveness, particularly when it shares a similar geography and culture with its neighbors. Strong themes like Green Tourism or Community Based Tourism that evoke experiences can differentiate a destination, raise its profile, generate visits and benefit local businesses. Further, it provides a framework for the development of tourism products and experiences, consequently, it becomes a cornerstone of destination management and marketing. Thus, it will enhance abilities to promote the unique attributes of a destination and can generate benefits in peripheral regions or at specific times of year. It has further the potential to develop a greater level of cohesion within the tourism industry and the supporting commercial community, and to instill a sense of pride within resident populations. In line with that, it can help reinforcing the identity of the territory, both internally and to the outside world. Through thematic branding, it fosters the coordination and shaping energies of local tourism agencies and authorities, and the activities of private businesses and associations working within a particular theme or topic.

3.2 Brand development for Community-Based Tourism (CBT) in Central Asia

For the creation of the brand for Community-Based Tourism in Central Asia, the following methodological approach was applied.

3.2.1 Online-Survey

Aiming at the identification of the main assets and elements for the brand of CBT in Central Asia, an online survey was conducted. The survey consists of eight open-ended questions, seven out of eight questions are directly associated with the brand, and further two socio-demographic questions (profession, country of origin). It was run two times, the first time from mid to end of April 2022 and the

second time from mid to end of July 2022. Each time, several follow-up E-Mails were written. The link for the online survey was distributed throughout the network of tourism stakeholders, both public and private, in Tajikistan, Uzbekistan and Kyrgyzstan.

Despite several calls for participation, the response rate has been limited. In total, 11 participants took part in the survey, whereby some questionnaires were not fully completed. The participation is as following: five answers from Kyrgyzstan, four answers from Tajikistan and two answers from Uzbekistan.

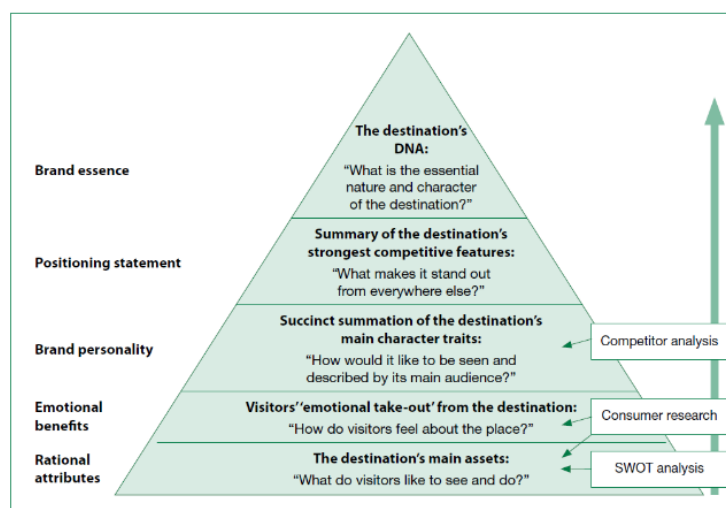
3.2.2 Rapid Assessment of European Tour Operators

To better understand the image of Kyrgyzstan, Uzbekistan and Tajikistan, a rapid assessment of European Tour Operators was undertaken with focus on promotional materials. A selection of tour operator catalogues from Germany, UK, the Netherlands and France were analyzed by looking at their offered tours in the three countries.

3.2.3 UNWTO Brand Pyramid

The key question of branding is: “What is the essential nature and character of the destination?” To provide a well-justified brand for CBT in Central Asia, the UNWTO brand pyramid was applied. The brand pyramid is a simple tool that builds up a brand logically from the assessment of the region’s or product’s main strengths to the distillation of its essence. The following graph shows the five steps to be taken till the brand essence – “the destination’s DNA” – is created.

Figure 1: UNWTO Brand Pyramid



Source: Handbook on Tourism Destination Branding, UNWTO

(1) Identification of emotional benefits and rational attributes

Aiming at the identification of emotional benefits and rational attributes, the results of the online survey and the rapid assessment of promotional material of established European tour operators were analyzed and consolidated.

A synthesis of source market perceptions as observed in tour operator catalogues and media is provided as follows:

- Adventure in pure nature
- Mountain scenery, untouched landscape, pristine lakes, desert
- Culture and history (focus on the Orient = “Tales of the Thousand and One Nights”)
- Silk Road
- Activities such as hiking and trekking due to mountainous area
- Encounter with local people

Key findings of the survey by country:

Kyrgyzstan	Uzbekistan	Tajikistan
What do visitors especially like to see (experiences) and do (activities)?		
<ul style="list-style-type: none"> • Lake Kul Suu • Close contact with local population • Ecology • Nomadic lifestyle • Hospitality and kindness • Geological / historical-cultural sites • Geological, historical, cultural heritage 	<ul style="list-style-type: none"> • History, architecture. 	<ul style="list-style-type: none"> • Nature, mountains, clean air of Tajikistan. traditions and customs • People and traditions • Personnel and their competence
How do these things make visitors feel? What impressions do visitors frequently talk about with great enthusiasm?		
<ul style="list-style-type: none"> • People, culture, good food, hospitality, mindset of local people, lifestyle, history • Beautiful nature, mountains, peaks, lakes, rivers, glaciers, wildlife • Excitement, joyful emotions, unforgettable impressions, harmony 	<ul style="list-style-type: none"> • Hospitality, architectural monuments 	<ul style="list-style-type: none"> • Feelings of admiration! A sense of friendliness, a sense of simplicity and trust. • Rich culture • Mountains as well as by the people and their identity
Do the expectations of foreign visitors from abroad meet? What types of tourism are they most attracted to?		
<ul style="list-style-type: none"> • Active, adventure tourism. • Unique tour products and offers. Personal approach and flexibility. • Eco, geo, agro and ethno tourism. 	<ul style="list-style-type: none"> • Zierat tourism 	<ul style="list-style-type: none"> • Nature of Tajikistan is unique, the purest fresh mountain air • Historical and cultural and mountain tourism (ecotourism)
What makes Central Asia and the product different from any other in the world?		
Why should international tourists consider CBT in Central Asia?		
<ul style="list-style-type: none"> • Traditional culture, hospitality, nomadic civilization, yurts • Ecology, unique landscape and natural conditions, geological heritage of world significance as Teske Geopark, beautiful lakes 	<ul style="list-style-type: none"> • Gastrotours. Monuments. Mountains 	<ul style="list-style-type: none"> • Friendliness, real friendship • Experience four seasons at the same time and one of the oldest civilizations that you will not find in the other world • Little-explored / little-visited region
How would you describe the essential nature or character of your country as a tourism destination?		
<ul style="list-style-type: none"> • Ecological, recreational, and winter tourism • Great Silk Road, Fergana Valley, ecology, nomadic culture, unique museums, exhibitions, ethno-cultural complexes, yurt camps, glamping, glaciers and peaks, tasteful water in the world, gastronomy 	<ul style="list-style-type: none"> • Historical monuments 	<ul style="list-style-type: none"> • Nature and beautiful mountains, oriental cuisine in Tajikistan, gastronomic tour • Untouched blank spots on the tourist map • Unique nature and extraordinary mountains perfect lake

- Geopark, landscapes, mountain lakes, mountain ecosystem, biodiversity, and climate
- Adventure tourism. Yurts, horseback riding and hiking tours, cultural tour products, master classes

When tourists visit local communities and use small, locally operated tourism services, what do they like most about that kind of experience?

- Event tourism, ethnography, myths and tales, culture, and life of the local population
- Stay in guest houses in villages and yurt camps
- Authenticity and hospitality
- Hiking and horseback riding

/

- Culture, customs, friendship
- Landscape, the identity of the people
- Cook local plov together

(2) Brand Personality

Based on the identified emotional benefits and rational attributes, the main assets and connecting elements of the three countries were worked out. Consequently, the summation of the destination's main character traits presents the brand personality as stated below.

Figure 2: Brand Personality CBT Central Asia

Silk Road

Unique, pristine landscape Natural ecosystem Untouched landscape

Nomadic civilization/lifestyle Cuisine Rich culture and strong cultural heritage

Active and adventure tourism Culture and ethno tourism

Hospitality, friendliness and kindness

(3) Positioning statement

Further, the positioning statement is defined, which shows the destination's strongest competitive features deriving from the prior mentioned main assets. It answers the question: "What makes the destination stand out from everywhere else?"

