



ALBANIA CULTURE MARKETING STRATEGY



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Contents

Background.....	3
Introduction.....	4
Part 1 Situation Analysis	6
1.1 Programme of Past and Present Cultural Marketing and Diplomacy.....	6
1.2 Tourism Performance, Profile and Trends.....	7
Part 2 Product: Market Analysis	9
2.1 Cultural Heritage Product Assessment.....	9
2.2 Destination Image	11
Part 3 Research and Analysis.....	12
3.1 Survey of Travel Trade and Opinion Formers	12
3.2 Lessons from Case Studies Lessons of Destination....	23
3.3 SWOT Analysis	25
Part 4 Culture Marketing Strategy Recommendations.....	26
4.1 Objectives	26
4.2 Vision	26
4.3 Strategic Approach	26
4.4 Components of Five-Year Culture Marketing Strategy	33

Appendices

A. Situation Analysis

A.1 Programme of NTA Tourism Marketing Activity

A.2 Tourism Statistical Analysis

A.2.1 Tourism to Albania

B. Product : Market Analysis

B.1. Cultural Heritage Products

B.1.1 Inventory of Cultural Heritage Sites and Attractions

B.1.2 Categorisation by Degree of Market Readiness

B.1.3 Performing Arts

B.1.3.1 National Opera, Ballet and Folk Ensemble, Tirana

B.1.3.2 Festivals

B.2 Case Studies

B.2.1. Selection of Case Study Destinations

B.2.2 Jordan

B.2.3 Montenegro

B.2.4 South Africa

B.2.5 Bosnia – Herzegovina

B.2.6 Macedonia

B.2.7 Overview of Case Study Destinations

C Terms of Reference

Background

The 'Culture Marketing Strategy for Albania' is being prepared against a background to (and as a component of) the Joint UNDP – UNESCO Culture and Heritage for Social and Economic Development Programme (CHSED-JD). The Terms of Reference may be found in Appendix C. This report relates to the second of three stages in the development of the Marketing Strategy.

The importance of Albania's rich, unique, and storied culture offers many opportunities to transform the country positively by weaving culture into the fabric of society – from economic development, to diplomacy, to education and everyday life of its citizens. With its proposed accession to the European Union, the country has a chance to demonstrate its cultural potential and history of peaceful multicultural coexistence between different religions and communities.

Albania has a very rich, distractive, and authentic culture and heritage - from the Greco-Roman, Byzantine, Ottoman and other historic periods up to the modern day. In addition to the built cultural heritage, Albania's culture and heritage also manifests itself in a non-built form in the guise of music, dance, language, crafts/ textiles, religion, and most importantly a multi-cultural society.

Notwithstanding its rich culture and heritage, there is a low awareness of Albania abroad. There is also evidence to suggest that where awareness of the country exists, the image of Albania abroad is not a good one.

A concerted strategy to improve awareness and appreciation of Albania through a series of activities designed to show the country's rich and diverse cultural heritage will not only boost Albania's perception overseas, and lead to a growing inbound tourism sector, but can also increase Albanians' (and the Albanian diaspora's) knowledge and interest in their own cultural heritage, and intensify their pride in their country.

The focus of the Marketing Strategy and subsequent Action Plan and Marketing Tools recommendations will be attracting the overseas visitor since this meets the second of the twin objectives of boosting the Albanian economy. The Marketing Strategy identifies the most appropriate market segments to be targeted, namely those with both a strong interest in the culture of the country and its people, and good spending power.

The Culture Marketing Strategy will provide a One Year Action Plan and Marketing Tools to help make Albanian culture accessible to target clients abroad. This report details the analysis undertaken to develop recommended strategic directions, whose implementation will subsequently be set out in the One Year Action Plan.

Introduction

The Culture Marketing Strategy is intended to improve the image of Albania internationally and thereby increase tourism from abroad. It is foreseen that the National Tourism Agency will be the lead body to implement the strategy assisted by relevant governmental departments and the tourism industry.

In undertaking the programme of research, analysis and interpretation necessary to meet the requirements of the terms of reference for this study, Tourism Development International has been aware of:

1. the difference between cultural heritage marketing and cultural heritage *tourism* marketing. While attracting overseas visitors to, and facilitating their experience of, the sites and other manifestations of Albania's cultural heritage is a vitally important component of cultural heritage marketing, there are other activities not related to foreign tourism that are important. Activities focused on the domestic population can both serve to increase awareness of the nation's cultural heritage assets and the need to look after them for posterity; and
2. the fact that there is no single market segment for cultural heritage. Not only do people have different levels of interest in the different aspects of cultural heritage; but they also seek to combine cultural heritage with other aspects of the destination they choose to visit e.g. nature.

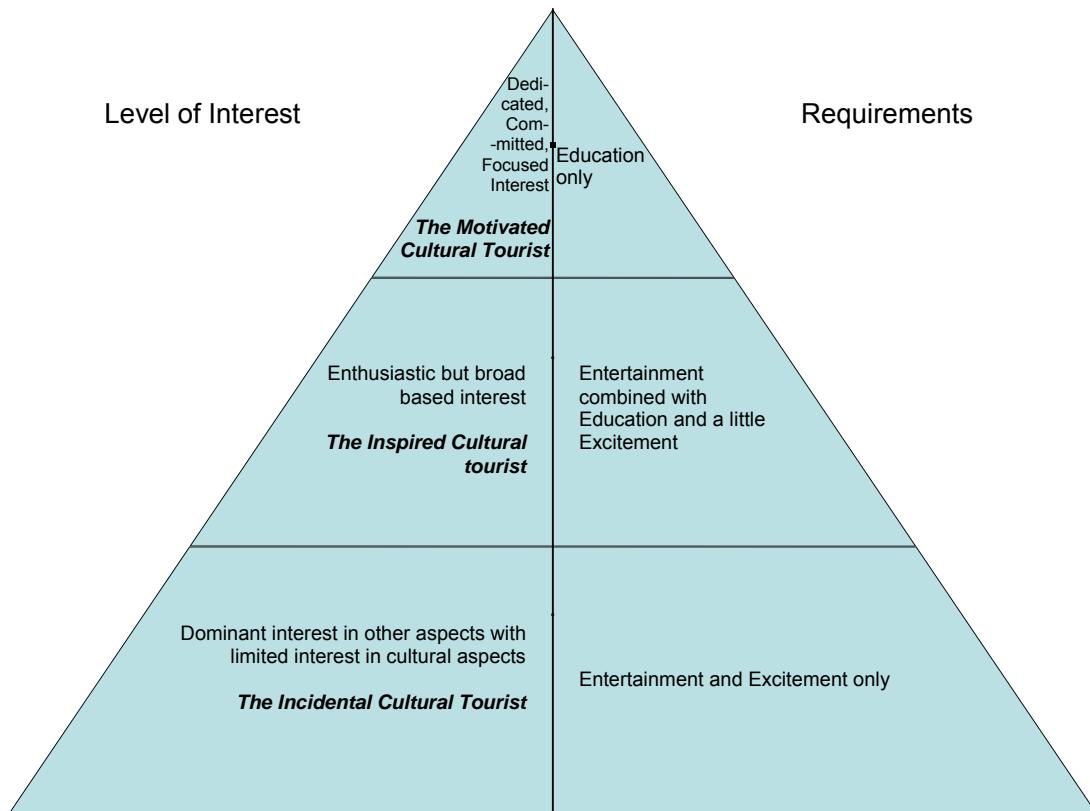
All tourism market segments can be seen as a triangle with those with the most dedicated interest – almost an academic research-based interest – at the peak, the small area indicating the relatively small number of such persons. Further down the triangle, as it broadens out, can be found those with a strong interest in the subject but who wish both to learn about it, and to enjoy the experiences provided by it. People who have only a passing interest in the subject tend to be grouped towards the bottom end of the triangle. The further down the triangle, so there are the greater volume of people. Thus, while their interest in the subject may be limited – say limited to a half day visit to a museum on a week-long vacation – the high numbers of such visitors result in a greater economic impact for paid facilities than from the small volumes of those with an intense and serious interest in the subject.

Tourism product planning on the principle of product: market 'matching' needs to satisfy the three E's of education, entertainment and excitement to maximise the benefits from all persons, with the focus on the educational component for the top end of the triangle through a much stronger emphasis on the entertainment and excitement elements for the large volumes of those without a specialised interest. Specifically relating this principle to cultural heritage tourists, we can classify those at the top end of the triangle as *motivated*, the larger volumes in the central parts as *inspired*, while the largest numbers towards the base are *incidental* cultural tourists.

Examination of the different market segments is further complicated by the fact that, apart from the dedicated – motivational – cultural tourist, the other categories of cultural tourist are interested in more than the cultural heritage of the destinations they choose to visit, but instead look for a mixture of things to do and see that give them a full appreciation of the destination. Such a desire typically manifests itself by combining visits to urban and rural locations, by experiencing both the cultural and natural heritage, and both by looking and doing. Isolating cultural heritage from the other components of a destination is, thus, an artificial exercise, as it does not relate to how visitors behave.

Further, cultural heritage is made up of the ways in which the population of a given location expresses itself in relation to its history, social systems, values, and their relationship with the environment in which they live. A location's topography, ecosystems and biodiversity cannot, thus, be divorced from the cultural heritage of the people who inhabit it. Cultural and natural heritage should be seen as part and parcel of the destination's total heritage. The growth of interest in all facets of a destination's heritage led to the classification by the National Geographic magazine of the *geotourist* market segment. Geotourists occupy much of the central parts of the consumer demand triangle. It is this broad segment that Albania's heritage (cultural and natural) can be targeted at most beneficially – both in respect of economic contribution, and image improvement.

Table 1 - Level of Interest and Requirements of Cultural Tourists



For the purposes of this report, the term 'cultural tourism' will be taken to relate to this broad definition incorporating elements of the environments in which people live, and having appeal to *geotourists*.

Part 1 Situation Analysis

1.1 Programme of Past and Present Cultural Marketing and Diplomacy

There has been limited promotion of Albania's cultural heritage abroad.

The NTA has published attractive brochures "Albanian Cultural Heritage" and "Albanian Traditional Cuisine", which feature a selection of the most important cultural monuments and dishes of Albania. These have been distributed principally at tourism fairs. Similar listings are featured in the www.albaniantourism.com website.

The website does not provide information of how to travel to the individual sites. It contains information about the history and significance of sites, but no practical information. Similarly, in respect of cultural events such as festivals, it does not give details of dates and booking procedures. It merely lists national holidays. Individual festivals also undertake very limited publicity.

A few individual attractions, principally the World Heritage Sites, have produced promotional literature often with donor support. Although 90% of admission fees to government owned attractions is designated to be returned to the relevant attraction for publicity and conservation purposes, this does not appear to happen consistently. Consequently these attractions are severely restricted in their ability to produce promotional materials.

The Marubi Museum produces a high quality calendar each year (1000 copies), which is distributed to VIPs in Albania including foreign diplomats. It also produces photo albums for limited distribution. Neither of these publications is available for sale, although they would make excellent souvenirs.

The National Opera, Ballet and Folk Ensemble has a full programme of opera, ballet and musical performances, which can appeal to foreign visitors. However, its publicity is very little and late. Due to late confirmation of budgets the annual programme is not confirmed until the season has already begun. The publicity accessible to foreign visitors extends no further than the exterior of the opera house in the form of large banners. Similar budgetary constraints affect other performing arts such as festivals.

Through its 49 missions abroad the Ministry of Foreign Affairs undertakes some promotion of Albania's cultural heritage. Receptions are often held on Independence Day (November 28) and on occasion folklore groups have provided entertainment at these.

Thanks to donor initiatives a number of foreign media have visited Albania in recent years producing extensive coverage on all aspects of the country and its touristic appeals. These visits have taken place mostly on an ad hoc basis. There is no planned programme of media visits, which an agency such as the National Tourism Agency (NTA) would normally undertake as part of its planned on-going activities.

The marketing activity of the NTA is summarised in Appendix A.1.

1.2 Tourism Performance, Profile and Trends

A detailed analysis is in Appendix A.2. The salient points are:

- 335,000 visits were made to cultural attractions – archaeological parks and museums – in 2009. This was a 110% increase over 2008. 24% of these visits were by foreigners. This indicates a strong interest in cultural heritage.
- Foreign visitor traffic increased by 18.3% in 2009 to 3,050,828 visits. This is an excellent performance in difficult economic times and probably the best in the region. Much of the increase came from Kosovo.
- 41.5% were non-resident Albanians; 3.9% day foreign visitors and 54.7% foreign staying visitors. The greatest increase is from foreign day and foreign staying visitors – 42% and 34% respectively.
- **Table 2 - Main Source Markets 2007-2009 – Visits by Nationality**

	2007	2008	2009	% of all 2009 Visits
Kosovo	336,322	324,771	674,214	37.7
Macedonia	224,348	341,801	306,714	17.2
Montenegro	105,636	120,125	118,731	6.6
Greece	58,217	85,505	100,171	5.6
Italy	84,680	98,573	98,919	5.5
UK	52,918	60,043	56,734	3.2
USA	43,779	50,354	48,599	2.7
Germany	31,181	38,428	47,240	2.6
Turkey	21,812	32,575	40,561	2.3
Serbia	*	59,557	25,542	1.4
France	16,527	18,369	19,342	1.1
Poland	11,026	14,427	17,037	1.0
Switzerland	9,157	15,660	15,960	0.9
Bulgaria	11,141	13,210	14,327	0.8
Austria	12,816	12,292	11,809	0.7

* included in Kosovo

Source: *World Tourism Organization (UNWTO)*

- 65% of visitors came from the neighbouring countries of Macedonia, Kosovo, Montenegro and Serbia. 25% came from Greece, Italy, UK, USA, Germany and Turkey.
- 13% arrived by sea, 15% by air and 72% by road.

Albania Culture Marketing Strategy

- There is an extreme peaking of visitor traffic with almost 50% arriving in July and August in 2009. This compares with 40% of arrivals in the same two months in 2005. The majority of these summer visitors travel by road from short haul markets. This summer peak is largely related to beach tourism and doubtless the spur to massive development currently underway in coastal resorts. Without a significant improvement in the seasonality of tourism much of this development may prove uneconomic.

Table 3 - Seasonality of Foreign Visitors to Albania 2005-2009

Month	2005	2006	2007	2008	2009	2009/ 2008 %
January	32,321	37,630	49,437	55,635	58,640	5.4
February	25,214	33,107	41,173	52,284	52,787	1.0
March	33,471	41,345	53,532	68,942	62,933	-8.7
April	41,891	58,723	70,040	76,867	98,735	28.4
May	49,148	66,696	77,577	97,995	113,362	15.7
June	62,201	73,402	93,533	123,249	135,740	10.1
July	139,446	173,124	201,428	251,926	469,109	86.2
August	163,681	197,976	215,120	257,185	411,252	59.9
September	70,805	82,731	95,148	101,461	119,358	17.6
October	49,286	57,181	75,109	91,319	100,783	10.4
November	39,840	45,227	54,994	65,691	73,165	11.4
December	44,533	58,914	71,674	87,584	90,181	3.0
Total	751,837	926,056	1,098,765	1,330,138	1,786,045	
% increase		23.2	18.6	21.1	34.3	
% in July/August	40.3	40.1	37.9	38.3	49.3	

Source: NSO / Immigration

- Earnings in 2009 are estimated at €1,240 million, an increase of 6% over 2008. Earnings are increasing much more slowly than visits, indicative of an increase in down market visitors and shorter lengths of stay.

There is evidently an urgent need to improve the seasonal spread of tourism. As the heritage and cultural attractions are largely of year round appeal, the increasing interest in them needs to be capitalised on to achieve both seasonal and geographic spread. Promotion should be directed principally at the top 10 non-regional source markets, which can give the best return on investment.

Part 2 Product: Market Analysis

2.1 Cultural Heritage Product Assessment

One only has to consider the UNESCO World Heritage Site designations that Albania has received to recognise that the country has considerable heritage product. There are plentiful and significant archaeological, religious, historic and architectural cultural assets throughout the country as well as a range of regional and national museums. There is also a full performing arts programme at the National Opera, Ballet and Folk Ensemble, the National Theatre and many Festivals held through much of the year and in many parts of the country. However, for the purposes of cultural marketing, the quality and quantity of heritage product are not the only considerations. Remembering that marketing concerns itself with meeting the needs of the market, the product has to be "market ready" before it can be sold effectively in the marketplace.

There are a number of criteria with which to assess market readiness and these are detailed in Appendix B.1.2. They fall into four categories:

- Access,
- Visitor Facilities,
- Interpretation, and
- Publicity

In conjunction with the MTCYS and the Institute of Monuments, 130 prime attractions, including museums have been selected as most likely to be the most marketable. They have each been assessed as to their market readiness based on the facilities and services available. An assessment has also been made of the intrinsic interest of each attraction to the Regional and International markets – high, medium or low. Finally, an evaluation of the overall market readiness of each attraction has been made – one to five stars.

It should be borne in mind when considering the results of such an exercise that the requirements to be market ready vary considerably from attraction to attraction. For example the Tanner's Bridge in Tirana requires very little interpretation and does not need toilets, catering, tour guides, etc., whereas all these are essential at an attraction such as Butrint.

The market readiness assessment will also vary between the motivated, inspired and incidental cultural tourist, with the less committed visitor being more demanding of the site's ease of access and range of facilities provided. The assessment made has been directed towards the mid point, and upwards, of the triangle of demand shown in the Introduction to this report.

Only a handful of attractions received a five star rating and even this does not mean that they are perfectly equipped to meet visitor needs. 60% only received a one or two star rating indicating that the vast majority do not meet visitor needs. The exercise is not entirely scientific, but serves to show that the vast majority of attractions need to improve their presentation and services if they are to cater to visitor expectations and be able to promote themselves confidently in the tourism marketplace.

Albania Culture Marketing Strategy

In the cultural heritage product assessment the following heritage sites/attractions achieved a four or five star rating and are therefore considered market ready:

Table 4 - Market Ready Attractions in Albania

Lezha	Burial Place of Scanderbeg
Kruja	Ethnographic Museum
	Castle of Kruja
	Museum of Scanderbeg
Fier	Ancient town of Apollonia
Shkoder	Castle of Rozafa
	Museum to the Castle
Korce	Museum of Medieval Art
Gjirokaster	Castle of Gjirokaster
	Ethnographic Museum
	Illyrian town of Antigonea
Berat	Castle of Berat
	Iconographic Museum
	Ruins of Red Mosque
	Ruins of White Mosque
	Ethnographic Museum
	Archaeological Museum
	Bridge over Osum River
Saranda	Ancient town of Butrint
	Archaeological Museum

Source: TDI analysis with MTCYS and Institute of Monuments

A low rating does not mean that an attraction should be excluded from publicity, only that visitor expectations should not be raised too high until the experience on offer is improved.

The selection of 130 prime attractions in or around the main tourist centres and tourism routes gives an indication of where resources need to be allocated. Enhancement of these attractions may be of prime importance for foreign visitors, but upgrades will also enhance the visit experience for domestic visitors and encourage increased awareness of and pride in the country's cultural heritage.

The performing arts, despite offering a wealth of "product" of high quality, also fall short of meeting visitor needs. The principal weakness is in the lack of publicity for events and performances whether at festivals or in permanent cultural venues such as the National Opera, Ballet and Folk Ensemble. There is a lack of funding for publicity, which can be said to contribute to the relatively low level of ticket sales, but the main problem is budgetary uncertainty. Budgets for cultural events are confirmed only shortly before the event or season. This problem is expanded on in Appendix B.1.3.

2.2 Destination Image

The image of Albania abroad varies dependent on the background and experience of the individuals concerned. Those who have visited Albania overwhelmingly have a positive image of the destination and of its culture. There are many positive cultural experiences to be enjoyed. There are some negative aspects, which are summarised in the Weaknesses section of the SWOT analysis.

The Albanian diaspora's image of the motherland depends to an extent on whether the individual is a first or subsequent generation expatriate. There are generally positive impressions tinged with past memories of difficult times and living conditions. The total Albanian diaspora around the world number between 6.5 and 7 million, more than double the resident population of the country. The opportunity exists to reconnect them to their cultural heritage through the marketing programme, thereby achieving two associated benefits: first, increased appreciation of Albania's cultural assets among the populations of the countries in which the diaspora live through positive word-of-mouth passed on from the diaspora following this reconnection; and, second, added impetus to the campaign to persuade more qualified and skilled Albanians to return to their homeland i.e. through the UNDP 2006-2010 Brain Gain project.

For the vast majority of people who have not visited the country and have no direct links with the country, Albania has an imprecise and somewhat negative image, based on pre-conceptions and lack of information. Albania is a lost or forgotten country of Europe. There is awareness of a history of harsh regimes and isolationism. It is a country whose people have been keen to leave as economic migrants and consequently the country is perceived as impoverished, backward and hostile. There are perceptions of crime and corruption. Because of the lack of information and paucity of media coverage there is limited awareness of the natural and cultural heritage strengths.

These negative aspects might appear depressing to the marketer, but compared to some of the image problems faced by the destinations on which case studies were undertaken (see section 3.2) Albania has a less daunting challenge to establish a positive awareness of the country's many strengths and appeals. The observation made by the Minister of Tourism at the Cultural Heritage Marketing Strategy study team's June 30, 2010 presentation that 'everyone who visits Albania finds that it exceeds their expectations' is highly relevant: first, by identifying this 'gap' it indicates the need to change the false perceptions held by overseas populations about Albania; and, second, it shows that the task of raising awareness and expectations is a realistic one since the raw material that constitutes the visitor experience in Albania is strong.

Part 3 Research and Analysis

3.1 Survey of Travel Trade and Opinion Formers

3.1.1 Introduction

This section of the report presents the findings of a Survey of Travel Trade and Opinion Formers. The survey was carried out by Tourism Development International with a view to informing the Culture Marketing Strategy. The survey, which was conducted on-line, was carried out from 18th February to 18th of April.

In total, 83 individuals were interviewed. In terms of country of residence, the sample composition was as follows:-

- Mainland Europe 44
- US/ UK/ Ireland 24
- Albania 15

Of the total sample, 61 respondents were Tour Operators while 8 were Travel Writers. 14 survey participants were representatives of International Institutions based in Tirana.

The survey sample comprised tour operators and travel writers who feature Albania in their programmes and those do not currently feature the country. Where appropriate, the findings relating to these two sub-groups are presented, particularly where a divergence of opinion occurs. Just over half (52%) of the travel trade features Albania.

Tourism Development International would like to acknowledge our appreciation to respondents for participating in this survey. The assistance of UNDP, British Guild of Travel Writers and GTZ is also much appreciated.

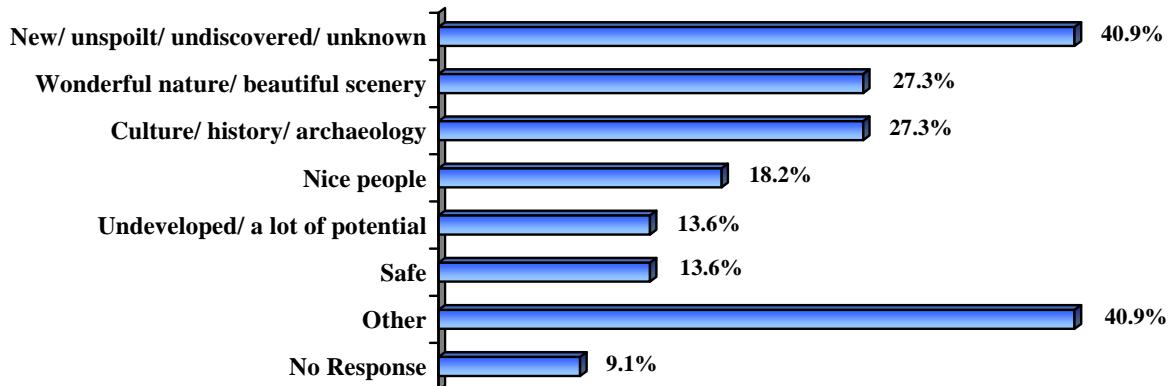
3.1.2 Balkan Destinations – The Competitive Environment

In overall terms, Croatia, Albania and Montenegro are cited as the Balkan destinations which are growing in popularity. There is, however, a divergence of views on this subject.

Tour Operators and Travel Writers familiar with Albania (i.e. Albania featured in their programmes/ articles) are more inclined to cite Albania as the Balkan destination growing in popularity, followed by Croatia. Those not familiar with Albania, on the other hand, identify Croatia, Montenegro and (to a lesser extent) Greece as the countries in the region with growing market appeal.

Albania's growth in popularity (amongst those travel trade representatives who feature the country) can be attributed to the fact that it is a new, largely undiscovered destination. Other factors contributing to its growth in popularity are the country's heritage/ history and natural beauty/ scenery.

Table 5 – Reasons for Growth in Albania's Popularity



Verbatim Comments:

"Albania is Europe's last "hidden area", and therefore the last secret place in the middle of Europe. Furthermore, in Germany Albania is known to many people as the Land of Scriptures, from the famous books of Karl May."

"Albania is an archaeological site from tip to toe, going back to Illyrian settlements, Greek colonies, Roman occupation, not to mention the invasions from Goths, Bulgars, Byzantines, Crusaders of the Holy Roman Empire and Ottomans who all but stopped time in tracks. Evidence of these civilizations are everywhere in Albania, and it's time to let the world see the great and wondrous sites. If only tourism had been developed, as it should have been, since the fall of communism in 1991 Albania would be a highlight on a European tour plan. It's never too late, but it's unfortunate that Albania's infrastructure --road development--has in the last 18 years of liberation done very little to give tourism a boost. Tourism should be number one on the economic plan for Albania."

"Has an interesting culture and a beautiful nature. The people are nice and it is very secure for tourists"

"A new destination which is unspoilt but mainly visited as part of a package with other Balkan destinations"

Albania's built heritage/ archaeology is identified as its strongest tourism assets overall. Other assets seen as significant are the natural heritage (mountains in particular) and rural tourism.

Built heritage is cited as the strongest asset by respondents both familiar and unfamiliar with Albania. In marketing terms, executives from Mainland Europe identify Albania's built heritage and archaeology as its primary asset, followed by mountains. Travel trade executives from the English speaking markets of USA, United Kingdom and Ireland highlighted built heritage and the mountains as strengths in more or less equal measure.

Albania Culture Marketing Strategy

In terms of identifying a potential future **market positioning of Albania** as a cultural tourism destination, the table below highlights the strengths associated with each of the Balkan destinations featured in the survey.

Table 6 – Strengths identified with Balkan Countries (as tourism destinations)

Country	Strengths
Montenegro	1. Mountains 2. Outdoor Activities 3. Built Heritage/ Archaeology
Bosnia-Herzegovina	1. Built Heritage/ Archaeology 2. Mountains
Albania	1. Built Heritage/ Archaeology 2. Mountains 3. Rural Tourism
Croatia	1. Built Heritage/ Archaeology 2. Outdoor Activities 3. Cuisine/ Food
Greece	1. Beaches/ Coastlines 2. Built Heritage/ Archaeology 3. Cuisine/ Food
Serbia	1. Built Heritage/ Archaeology 2. Rural Tourism 3. Environmental/ Eco-tourism
Macedonia	1. Built Heritage/ Archaeology 2. Mountains 3. Outdoor Activities

It can be seen that, with the exception of Montenegro and Greece, built heritage/ archaeology is identified as the strongest tourism asset for each of Albania's other competitors.

In order to differentiate itself from its competitors, Albania will need to offer more than built heritage if it is to fully realise its potential as a cultural tourism destination.

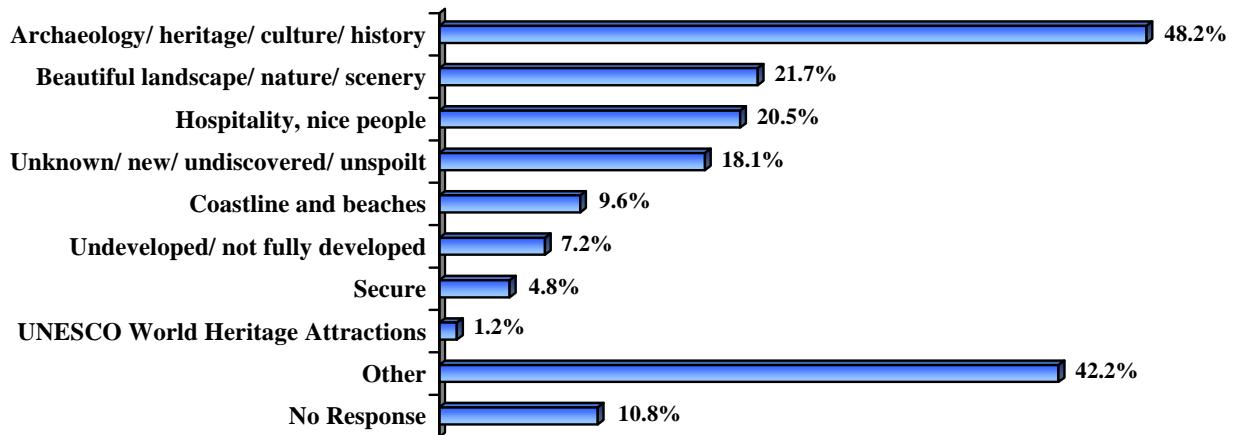
3.1.3 Albania in Focus

This section of the survey focuses in more detail on attitudes to Albania, experience and rating of its tourism product and infrastructure, and unique attributes associated with the country.

In a follow up question, travel trade representatives were asked to identify Albania's **main** strengths. In this regard, archaeology/ heritage/ culture is identified as the main strength by almost half of the respondents.

Three other strengths warrant mention. These are the country's beautiful landscape, the friendliness of its people, and the fact that it is a largely undiscovered destination.

Table 7 – Albania’s Main Strengths

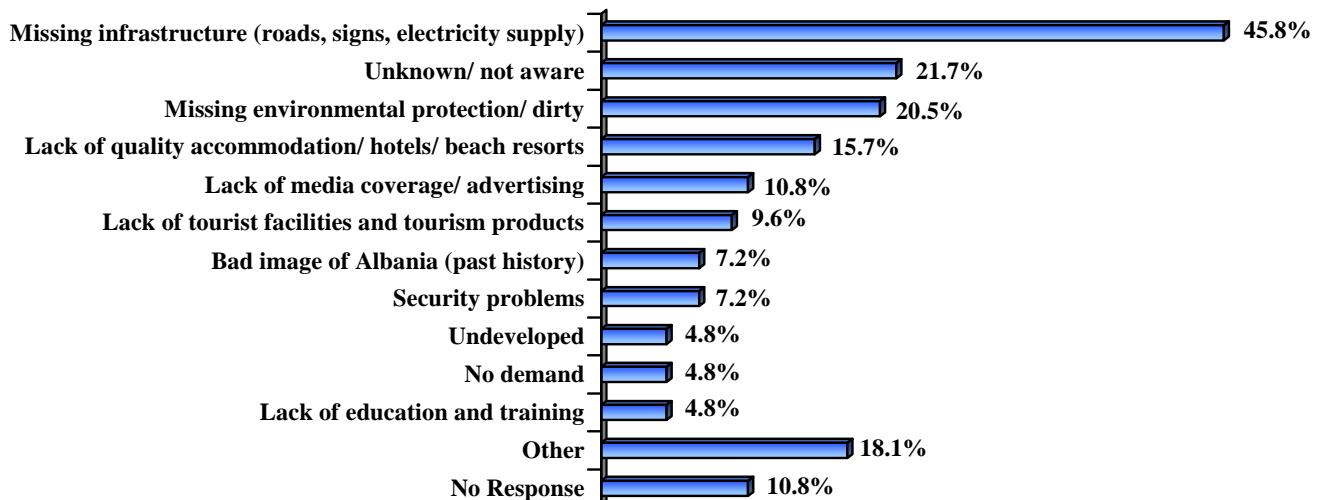


Travel trade representatives and opinion formers familiar with Albania nominate archaeology/ heritage/ culture as the country’s main strength, with landscape and ‘hospitality’ seen as supporting (nevertheless significant) attributes.

Executives who are not familiar with Albania on the other hand, identified the fact that the country is unknown and undeveloped (in tourism terms) as being of equal importance as archaeology/ heritage/ culture in terms of perceived main strengths.

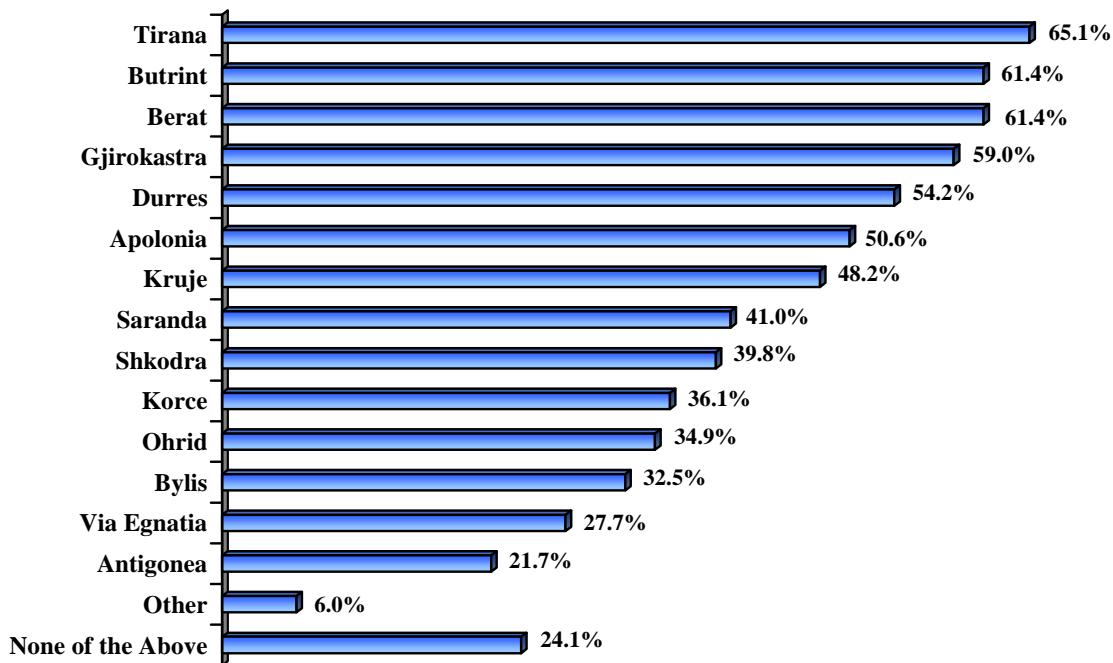
Inadequate infrastructure is identified as Albania’s main weakness by half of all survey respondents. A lack of planning and environmental protection policies allied to absence of quality accommodation was also highlighted as weaknesses.