Figure 3: Positioning Statement CBT Central Asia



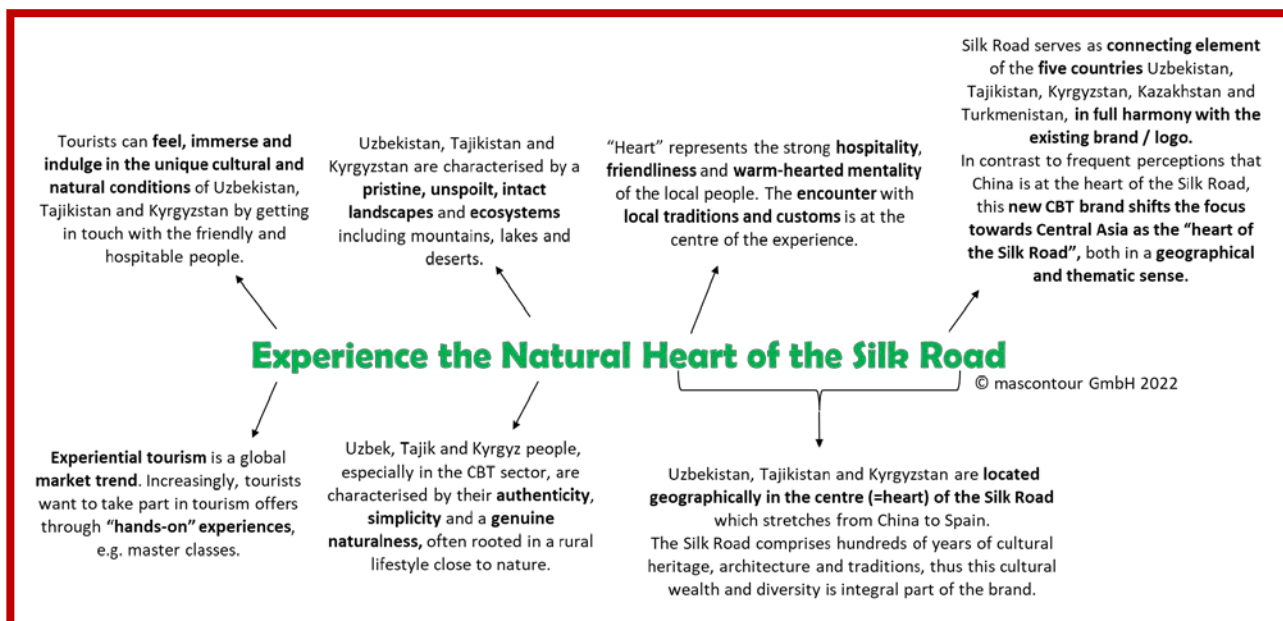
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(4) Brand Essence for CBT Central Asia

Finally, the brand essence for CBT in Central has been derived from the mentioned strong points, character traits and main assets of the destination Central Asia (focus on Tajikistan, Uzbekistan, Kyrgyzstan). The brand (slogan) for the destination is: **“Experience the natural heart of the Silk Road”**

Each word of the slogan has a particular double meaning. In the following graph, the choice for each word is explained and justified.

Figure 4: Brand Essence CBT Central Asia



In any visual presentation (e.g., logo), the term *“Central Asia”* should be included to ensure the association with Central Asia.

Recommendations for Action

- Extensive internal marketing campaign aiming at the identification with the defined brand essence **“Experience the Natural Heart of the Silk Road”** to be undertaken by the national community-based tourism associations as well as other national tourism associations (e.g., APTA)
- Definition of a visual presentation of the brand (=corporate design) that includes the term **“Central Asia”**
- Continuous use of the brand in all marketing activities, both online and offline, in public relations activities, etc.

4 SOURCE MARKETS: MARKET SEGMENTS AND MOST PROMISING PLAYERS

It is important to bear in mind that travelers always have multidimensional, overlapping motivations and that addressing segments and target groups in isolated ways is rarely convenient. There is no point in developing a marketing strategy for caving as a standalone activity, for example. There are a few exceptions where highly specialized tourism companies may want to focus their marketing on only one aspect, segment, or target group. Fortunately, with the advances in web page design, nowadays it is easy to offer differentiated activity modules that can be highly targeted and specific without obliging the user to navigate through the details of each option. This allows companies to offer a menu of alternatives, providing each potential client with tailored content as required.

4.1 Market Segments

Community-based Tourism can be considered as a cross-sectional tourism segment as different market segments overlap with it, such as nature tourism, adventure tourism, cultural tourism or rural tourism.

4.1.1 Nature Tourism

Nature tourism can be divided in activity-oriented and observation-oriented, or relaxation-oriented. As with any segmentation attempt, these are only approximate divisions. The activity-oriented aspects of nature tourism often present a strong overlap with adventure tourism.

The main source markets in Northern Europe, like Germany, the United Kingdom, and the Netherlands, have a particular interest in nature-based tourism and at the same time are concerned with sustainability. Nature tourism tends to be on the increase, and along with it goes the wish to travel sustainably and to have some type of reassurance that the trip is organized in accordance with objective sustainability criteria.

Across Europe, there has been a trend to constitute new travel associations and platforms that focus on nature conservation and sustainable travel, as the following (non-exhaustive) list of examples clearly demonstrates:

Country	Example of leading organization engaging in nature-friendly, sustainable tourism
Germany	Forum Anders Reisen: www.forumandersreisen.de
Austria	Respect – Naturefriends International for Sustainable Tourism Development: www.respect.at
Switzerland	Arbeitskreis Tourismus & Entwicklung – Fair Unterwegs: www.akte.ch / www.fairunterwegs.org
Netherlands	ANVR – Dutch Federation of Travel Organizations – Sustainable Tourism Initiatives: www.anvr.nl/English/sustainable-tourism.aspx
UK	Responsible Travel: www.responsibletravel.com
France	ATR – Agir pour un Tourisme Responsable: www.tourisme-responsable.org
Belgium	EARTH – European Alliance of Responsible Tourism and Hospitality: www.earth-net.eu

Italy	AITR – Italian Association for Responsible Tourism: www.aitr.org/italian-association-responsible-tourism/
Spain	Institute for Responsible Tourism: www.institutoturismoresponsable.com/en

Source: Own elaboration

4.1.2 Adventure Tourism

While adventure tourism usually takes place in natural settings or places of scenic beauty, the primordial motivation of adventure travellers is to experience a challenging physical activity. Adventure travel comes in many forms and varieties and presents a strong overlap with nature-oriented outdoor tourism.

Given the many outdoor activities that are possible in Tajikistan, Kyrgyzstan, and Uzbekistan, these three destinations are predestined to receive adventure tourism. Adventure activities can be roughly divided into Soft Adventure and Hard Adventure. Soft Adventure has a much broader appeal because it allows less physical fit travellers, such as the elderly or simply all those that do not have interest in engaging in strenuous activity, to engage in outdoor activities. While some tourists are happy with a moderate degree of adventure, others actively do seek out physically challenging itineraries, pursuing hard adventure activities such as trekking or caving. Therefore, tourism service providers must be careful and provide an exact idea of the degree of physical fitness that is required for each tour in their itinerary descriptions.

ATTA – Adventure Travel Trade Association is one of the main organizations for adventure travel in the world and has members from around the world, including tour operators from Europe: www.adventuretravel.biz. ATTA organizes a yearly adventure tourism fair in a rotating manner in countries around the world, called Adventure Travel Word Summit www.adventuretravel.biz/events/summit/.

In the European market that dominate particularly in adventure tourism are Germany, Netherlands, United Kingdom, and France. In general terms, adventure tourists do have more precise ideas concerning their travel plans than the typical mainstream. Therefore, this kind of tourist needs to be catered to with more personalized services, which represents both an opportunity and a challenge for incoming tour operators and service providers. It is important to be prepared for the elaboration of highly customized itineraries while also demonstrating the ability to accommodate special requests. This might relate to details concerning the itinerary or health concerns, for example when traveling at high altitudes in the Kyrgyz mountains, or other provisions; for example, when elderly travellers choose to engage in adventure activities.

Legal considerations:

Most European markets have a strong consumer protection legislation in place, reflecting the principles laid out in the so-called EU Package Travel Directive (https://ec.europa.eu/info/law/law-topic/consumer-protection-law/travel-and-timeshare-law/package-travel-directive_en). It is extremely important that Central Asian providers **take all the required safety measures in the development of adventure tourism**. If an international tour operator senses that this aspect is not duly taken care of, there will be reluctance to incorporate a particular offer into an itinerary, since tour operators want to avoid problems with their clients and avert legal consequences at all costs. In addition, just one incident can be enough to damage the reputation of a tour operator, be it through the media or via comments in online forums and social media channels. **Consistent safety practices are therefore the only way to successfully work with the European market.**

Regarding direct bookings through the internet, which usually are not subject to consumer protection laws, it is even more important to demonstrate the seriousness of the company by **demonstrating that all pertinent regulations are met, and all insurances are in place**. One good way is to show membership in an association that regulates the company's activity.

4.1.3 Rural Tourism

Central Asia offers many natural spaces, untouched landscapes, and scenic beauty, as well as rural communities dedicated to a traditional lifestyle. Certainly, Uzbekistan, Tajikistan and Kyrgyzstan are not the exception. In other words, rural tourism can readily be developed and is fully in line with many the expectations and aspirations of many Europeans. Rural tourism presents an overlap with nature and adventure tourism but the emphasis here is on the authentic life in the countryside, experiencing the traditions of the locals, blending into the local lifestyle, and enjoying authentic encounters with the local people, often by sharing their daily activities and way of life.

4.1.4 Cultural Tourism

Most European source markets share a high interest in cultural tourism. On one side of the spectrum there are the outright culture buffs who want to learn everything about historic sites and who plan their days carefully to visit as many museums as possible. On the other side of the spectrum, there are those travellers that visit cultural sights more by chance. European markets have a relatively long lengths of stay resulting in round trips and complex itineraries within the destinations. This allows them to visit not just the main attractions, but also those in remote rural area to appreciate smaller touristic gems or living cultures rather. Precisely within the paradigm of experiential tourism, many Europeans take great interest in the intangible aspects of Central Asian culture and are curious to learn about the local lifestyle and traditions.

4.1.5 Conclusion

For all types of tourism, the key trend is to focus on experience. So rather than observing, the challenge is to organize immersive experiences in which visitors can sense and smell the forest, camp in a yurt, eat with a family, or prepare dinner together. However, as it is easy to imagine, immersive experiences

require expertise, careful planning, and respect of limits in order not to disturb ecosystems and the wildlife.

Community-based tourism is linked to the tourism segments outlined above that drive most of the tourism business from Europe to Central Asia, namely: nature tourism and adventure, rural and cultural tourism. While it is difficult to pinpoint the exact market share of these segments for each country due to the multi-layered travel patterns and motivations of tourists, almost without exception, across all source markets, packages offered in Europe include these three types of tourism.

The art of creating marketable packages therefore does not consist in designing itineraries that are strictly limited to a certain segment at the expense of ignoring everything else but rather by addressing the multidimensional motivations of travellers. Even the most versed multi-day trekking person wants to take part in some cultural exchange with a Tajik family, and even the most rugged outdoor type climbing Kyrgyzstan's peaks will appreciate a glimpse of Bishkek's Soviet charm.

4.2 Market segments and their importance in source markets

	Main themes	Nature		Adventure/Active		Culture	
	Market segments	Eco-Tourism	Bird-watching	Biking	Hiking/Trekking	City breaks	Cultural itineraries
Target Group	Relevance for German market	****	*	***	***	**	***
	Relevance for Spanish market	**	*	*	**	***	***
	Relevance for the UK Market	*	***	*	**	***	**
	Relevance for the French market	**	*	**	**	**	**
	Relevance for the BeNeLux market	**	***	**	***	***	**
	Relevance for Italian Market	**		*	*	***	***

Source: Own elaboration, based on <https://www.birdwatching.co.uk/>, Reiseanalyse Deutschland

4.3 Key players within CBT and related segments

The following sections provide typical and relevant examples of players and events relevant to planning marketing activities in Europe, organized by source market. Each country list is focused on players from the tourism trade and includes organizations, whenever available, directly related to Central Asia, the main trade associations as well as organizations that focus on sustainable tourism. Note that each European country has its own combination of relevant players and that the countries with strong populations tend to have a more differentiated institutional landscape.

Market segments	Media	Tour operators
German market	<ul style="list-style-type: none"> • Abenteuer und Reisen - leading travel magazine in Germany, focus on adventure travel: www.abenteuer-reisen.de • Trekking Magazin: www.trekkingmagazin.com • Wander Magazin: www.wandermagazin.de • Outdoor-Magazin: www.outdoor-magazin.com • Merian: www.merian.de/ • Wir sind anderswo - a magazine dedicated to alternative forms of travel: www.wirsindanderswo.de 	<ul style="list-style-type: none"> • diamir Reisen: www.diamir.de • nomad Reisen: www.nomad-reisen.de • Wikinger Reisen: www.wikinger-reisen.de • Hauser Exkursionen: www.hauser-exkursionen.de • Natours Reisen: www.natours.de
Austrian market	<ul style="list-style-type: none"> • Besser Reisen, leading travel portal in Austria: www.besser-reisen-online.at • Nachhaltig Reisen – online platform for sustainability-oriented travel: www.nachhaltig-reisen.at 	<ul style="list-style-type: none"> • ARR Reisen: www.arr.at • Weltweitwandern: www.weltweitwandern.at • Experience Wilderness: www.experience-wilderness.com
Swiss market	<ul style="list-style-type: none"> • Globetrotter Magazine, a high-quality travel magazine with 4 editions per year: www.globetrottermagazin.ch • Fernweh, a Swiss travel magazine presenting destinations and their people, culture, nature, etc.: www.fernweh-magazin.com 	<ul style="list-style-type: none"> • Knecht Reisen: www.knecht-reisen.ch • Asia365: www.asia365.ch • Baumeler: www.baumeler.ch
UK market	<ul style="list-style-type: none"> • Wanderlust Travel Magazine, key UK travel magazine covering everything related to hiking: www.wanderlust.co.uk • Adventure Travel Magazine: www.adventuretravelmagazine.co.uk • Trek and Mountain: leading UK source for trekking and climbing: www.trekandmountain.com 	<ul style="list-style-type: none"> • Walks Worldwide: www.walksworldwide.com • Ramblers Holidays: www.ramblersholidays.co.uk • Jules Verne: www.vjv.com
French market	<ul style="list-style-type: none"> • Trek Magazine, key French source for trekking: www.trekmag.com • Tour Magazine, general online travel magazine: www.tourmagazine.fr • Desirs de Voyage, travel and lifestyle magazine: www.desirs-de-voyages.fr 	<ul style="list-style-type: none"> • Terres d'Aventure www.terdav.com • Allibert Trekking www.allibert-trekking.com • Nomade Aventure www.nomade-aventure.com
BeNeLux market	<ul style="list-style-type: none"> • Natuurfoto Magazine, dedicated to nature photography: www.natuurfotomagazine.nl • Bike and Trekking – Dutch magazine focused on biking and trekking: www.bikeandtrekking.nl • Hike and Trekking – Dutch magazine focused on hiking and trekking: www.hikeandtrekking.nl • National Geographic Traveler Netherlands: www.natgeotraveler.nl • SNP NL Magazine 	<ul style="list-style-type: none"> • Sensinverse Ecoturisme: www.sensinverse.be • Dosjer Reisen: www.djoser.de • Fietsvakantiewinkel: www.fietsvakantiewinkel.nl • Sawadee: www.sawadee.nl
Italian market	<ul style="list-style-type: none"> • Trekking, Italian magazine for trekking and outdoor activities: www.trekking.it • Emotions Magazine, publication focused on travel and culture www.emotionsmagazine.com 	<ul style="list-style-type: none"> • Boscolo: www.boscolo.com • Viaggi Giovani: www.viaggigiovani.it • Originaltour: www.originaltour.it
Spanish market	<ul style="list-style-type: none"> • Lonely Planet España, Spanish version of the international magazine focusing on discovery and adventure: www.lonelyplanet.es/revista.html • Revista Oxígeno, magazine dedicated to outdoor and active travel: www.revistaoxigeno.es • Aire Libre, monthly magazine about active and rural tourism: www.airelibre.com 	<ul style="list-style-type: none"> • Panavision Tours: www.panavision-tours.es • Aspasia Travel: www.aspasiatravel.es • Luso Viajes: www.lusoviajes.com