Table 8 – Albania’s Main Weaknesses



Tirana, Butrint, Berat and Gjirokastra are the best known locations/ historic sites in Albania.

Table 9 – Albania Locations/Historic Sites heard of



Perhaps benefiting from its close proximity to Tirana, Kruje is the second most popular ranked location in terms of destinations **ever visited**, followed by Butrint, Berat and Gjirokastra.

Respondents were asked to rate Albania's historic sites across a range of criteria. As can be seen from Table 10 below, the poorest ratings were recorded in relation to [inadequate] visitor facilities at the country's historic sites.

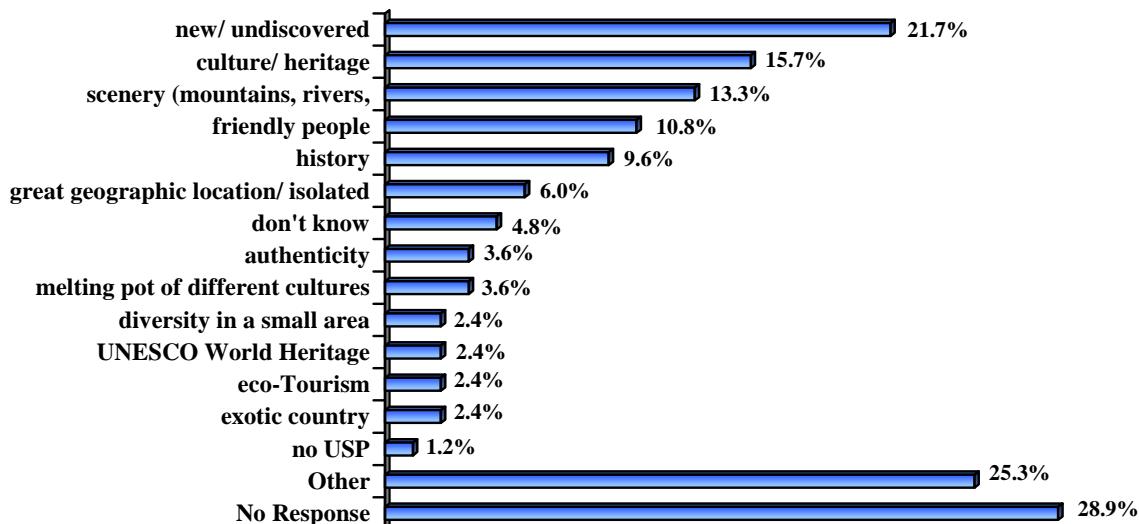
Table 10 – Rating of Historic Sites in Albania

		Very Good	Good	Fair	Poor	Very Poor	No Reply
Conservation of Historic Buildings	%	12	30	46	9	3	-
Interpretation	%	18	16	49	13	4	-
Visitor Facilities	%	-	16	44	33	4	2
Landscaping/ Site Presentation	%	7	44	31	13	4	-
Staff/Guides	%	9	49	22	9	7	-
Overall Site Management	%	7	20	42	27	2	2

There was no clear consensus amongst travel trade representatives and opinion formers regarding Albania's Unique Selling Proposition (USP). In other words, what, if anything, makes Albania different to other countries.

Albania Culture Marketing Strategy

Table 11 – Albania's Unique Selling Proposition (USP)



The lack of consensus regarding the country's USP is even more pronounced amongst those respondents who are familiar with the country.

3.1.4 Appeal of Potential Cultural Heritage Initiatives

In order to gain an insight into aspects of Albanian culture that are most likely to appeal to visitors, respondents were presented with a listing of possible tourism products. The following question was asked:

“How interested would visitors be in experiencing the following tourism products.”

The findings indicate potentially significant levels of demand for built and non-built aspects of Albanian culture heritage including food/ cuisine, Byzantine history and architecture, classical archaeology, rural lifestyles, and Ottoman history. There are also reasonable levels of interest in folk festivals, village celebrations and agritourism.

Albania Culture Marketing Strategy

Table 12 – Interest of Visitors experiencing the following Tourism Products

		Very Interested	Quite Interested	Not Very Interested	Not at all Interested	No reply
Classical Archaeology	%	33	49	5	5	8
Byzantine History and Architecture	%	36	43	8	5	8
Ottoman History and Architecture	%	30	46	8	7	10
Trekking	%	15	31	34	12	8
Mountaineering	%	8	25	41	16	10
Wildlife	%	23	36	23	8	10
Agritourism	%	7	34	34	15	10
Scuba Diving	%	7	13	41	30	10
Hunting and Fishing	%	3	11	38	38	10
Folk festivals	%	13	43	15	18	11
Food/ Cuisine	%	43	34	7	8	8
Rural Lifestyles	%	23	53	7	8	10
Village Celebrations	%	21	30	25	13	11
Coastal Villages	%	21	30	18	15	16
Other	%	3	2	-	5	90

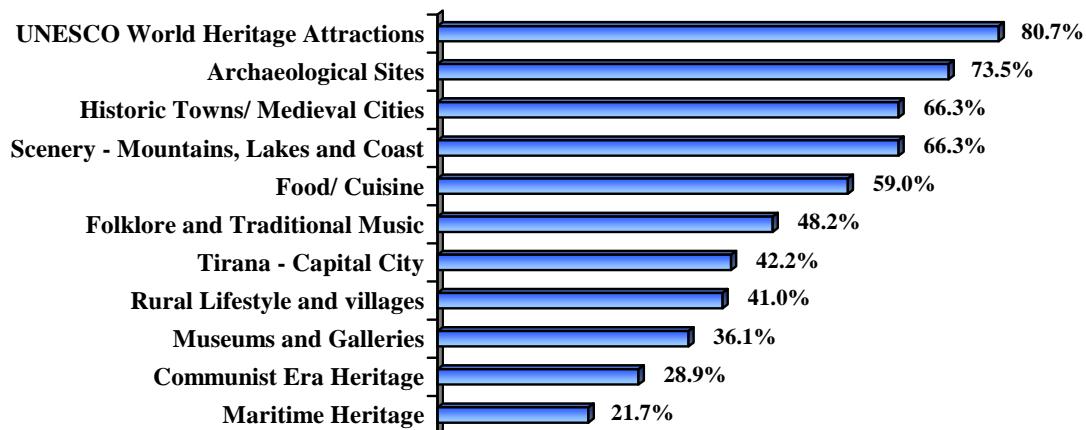
In a follow up question, travel trade executives and opinion formers were asked to identify aspects of Albania's culture heritage that are likely to appeal to visitors.

The findings indicate the appeal of the UNESCO World Heritage Attractions and the role which these can play in the development of cultural tourism in Albania. It is also clear that the country's other archaeological sites and medieval towns have an important role to play.

Opportunities also exist to differentiate the country by including traditional cuisine and visits to Albania's most scenic locations.

Albania Culture Marketing Strategy

Table 13 – Aspects of Albania's Cultural Heritage likely to appeal to visitors



There was no clear consensus amongst respondents as to the types of promotional/ marketing activities considered to have the greatest impact. There is broad support for a mix of marketing activities.

Table 14 – Promotional/ Marketing Actions

	Total	Sectors			Markets		
		Tour Operators	Travel Writers	Institutions	US/ UK/ Ireland	Europe	Albania
		%	%	%	%	%	%
TV advertising	19	18	-	36	8	18	40
Journals/ magazines	17	16	25	14	21	16	13
Attend trade fairs	16	18	-	14	21	11	20
Fam trips	13	16	13	-	8	21	-
Destination guide books/ brochures	15	8	13	43	13	9	33
Good motivational photos	4	3	13	-	-	7	-
More marketing/ advertising in general	22	21	50	7	29	23	7

Albania Culture Marketing Strategy

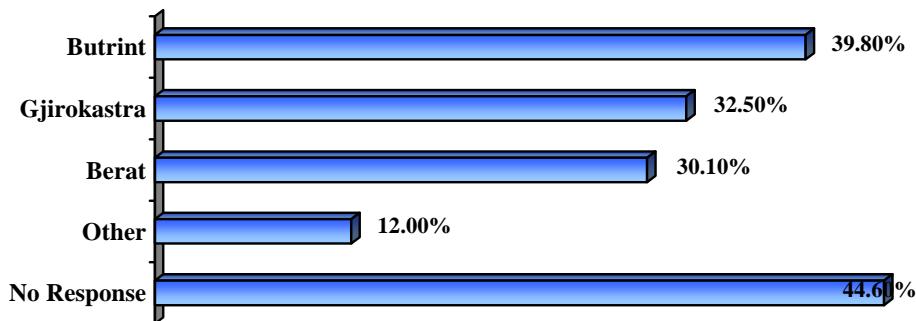
Travel Writers highlight the need for greater investment in marketing generally, while those International Institutions based in Tirana would like to see greater emphasis on TV advertising and commercial guidebooks.

Survey responses also indicate that the marketing mix will require adjustments for each of the main market areas.

3.1.5 Capitalising on UNESCO World Heritage Sites

On average, one third of respondents were aware of Albania's UNESCO World Heritage Attractions on a spontaneous/ unprompted basis. Awareness of Butrint was slightly higher than that recorded in respect of Berat or Gjirokastra. Spontaneous awareness of Iso-Polyphony was very low at less than 5%.

Table 15 – UNESCO World Heritage Attractions (unprompted)



A similar level of response was recorded in relation to UNESCO World Heritage Sites ever visited. Once again, the proportion of respondents claiming to have direct experience of the sites averaged one third.

Where Travel Writers are concerned the proportion claiming to have visited the UNESCO World Heritage Sites was significantly higher at 75% to 80%.

Tour Operators and Travel Writers were in agreement that the UNESCO World Heritage Sites offer a significant branding opportunity for Albania, and one which should be taken into account in the preparation of the Culture Marketing Strategy.

3.1.6 Other Measures

The travel trade identify an improvement to infrastructure, environmental protection measures and improved accommodation standards as measures necessary if Albania is to develop as a cultural tourism destination.

3.1.7 Summary of Findings

The principal findings can be summarised as follows:

- Within the Balkan region there is strong competition for cultural tourists. Tour Operators and Travel Writers familiar with Albania are more inclined to cite Albania as the Balkan destination most rapidly growing in popularity, followed by Croatia. Those not familiar with Albania, on the other hand, identify Croatia, Montenegro and (to a lesser extent) Greece as the countries in the region with growing market appeal.
- Albania's built heritage is seen as its strongest cultural and tourist asset. Archaeology and the built heritage are also seen as the prime assets of all regional destinations apart from Montenegro and Greece. In order to differentiate itself from its competitors, Albania will need to offer more than built heritage if it is to realise its potential fully as a cultural tourism destination.
- Three other Albanian strengths were mentioned. These are the country's beautiful landscape, the friendliness of its people, and the fact that it is a largely undiscovered destination
- Respondents who are not familiar with Albania on the other hand identified the fact that the country is unknown and undeveloped (in tourism terms) as being of equal importance as archaeology/ heritage/ culture in terms of perceived main strengths.
- Inadequate infrastructure is identified as Albania's main weakness by half of all survey respondents. A lack of planning and environmental protection policies allied to absence of quality accommodation was also highlighted as weaknesses.
- Those who have visited Albania's major attractions rated their quality, conservation and staffing as fair to good. Visitor facilities were rated as fair to poor and management assessed as fair.
- There is a lack of consensus regarding the country's Unique Selling Proposition. This is even more pronounced amongst those respondents who are familiar with the country.
- Visitors were most interested in experiencing the Albanian cuisine, built heritage and wildlife. This suggests that opportunities exist to differentiate the country by including traditional cuisine and visits to its most scenic locations.
- As might be expected from a sample of travel trade and media specialists there was no clear consensus as to the types of promotional/ marketing activities considered to have the greatest impact. There is broad support for a mix of marketing activities.
- Only one third of respondents were aware of Albania's UNESCO World Heritage Attractions on a spontaneous/ unprompted basis. Awareness of Butrint was slightly higher than that recorded in respect of Berat or Gjirokastra. Spontaneous awareness of Iso-Polyphony was very low at less than 5%.
- Tour Operators and Travel Writers were in agreement that the UNESCO World Heritage Sites offer a significant branding opportunity for Albania.

3.1.8 Conclusions

1. Awareness and Image

Albania faces a key challenge in terms of **raising awareness** with the travel trade and consumers alike. Many tourism professionals are unaware of what Albania has to offer as a destination. Ignorance and misperceptions of Albania's cultural and natural heritage assets are widespread.

The evidence suggests that individuals who are familiar with Albania have a positive image of the country overall and of its culture and heritage in particular.

2. Market Positioning

Many of the strengths associated with Albania (particularly built heritage/archaeology) are equally associated with the country's main competitors. In order to differentiate itself as a cultural tourism destination, Albania will need to develop **cultural holiday experiences** that combine the country's leading historic and archaeological sites (particularly the UNESCO World Heritage Sites) with other cultural experiences (ie mountains/ scenery, rural lifestyles etc).

3. Tourism Product and Infrastructure Development

Apart from the adoption of a professional marketing approach to raise awareness and promote Albania as a cultural tourism destination, other key issues will need to be addressed. Most important in this regard are the need for improved **environmental controls**, investment in **access/infrastructure** (ie roads, signage, etc) **human resource development** and **development of the tourism product**. A priority where tourism product development is concerned is the need for visitor facilities, interpretation and management at many of the country's most important archaeological/historic sites.

4. Marketing

A mix of marketing activities is recommended based on the adoption of a clear market positioning and branding for cultural tourism. To have the desired impact, it would be essential that marketing activities are sustained over time.

3.2 Lessons from Case Studies Lessons of Destination

Image Amelioration Campaigns

A major barrier Albania has to overcome in order to establish itself as a successful tourism destination is the country's image internationally. Among the majority of potential visitors the country has more negative connotations than positive. There is also a significant lack of awareness of the appeals and positive attractions of Albania. The challenge facing Albania is to dispel the negative aspects and emphasise the positive. This sort of challenge has been faced by many destinations in the past, though their image problems are varied – political, conflict, natural disasters, etc. Studying the approaches used by other countries and their tourism offices to improve destination image may provide some useful guidance for Albania.

To this end case studies of a variety of destinations suffering from image problems are analysed below:

- ❖ Balkan Region
 - Montenegro
 - Macedonia
 - Bosnia-Herzegovnia
- ❖ International
 - Jordan
 - South Africa

The information sought in relation to each case study was:

- Destination profile including population, GDP, tourism volume and value
- Image related challenges facing the destination
- Strategy for addressing these challenges
- Techniques used to effect change

Conclusions of relevance to Albania have been identified. The salient points with relevance to Albania are:

- Editorial coverage of the destination is far more powerful and credible than paid advertising. Advertising should only be undertaken when it can be afforded and in support of PR activity.
- Public Relations activity may be more labour intensive, but provides much better value for money than paid advertising
- Endorsements by international personalities carry great weight
- It is better to emphasise the positive rather than try and persuade people their negative perceptions are wrong
- A balance should be maintained between media, consumer and travel trade activity – stimulate the customer's interest, provide comprehensive information (website, guide books, etc.) and ensure there is product readily available to purchase at their local travel agency
- Devolve marketing planning, decision-making and implementation to a well resourced National Tourism Organisation

Albania Culture Marketing Strategy

- Ensure the National Tourism Organisation is staffed with well trained and motivated staff
- Stability in funding of the NTO is more important than the level of budget
- High quality standards for cultural and touristic products need to be introduced and enforced in order to give customer confidence (tour operators as well as individuals).
- Comprehensive and impartial information – primarily provided through the destination website – is expected as standard. Online booking – or at least referral to the supplier – is increasingly common
- An informative and well maintained website is crucial in today's marketplace and should be given priority over all other activity
- Small scale interventions by donors and other NGOs are most valuable in showing how progress can be achieved, but a national, coordinated approach is essential. It is better to implement strategies and master plans making adjustment in the light of experience than to take no action

These are only the key points. Many other useful conclusions may be drawn from the full case studies featured in Appendix B.2.

3.3 SWOT Analysis

The Strengths and Weaknesses of the Albanian cultural heritage in respect of tourism marketing are set out below together with the Opportunities for increased marketing and threats.