Market segments	Fairs	Associations /institutions	Others
German market	<ul style="list-style-type: none"> • ITB Berlin - biggest tourism fair in the world: www.itb-berlin.de • CMT Stuttgart: most popular consumer fair: https://www.messe-stuttgart.de/cmt/ 	<ul style="list-style-type: none"> • Forum anders reisen: association of 130 German tour operators focusing on sustainable forms of travel: www.forumandersreisen.de • DRV, German Travel Trade Association: www.drv.de 	<ul style="list-style-type: none"> • German Hiking Association: www.wanderverband.de • NaturFreunde Deutschlands e.V
Austrian market	<ul style="list-style-type: none"> • Ferienmesse Wien: leading Austrian tourism fair in Vienna: www.ferien-messe.at 	<ul style="list-style-type: none"> • ÖRV: Austrian Travel Trade Association: www.oerv.at 	<ul style="list-style-type: none"> • Naturfreunde Österreich • Respect: platform for sustainable tourism in Austria: www.respect.at
Swiss market	<ul style="list-style-type: none"> • Fespo Zürich – the most important Swiss tourism fair: www.fespo.ch • Ferienmesse Bern: www.ferienmesse.ch 	<ul style="list-style-type: none"> • SRV, Swiss Travel Association: www.srv.ch 	<ul style="list-style-type: none"> • Fairunterwegs, Swiss web portal for fair and sustainable travel: www.fairunterwegs.org • Akte: Swiss Working Group on Tourism and Development: www.akte.ch
UK market	<ul style="list-style-type: none"> • WTM, leading trade fair in Europe: www.wtmlondon.com • Adventure Travel Show, specialized in adventure travel: www.adventureshow.com 	<ul style="list-style-type: none"> • AITO, Association of Independent Tour Operators: www.aito.com • ABTA: tourism trade association, www.abta.uk 	<ul style="list-style-type: none"> • Ramblers, British organization dedicated to walking: www.ramblers.co.uk • Responsible Travel, focus responsible travel: www.responsibletravel.com
French market	<ul style="list-style-type: none"> • IFTM TOP Resa: important tourism trade fair in Paris: https://www.iftm.fr/ • Destinations Nature, tourism fair focusing on nature tourism: www.destinations-nature.com 	<ul style="list-style-type: none"> • SETO, French Association of Tour Operators: www.ceto.to • ATES: A Tourisme Solidaire, network for solidarity tourism: www.tourismesolidaire.org • ATR, French network for responsible tourism: www.tourisme-responsable.org 	<ul style="list-style-type: none"> • CEVIED: travel around the world with focus on an ethical, responsible tourism: www.cevied.org
BeNeLux market	<ul style="list-style-type: none"> • Vakantiebeurs, the most important Dutch tourism fair www.vakantiebeurs.nl • Fiets en Wandelbeurs, the leading Dutch fair for hiking and cycling, www.fietsenwandelbeurs.nl • Salon des Vacances, leading Belgian fair, www.salondesvacances.eu/fr/ • Brussels Travel Expo: www.btexpo.com (trade) 	<ul style="list-style-type: none"> • ANVR, Association of Dutch Tour Operators: www.anvr.nl • ABTO, Association of Belgian Tour Operators: www.abto.be 	<ul style="list-style-type: none"> • Portal Fair Tourism, focus on sustainable tourism, ecotourism and community-based tourism: www.fairtourism.nl • My Natour, online community dedicated to nature, ecotourism: www.mynatour.org • Alter Voyages Liège: Belgian platform for alternative travel: www.altervoyages.org
Italian market	<ul style="list-style-type: none"> • BIT Milan, Italy's main tourism fair: www.bit.fieramilano.it • TTG Incontri, www.ttgincontri.it (trade) 	<ul style="list-style-type: none"> • FIAVET: Italian Federation of Travel & Tourism Associations: www.fiavet.it • AITR, main organizations in Italy for sustainable tourism: www.aitr.org 	<ul style="list-style-type: none"> • Italy-only portal on Agrotourism, providing a good idea on the type of product clients look for: www.agriturismo.it
Spanish market	<ul style="list-style-type: none"> • Fitur, Spain's most important tourism fair: www.ifema.es/fitur 		

5 COMMUNICATION AND SALES

As part of their marketing mix, the tourism authorities in Central Asia should realize several activities that are dedicated to both the trade and the final consumer in Europe. Aiming at successful communication, promotion, and sales of a destination, two approaches underpinned with specific activities can be applied: (1) Business-to-Business Marketing (B2B) and (2) Business-to-Customer Marketing (B2C). To some extent, activities can be used interchangeably and do not belong exclusively to one category

Business-to-Business marketing includes all actions and processes to market and distribute a product or service to another company. In other words, it is marketing directed at other businesses instead of directed at consumers. Marketing aiming at consumers is therefore called B2C Marketing.

Figure 5: Overview of Major B2B and B2C Marketing Activities

	B2B		B2C	
	Online	Offline	Online	Offline
Communication	<ul style="list-style-type: none"> Business website (SEO) Public Relation works E-Mail-Marketing B2B marketplace 	<ul style="list-style-type: none"> Trade fairs Familiarization Trips Roadshows Public Relation works B2B marketplace Event networking 	<ul style="list-style-type: none"> Social media Review/comparison portals Business website (SEO) E-Mail-Marketing/WhatsApp Video-Marketing 	<ul style="list-style-type: none"> Consumer fairs Offline media Tourist office
Sales	<ul style="list-style-type: none"> Business website (SEO) Sales guides B2B marketplace Paid Per Click (PPC) 	<ul style="list-style-type: none"> Trade fairs Sales guides B2B marketplace Sales representative 	<ul style="list-style-type: none"> Business website (SEO) Online Portals/Travel Agencies Paid Per Click (PPC) 	<ul style="list-style-type: none"> Tourist office Stationary tour operator/travel agency

6 BUSINESS-TO-BUSINESS MARKETING (B2B)

There are many mechanisms that facilitate market access to the European market. It is important to understand that these present a high degree of overlaps and interdependence so there is no one single-bullet, sure-fire way of capturing the European market. Some of the key mechanisms are described below.

6.1.1 Market Intelligence

One of the most important aspects impacting a destination's and tourism businesses' ability to stay ahead of the market is to have a comprehensive understanding of its competitors, the state of the tourism industry, and the changing consumer landscape. Frequent development and advancement on product development, promotion, communication, and sales, but also consumer trends, travel habits and patterns in the source markets require continuous adaptation of tourism products, promotion, and distribution.

Consequently, it is key to collect continuously data on market intelligence, to analyze and use it to make informed decisions regarding competitor behaviors, products, consumer trends, and market

opportunities. As there is a great amount of data available, good knowledge management and transfer is crucial. Once the data is collected, it needs to be centralized and made available for CBT service providers. It can be facilitated through an internal platform (intranet), where eligible stakeholders have access to. Responsibilities for the respective tasks need to be allocated and the market intelligence frequently updated.

At the same time, studying tour operators' webpages helps to understand how different motivations of clients are integrated in one multi-faceted but still coherent package. A selection of relevant tour operators per source market is listed in the table on page 16.

Recommendations for Action

- As CBT Association, collect continuously data on market intelligence, analyze and use it to make informed decisions regarding competitor behaviors, products, consumer trends, and market opportunities. Update your members about market trends via newsletters.
- Establish a centralized internal platform (intranet) where all data is combined and made available for CBT service providers
- Study tour operators' webpages (see list above) to understand the different motivations and demand of clients and get a better sense of target groups.

6.1.2 Cooperation with Tour Operators

While the use of internet and social media is ever more important, the traditional tourism distribution chain involving travel agencies as well as outbound and inbound tour operators still plays a pivotal role in organizing tourism from Europe to Central Asia.

Given that many trips to countries like Uzbekistan, Tajikistan and Kyrgyzstan are costly "once in a lifetime" trips from the perspective of the average European, many travelers want to make sure that everything goes right and to prefer to book via a tour operator, with all legal assurances in place. In recent times, most tour operators have shifted from catalogues as a printed version to online format, mainly available as PDF-version for download from their website, which is the major platform to market products.

In addition, tour operators approach their clients through several channels such as advertising in special interest magazines, participation in fairs, newsletters, or through events for the consumer.

Given that many consumers utilize international tour operators to book their trip, providers should seek synergies with these instead of trying to bypass key instances in the source market that are specialists in their market environment. The primordial goal is therefore to appear published in the catalogue of an international tour operator – either through direct interaction or facilitated by the Central Asian incoming agency of that operator – to be benefitted by the promotional activities that the tour operator realizes.

Database Management

The tourism industry landscape is constantly changing in the source markets, some tour operators appear, others merge or disappear; or contact persons change their position. Therefore, continuous research on tour operators and travel agencies is essential to keep an up-to-date data base of tour

operators per country. A well-sorted data base of tour operators includes the following items (selection of major items):

- Name of the tour operator and address
- Portfolio of the tour operator, offered products and services
- Website, contact person for Central Asia and E-Mail Address
- Focus on geographical region or theme

Again, a responsible entity for the database management is required which facilitates updated information to the CBT service providers in Central Asia.

Recommendations for Action

- Name a person at the CBT Association that maintains a database of all relevant commercial contacts
- Undertake a regular revision / update (once per year) of the database
- Realize periodic mailings by the CBT Association that include updates from CBT members
- Share the database among members and make it centrally available (Intranet)

6.1.3 Travel Agencies

Although the importance of travel agencies has lessened in Europe, with several country source markets showing a reduction of almost 50% in the number of travel agencies in the last 10 to 15 years, they still represent an important source of information, as well as a booking channel for many final consumers, especially those used to traditional ways of setting up their travels. While specialized tour operators often do not use travel agencies as distribution channel, or only a few selected agencies, most mainstream operators continue to depend on travel agencies as a means of reaching out and selling to the final consumer. The focus for Central Asia providers in this scenario remains the same: Try to establish a presence in tour operator catalogues and on their websites through direct negotiation with tour operators or their respective incoming agencies in Tajikistan, Uzbekistan, and Kyrgyzstan.

6.1.4 Promotional Mechanism by Tourism Entities

With the aim to raise the interest among decision makers and product managers in European tour operator companies, national tourism entities of Central Asia should be approached through promotional mechanisms such as trade roadshows, newsletters, or trainings (webinars).

Newsletters for travel trade inform the tourism industry about the latest news on tourism in Central Asia. Coverage includes important updates for tour operator and travel agent partners as well as news from CTB service providers. It is essential to provide newsworthy, relevant, and precise information in the newsletter that sparks the interests of the travel trade. English as universal language in the Western market should be used. For Central Asia, a quarterly e-newsletter with focus on Central Asia and CBT is recommended. Aiming to get a broad range of subscription, a subscription form should be included in various websites of tourism stakeholders in Central Asia, e.g., APTA, TCBTA and KCBTA. It is essential to allocate concrete responsibilities for the collection of content, preparation and sending out of the newsletter's frequent publication.

Webinars are an efficient tool to communicate important updates of Central Asia and news from CTB service providers to tour operator and travel agent partners. Nowadays, there are numerous freeware

applications to conduct such webinars. Based on a concept note, newsworthy information needs to be collected and edited to be presented in a webinar. Depending on the amount of news to be shared with the tourism industry, webinars should be conducted once or twice a year, preferably prior to an important trade fair event (e.g., ITB Berlin, WTM London).

Roadshows are organized by the national tourism authorities to promote the destination. Central Asian tourism enterprises can usually join to present their individual product parallel to the general promotion of the destination – usually a very effective promotion mechanism. If a provider cannot participate directly because of cost or time, alternatively arrangements can be made to be represented through a participating incoming tour operator or the representative of some trade association or marketing alliance.

Recommendations for Action

- Discuss joint promotions targeting agencies with your Ministry of Tourism.
- Partner with organizations in your source market that can set up events with travel agencies and have the corresponding databases (tour operators, travel agency cooperations, marketing representatives...)

6.1.5 Sales Information and Sales Manual

Tour operators and travel agents need far-reaching, at the same time precise information about the travel destinations to provide customers with respective data. Technical information on safety and security, health and hygiene, currency, electricity, travel season, etc., is just as important as information on specific regions, tourism attractions and offers, accommodation, etc.

The necessary information needs to be collected, well-sorted and stored (e.g., cloud-based storage), and further combined preparing a sales manual that has the character of “Central Asia at your fingertips”.

Following a proposal for a structure:

- (1) Description of key destinations/regions with vivid pictures and tourism highlights. Ideally a map of the region is included to illustrate the locations.
- (2) Presentation of unique and creative itineraries, each of them written towards a single theme showcasing the richness of Central Asia as a destination and the uniqueness of CBT.
- (3) Practical Travel Information contains brief, yet comprehensive information about accommodation, general travel arrangements and means of transportation available in Central Asia.

A sales manual should be well-structured and designed, and available for download on important regional and national tourism website of Central Asia, including Uzbekistan Travel, Kyrgyzstan Travel, Tajikistan Travel, as well as the CBT associations in the three countries.

Recommendations for Action

- Elaborate a comprehensive sales manual by using the above-mentioned structure that can be in digital form for easy distribution.
- Start with a simple fact sheet and offer more comprehensive information over time.
- Make the sales manual and factsheet publicly available on the website, and create a QR-code to get easy access to it

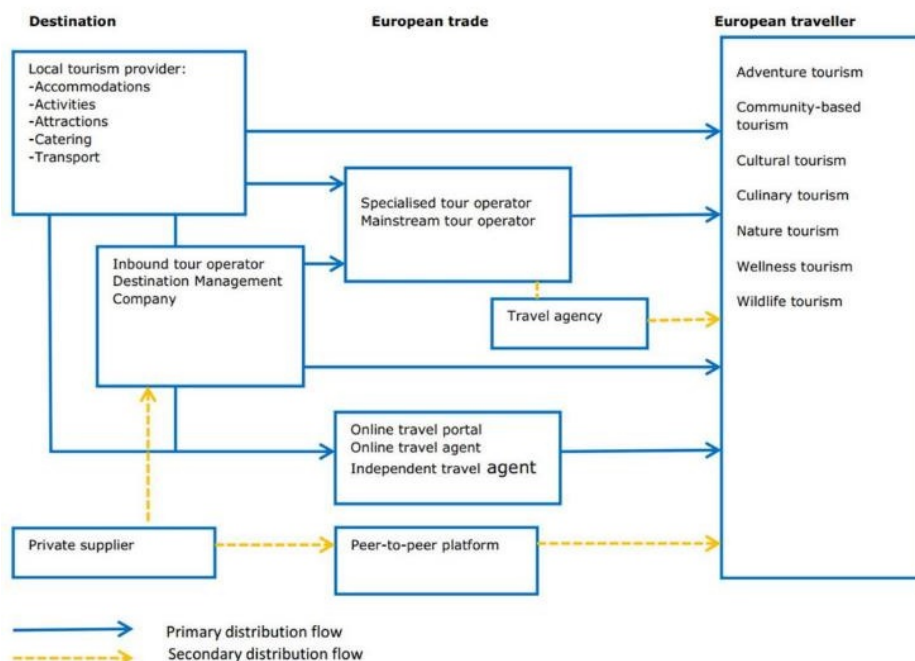
6.1.6 Distribution and Commission

One way to grow booking volume is by growing the distribution strategy to get services in front of a larger audience. This usually involves working with a reseller who relies on a commission to keep their business going. But deciding on the amount of commission to pay a reseller can be tricky and calculating it can be confusing.

Commission is paid to distributors or resellers for promoting and selling products. It also gives them an incentive to sell tours or activities of a specific providers over someone else's. Resellers promote tourism products to niche and mass markets, offline and online. Working with distributors can also expand the reach through promotion in long-haul markets.

Long-haul tourism is characterized by a long distribution flow (see figure below). Local tourism providers provide a wide range of services including accommodation, activities, catering, and transport. These services are sold through the inbound tour operator in the destination, which aims at getting the right tour and activity supplier for the job. The country's inbound tour operator liaises with a tour wholesaler, either a specialized tour operator or mainstream tour operator, in the source market. These wholesalers have a very good understanding of the travel patterns, habits, and preferences of their travelers; and thus, offers tours and activities to do while in destination. Tour packages and round trips, designed by the wholesalers are sold via a travel agent, who plans and arrange the entire holiday experience for their customers to the final customer.

Figure 6: Trade Structure for long-haul tourism



Source: CBI

Due to the distribution flow, where several stakeholders are involved, commission rates of roughly 30% apply, as following: 10% inbound tour operator, 10% wholesaler and 10% the travel agency in the source market. Commission charges don't have to be paid separately but is done automatically through the involved party.

There are two rates to be considered, net rates and gross rates. The net rate (sum of fixed and variable costs, as well as your profit margin) is the amount to be passed on to the distributors before they add their commission charges to the final price. The gross rate is the final price customers pay, which includes the distribution commission. The commission rate is usually charged as a percentage, also known as a mark-up percentage.