Strengths

- 3 World Heritage Sites – Butrint, Gjirokaster and Berat
- 8000 years of heritage with extensive range of remains from Illyrian, Roman, Byzantine, Venetian, Ottoman and Communist times
- Skanderbeg tradition and related sites / attractions
- Unique musical heritage – polyphony
- Distinctive, organic cuisine
- Emerging rural tourism product range
- Range of colourful and distinctive festivals
- Range of high quality museum collections – iconography, photography, etc.
- Strong and distinctive handicraft sector
- Distinctive traditional cuisine based on quality natural products
- Friendliness of the people
- Religious diversity and tolerance

Weaknesses

- Increasingly peaked tourism season – 50% of visits in July / August
- Negative images – litter, pollution, poverty, etc.
- Poor inter-institutional collaboration
- Lack of skill, funding and continuity in destination marketing
- Much of road infrastructure in poor repair
- Majority of attractions poorly presented and interpreted
- Lack of consistency in tourism marketing – both in personnel and activity
- No licensing of tour guides
- Lack of legislation and/or weak implementation resulting in uncontrolled and inappropriate development
- No quality control of accommodation and restaurants due to lack of registration scheme

Opportunities

- Network of Albanian embassies abroad
- Influential diaspora in main source markets
- Interest in Europe's "unknown" country
- Improving visitor data collection system
- Foreign media keen to discover this little known country
- Location – the close proximity to Western European markets

Threats

- Illegal development
- Failure to introduce and enforce regulations – accommodation, heritage conservation, pollution, etc.
- Competition particularly from other Balkan Destinations

Part 4 Culture Marketing Strategy Recommendations

4.1 Objectives

The objectives of the Culture Marketing Strategy are to:

- project an image of Albania internationally as a country with an outstanding wealth of cultural heritage assets – historic sites, built heritage and the performing arts
- create interest and desire among foreign populations to visit Albania for its rich and vibrant cultural heritage in which visitors can participate
- increase tourism to Albania from priority markets
- improve the seasonal and regional spread of tourism through the appeal of cultural attractions and events
- increase foreign currency earnings from tourism
- increase job opportunities in the culture and tourism sectors

4.2 Vision

Albania will, by 2015, have established itself as a vibrant country with an inspiring image as a highly attractive and welcoming destination for culture (and nature) based tourism.

4.3 Strategic Approach

The Cultural Heritage marketing of Albania has the twin objectives of enhancing the destination image and of increasing tourism. To achieve this cultural marketing needs to be integrated into and lead the overall destination marketing activity. Cultural heritage (incorporating the environment in which the people of Albania lived and live) should be used as a the spearhead for destination marketing in the form of touring routes, festivals, events and performances, and activities both in urban and rural areas.

The thrust of the cultural heritage marketing strategy outlined in this document as the means by which Albania can increase awareness and appreciation in all markets (including among the Albania population) of the rich and diverse cultural heritage possessed by the country. This will lead to a fuller and upgraded understanding of the country, manifested through increased inbound tourist flows and inward investment in tourism and, possibly, other economic sectors.

However, the present inadequacies in respect of development standards and institutional structures to implement the marketing and promotion campaign necessary to implement the strategy cannot be ignored since addressing these at the earliest possible time will be necessary for the strategy to fully succeed.

Albania Culture Marketing Strategy

The specific aspects that require to be upgraded in order to provide the necessary sound foundation on which the cultural heritage marketing strategy can be based with good prospects of success can be divided into two groups:

1. Development and Delivery Standards
2. Structural Reform and Strengthening of Institutions

4.3.1. Development and Delivery Standards

Marketing is about meeting customer needs profitably. In tourism, the primary needs of visitors are convenience, comfort, safety and health even before the touristic experiences are considered. Without these basic requirements, destination marketing campaigns cannot be fully effective.

Accommodation

Both prior to booking and during their visit tourists need assurance they will receive acceptable standards of accommodation whether they require de luxe or basic standard hotels, apartments, etc.

There is currently no provision for ensuring accommodation providers adhere to minimum standards as there is no regulation of the sector. In its draft stages the Tourism Law foresaw the need for a Tourism Standards Commission. This would have provided such regulation. This provision was omitted from the enacted law. It should be re-activated.

In some well developed countries, particularly where major accommodation chains are operative, self regulation of the hotel sector has proved possible. In Albania, where the hotel industry is dominated by privately owned small businesses, leadership and control need to be provided at government level. Currently there is a huge amount of unsupervised hotel and apartment development, where there is no guarantee that minimum standards of facilities are being provided. This is not acceptable to the discerning tourist.

A prime requisite, therefore, is the introduction of an accommodation registration scheme to establish and enforce minimum standards for the different grades and types of commercial lodging facilities to be used by tourists.

Development Planning

Uncontrolled and, in particular, inappropriate development can lead to the downfall of potentially excellent tourism destinations. There are plentiful examples of this in Spain and elsewhere. There is a great risk that Saranda and other resorts are heading down this route. Development is too congested and not sympathetically integrated to the resort. Developments are not linked to basic infrastructure requirements such as water, sewage and parking. A review of planning controls is needed and particularly their enforcement if highly detrimental development is to be avoided, that could otherwise impact extremely negatively on the destination image.

Environment

High on the list of Albania's weaknesses noted in surveys is the problem of litter. A litter-covered countryside is both a visual deterrent and a health hazard. It is also an indication that the country's environmental credentials are poor in terms of water protection and waste disposal. Particularly for a destination with major natural appeals such as the pure waters of Lakes Ohrid and Prespa and spectacular mountain ranges, this is a major hurdle to be removed before a positive image can be developed.

Transport

Although good progress is being made in the development of the Albanian road network and its quality, it has to be mentioned that standards are still well below acceptable European levels in terms of road width, surfaces and medians. One particular area of concern noted where existing roads have been widened or new roads built, is the stabilisation of the roadsides and hillsides. Landscaping and re-planting are often not being undertaken to ensure stabilisation and minimisation of environmental impact.

4.3.2. Structural Reform and Strengthening of Institutions

In view of the concerns noted above regarding the agencies involved in cultural heritage and its marketing, the consultants undertook a separate examination of Albania's institutions as far as they relate to, and impact on, the country's cultural heritage i.e. the Ministry of Tourism, Culture, Youth and Sports, the National Tourism Agency, and the various Cultural Institutions.. The findings, conclusions and recommendations of this exercise are reported on in a separate document – Cultural Heritage Institutional Structures. By matching the current structures to the proposed cultural heritage marketing strategy, the necessary strengthening of the relevant institutions has been identified and specified. The proposed structural and institutional reform is designed to equip the relevant institutions both to deliver the product and service that tourists will need and also to empower and professionalise these institutions.

While many of these improvements may seem to have little bearing on cultural heritage marketing, their implementation cannot be allowed to lag for fear of delivering poor quality product and service to visitors, which would be detrimental to the country's tourism image. Without early action, the marketing strategy is unlikely to succeed. The recommendations include:

Strengthening both the Ministry of Tourism, Culture, Youth and Sports, and the National Tourism Agency

A series of steps are proposed:

- establish a formal planning process, through close consultation between the two agencies
- create a close and regular working system between the policy and implementation arms of government,
- grant the NTA greater responsibility and authority, and provide it with more and better trained manpower, and increased operating budgets, and
- create working advisory committees involving the Ministry, the NTA and the tourism private sector – possibly through the recently-established Albanian Tourism Association

Cultural Institution Empowerment

Apart from the capacity building of the NTA, other cultural institutions within the MTCYS need to be given greater responsibilities in their operations. This applies particularly to budgetary control. Currently, there is little or no incentive for cultural institutions to be service and commercially orientated. Any revenues they generate tend to be lost to them. The provision of revenue-raising visitor services, promotional activity to increase visitor numbers, and so on, should be encouraged by permitting the institutions to retain revenue thus generated.

Inter-Ministerial Collaboration

Although there is communication and collaboration between Ministries this needs to be strengthened. Closer collaboration between the MTCYS and Ministry of Education, which oversees the major cultural heritage Institutes, is needed. This is a particularly significant issue given that not all cultural heritage marketing activities relate to inward tourism and, thus, the responsibility of the NTA. Many activities such as overseas exhibitions as part of the Independence Centenary celebrations will fall under the Ministry (and possibly other government agencies) through the diplomatic offices.

The improvement of tourism related statistics is a major concern and better collaboration between the MTCYS, the National Statistics Office, Immigration Department and Bank of Albania is needed to improve the statistical collection and analysis systems. This collaboration will better meet the needs of each agency as well as of the NTA.

Human Resources

With the rapid expansion of the tourism and cultural heritage sectors it is not surprising that there is a lack of qualified personnel both in the accommodation and catering industry and in cultural tourism operations and management. A comprehensive review of the tourism related HRD requirements for the next 10 years is needed to identify the staff numbers and skills and specify training provision.

In the NTA and Cultural Heritage Institutions it is recommended that a Training Needs Assessment be undertaken. This should identify both the practical skills training requirement for front line museum and attraction staff - basics such as customer care and brochure design and distribution – and also specialist skills such as marketing and IT for NTA staff.

The Training Needs Assessment for NTA should not only consider capacity building requirements but also possible restructuring.

4.3.3. Approach to the Marketing Strategy

The marketing approach requires a structured and integrated planning process based on those products that are market ready – see assessment in Appendix B.1.1. - and give Albania a competitive advantage. A clear tourism development policy is the basis for the preparation of both a destination's product development and marketing strategies, using a product: market matching process and using aspects of the destination that provide a positive differentiation from its rivals. The marketing strategy is then expressed through a series of steps: positioning of the destination and its tourism products focusing on those features that are both distinctive and superior to its competitors; targeting marketing activities towards those market segments identified through research to hold the greatest potential for the destination; and design of the mix of marketing and promotional tools and techniques to achieve the greatest level of conversion of the market potential. The marketing plan translates the principles of the marketing strategy into a programme of activities for implementation to ensure its achievement.

Policy>strategy>planning>implementation is the sequence. Without it, no destination is likely to achieve its full potential.

Policy and Positioning

Albania's differentiation and advantage over its regional competitors relates to its cultural and natural heritage. No other nation in the Balkans can claim as much variety in its cultural heritage as Albania, having experienced a succession of occupiers over the centuries each of whom has left a rich heritage in terms of archaeological sites, historic buildings, traditional dress, customs and legends, music and art, and food and drink. In combination these treasures are unique but also serve to complement those of its neighbours. Furthermore, many of the aspects of Albanian heritage relate to the land in which the people lived – particularly the mountains and lakes since the coastal plains were less easy to defend leading the inhabitants to live in the upland areas. It would be a failure to maximize the distinctiveness of the country if Albania's cultural and natural heritage were to be separated in respect of the image presented overseas. By focusing on cultural and natural heritage in its marketing policy, Albania can establish a distinct niche for itself in tourist markets.

Albania needs to position itself as distinct from its neighbours in the Balkans, concentrating on its rich and varied cultural heritage. The country needs to position itself as offering historic and living cultural diversity in a dramatic and varied landscape. This should compete with the positioning of neighbouring countries – Montenegro / mountains; Greece and Croatia / beach tourism; Bosnia and Macedonia / built heritage.

This cultural diversity and the religious tolerance in Albania are valuable assets to be used in the market positioning of the country.

Product: Market Matching

The consultants' analysis reported on in section 2.1. found that 20 cultural heritage sites and features in Albania are already ready to be presented to the market. These attractions should be the focus of short term marketing and promotional activities and spearhead the cultural heritage marketing strategy. At the same time, every effort within available financial and human resources should be made to increase the volume of sites that are market ready through an ongoing programme of development and training work to:

- improve access to the sites and features e.g. roads, signposting at key intersections on the way,
- improve the sense of arrival and welcome at the attractions e.g. reception kiosk/visitor center, appropriate amenities such as toilets, retail and catering outlet,
- improve interpretation of the attractions e.g. interpretation boards in English as well as Albanian that are well designed and maintained, simple leaflet (again in main visitor languages), audio guides, supply of well informed and trained tour group guides,
- produce and distribute publicity materials and information on the attraction.

Not all market segments will respond in the same way to Albania's cultural heritage attractions. Visitors from other Balkan countries may be less interested in the archaeological sites than those from Western countries since they have similar sites in their homelands. The Albanian diaspora will have more knowledge about the sites and attractions than other visitors since they represent part of their own background – albeit in many instances a distant part. However, even within the geographic markets, visitors will exhibit different levels of interest. As explained in the Introduction, each market segment for a product offering divides into three broad sub-segments related to high, moderate and low interest in the particular product. Application of this stratified approach to the different main geographic markets is presented in section 4.4.

Marketing Planning

The development of an annual Marketing Plan should become the focal activity of NTA. This will set objectives including the enhancement of Albania's image as a tourist destination and feature the country's cultural heritage as the prime attraction alongside its natural heritage and activity appeals.

Product Presentation

An on-going programme of training and development work is required in order to:

- Improve access to attractions – roads and signposting all the way to the attraction
- Improve the welcome at attractions – reception and appropriate amenities (toilets, café, shop, etc.)
- Improve interpretation – from simple leaflets to audio guides
- Produce and distribute publicity materials and information

Branded Routes – Positives and Possibilities

Themed itineraries have three merits. They can be:

1. used to create an identity for a destination,
2. designed to broaden the geographic spread of visitors, thereby creating positive economic impact in many parts of a destination, and
3. a means to increase the visitor's stay in a destination, thereby generating a higher spend.

Albania has a number of possible thematic routes:

- Via Egnatia – including possible southern loop
- Byron Trail – following in the footsteps of the nineteenth century British poet who visited Albania as part of his Mediterranean journey. (NB a second possibility in a similar vein could be a trail related to the journeys in Albania of Edward Lear – a celebrated nineteenth century British landscape artist and writer)
- The UNESCO World Heritage Site Trail (though present road conditions necessitate an amount of doubling back since the road between Berat and Tepelene is not serviceable for tourist vehicles)
- The Illyrian Way – a north-south route including the Gjirokaster loop.

These four possibilities embrace a Roman name, a personage known to most people in Western markets, the world-renowned UNESCO sites, and an ancient Albania name.

Cultural Festivals and Events

Cultural festivals and events can serve as a means to attract a visitor to a destination that he/she might not otherwise make since they provide a focus for the visit. The event can both be an end in itself and act as a sampler of the destination in which it is being held, serving to encourage a possible return visit involving a longer stay.

Themed festivals and events can also be held during shoulder and off season times thus extending the visitor season for a destination.

A third role for festivals and events is that they can be used as a means to raise awareness of a given theme or topic – in this case, the Albanian population's awareness of its rich and diverse past and present cultural heritage.

Each of these three possible roles exists in Albania in respect of the country's cultural heritage. Performances of Albanian theatre, opera, ballet and traditional music (e.g. iso-polyphony) can serve to attract Western visitors and raise awareness among Albanians.

Crucially, however, the organization of such events should be finalized and information disseminated sufficiently far ahead of the event to permit advance planning for the foreign visitor. A timetable of festivals and events published six months ahead, with an on-line booking facility is a necessity for the full potential of a dedicated cultural arts programme of festivals and events to be successful.

This will entail overcoming the present major restriction of the late confirmation of funding for festivals and the performing arts such as the National Opera. It is recommended that the major institutions and festivals be given a three year rolling budget. This would allow far better forward planning and promotion of their programmes.

Information

To make the product range accessible, information on all aspects of the cultural and tourist offer needs to be made available to visitors when and where needed. This includes a continuation of the current development of a network of official Tourist Information Centres

In particular the NTA website (and data bases) needs to be expanded to provide planning information to potential visitors and tour operators:

- Include maps of the country and main towns. Also links from individual pages to maps, e.g. town names (map reference or electronic link)
- Include a complete directory of approved accommodation – hotels, guest houses, apartments, etc. - not a separate hotel section – a search engine also to identify accommodation by type, location, standard
- Improved listings of attractions by town / region
- Expand the directory of events and festivals (not just national holidays), including contact details for bookings at events etc.
- Provide links to Opera and Ballet websites or feature their full programme
- Provide link to festival sites or feature their programmes
- Include suggested itineraries, i.e. the branded routes

4.4 Components of Five-Year Culture Marketing Strategy

In developing the most appropriate culture marketing strategy for Albania, it is important initially to recognise that there are two broad components: first, the strategy that will result in foreigners being attracted to Albania as tourists; and, second, those components of the strategy that communicate the country's cultural heritage through media that the foreigner can experience in his/her home country. Tourism involves bringing the foreigner to Albania – the 'pull' approach; while exhibitions, performances and media features abroad constitute taking the cultural heritage to the foreigner – the 'push' approach.

The focus of the marketing strategy presented in this document is the overseas visitor but where there are applications that can be undertaken overseas that will strengthen the impact of the proposed strategy in respect of raising the profile and image of Albania these are incorporated within the strategy. In particular, the short term opportunity afforded by the Centenary Independence celebrations in 2012 for a series of overseas cultural activities – i.e. art exhibitions, cultural performances - can directly boost foreigners' awareness and appreciation of Albania and its cultural heritage. These are incorporated within the separate short term Action Plan prepared in implementation of the Marketing Strategy outlined in the present document.

In devising a destination marketing strategy, two key questions need to be addressed. What products are available and being focussed on in order to establish a growing visitor economy in the country? What markets and segments within those markets are being targeted through marketing and promotional activities?

The Cultural Heritage Product

As stressed throughout this report, all destinations should seek to match their product offering with the markets segments that show the greatest potential and that they wish to attract. No consideration of the Albanian cultural heritage product can thus be made in isolation of the market and its demands. In identifying the most appropriate individual, and mix of, cultural heritage products to be featured in the marketing strategy, it is essential to consider the composition of the market and what it is looking for.

All tourism market segments can be seen as a triangle with those with the most dedicated interest – almost an academic research-based interest – at the peak, the small area indicating the relatively small number of such persons. Further down the triangle, as it broadens out, can be found those with a strong interest in the subject but who wish both to learn about it, and to enjoy the experiences provided by it. People who have only a passing interest in the subject tend to be grouped towards the bottom end of the triangle. The further down the triangle, so there are the greater volume of people. Thus, while their interest in the subject may be limited – say limited to a half day visit to a museum on a week-long vacation – the high numbers of such visitors result in a greater economic impact for paid facilities than from the small volumes of those with an intense and serious interest in the subject.

Tourism product planning on the principle of product: market ‘matching’ needs to satisfy the three E’s of education, entertainment and excitement to maximise the benefits from all persons, with the focus on the educational component for the top end of the triangle through a much stronger emphasis on the entertainment and excitement elements for the large volumes of those without a specialised interest. Specifically relating this principle to cultural heritage tourists, we can classify those at the top end of the triangle as *motivated*, the larger volumes in the central parts as *inspired*, while the largest numbers towards the base are *incidental* cultural tourists.

Examination of the different market segments is further complicated by the fact that, apart from the dedicated – motivational – cultural tourist, the other categories of cultural tourist are interested in more than the cultural heritage of the destinations they choose to visit, but instead look for a mixture of things to do and see that give them a full appreciation of the destination. Such a desire typically manifests itself by combining visits to urban and rural locations, by experiencing both the cultural and natural heritage, and both by looking and doing. Isolating cultural heritage from the other components of a destination is, thus, an artificial exercise, as it does not relate to how visitors behave.

Further, cultural heritage is made up of the ways in which the population of a given location expresses itself in relation to its history, social systems, values, and their relationship with the environment in which they live. A location’s topography, ecosystems and biodiversity cannot, thus, be divorced from the cultural heritage of the people who inhabit it. Cultural and natural heritage should be seen as part and parcel of the destination’s total heritage. The growth of interest in all facets of a destination’s heritage led to the classification by the National Geographic magazine of the *geotourist* market segment. Geotourists occupy much of the central parts of the consumer demand triangle. It is this broad segment that Albania’s heritage (cultural and natural) can be targeted at most beneficially – both in respect of economic contribution, and image improvement.

Albania Culture Marketing Strategy

This explanation can be seen to be consistent with the December 2005 *Strategy and Action Plan for the Development of the Albanian Tourism Sector Based on Cultural and Environmental Tourism* (UNDP, author: Lawrence Pratt) in which it is stated:

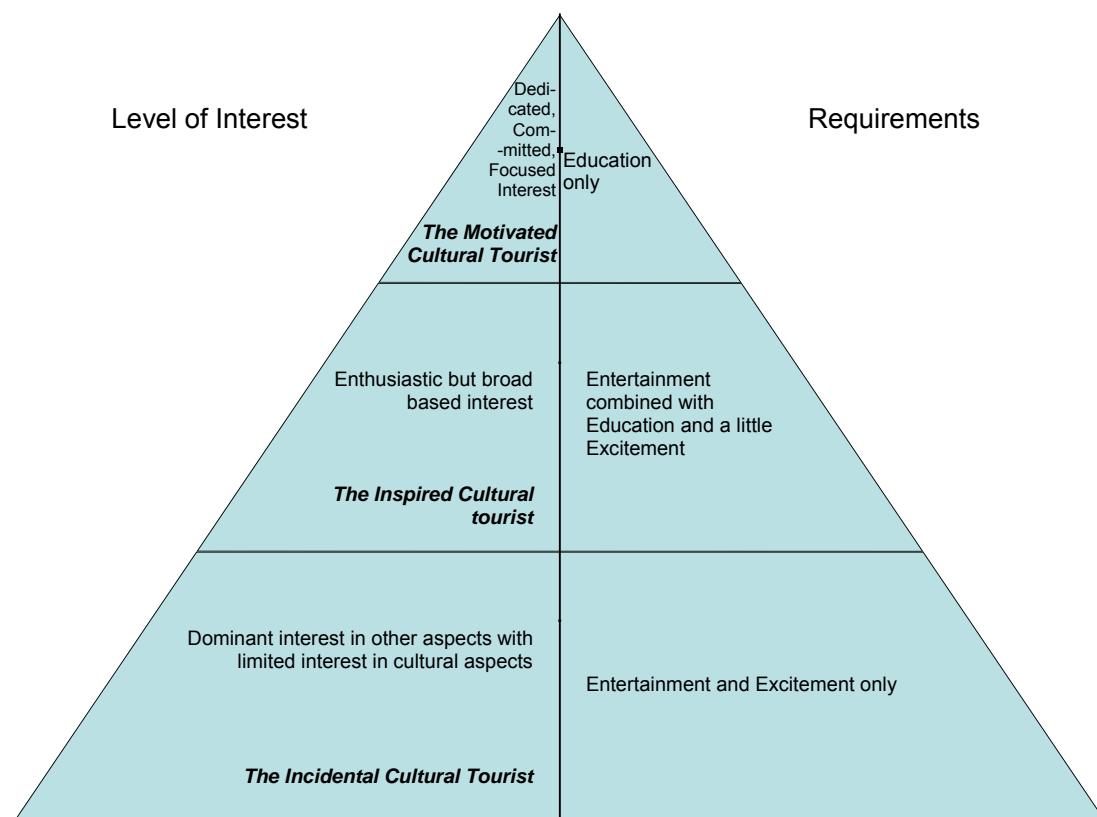
"Albania's central product will be the "discovery" of Albania. The product is a presentation of a broad cross-section of Albania's history, nature, archaeology, living culture, cuisine and hospitality. Visitors participating in this discovery will leave with a lasting impression of the diversity, complexity and beauty of the culture and the land.

Albania will specialize in attracting educated, independent travelers and specialized group travelers. The principal target markets will be upper-middle income individuals from Europe (primarily northern Europe and the United Kingdom) and North America.

The discovery of Albania through its natural and cultural attractions is of interest primarily to educated, relatively affluent international tourists. This demographic segment spends considerably more for tourism products that include new experiences such as education, adventure and culture. In addition, their spending patterns are highly favorable for development, as they prefer to interact directly in the communities they visit (shops, restaurants, and other local businesses) and tend to purchase a great deal of locally provided products and services, in particular excursions, guided cultural and nature tours, adventure experiences, and handicrafts.

This segment does not make a strong distinction between cultural, natural and other tourism products. Visitors in this segment tend to combine many different activities during their visit, and usually see the various natural and cultural activities as part of the process of discovering the destination."

Table 16 – Level of Interest and Requirements of Cultural Tourists



Albania Culture Marketing Strategy

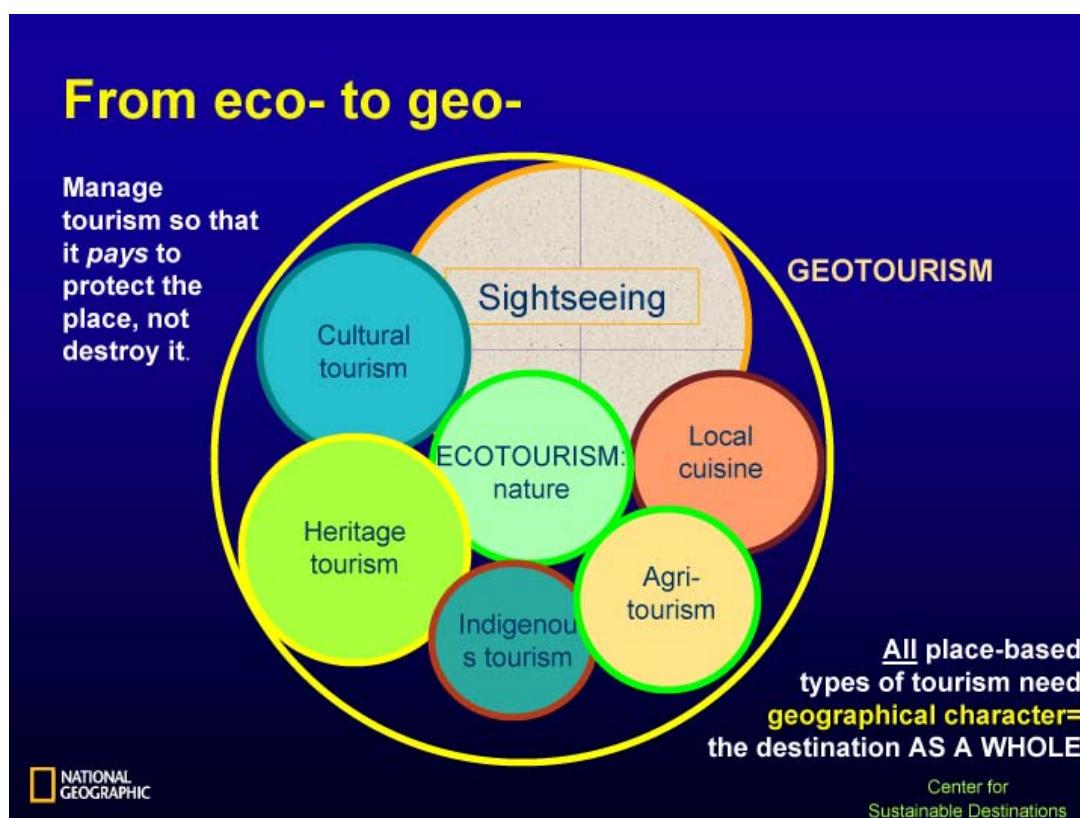
For the purposes of this report, the term 'cultural tourism' will be taken to relate to this broad definition incorporating elements of the environments in which people live, and having appeal to *geotourists*.

It should be noted that the foregoing analysis is not to diminish in any way the significance and growing importance of the cultural heritage component of tourism. Indeed there is a considerable body of evidence from UNWTO studies to indicate that overseas visitors are increasingly interested in the historical, artistic and societal features of the destination they visit. It is also significant to point out that cultural heritage, as a definer and differentiator, plays a more important role in brand identity for many destinations – a key factor for Albania.

The significant point, however, is that visitors wish to experience the cultural heritage of the countries they visit as *part of* their growing engagement with, and desire for, direct access to all authentic aspects of their chosen destination – the *geotourist*. In essence, in Albania's case, the rewards both in respect of overseas recognition and the economic benefits of increased inbound tourism will be far greater by combining the narrowly defined cultural heritage of Albania with the broader range of heritage reflecting the lives and lifestyles of the people of the country.

To facilitate understanding of the concept and requirements of geotourists, the National Geographic Center for Sustainable Destinations is reproduced below. This shows that cultural heritage is a component of geotourism wrapped around with all other aspects related to the environment and lifestyles of the people of the destination.

Table 17 – Geotourist Requirements



Markets and Segments

Applying this broad sub-segment analysis to the four main geographic markets – i.e. regional, diaspora, domestic and Western – the following conclusions are drawn from the research programme undertaken by the consultants:

1. the **regional** markets will fall predominantly in the *incidental* cultural heritage visitor category, drawn principally by the coastal resorts and the multiple attractions of Tirana. They will visit cultural heritage sites en route (e.g. Shkoder, Kruje, Durres, Butrint) to their chosen destination but are unlikely to go out of their way to visit other sites.
2. the **diaspora** will feature all three categories, most such visitors to their original homeland wishing to see and experience a wide range of places and things of interest from both the past and present. Specific sites will be sought out by some visitors, such sites having a personal relevance to them. Such visitors may be expected to be more forgiving of shortcomings in the presentation and maintenance of sites than Western visitors might be. Visitors from the diaspora are likely to visit a wider range of cultural heritage sites and attractions, motivated to do so by their family's background.
3. there are already significant volumes of **domestic** tourists at the primary cultural heritage attractions but few of the Albanian population – particularly the younger age groups - know much about the many sites that are not market ready. Increasing Albanians' awareness of their own cultural heritage is an important goal for this programme. The primary tools to create such awareness are through themed festivals and events, as well as information and publicity encouraging visitation.
4. the triangle related to the scale of demand for the *motivated, inspired and incidental*, is unlikely to be fully played out in respect of **International (particularly Western) market** visitation to Albania – at least in the short to medium term. Though the proposed focus on Tirana City Breaks will undoubtedly draw some visitors with little interest in Albania's cultural heritage, the great majority of visitors attracted from Western markets to Albania will place a high score on cultural heritage as the prime reason why they chose to visit the country. Most Western visitors will therefore fall in the *motivated* and – particularly - *inspired* sub-segments. While the *motivated* cultural heritage visitor will go off-the-beaten-track to pursue an a specific interest, the bulk of Western visitors will be seeking the mixture of education and entertainment from the cultural heritage sites and attractions they visit. The itineraries for these visitors should, therefore, concentrate on those features that are market ready.

Priority Markets

Concentrating on foreign markets – since these will be those most sensitive to marketing and promotional activities, Albania's source markets fall into two groups – regional and international. The regional markets – Kosova, Macedonia, Montenegro and Serbia - have a significant number of non-resident Albanians in their populations with a propensity to visit the motherland. They provided 63% of visitors in 2009 and have considerable growth potential. However, they contribute disproportionately to the high volume of July and August traffic to the coastal areas. This group of markets should be retained in the prime target group.

Albania Culture Marketing Strategy

It will be neither realistic nor cost effective to promote Albania in all markets. Consequently only the markets, which show the greatest potential for growth, should be addressed. Based on performance and growth in recent years the target markets are listed in the table below, sub-divided into leading and secondary markets. Leading markets should be covered by marketing and promotional activity on a substantial and continuing basis; while secondary markets can be targeted in due course and at a lower level of investment.

Table 18 – Target Markets

Regional Markets	International Markets
<i>Leading</i>	<i>Leading</i>
Kosovo	Greece
Macedonia	Italy
	UK
	USA
	Germany
<i>Secondary</i>	<i>Secondary</i>
Montenegro	Turkey
Serbia	France
	Switzerland
	Austria

Source: TDI analysis

The International target markets generated 26% of visitors in 2009. Cultural motivations are high in most of these markets. They also demonstrate a broader seasonal spread.

While direct promotion is not recommended in other markets, the maintenance of a quality Albania website will ensure that they have access to full information on the destination. The network of Albanian embassies also ensures a presence in these markets as a source of market intelligence and information dissemination. This selection of priority markets will need to be reviewed after the first three years of the strategy implementation.

It would also be important that consideration be given to the domestic market in considering the marketing of Albania's culture. Culture requires validation by today's generation and unless culture is consumed locally, it will lose its legitimacy for international markets. The raising of awareness of culture amongst the domestic Albanian population will require a separate strategy and action plan.

Market Segmentation

Given the current lack of data on the profile of visitors to Albania a sophisticated market segmentation is not possible at this stage. It is therefore recommended that a broad based approach be adopted based on the three categorisations of geotourist discussed previously:

1. Motivated Cultural Tourists

The holiday is motivated by the cultural element – their interest may be specialist or general interest, and their focus might be on permanent fixtures such as architecture or transient opportunities such as a festival.

2. Inspired Cultural Tourists

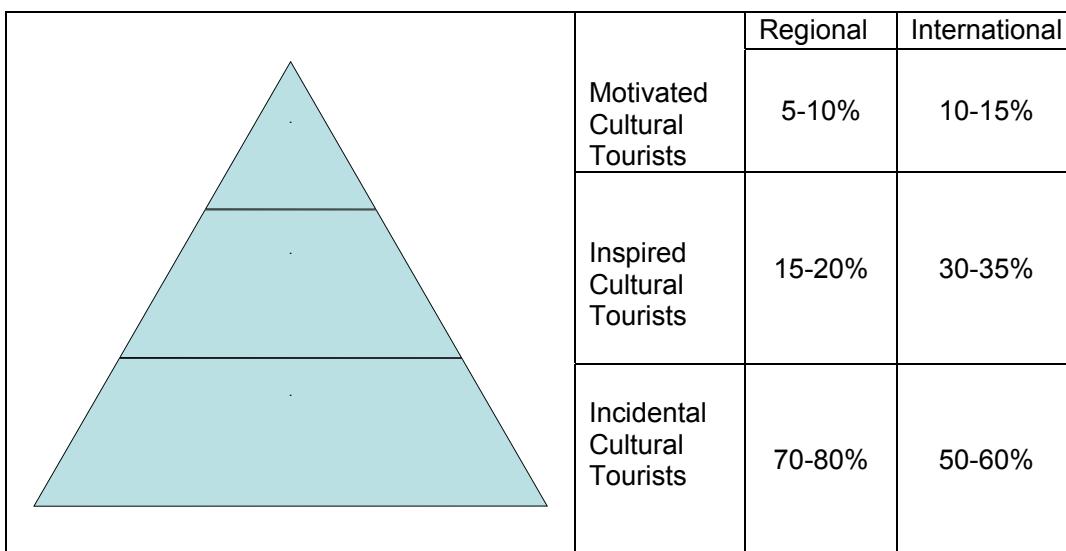
These have a strong, broad interest in Culture and Sightseeing. A large element of their holiday is inspired by the cultural opportunities associated with a destination.