Recommendations for Action

- Clarify your distribution channels by relevance: How do clients book your product?
- Define your pricing and commission policy in tune with the main distribution channels.
- Inform members of CBT associations about pricing and commission policies.
- If necessary, provide trainings on pricing and commission.

6.1.7 Trade Fairs

As stated above, fairs are a key mechanism to gain market access in Europe for mid- and long-haul destinations. After having explained consumer fairs explained above, in the following, the focus is put on trade fairs.

In the following, relevant trade fairs in major European source markets are listed:

Table 1: Relevant trade fairs in major European source markets

Country	Consumer Fair	Time of the year	Website
Germany	ITB Berlin	March	www.itb.com/en
Spain	FITUR	January	www.ifema.es/fitur
France	IFTM Top Resa	September	www.iftm.fr/en-gb.html
Netherlands	Vakantiebeurs	January	www.vakantiebeurs.nl/en/
Belgium	Brussels Travel Expo	November	www.btexpo.com/
Italy	BIT Milan	February	www.bit.fieramilano.it
UK	WTM	November	www.wtm.com/london/

In the following, relevant trade fairs of importance to European source markets are listed:

Uzbekistan:

- Tashkent International Tourism Fair TITF (titf.uz) in Tashkent
- Tashkent Travel Mart in Tashkent

Kyrgyzstan

- International Tourism Fair (IITF) on the shores of Issyk-Kul Lake

Tajikistan:

- Tajikistan currently does not have a major national tourism fair

Note: Details on relevant tourism fairs in Central Asia are provided in the document “Concept Note on Promotional Events”, elaborated by mascontour under the activity 3.3. Promotion of Central Asia Green Tourism in the region and beyond

During the participation at regional tourism trade fairs, the establishment of a special matchmaking session with buyers present at the fair (through the Hosted Buyers Program or otherwise) is highly recommended. In a Hosted Buyer Program, selected international trade visitors visit Uzbekistan, Kyrgyzstan and/or Tajikistan by invitation of the respective national Ministry of Tourism¹. Hosted buyers enjoy free flights, free accommodation, and free attendance.

¹ The exact name for the National Ministry of Tourism varies among the three countries, thus only the short form is applied

Matchmaking sessions can be preceded by a presentation about the business case of green tourism, based on market trends and research, highlighting business opportunities, and encouraging buyers to specifically seek out providers with credentials in environmentally friendly practices.

Recommendations for Action

- Seek to participate in the most relevant trade fairs as CBT Association, in coordination with the Ministry of Tourism.
- Pool economic resources by organizing a joint stand.
- Contact tour operators well in advance to set up business meetings and to establish new commercial relationships.
- Prepare relevant material, e.g., sales manual, factsheet, to promote your offers best.

7 BUSINESS-TO-CUSTOMER MARKETING (B2C)

As mentioned above, B2C marketing, refers to the tactics and strategies in which a destination or company promotes its products and services to individual people.

7.1 Digital Marketing

As our world is characterized by digitalization, digital marketing serves the key approach. The importance of digital marketing is underpinned by the following number: The number of internet users worldwide has reached 4.66 billion (2021) and the number of social media users worldwide has reached 3.66 billion (2020). There are almost 4 billion smartphone users (2022) and more than 65% of travel decisions are made online. In a nutshell, we live in a digital age – social media has become a part of everyone's life!

In addition, with digital marketing there is a high cost-effectiveness of (the major cost to digital marketing is time) as well as a high reach and direct approach to the target group.

Figure 7: Overview of Digital Marketing Options

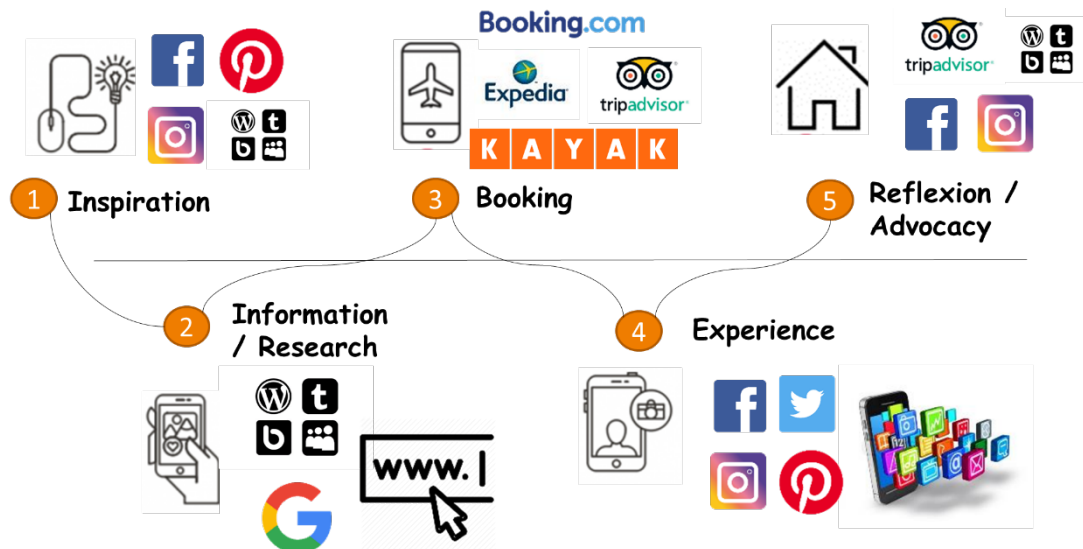


It is important to use, orchestrate and optimize multiple communication channels

7.1.1 The Digital Customer – Customer Journey

The Customer Journey describes the journey of a (potential) guest by representing five different touchpoints that characterise a customer's interaction throughout his travel. The five touchpoints are Inspiration, (2) Information/Research, (3) Booking, (4) Experience and (5) Reflexion/Advocacy. In the realm of digital marketing, there is a predominance of social media channels throughout the entire digital customer journey.

Figure 8: Digital Customer Journey



it is important to use different digital platforms or channels as their importance varies throughout the customer's journey. The digital platforms or channels will be explained below.

7.1.2 Storytelling and Content Creation

Nowadays, travel is one of the most shared topics on social media. Transmitting travel experiences filled with emotions is essential in B2C marketing aiming at the generate the tourists' desire to visit the destination. Key element is the concept of "**Storytelling**", where it is all about creating an emotional story that relates to a certain person or character, place or region, traditions, or customs, besides others. A good story captures the dream and particularities to be lived in a destination, at the same time transmit experiences and activities as well as provides visual clues and glimpse. Remember: to create a successful story, think like a tourist and put yourself in his/her mindset. The more authentic the story is, the better experiences are transmitted.

Content to be used in digital marketing can either be created or curated.

For **content creation**, always apply the concept of storytelling as explained above. Tell the very particular story of your business or destination. Capture the dream and the experience to be lived. Think about what special story can be told about? What makes tourists (and yourself) want to visit the destination or stay at the place? Create an interesting, appealing story to your customers that stops the scroll!

In contrast, **user-generated content (UGC)** refers to content that has been created by visitors who have lived the experience. Make use of user-generated content, such as images, ratings, comments and even blog articles or video clips (with permission) by curating and sharing it on the company's or destination's

website or social media channels. But remember to share only content from reputable sources, add your own perspective and add some additional value for your audience, such as additional information or a special offer. Being authentic and credible (not sponsored) content, UGC is of high value as it promotes authenticity, creates trust and, above all, is free for marketers.

7.1.3 Social Media Channels

Social Media provides different channels that can be used for promoting CBT Central Asia. It is of great importance to reach the target audience by using the right platform with the appropriate content. Essentially, it is about convincing people to visit the destination and to buy and experience the services in the region. Thus, **convert “followers” into customers**.

The most relevant Social Media Channels for the promotion of CBT Central Asia are Instagram, Facebook, YouTube and partially Pinterest, which will be presented shortly.

Instagram

A picture is worth a thousand words... that is the key approach of Instagram. Central Asia with all its treasures and tourism offers can be well promoted through emotional photos and videos aiming at the inspiration of visitors from around the world to explore a new travel destination. Therefore, stunning photos and videos of Central Asia and Community-Based Tourism activities transmitting the emotions and experiences to be lived, need to be captured. Further, travelers should be engaged to share their pictures and experiences (see above, user-generated content).