3. Incidental Cultural Tourists

These typically have another primary reason for their trip and participate in cultural activities that are in keeping with their travel plans or itinerary.

As mentioned in the Introduction these categories form a pyramid with the Motivated Cultural Tourists forming the minority at the top of the pyramid. Without specific research it is not possible to quantify the percentage of each category for each market. However, indicative estimates of the relative importance of the sub-categories based on international experience in other destinations have been prepared and are presented in the table below, separately for Regional and International Markets.

Table 19 – Cultural Tourists Segmentation



Products

The recommended Albanian cultural heritage product range to be developed and targeted at the main segments is as follows:

1. UNESCO World Heritage Sites / Destinations
2. Themed Routes
3. Fixed Site Cultural Attractions (including UNESCO World Heritage Sites)
4. Festivals and Cultural Events
5. Tirana Arts and Cultural Events
6. Tirana City Breaks

Product:Market Matching

Based on this segmentation the following product:market matching has been developed:

Table 20 – Demand for Cultural Products by Market Segments

	World Heritage Sites	Themed Routes	Cultural Attractions	Festivals and Events	Tirana Cultural Events	Tirana City Breaks
Regional Markets						
Motivated Cultural Tourists	High	Medium	High	High	High	Medium
Inspired Cultural Tourists	Medium	Medium	Medium	Medium	High	Medium
Incidental Cultural Tourists	Medium	Low	Low	Medium	Low	High
International Markets						
Motivated Cultural Tourists	High	High	High	High	High	Medium
Inspired Cultural Tourists	High	High	Medium	Medium	High	High
Incidental Cultural Tourists	Medium	Medium	Medium	Low	Medium	High

Source: TDI analysis

Marketing Tools

The following initial ideas for marketing interventions/tools designed to facilitate the culture marketing strategy were identified by the TDI team during the course of the site visits and stakeholder discussions during Phases 1 and 2 of the study programme. These - and others identified in the meetings held in the early days of the Phase 3 programme of research and inquiry – were examined in consultation with the UNDP and the MTCYS - to determine, and reach agreement on, those interventions/tools to be subject to detailed specification in the consultants' subsequent work.

Albania Culture Marketing Strategy

Table 21 – Long list of potential marketing tools

Tool suggested	Issues
PR campaign material for use internationally	Requires the appointment of in-market PR professionals if the PR material is to effectively get to key media.
International personality endorsement campaign: either use famous Albanian artists as cultural ambassadors (writer Ismail Kadare, opera soprano Inva Mula, actor James Belushi, TV show ballet Kledi Kadiu, photographer of Miss America Fadil Berisha, footballer the captain at Sunderland Lorik Cana), or seek non-Albanian stars' endorsement.	Will require negotiation of contracts with stars – could be expensive in some cases.
Visitor information: website upgrade	Improve what is already there, e.g. <www.albaniantourism.com> already has a fairly comprehensive cultural tourism section
Heritage trails (e.g. Via Ignatia, Byron Trail, North-South Trail)	Excellent initiatives but not 'market ready'. Will require long term development.
Development of National Day as overseas promotion	Requires greater engagement between NTA and Ministry of foreign Affairs
Gift/briefing packs for use by embassies and others on promotion overseas - e.g. a luxury publication on Albania (history, heritage, people).	Difficult to ensure effective distribution of gifts.
Heritage Tourism Map of Albania	Needs to be part of wider campaign to be effective in attracting visitors.
Promotion of Marubi Collection images	Needs to be part of wider campaign to be effective in attracting visitors. Selling nostalgia rather than current culture.
Taste of Albania promotion	Can also use NTA food publication but requires a lot of coordination in Albania to be delivered as international product offer.
Gjirokaster Literary Festival	Good idea but not market ready for 2011
Tirana City Breaks	Requires strong private sector engagement
On line ticketing for national cultural institutions	If tool to be effective it requires international marketing if tourists to be attracted to national cultural institutions (City Breaks?)
Iso-Polyphonic Festivals abroad using Diaspora	Albanian Cultural Festivals already underway in USA.
Cultural tours overseas	Needs to be part of wider campaign to be effective in attracting visitors
Calendar of cultural events	Needs to be part of wider campaign to be effective in attracting visitors
Promotion of Albania as a film destination and attracting well-known film directors/producers (Hollywood, UK, France, Germany, Italy) to produce films in Albania affected by Albanian history (cold war), and cultural heritage.	Can be effective but films unlikely to limited to cultural heritage scenes and positive publicity. Stent Dragotti, (the Albanian author and director of the promotional campaign <i>I Love New York</i>), has expressed interest .

Development of Cultural Heritage Flagships and Touring Routes

The market ready cultural heritage attractions can be ‘packaged’ in a number of ways for presentation to markets, as:

- Flagship attractions
- Clusters
- Touring Routes

Flagship Attractions

Albania’s flagship attractions are undoubtedly its World Heritage Sites – Berat, Gjirokaster and Butrint. In terms of numbers of visitors these are closely followed by the National Historical Museum in Tirana and the Kruje museums. The renovation of the National Historical Museum and re-designation as ‘National Museum’ will further enhance its status. From a marketing viewpoint, these flagship attractions constitute a reason to visit for the motivated cultural tourist.

Clusters

There are several locations where the proximity of a number of attractions can be formed into a cluster, which in combination makes a visit appealing. These are Saranda, Gjirokaster, Korce, Vlora and Tirana each of which has at least half a dozen attractions within easy reach of each other.

Touring Routes

Probably the best way to promote the many cultural attractions is to present them as worthwhile stops on a touring route. Albania already has one such route, the Via Egnatia, created by the Romans two millennia ago. This route has its own brand identity already in place on which one can build.

The logical line for a further route or trail is the west coast road from north to south of the country incorporating loops to include Kruje and Tirane and also Berat and Gjirokaster. A brand name for this route needs to be determined. One suggestion is The Illyrian Way.

The problem with this route – or one specifically devoted to the three UNESCO World Heritage Sites – is that a certain amount of back-tracking is necessary with the present road structure and condition, with the link between Berat and Tepelene presently unserviceable for tourist vehicles.

The designation of a branded route need not be restrictive. It neither needs to feature solely Roman and pre-Roman heritage in the case of the Via Egnatia, nor does it need to adhere to a strict itinerary. Thus the Via Egnatia, although it enters Macedonia at Qafe Thana to the north of Lake Ohrid, should feature Korce and Pogradec to the south.

A touring route should feature all attractions of interest, including scenic excursions, on or within easy reach of its main itinerary. Its prime objective is to reveal the wealth of places to visit and thereby encourage travelers to spend longer in the country.

There are a number of ways to promote a tourist route. Firstly a map directory is needed. That is a route map identifying and explaining each route’s attractions.

Albania Culture Marketing Strategy

Secondly the branding of the route should be incorporated into the brown tourism road signposting. This acts both as a way finder and incites interest in the route itself among those not specifically following it.

Naturally promotional devices such as website entries and media visits should also be utilised.

Table 22 – Outline of Via Egnatia and Illyrian Way Touring Routes



Appendices

A. Situation Analysis

A.1 Programme of NTA Tourism Marketing Activity

It is perhaps more correct to say that NTA has, for the last few years, undertaken a varied programme of promotional activity rather than to speak of its tourism marketing programme. There has been no marketing plan based on research of markets and segments with potential, and no detailed matching of markets to appropriate product. The promotional activity has therefore been based partly on historical precedent and partly on ad hoc decisions.

There are a number of reasons for this approach. Previous occupants of the post of General Director have changed frequently and few have had the depth of experience of tourism and marketing that such a post demands. The organisation has therefore lacked consistent leadership and direction. Management staff are also lacking in the requisite skills. The budgetary process, whereby funds are rarely confirmed until the operational year has commenced, and then their release is not guaranteed, makes formal planning extremely difficult.

NTA's promotional activity has concentrated on TV advertising in regional markets; attendance at a wide range of tourism fairs in Europe; the maintenance of the Albania tourism website; and the publication of promotional materials. It has also undertaken some developmental work such as the extension of tourism signage.

Given the overall budget levels it is doubtful whether the cost of TV advertising can be justified if a balanced marketing programme is to be achieved. The exhibition programme appears to be a selection of events proposed by the Albanian trade rather than based on the selection of priority markets following research. There has also been no programme of familiarisation visits for tour operators and media linked to the exhibitions, capitalising on the contacts made. The publications, though of a high quality, have been produced in insufficient quantities to meet demand even by Albanian embassies abroad. The website is attractive, but deficient in a number of ways, principally in the provision of information on accommodation and events. The low cost medium of public relations, based largely on media familiarisation visits has been given low priority. Indeed it appears most such visits have been staged at the instigation of donors or Albanian embassies rather than based on NTA's own programme.

The natural and cultural heritage has featured strongly in NTA promotional activity. The NTA clearly needs consistent expert leadership, capacity building at all levels and a formalised planning process to structure its marketing activity. At the same time it needs security of funding however low it may be, and a much greater degree of freedom to make decisions itself.

A.2 Tourism Statistical Analysis

The core data on tourism to and from Albania is collected by the Central Statistical Office and the Bank of Albania in collaboration with the Immigration Department. This data is further analysed by the MTCYS and NTA. The collection of statistical data on visitors to and from Albania is in a state of flux. With assistance from the UNWTO definitions have been agreed between the interested agencies and in conformance with international criteria. Since September 2009 these definitions,

Albania Culture Marketing Strategy

linked to new computer programmes, are being implemented by immigration staff at all 26 entry points. There are, however, teething troubles.

In particular there are discrepancies in the recording of non resident Albanians and also in recording the purpose of visit correctly. Length of stay, sex and age band will henceforth be captured automatically. Day visits are also identified automatically.

Additionally to the NSO / Immigration collection of visitor data on a universal basis the Bank of Albania undertakes quarterly sample surveys at some border posts primarily to ascertain expenditure data. The questionnaire varies periodically, but generally includes questions relating to country of residence, length of stay, detailed purpose of visit and type of accommodation used. This in effect forms the core of a traditional exit survey. In collaboration with the NSO and NTA this survey could easily be expanded to include visitor profile questions and to assess visitor satisfaction, which would provide vital marketing and development data.

The UNDP sponsored an exit survey at Tirana International Airport from April 2007 to May 2008. This provides valuable profile information on visitors travelling by air who comprise some 15% of the total.

The MTCYS and CSO have endeavoured to introduce a regular hotel survey. Possibly because it seeks financial data, but also because it demands long term commitment from hoteliers with little perceived benefit, this has met with a lethargic response from the industry.

There is no mandatory registration of hotels or other accommodation with the MTCYS and consequently incomplete data on accommodation capacity, let alone occupancy, on which to base planning for development and marketing. This lack of data results in part from an unresolved issue of whether illegally constructed accommodation should be included in official data.

At ITB in Berlin in 2010 the MTCYS undertook a survey of visitors to the Albania stand to ascertain the sources of information that stimulated interest in the stand visit. This may provide an insight into pertinent promotional media.

A.2.1 Tourism to Albania

Total visitor traffic data comprises:

- Non-resident Albanians
- Foreign tourists
- Foreign day visitors

Summary data for the last two years is:

Visitors to Albania 2008-2009

	2008	2009	% increase
Non-resident Albanians	1,248,489	1,264,783	1.3
Foreign day visitors	83,013	118,199	42.4
Foreign tourists	1,247,125	1,667,846	33.7
Totals	2,578,627	3,050,828	18.3

Source: NSO / Immigration

Data on Foreign Day Visitors and Foreign Tourists are normally expressed jointly. These annual totals indicate the slow growth of non-resident Albanian traffic and that the majority of growth is coming from foreign visitors, especially on day visits.

Albania Culture Marketing Strategy

There has long been a considerable peak in foreign visits in the summer months – in 2005 40% arrived in July and August. The growth in foreign visits has exacerbated this peak with half of all foreign visits taking place in July and August 2009. This emphasises the need for off-season marketing.

Seasonality of Foreign Visitors to Albania 2005-2009

Month	2005	2006	2007	2008	2009	2009/2008 %
January	32,321	37,630	49,437	55,635	58,640	5.4
February	25,214	33,107	41,173	52,284	52,787	1.0
March	33,471	41,345	53,532	68,942	62,933	-8.7
April	41,891	58,723	70,040	76,867	98,735	28.4
May	49,148	66,696	77,577	97,995	113,362	15.7
June	62,201	73,402	93,533	123,249	135,740	10.1
July	139,446	173,124	201,428	251,926	469,109	86.2
August	163,681	197,976	215,120	257,185	411,252	59.9
September	70,805	82,731	95,148	101,461	119,358	17.6
October	49,286	57,181	75,109	91,319	100,783	10.4
November	39,840	45,227	54,994	65,691	73,165	11.4
December	44,533	58,914	71,674	87,584	90,181	3.0
Total	751,837	926,056	1,098,765	1,330,138	1,786,045	
% increase		23.2	18.6	21.1	34.3	
% in July/August	40.3	40.1	37.9	38.3	49.3	

Source: NSO / Immigration

There are 26 points of entry into Albania – 20 land border crossings, 5 seaports and Mother Teresa International Airport. The airport is served by 12 airlines with flights from 33 cities. The majority of visitors arrive by road.

Means of Transport of Foreign Visitors - 2008

Month	Air	Sea	Land	Total
January	11,101	3,498	41,036	55,635
February	11,011	4,049	37,224	52,284
March	14,851	6,847	47,244	68,942
April	14,778	7,356	54,733	76,867
May	16,974	12,142	68,879	97,995
June	19,839	17,867	85,543	123,249
July	29,730	45,715	176,481	251,926
August	22,024	32,232	202,929	257,185
September	17,861	16,493	67,107	101,461
October	16,653	11,798	62,868	91,319
November	13,076	5,098	47,517	65,691
December	16,235	19,241	52,108	87,584
Total	204,133	182,336	943,669	1,330,138
%	15.3	13.7	70.9	100.0

Source: NSO / Immigration

The summer peak in visitors comprises mostly arrivals by road.

There is a very high percentage of Leisure and VFR visits, though unfortunately no distinction is made between these two categories.

Purpose of Visit - 2008

Purpose	Visits	%
Leisure and VFR	1,104,283	83.0
Business	81,095	6.1
Other	61,745	4.6
Day Visit	83,015	6.2
Totals	1,330,138	100

Source: NSO / Immigration

Principal source markets of foreign visitors are as follows:

Main Source Markets 2007-2009 – Visits by Nationality

	2007	2008	2009	% of all 2009 Visits
Kosovo	336,322	324,771	674,214	37.7
Macedonia	224,348	341,801	306,714	17.2
Montenegro	105,636	120,125	118,731	6.6
Greece	58,217	85,505	100,171	5.6
Italy	84,680	98,573	98,919	5.5
UK	52,918	60,043	56,734	3.2
USA	43,779	50,354	48,599	2.7
Germany	31,181	38,428	47,240	2.6
Turkey	21,812	32,575	40,561	2.3
Serbia	*	59,557	25,542	1.4
France	16,527	18,369	19,342	1.1
Poland	11,026	14,427	17,037	1.0
Switzerland	9,157	15,660	15,960	0.9
Bulgaria	11,141	13,210	14,327	0.8
Austria	12,816	12,292	11,809	0.7

* included in Kosovo

Source: NSO / Immigration

These are the markets on which promotional activity should be concentrated.

The 2007/2008 UNDP sponsored Airport Survey gives insights into one market segment. Unsurprisingly 52% of air travellers were on business compared to 6% of all visitors. 14% were on leisure visits and 29% VFR. Indications of interest in cultural activity is indicated by the fact 25% visited museums during their stay and 16% attended local music concerts.

Albania Culture Marketing Strategy

Better purpose of visit data might give an indication of the demand for cultural activities but unfortunately is unreliable. However, visits to national parks and museums give an indication of the popularity of these cultural attractions both to domestic and foreign visitors. A quarter of visits are made by foreign visitors with the most popular attractions for them being Gjirokaster and Berat.

Visitors to National Parks and Museums - 2009

	Domestic	%	Foreign	%	Total
Amantia	435	55	353	45	788
Antigone	1,839	83	390	17	2,229
Apolloni	5,570	64	3,133	36	8,703
Butrinti	36,194	72	13,936	28	50,130
Bylis	6,939	97	246	3	7,185
Shkoder	17,774	66	9,007	34	26,781
DRKK Berat	7,788	42	10,908	58	18,696
Historical Museum	88,713	88	12,006	12	100,719
Kruje Museum	61,625	90	6,975	10	68,600
DRKK Durrës	9,676	66	4,957	34	14,633
Independence Museum Vlora	1,565	59	1,096	41	2,661
Gjirokaster Castle	1,750	12	12,476	88	14,226
Medieval Art Museum Korce	3,322	60	2,174	40	5,496
DRKK Vlora	2,154	68	1,026	32	3,180
Onufri Museum Berat	3,130	60	2,075	40	5,205
Ethnographic Museum Berat	1,793	65	980	35	2,773
M. Ark. Korce	2,735	94	183	6	2,918
DRKK Saranda	0	0	70	100	70
Totals	253,002	76	81,991	24	334,993

Source: MTCYS

This is more than double the visits recorded in 2008, indicating a significant increase in interest by both foreign and domestic visitors in the nation's heritage.

Visitors to National Parks and Museums - 2008-2009

	2008	2009	+ %
Domestic	94,142	253,002	169
Foreign	65,347	81,991	25
Totals	159,489	334,993	110

Source: MTCYS

Visitor Expenditure is calculated as follows:

Year	€million	% increase
2007	1,002	
2008	1,170	16.8
2009	*1,240	6.0

* estimate

Source: NSO / Bank of Albania

The increase in earnings is commendable in a time of economic downturn in most source markets. However, earnings have not increased anywhere near as rapidly as visits.

Summary

The visitor traffic to Albania is increasing at a faster rate than to other destinations in the region. This is to be expected for an emerging tourism destination. Regrettably this increase is predominantly in the peak months of July and August, when tourism facilities are already under great pressure.

At the same time there is a significant increase in visitation to cultural and heritage attractions by foreign visitors (and Albanians).

There is evidently an urgent need to improve the seasonal spread of tourism. As the heritage and cultural attractions are largely of year round appeal, the increasing interest in them needs to be capitalised on to achieve both seasonal and geographic spread.

B. Product : Market Analysis

B.1. Cultural Heritage Products

B.1.1 Inventory of Cultural Heritage Sites and Attractions

It is not feasible to develop or promote all heritage products to the visitor market. For a variety of reasons not all heritage assets, even some with major historical significance, will appeal to visitors. It is necessary therefore to identify those heritage attractions which will be of primary interest to tourists.

It should be recognised that, unfortunately, most visitors are limited in their appreciation of history, art, architecture. They tend to be interested in those that have a “wow” factor, i.e. are impressive in some way and easy to appreciate.

The selection of heritage attractions with potential to be marketed to visitors takes into account the visitor’s needs; that is their desire to obtain enjoyment (and education) in an undemanding fashion. Some of these criteria are:

- Proximity to established resorts or touring routes – ease of access
- Proximity to other major attractions – part of a cluster
- Impressive in their location – scenic, dramatic, romantic, etc
- Impressive in their size, extent, particular features
- Relevance to the visitor’s own heritage
- Uniqueness
- Links to well known people / characters or myths and legends
- Ease of engaging in the attraction, i.e. how well it is interpreted and brought to life.

Some outstanding attractions in remoter areas may be of interest. The criterion is whether the effort of the journey (and sometimes the journey itself) is justified by the end experience.

In conjunction with the MCTYS and Institute of Monuments the project team identified 130 heritage attractions and museums that meet these criteria.

B.1.2 Categorisation by Degree of Market Readiness

The concept of “market readiness” relates to the degree to which an attraction meets the potential tourist’s needs and consequently is worthy of being included in marketing activity. An attraction can be deemed “market ready” when it meets most of the following criteria:

- Intrinsic interest to a wide range of visitors – its appeal
- Ease of access – public transport and reasonable roads as well as good signposting to the attraction
- Reception facilities including toilets, catering and souvenir shop, dependent on magnitude of the attraction
- Clear interpretation of the attraction, ranging from a simple leaflet through interpretation panels, tour guides to multi-lingual electronic guides
- Promotional materials in relevant languages including location map
- Website

Festivals and events can also be market ready if:

- The subject or theme appeals to specific market segments
- Good transport access
- Festival/event dates and programme are publicised well in advance – of particular importance to tour operators
- Tickets can be purchased easily in advance
- Accommodation is available locally and can be booked easily
- Festival facilities are of a good standard – catering, toilets, parking

In conjunction with the MTCYS and Institute of Monuments the database of heritage monuments was refined to those thought likely to be of most interest to visitors and located reasonably close to the main tourism routes through and within Albania. The attractions on this list were further analysed to ascertain the degree of their appeal to regional and international audiences. Their degree of “market readiness” was also assessed following a survey of the facilities and services available at each.

The tables below identify the results of this exercise.

Albania Culture Marketing Strategy

Attraction	Access / Welcome			Visitor Amenities			Interpretation		Publicity		Regional Appeal	International Appeal	"Market Readiness"			
	Good road access	Signposting to the site	Parking for Cars	Parking for coaches	Admission charge	Reception area	Visitor toilets	Catering	Souvenir shop	Guided Tours	Guidebook	Interpretation panels	Audio guide	Promotional leaflet	Other promotional materials	Website
Tirane																
Castel of Tirana - Kalaja e Tiranës	✓	✓					✓	✓	✓					L	M	**
Mosque of Ethem Beut - Xhamia e Ethem Beut	✓	✓					✓	✓	✓					M	M	***
Clock tower - Kulla e sahatit	✓	✓				✓	✓	✓	✓	✓				M	M	***
Mosaic - Mozaiku	✓	✓				✓	✓	✓						L	L	**
The bridge of Tanners - Ura e Tabakëve	✓	✓					✓	✓						M	M	***
Grave of Kapllan Pasha - Tyrbja e Kapllan Pashës	✓	✓					✓	✓	✓					L	L	***
Shijaku's house - Banesa e Shijakasve	✓						✓	✓						L	L	**
Castle of Petrela - Kalaja e Petrelës	✓	✓	✓	✓			✓	✓						M	M	***
Castle of Preza - Kalaja e Prezës	✓	✓	✓				✓	✓						M	M	***
National Historic Museum - Muzeu Historik Kombtar	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		H	H	***
Lezha																
Lezha Castle, ancient walls - Kalaja, muret antik		✓				✓						✓				
Kruja																
Castle of Kruja - Kalaja e Krujës	✓	✓	✓	✓	✓	✓	✓	✓	✓					M	M	****
Museum of Scanderbag - Muzeu "Gjergj Kastrioti"	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		H	H	****
Ethnographic Museum - Muzeu Etnografik	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		M	H	****
Old bazaar of Kruja - Pazari i Vjetër Krujë	✓	✓	✓	✓			✓	✓	✓					H	H	***
Dollma Teqe - Teqja e Dollmës	✓													M	M	**
Kalaja e Zgërdheshit		✓												M	M	**

Albania Culture Marketing Strategy

Attraction	Access / Welcome				Visitor Amenities			Interpretation		Publicity		Regional Appeal	International Appeal	"Market Readiness"			
	Good road access	Signposting to the site	Parking for Cars	Parking for coaches	Admission charge	Reception area	Visitor toilets	Catering	Souvenir shop	Guided Tours	Guidebook	Interpretation panels	Audio guide	Promotional leaflet	Other promotional materials	Website	
Fier																	
Ancient town of Apollonia - Qyteti antik i Apolonisë	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓							
Monastery of St. Mary - Manastiri Sh. Mërisë, Pojan	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				M	H	****	
Ancient town of Bylis, Hekal - Qyteti ilir i Bylisit, Hekal		✓	✓	✓		✓	✓			✓	✓				L	M	***
Lushnja																	
Monastery of St. Mary - Manastiri i Sh. Mërisë	✓	✓	✓					✓	✓						L	M	**
Hall of Lushnja Congress - Ndërtesa e Kongresit të	✓	✓						✓	✓						L	L	*
Elbasan																	
Castle of Elbasan - Kalaja e Elbasanit	✓	✓	✓	✓				✓	✓	✓				L	M	**	
Clock tower, Elbasan - Kulla e sahatit, Elbasan	✓	✓	✓	✓				✓	✓	✓				L	M	***	
Old hammam - Hamami i Vjetër, Lagja Kala	✓							✓	✓					L	L	**	
Church of St. Mary - Kisha e Sh. Mërisë, Lagja Kala	✓							✓	✓					L	M	**	
King mosque - Xhamia Mbret, Lagja Kala	✓							✓	✓					M	M	**	
Hammam of bazaar - Hamami i pazarit	✓	✓	✓	✓				✓	✓					M	M	**	
Museum of Kristoforidhi - Shtëpia muze e K. Kristoforidhit	✓	✓	✓					✓	✓					L	M	**	
Ethnographic museum - Muzeu Etnografik (Banesa e Hajdar Sejdinit)	✓	✓	✓	✓	✓			✓	✓					L	M	***	
Ancient ruins (road station of Ad – Quintum, via Egnatia) - Gërmadhat antike (stacioni rrugor Ad – Quintum i via Egnatia), Bradashesh	✓	✓												L	L	*	
Church of St. - Kisha e Sh. Kollit, Shelcan.														L	L	*	

Albania Culture Marketing Strategy

Attraction	Access / Welcome				Visitor Amenities			Interpretation		Publicity		Regional Appeal	International Appeal	"Market Readiness"		
	Good road access	Signposting to the site	Parking for Cars	Parking for coaches	Admission charge	Reception area	Visitor toilets	Catering	Souvenir shop	Guided Tours	Guidebook	Interpretation panels	Audio guide	Promotional leaflet	Other promotional materials	Website
Durres																
Castle of Durres - Kalaja e Durrësit	✓	✓				✓	✓				✓					
Durres gates and walls - Muret e Portës së qytetit	✓	✓				✓	✓				✓					
Durres Amphitheatre - Amfiteatri i Durrësit	✓				✓	✓	✓	✓			✓					
Mosaic - Mozaiku (P. Kulturës)	✓	✓				✓	✓									
Archaeological Museum - Muzeu Arkeologjik	✓	✓			✓	✓	✓		✓		✓					
Ancient thermal baths - Termat antike (P.Kulturës)	✓	✓				✓	✓							L	L	**
Hamman - Hamami														L	L	*
Well of Tophana - Pusi i Topanës														L	L	**
Mosque of Fatih - Xhamia e Fatiut	✓	✓				✓	✓							L	L	**
Childhood house of A. Moisiu - Shtëpia e fëmijërisë A. Moisiu	✓	✓				✓	✓							L	L	**
Castle of Scanderbag - Kalaja e Skenderbet (<i>Kepi i Rodonit</i>)														L	L	**
Church of St. Andon - Kisha e Sh. Andonit (<i>K. Rodonit</i>)														L	L	*
Castle of Ishmi - Kalaja e Ishmit	✓													L	L	**
Mosaic of Arapaj - Mozaiku, Arapaj	✓	✓												L	L	*
Kavaja																
Ethnographic museum - Muzeu Etnografik, Kavajë	✓	✓				✓	✓							M	M	**
Clock tower - Kulla e Sahatit, Kavajë	✓	✓				✓	✓							M	M	***
Bashtova castle - Kalaja e Bashtovës														M	M	**
Peqin																
Castle of Peqin - Kalaja e Peqinit	✓	✓				✓	✓							M	M	**
Clock tower - Kulla e sahatit, Peqin	✓	✓				✓	✓							M	M	**

Albania Culture Marketing Strategy

Attraction	Access / Welcome			Visitor Amenities			Interpretation		Publicity		Regional Appeal	International Appeal	"Market Readiness"			
	Good road access	Signposting to the site	Parking for Cars	Parking for coaches	Admission charge	Reception area	Visitor toilets	Catering	Souvenir shop	Guided Tours	Guidebook	Interpretation panels	Audio guide	Promotional leaflet	Other promotional materials	Website
Shkoder																
Castle of Rozafa - Kalaja e Rozafes	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Museum to the castle - Muzeu i Kalase	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓						
Mesi Bridge - Ura e Mesit	✓	✓														
Hammam - Hamami, Shkodër	✓	✓					✓	✓								
Leaden mosque - Xhamia e Plumbit	✓	✓					✓	✓								
History and Archaeological museum - Muzeu Historik dhe Arkeologjik (Oso Kuka)	✓	✓			✓	✓	✓	✓								
Marubi Photographic Museum - Fototeka Marubi	✓	✓					✓	✓	✓	✓						
Korce																
Mosque of Iliaz Mirahorit Xhamia e Iliaz Mirahorit	✓	✓	✓				✓	✓								
Elbasani Inn - Hani "Elbasani"	✓	✓	✓	✓			✓	✓								
Manastiri Inn - Hani "Manastiri"	✓						✓	✓								
Old bazaar - Pazar i Vjetër	✓	✓	✓	✓			✓	✓								
Museum of medieval art - Muzeu Artit Mesjetar	✓	✓			✓		✓	✓	✓	✓		✓	✓	✓		
Vangjush Mio Artist's house - Shtepia Muze e Piktoret Vangjush Mio	✓	✓	✓	✓			✓	✓								
National Education Museum - Muzeu i Arsimit Kombëtar	✓	✓	✓	✓	✓		✓	✓	✓							
Archaeological museum - Muzeu Arkeologjik	✓	✓			✓		✓	✓	✓	✓	✓					
Church of St. - Kisha e Sh.Jovanit, Bobsticë	✓	✓					✓	✓								
Church of St. - Kisha e Sh. Mitrit, Bobsticë	✓	✓														
Monastery of St. - Manastiri i Shën Prodromit, Voskopojë	✓	✓					✓	✓								*
Church of St. - Kisha e Shén Thanasit, Voskopojë		✓														
Church of St. - Kisha e Shén Mëhillit, Voskopojë		✓														
Church of St.-Kisha e Shén Kollit, Voskopojë	✓	✓					✓	✓								
Church of St. - Kisha e Shén Marisë, Voskopojë	✓	✓					✓	✓								
Monastery and church of St. - Manastiri i Sh.Pjetrit dhe Kisha e Shén Kozmait (<i>Qimitiri</i>), Vithkuq	✓	✓														*
Church of St. - Kisha e Shén Marisë, Vithkuq	✓	✓														*
Church of St. - Kisha e Shén Mëhillit, Vithkuq	✓	✓					✓	✓								*
Church of St. - Kisha e Ristozit, Mborje	✓	✓					✓	✓								**
Tumulus of Kamenica - Tuma e kamenicës	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			****

Albania Culture Marketing Strategy

Attraction	Access / Welcome				Visitor Amenities			Interpretation		Publicity		Regional Appeal	International Appeal	"Market Readiness"		
	Good road access	Signposting to the site	Parking for Cars	Parking for coaches	Admission charge	Reception area	Visitor toilets	Catering	Souvenir shop	Guided Tours	Guidebook	Interpretation panels	Audio guide	Promotional leaflet	Other promotional materials	Website
Pogradec																
Rock tombs - Varret ne shkemb në fshatin Selcë e Poshtme	✓	✓														
Ruins of paleochristian church - Rrënojat e Kishës Paleokristiane dhe mozaikët në fshatin Lin	✓	✓				✓	✓		✓							*
Gjirokaster																
Castle of Gjirokastra - Kalaja e Gjirokastrës	✓	✓	✓	✓	✓	✓			✓	✓						****
War museum - Muzeu i luftes	✓	✓	✓	✓	✓	✓			✓	✓						***
Baths - Banjat, Lagjja Meçite	✓	✓					✓	✓								**
Teqe Mosque - Xhamia e Teqes	✓	✓					✓	✓								**
Ethnographic museum - Muzeu Etnografik	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓						****
Zekate's house - Banesa e Zekatëve	✓	✓	✓	✓	✓	✓	✓	✓								***
Castle of Melan - Kalaja e Melanit, fshati Nepravishtë																**
Teqe of Melan - Teqja e Melanit, fshati Nepravishtë																*
Church - Kisha e Vrako Goranxi, fshati Nepravishtë														L	M	*
Bridge of Kollorca - Ura e Kollorcës														L		***
Castle of Libohova - Kalaja e Libohovës	✓	✓												L	M	**
Ruins of ancient theatre - Rrënojat e teatrit antik, Sofratikë														L	M	*
Church - Kish e Sh. Mërisë, Labovë e Kryqit	✓	✓					✓	✓	✓	✓				L	M	**
Illyrian town of Antigonea - Qyteti ilir i Antigonese	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	M	H	****
Tepelena																
Castle of Tepelena - Kalaja e Tepelenës	✓	✓				✓	✓							M	M	**
Aqueduct of Bença - Ujësjellësi i Bënçës														M	M	***