Macro level: It is recommended to establish an Instagram account such as “Community-based Tourism in Central Asia” by a marketing entity responsible for all three countries. The account needs to be filled with well selected pictures and short videos that create emotions and have a high appeal to tourists. To build up an Instagram channel that has a wide user reach requires time, regular posting (at least 1-2 times a week) and very good content. Besides the posting of pictures, tools such as reels and stories should be included.

Micro level: An Instagram account can also be created at business level, whereby a professional account must be used, instead of a private account. Ideally, several businesses have a common platform where they can be promoted, always with direct linkage to the destination level.

Facebook

As a well-established social media platform, Facebook has a wide range of users, however, the younger generation has a greater affinity towards Instagram.

Facebook serves for inspiring and informing (potential) tourists. By establishing a common Facebook page for CBT Central Asia, the entire destination can be promoted in multiple ways through photos, videos, texts, etc. the advantage of Facebook is that when it is well managed, you can engage with visitors by answering questions provided by visitors.

YouTube:

YouTube is a recommended platform to promote the destination by using short (image) videos and clips – it is one of the easiest ways to connect with, inspire and engage visitors. It is about visual storytelling and fosters the emotional connection with potential guests. In contrast to Facebook and Instagram, the production of professional image videos has a certain cost that should not be underestimated. However,

once being produced, an image video can be shown via various other social media channels and even be embedded in different websites. A well-produced video serves for the trip inspiration and planning as well as for taking the booking decision.

To produce an image video, the following aspects need to be taken into consideration: the target audience, available financial and human resources, tourism type of tourism and activity, as well as the competitors' activity.

Blogs

Blogs serve as an online journal or informational website displaying a variety of travel information. In contrast to Facebook or Instagram, travel blogs provide more and deeper information about the destination as travelers share their own experiences and tell their stories. Professional blog posts contain quality content with important information about the destination, written from travelers' perspective. Destinations can create their own blog; however, it is recommended to use well-established (thematic) blogs with a wide outreach addressing the respective target group.

It is essential to identify appropriate blogs that either focus on specific themes, such as ecotourism, green tourism, Community-based tourism, or on a specific region, in this case Central Asia. Counting with a list of appropriate blogs, a cooperation with bloggers needs to be established, who are invited on a trip to write blog posts on CBT in Central Asia. (see press trips/blogger trips).

Recommendations for Action

- **Name a Social Media Manager with appropriate language skills for each CBT Association**
- **Identify relevant social media channels that the CBT Association can frequently fill with content**
- **Elaborate a social media strategy: What channels should be used? What content should be published? What stories can be told?**

7.1.4 Hashtag Campaigns

In the world of social media, hashtags play an important role. A hashtag is a word or phrase preceded by a hash sign (#). It is a tool to index and categorize content and to connect content in a meaningful way. It makes it easier for people to search for other tweets about those topics. Hashtag should be included into your social media post in addition to a short description of the destination with its main services to be offered and a link to an official destination website. Major benefits of using hashtags are an increased visibility for the destination Central Asia and its CBT businesses, increased awareness and engagement, the opportunity to engage with visitors and to find target audience and to join the conversation. In a nutshell, if customers follow a certain hashtag, they'll see recent posts that have that hashtag.

Which hashtags should be used? (1) Take advantage of existing hashtags and the social media share of voice; join the conversations already out there to add the narrative of Central Asia to the conversation. (2) Establish a few key hashtags to use in all the destination posts and conversation.

It is further necessary to do some research on already existing hashtags. Take the time to discover the most popular and most relevant hashtags on CBT in Central Asia that are of relevance for social media.

Further, it is recommended to discuss at destination level with relevant stakeholders from Tajikistan, Uzbekistan and Kyrgyzstan potential hashtags and agree with the partners on top **5 or 6 hashtags** to be used in all posts being posted.

Potential hashtags for CTB Central Asia are #CBTCentralAsia, #communitybasedtourism, #CBTTajikista, #CBTUzbekistan, #CBTKyrgyzstan, #CBTSilkRoad, #NaturalHeartSilkRoad

7.1.5 Social Media Management

In a destination where many stakeholders are involved in content creation and sharing, social media management is a crucial aspect.

Social Media Manager: For the destination Central Asia, it is recommended to announce a Social Media Manager who is responsible for corporate communication in social networks across the three countries including the publication of product news, recent developments in the destination, responding to enquiries and accompanying discussions. Further, he/she develops and monitors Social Media campaigns, and measures with the help of various tools (see below).

Social Media Planning: To schedule the content that is planned to be posted across all social media channels, a social media calendar template should be applied (see template below). It helps to plan and coordinate, comment and schedule social media activities; in addition, it helps to allocate resources effectively and avoids cross-platform errors.

Figure 9: Social Media Calendar Template

MONDAY 7					
TWITTER					
TIME OF LAUNCH	CONTENT TITLE	TEXT	CONTENT TYPE	LINK	CLICK ENGAGEMENTS
12:30 AM					
4:30 AM					
8:30 AM					
12:30 PM					
4:30 PM					
8:30 PM					
FACEBOOK					
TIME OF LAUNCH	CONTENT TITLE	TEXT	CONTENT TYPE	LINK	CLICK ENGAGEMENTS
2:30 AM					
6:30 AM					
10:30 AM					
2:30 PM					
6:30 PM					
10:30 PM					
INSTAGRAM					
TIME OF LAUNCH	CONTENT TITLE	TEXT	CONTENT TYPE	LINK	CLICK ENGAGEMENTS

For a more advanced approach, professional tools such as a social media dashboard can be applied. As one single interface for all social media channels, social media dashboards simplify social media management, save time, track competitors, and measure the impact of posts – all digitally. The facilitates the collaboration with partners distributed across a certain distance.

There are many professional social media dashboard applications, such as Hootsuite, Agorapulse, Buffer or Social Pilot. The analysis of different social media dashboards and their applicability is beyond the scope of this study but to experiment with these will reveal the most suitable one.

Frequency: Instagram is the channel where posts need to be shared most often, 2-3 times per week. On Facebook, posts can be published once a week, or even every two weeks. Important to note, only publish

any post if you have quality content. Just for the sake of posting, it is not worth providing bad quality photos or news.

Recommendations for Action

- Identify a Social Media Manager that takes ownership and responsibility for social media
- Establish a plan for content creation and publication that ensures consistency
- Define clear roles and task among members regarding content creation and collection, including pictures, videos, texts – who publishes what, when and how?
- Ensure accessibility to the internet for responsible persons.

7.2 Public Relations

Public Relations (PR) differ from other marketing tools – mainly advertising - in communicating messages as it best creates the launch of a brand. Through a third-party endorsement, it is successful at pitching stories without seeming too salesy and it can effortlessly provide greater connections with audiences by communicating key messages. By applying a variety of public relations tools, awareness creation becomes easier such as for the launch of new products, services, or any promotions. PR has always been considered as a major part of the promotional mix to shape a destination's or business's reputation.

Relevant tools of public relations include press trips, press releases, press conferences, blogs and participation and consumer fairs.

To step into new markets which are rather unknown to Central Asia, the implementation of PR representatives in relevant source markets is recommend. They can facilitate specific marketing and promotion campaigns, have good contacts with media and press and thus, can raise awareness about the destination and its offers. This has, however, a certain cost and should be embedded in the general marketing activities of the three countries.

7.2.1 Press Trips in Cooperation with Ministries

A press trip offers journalists and bloggers the chance to gain first-hand experience of Central Asia and to experience the various offers and services. During this accompanied tour by professional guides, journalists and bloggers discover CBT and related offers and services and can further transmit their knowledge and insights to the end consumer through articles and posts in a wide range of media including newspapers, travel magazines, travel blogs, podcasts, besides others.

Therefore, it is recommended to provide press trips that are organized in cooperation with the ministries of Uzbekistan, Kyrgyzstan, and Tajikistan (with the Department of Tourism). The press trip should be held and promoted under a special theme and all activities should be focused respectively. Besides Community-based Tourism as overarching theme, recommended topics are #ecotourism, #adventure tourism (hiking, trekking), #CBT along the SilkRoad in Central Asia and #cultural tourism.

As journalists and bloggers get invited for participation, press trips are quite cost intensive. Besides the financial support through the ministries, a cooperation with national airline companies can be established to cover the airfare for participants.

Above all, a coordination entity for the entire organization of the press is essential which takes responsibility for all related tasks.

Recommendations for Action

- Discuss opportunities to showcase CBT providers during press trips with Ministry of Tourism
- Directly host journalists and bloggers when the opportunity arises, under the auspices of the national CBT Association

7.2.2 Consumer Fairs

Fairs are a key mechanism to gain market access in Europe for mid- and long-haul destinations.

They can be roughly divided into three types: (1) Trade events, (2) Consumer fairs of a general nature and (3) Mixed fairs (trade + end consumer). In the following, the focus is put on consumer fairs.

National and international consumer fairs provide a good platform to promote Community-Based Tourism directly to the end consumers. Despite the strong influence of the internet, an on-site presentation at relevant consumer fairs in major source markets is recommended. The participation at consumer fairs requires a cooperation with the ministries of Uzbekistan, Kyrgyzstan, and Tajikistan (with the Department of Tourism) as they oversee the overarching country tourism marketing.

In the following, relevant consumer fairs are listed in major European source markets.

Table 2: Consumer fairs in major European source markets

Country	Consumer Fair	Time of the year	Website
Germany	CMT Stuttgart	January	www.messe-stuttgart.de/cmt/en
Austria	Ferienmesse Wien	March	www.ferien-messe.at
Switzerland	Fespo	February	www.fespo.ch
France	Tourissimo Strasbourg	February	www.tourissimo-strasbourg.com/
	Paris Port de Versailles	March	www.destinations-nature.com/
Netherlands	Vakantiebeurs	January	www.vakantiebeurs.nl/en/
Belgium	Salon des Vacances	February	www.brusselsholidayfair.eu/
UK	Destinations Manchester	January	www.destinationsshow.com/manchester/

Since fair participations are costly, a careful prioritization when choosing them is recommended. The best strategy is to participate in the major tourism trade fairs listed above. These are fairs of a universal character, accommodating best the wide variety of segments, target groups and opportunities for commercial exposure.

Recommendations for Action

- Discuss fair participation opportunities with Ministry of Tourism
- Consider linking various events to add value to your trip

7.3 Travel Brochure

Many tourists get inspired and informed through different online media and channels (social media, travel websites, etc.) being increasingly the primary source of information. However, a well-designed destination brochure with relevant information, short descriptions and attractive images can inspire and engage tourists to visit the destination. It gives a glimpse of the destination, its treasures and activities to be experienced, and consequently influences the travel decision for a certain destination. Therefore, the development of a themed travel brochure on Ecotourism or on Community-Based Tourism in Central Asia/Silk Road is recommended, whereby some key elements need to be considered:

- Professional design of the brochure to inspire customers including appealing, authentic images
- Presentation of the regions with a short, informative description
- Presentation of important tourism offers and activities, important to note: only include offers that can be implemented and experiences (ready for distribution)
- Directory of tourism providers, a tourism map, contact information

In general, any travel brochure needs to be embedded in the overarching public relations work at national level undertaken by the Tourism Ministry or similar institutions.

Since printing is rather cost intensive and the use of natural resources needs to be limited, the travel brochure should be made available online as a PDF-version for download and be integrated in relevant websites. Nevertheless, a certain quantity of the brochure can be printed and carried along to consumer fairs. In recent times, the QR-code has become increasingly popular. Therefore, it is recommended to generate a QR-code with the direct link to the brochure, which can then be put on small stickers or flyers being distributed on tourism fairs, events, or any other public event. Consequently, the tourists can download the brochure on their mobile devices and read it when convenient.

Recommendations for Action

- Develop a high-quality brochure for selective distribution (i.e. trade partners)
- Print simpler brochures or leaflets for greater distribution (info centers)
- Focus on digital distribution of the pdf version to lower costs
- Generate a QR-Code that directs interested people to the Website where the pdf version can be found

8 TRANSVERSAL MARKETING ACTIVITIES: B2B AND B2C

8.1 Word-of-Mouth

Word of mouth is often underestimated because it does not cost anything. However, it is rather effective because it is based on personal recommendations and trust. Particularly more specialized niche products that cannot be found readily on the internet or in tour operator catalogues, in which affinity plays a big role, have a very valuable tool in word-of-mouth promotion. In addition, special interest groups readily communicate preferences among their members through word of mouth precisely because there are not so many information sources available.

Specialized products are not a commodity that can be easily compared by price on the internet; thus, price is not the driving factor. The key competence is having a very close understanding of customer needs to satisfy the clientele properly and promote favorable word of mouth

8.2 Website Presence

As a centerpiece of promotion and direct link to both trade and final consumer, a tourism destination has a professional and well-maintained tourism website. In order to attract visitors and convert lookers into bookers, some key elements need to be considered:

- Professional design of the webpage to inspire trust and facilitate direct reservations
- Availability of content in different languages that are relevant in Europe
- Booking facilities – this may be a simple e-mail address, a contact form, a booking form (with or without payment facilities) or a reference to a booking possibility in the source market (hint at tour operator or travel portal)

Key mechanisms to ensure visitors are:

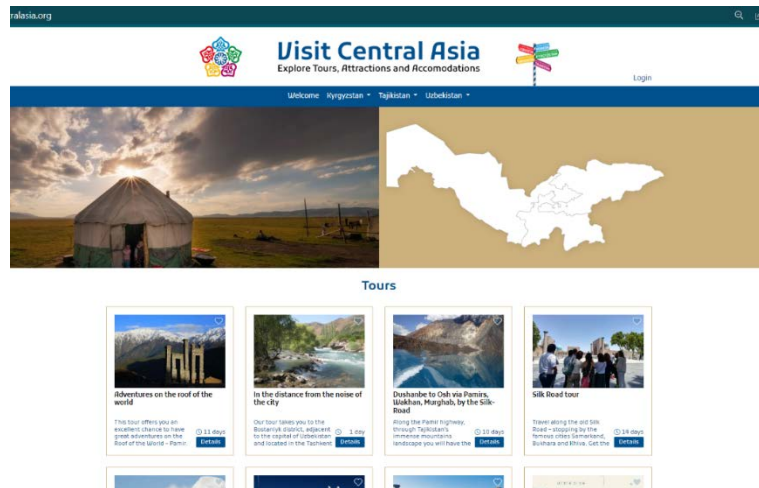
- Search Engine Optimization (SEO) / Search Engine Marketing (SEM)
- Exchange of links with other complementary websites
- Inclusion of URL in related travel directories and portals
- Continuous promotion of content via social media
- Promotion of URL in brochures, via presentation cards or little flyers that are economical to print, for massive distribution in events

For Community-based tourism in Central Asia, the tourism website *www.visitcentralasia.org* offers tours and accommodation in the CBT sector in Uzbekistan, Kyrgyzstan, and Tajikistan. The website provides information on itineraries, guest house facilities and activities, as well as a booking option. The website serves as a first common marketing and distribution channel for CBT in Central Asia. However, there is a lot of potential for improvement regarding the structure as offers appear in no order. It is recommended to elaborate a well-defined structure, for example by geography, theme or activity that enables an intuitive and easy application of the website by (potential) tourists.

However, it is recommended to further develop and improve the website with regards to transparency of booking processes, the General Data Protection Regulation (GDPR, <https://gdpr.eu/>) and travel law. It is of utmost importance that the maintenance of the website and the processing of enquiries by potential visitors are guaranteed beyond the duration of the project. Therefore, responsibilities on the management of *www.visitcentralasia.org* must be clearly regulated and distributed among the partners

APTA, TCBTA and KCBTA. In addition, the payment for hosting and maintenance needs to be ensured, which can be realized through a small fee for service providers being marketed on the website.

Figure 10: Website Visit Central Asia



Source: <https://visitcentralasia.org/>

Recommendations for Action

- Ensure customer-friendly navigation on your site. Ask clients if they are satisfied with the website and keep improving.
- Check regularly if your website is well ranked in searches involving typical keywords.
- Regularly update your website. Avoid any outdated information.
- Make sure that all links are properly working.
- Ensure that a contact address is named, and a contact person can be reached to acquire further information.

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ELABORATED FOR
ACTED Kyrgyzstan, Uzbekistan and Tajikistan
Contact: Zarina Sagynbaeva
15 Malydybaev str., House 1
720055 Bishkek, Kyrgyzstan
Mail zarina.sagynbaeva@acted.org



PROVIDED BY
mascontour GmbH
Matthias Beyer/Managing Director
Elaborated by: Franziska Rottig, Hendrik Wintjen
Schwiebusser Str. 9
10965 Berlin/Germany
Mail: beyer@mascontour.info

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