Albania Culture Marketing Strategy

Attraction	Access / Welcome				Visitor Amenities			Interpretation		Publicity		Regional Appeal	International Appeal	"Market Readiness"		
	Good road access	Signposting to the site	Parking for Cars	Parking for coaches	Admission charge	Reception area	Visitor toilets	Catering	Souvenir shop	Guided Tours	Guidebook	Interpretation panels	Audio guide	Promotional leaflet	Other promotional materials	Website
Përmet																
Church - Kisha e Sh. Premtes në qytetin e Përmittit.	✓	✓						✓	✓							
Church - Kisha Sh. Mërisë, Leusë	✓	✓														
Church - Kisha Sh. Mërisë, Kosinë	✓	✓														
Rock of the town - Guri i qytetit të Përmittit.	✓	✓														
Berat																
Castle of Berat - Kalaja e Beratit	✓	✓	✓	✓				✓	✓	✓						
Church - Kisha e Shën Triadhës, Lagja "Kala"	✓	✓	✓									✓				
Church - Kisha e Shën Marisë Vllahernës, Lagja "Kala".	✓	✓	✓					✓	✓	✓						
Iconographic museum - Muzeu Ikonografik Onufri, Lagja "Kala" (Kisha e Shën Todrit).	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Ruin of red mosque - Rrënojat e Xhamisë së Kuqe Lagja "Kala"	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Ruins of white mosque - Rrënojat e Xhamisë së Bardhë Lagja "Kala"	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Church - Kisha e Shën Mehillit, Lagja "13 Shtatori"		✓														
Archaeological Museum - Muzeu Arkeologjik (Xhamija Mbret)	✓	✓						✓	✓	✓	✓	✓	✓	✓	✓	✓
Teqe of Helvety - Teqeja e Helveticë	✓	✓						✓	✓	✓	✓	✓	✓	✓	✓	✓
Leaden mosque - Xhamija e Plumbit	✓	✓						✓	✓	✓	✓	✓	✓	✓	✓	✓
Ethnographic museum - Muzeu Etnografik (Banesa e Xhokaxhinje)	✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Bridge over Osum river - Ura mbi lumin Osum	✓	✓					✓	✓								

Albania Culture Marketing Strategy

Attraction	Access / Welcome				Visitor Amenities			Interpretation		Publicity		Regional Appeal	International Appeal	"Market Readiness"		
	Good road access	Signposting to the site	Parking for Cars	Parking for coaches	Admission charge	Reception area	Visitor toilets	Catering	Souvenir shop	Guided Tours	Guide book	Interpretation panels	Audio guide	Promotional leaflet	Other promotional materials	Website
Saranda																
Mosaic - Mozaiku	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			L	L	**	
Monastery of 40 saints - Manastiri i 40 Shenjtoreve	✓	✓		✓									L	L	*	
Castle of Iekursi - Kalaja e Likursit	✓	✓					✓	✓					M	L	**	
Monastery - Manastiri i Sh. Gjergjit në Dema	✓												L	M	*	
Ancient town of Butrint - Qyteti antik i Butrintit	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	H	H	****	
Archaeological museum - Muzeu Arkeologjik, Butrint	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	M	H	****	
Castle of Ali pasha (1) - Kalaja e Ali Pashës, Vrina	✓	✓	✓	✓	✓		✓	✓					M	H	***	
Castle of Ali pasha (2) - Kalaja e Ali Pashës, Vivar													M	M	*	
Ancient town of Foenike Qyteti antik Foenike, Finiq (Qyteti i poshtëm).	✓												L	M	**	
Church and monastery - Kisha e Manastirit të Sh. Kollit në Mesopotam	✓	✓											L	L	*	
Castle of Delvinë - Kalaja e Delvinës	✓	✓						✓	✓				L	L	**	
Islamic urban complex - Kompleksi urbanistik islamik në Lagjen Lejla Malo, Delvinë	✓							✓	✓				L	L	**	
Mosque - Xhamia Gjin Aleksit, Rusanj	✓												L	L	*	
Castle - Kalaja, Borsh	✓	✓											L	M	*	
Vlora																
Independence museum - Muzeu i Pavaresise	✓	✓					✓	✓	✓				M	M	***	
Ancient town of Orik - Qyteti antik Orik, Pashaliman	✓	✓	✓	✓	✓					✓	✓		M	M	***	
Illyrian town of Amantia - Qyteti ilir Amantia	✓	✓											M	M	**	

B.1.3 Performing Arts

B.1.3.1 National Opera, Ballet and Folk Ensemble, Tirana

The annual programme of opera, ballet, concert and folk ensemble performances for the calendar year is not published until the budget is confirmed – usually in January. The National Opera is dependent on sponsorship (usually a telecommunications company) for the production of posters, local TV advertising, press conferences and other promotional collaterals. For 2010 there was a problem with this sponsorship, so the only source of programme details until late March was a handbill requested in person at the Opera box office.

There is no National Opera website to publicise performances. The programme is not even featured on the NTA website.

Tickets must be purchased at the box office. Telephone and email reservations can be made, but tickets must be collected and paid for within days. There is no facility for credit card payment either by phone or Internet.

These conditions also apply to tour operators and there are none actively involved in marketing performances at the National Opera.

Opera performances are the most popular. Ballet has less of a following. There is plentiful availability of seats. Prices are extremely good value for money particularly to foreign visitors – top price 1000 Lek.

The 2010 programme is below:

Opera	"MANON LESCAUT"	14-16-18-20 February
Opera	"RIGOLETTO"	20-21-23-24 March
Opera	"CARMEN"	11-12-14-16 April
Opera	"JETA ESHTE ENDERR"	29 April 1, 2 May
Opera	"ANNA BOLENA"	6-7 - 8-9-11 June
Opera	"TALES OF HOFFMANIT"	1-2-4-5-6 October
Opera	Evening with new opera artists	5 November
Opera	"OTHELLO"	11-12-14-15-17 – 18 November
Opera	The Best of Albanian Opera	25 November
Opera	"VEJUSHA GAZMORE	23-24-25-26 December
Ballet	"Arrëthyesi"	16 – 17 January
Alternative Dance	"Një ndodhi në pyll"	19 January
Ballet	"DELINA"	5-6- 7 March
Ballet	"ZORBA"	23-24-26-27-29-30 June
Ballet evening	"Preludi i lavdise" from F. Shopen	17 October
Ballet	"GJAK DHE DRITË"	20-21-23-24 October
Ballet	Flutura qe vallezon pambarim	20 November
Ballet	"BUKUROSHJA E FJETUR"	2-3-5-6 –8 December
Concert	"Tinguj per solidaritetin"	24 January
Concert	"Gjerdani i perlave popullore"	20 January
Concert	"Tirana by night"	22 January
Concert	KOSOVA GËZON Me rastin e 2-vjetorit te Pavaresise	17 February
Concert	Koncert i pianistit polak Marek Szlezer	3 March

Albania Culture Marketing Strategy

Concert	Michele Campanella	25 March
Concert	Mbrëmje muzikore	30 March
Concert	Mjeshtri Uto Ughi dhe I Filarmonici di Roma	8 April
Concert	Koncerti i Tony Esposito & La Banda del Sole	15 April
Concert	“Tutta la vita e mar”	20 April
Concert	nga Sandro Capelletto - Giacomo Puccini “Duhej t'i kisha vrarë të gjitha”	21 April
Concert	Koncert i Ansamblit Popullor	12 May
Concert	nga skenat evropiane në Tiranë	16 May
Concert	International music day	21 June
Concert	Koncert i madh per Nene Terezen, me rastin e 100-vjetorit të lindjes	26 August
Concert	Koncert i Ansamblit Popullor	15 September
Concert	Mbrëmje solistike e romancave dhe duove	8 October
Concert	“Takim në botën e tingujve”	22 October
Concert	Me repertorin e soprano së madhe lirike shqiptare Tefta Tashko Koço, në 100-vjetorin e lindjes	25 October
Concert	Premiere e Ansamblit Popullor	27 October
Concert	Mbrëmje përkujtimore	28 November
Concert	“Albumi më i ri i krijuesve ende të panjohur”	9 December
Concert	“Ngjis shkallët e Operas”	17 December
Concert	TASHMË TRADITË	25 December
Concert	“Grand ballo në Opera”	30 December

Source: National Opera, Ballet and Folk Ensemble

There is a clear cut requirement for a modern box office system linked to a National Opera website and with electronic payment facility. This would serve both the local market, tour operators and any direct foreign demand. One example might be the system used by the Royal Opera House, Covent Garden (www.roh.org.uk). This is a pragmatic marketing tool the installation of which might attract donor support.

B.1.3.2 Festivals

There is a full and varied festival programme covering most parts of the country – see schedule below. While most of the festivals take place annually some of the major ones are staged less frequently.

Festivals are not just a shop window on the country's living cultural heritage but a strong motivator for tourism. Although they may be fixed geographically, or have a small number of locations where they are staged by rotation, there is usually some flexibility in the dates they are staged. This allows them to be used as a magnet for tourism outside the peak periods, which can have a significant impact on the local economy.

It is understood that some festivals are being encouraged by the MTCYS to move their dates out of the peak July/August period. Although there is an argument that summer visitors should be offered as wide a range of activities and events as possible, the moving out of the peak avoids the congestion at the peak period. Concentrating activities at the peak doesn't bring as much financial benefit as would accrue at other times.

Albania Culture Marketing Strategy

The lack of information available well in advance on festivals, is a concern and severely limits the use of festivals by operators as a means of attracting visitors, particularly from abroad. The prime cause of this weakness is a funding issue.

Most festivals receive up to 50-70% subsidy from MTCYS as well as additional funding from sponsors. This degree of government funding is appropriate to launch festivals and sustain them in their early years. However, the development of other revenue sources should reduce this level of subsidy in the medium to long term. The timing of the announcement of funding levels is the real problem. Applications for financial support can be submitted in December for the following year and confirmation of budget allocations goes on until April and beyond. This means festival organisers cannot confirm their programmes and publish programmes until the spring at the earliest. This is far too late for operators to undertake tour planning and promotion.

Additionally the programmes of festivals, not to mention booking procedures and ancillary information, are not available on-line to individuals or operators. As a result even late booking individuals are inhibited from including festivals in their trips.

This lack of advance publicity also results in poor general publicity for the events and a lack of awareness of the country's wealth of cultural events.

A schedule of festivals of Regional and International appeal is given below. This demonstrates the regional and seasonal spread of the festival programme.

Month	Festival	Location	Frequency
February	Mask Festival	Shkodra	Annual
February	International Festival of Carnivals	Shkodra	Annual
March	National Festival of Urban Folk Songs	Elbasan	Annual
March-September	Apollonia Music Festival	Apollonia	Annual
March – June	“Fest-Folk Egnatia 2010”	Elbasan	Annual
April	Balkan Festival - (with the participation of Përmeti folk group)	Brussels	Annual
April-July	Philharmonic Summer Concerts 2010	Tirana	Annual
April-May	“Rinfest 2010” (YouthFest)	Tirana	Annual
April- May	Festival of Drama “Apollon 2010”	Fier	Annual
April	Festival “Sofra Myzeqare e Ardenicës”	Fier	Annual
May	Giffoni Shqipëria Film Festival	Tirana, Shkodra	Annual
May	National Festival of Folk Dances	Lushnje	Annual
May	International Folk Festival ‘Aulona’	Vlora	Annual
May	Albania Dance Meeting Festival	Durrës	Annual
May	Nostalgia for Lake’s songs	Pogradec	Annual
May-June	Days of Mountains Lists	Commune of Kelmend	Annual
May	Monodrama Festival	Voskopoje	Annual
May-June	“Illyrian” Sofra	Apollonia	Annual
Maj-June	Drama Presentation of Union Balkan Cultures	Tirana	
July	International Festival of Drama	Butrinti	Annual
June	National Festival of Folk Instruments	Gjirokastra	Annual

Albania Culture Marketing Strategy

June	Folklore Festival "Sofra Dardane"	Tropoja	Annual
June	International Festival Multicultural Përmet	Përmet	Annual
June-September	"Magic Nights of Opera"	Tirana	Annual
June	Gala Concert of Albanian Lyric Artists	Durrës	Annual
June-August	Concert "Summer Sounds"	Tirana	Annual
July	National Festival of Rhapsodists and Folk Instrument Players	Lezha	Annual
July	Festival "Oda Dibrane"	Peshkopi	Annual
July	Albanian Wind Band Festival	Saranda, Himarë, Ksamil, Delvinë	Annual
July	Festival of Minorities	Korça	Annual
July	Festival of Songs and Dances of Çameria region	Sarandë	Annual
July – August	International Summer Festival of Music	Durrës	Annual
July	Tirana Jazz Festival	Tirana	Annual
August	Shkodra Jazz Festival	Shkodra	Annual
August	International Folk Festival "Alb-Mediterraneo"	Vlora	Annual
September	National Typology Festival of Saze and Folk Orchestras	Korça	Annual
September	Festival of Albanian Humour	Durres	Annual
September	Fest-Argjiro 2010	Gjirokastër	Annual
October	Raki Festival	Peshkopi	Annual
October	National Festival of Folklore	Gjirokastra	4 yearly
October	International Festival of Opera Vocal "Marije Kraja"	Tirana	Annual
October	International Festival of Contemporary Drama -"Skampa 2010"	Elbasan	Annual
November	National Festival of Iso-Polyphony	Vlora	Annual
December	Concert of Year Eve "3 Tenors"	Tirana	Annual

Source: MTCYS and TDI

B.2 Case Studies

B.2.1 Selection of Case Study Destinations

In order to determine the appropriate approach for Albania to adopt to improve its image and attract more tourism, it was decided to undertake a number of case studies of other destinations that have faced image problems both in the past and currently. From their approach and degree of success it was anticipated that useful examples of best practice – and possibly pitfalls to avoid – could be identified.

The countries selected and the image problems they faced are:

- Jordan – neighbour to Iraq with connotations of being a terrorist haven and liable to political unrest
- Montenegro – a history of involvement in the Balkan conflict and only recent political separation from Serbia.
- South Africa – unstable post-apartheid political situation, high crime levels, dangerous city centres and townships, prevalence of AIDS
- Bosnia – at the core of the Balkan conflict and scene of war crimes
- Macedonia – linked to the Balkan conflict. Also a country with no strong identity apart from a familiar name.

B.2.2 Jordan



Challenges in respect of the British market:

- Currently no beach product – Main UK holiday product
- Cost of holiday – in comparison to other destinations
- Geo political situation in the Middle East
- Constant news coverage of ME, Iraq, Israel, Iran

As a neighbour of Iraq, the prevailing market perception in relation to personal safety in visiting Jordan has over the past two decades - since the 1990 invasion of Kuwait – been at best suspicious and, at worst, highly negative.

In consequence, every incident involving terrorist activity that affects Westerners acts as a reminder for the prospective tourist that travel to destinations associated with terrorism is risky.

Situation

Jordan has many outstanding attributes as a prospective destination for British tourists.

- Moderate Middle East country
- A traditional Kingdom – affinity with UK
- Warm, friendly and sincere people with 5 star hospitality
- Quality restaurants throughout Jordan
- Traditional Arabic and Fusion cuisine
- English widely spoken

It offers an extensive and high quality cultural tourism product:

- **Petra** – a ‘must see before you die’ attraction
- **Wadi Rum** – the desert made famous by Lawrence of Arabia
- **Roman archaeology** – Jerash, Um Qais and Amman
- **Christian Tours** - Jesus baptised in Jordan
- **Dead Sea** – renowned for its healing properties
- **Aqaba** – Where the Red Sea Riviera starts and finishes

Marketing and Promotion 2000 -2005

Between September 2001 and October 2005 the total advertising / promotional spend in the UK was less than £150,000. All above and below the line advertising was stopped between September 2001 and October 2005. Focus was entirely on public relations activities - during this period over 300 journalists visited Jordan – resulting in positive PR coverage.

Action One – post 9/11

Challenge – To promote the Royal Tour television programme featuring King Abdullah II in advance of broadcast on Discovery Channel – Broadcast 2 months after 9 / 11

Approach – TV critics were invited to Jordan so they could experience their own personal Royal Tour led by the Jordan Tourism Board

Results – Jordan seen out of the travel pages and placed in TV magazines and colour supplements plus TV listings pages – 100 bookings taken by one tour operator within two days of coverage

To offset the radical Islam movement in the early part of the 21st century

Challenge – To raise the profile of Jordan at the 2002 WTM during what was a difficult time for tourism to the Kingdom

Approach – Arranged for Queen Rania to open WTM and to be guest of honour at the Captain’s of Industry Lunch. Jordan also sponsored the British Guild of Travel Writers’ (BGTW) awards dinner

Results – Renewed interest in Jordan as a destination amongst 200 journalists at the BGTW dinner and tour operators at WTM following Jordan’s high profile position.

Following end of first Iraq war 2003

Albania Culture Marketing Strategy

Challenge – To maintain Jordan uppermost in the consumers' and tour operator' minds as a destination open for business

Approach – To sponsor editorial in a number of publications and provide free advertisements for relevant tour operators

Results – Positive coverage for Jordan and renewed confidence in the destination from consumers and trade

Following the Madrid train bombings

Challenge – To promote a high profile Bentley Rally when 44 of the world's best classic cars drove through Jordan on tour

Approach – Arranged for Queen Rania to meet the tour and for Lord Montagu to attend and also write articles for Hello and Classic Car Magazine. 18 members of the press participated in the tour and articles appeared in Daily Mail, Financial Times, as well as diary columns

Results – Media coverage in Hello, Telegraph, as well as car enthusiast magazines. A television programme "Jordan Jewel of the Desert" was also made and broadcast.

Strategy 2004-2010

Vision - Tourism is an essential and vibrant growth sector that will contribute to improving the long-term economic and social well-being of Jordanians.

Mission - Jordan will develop a sustainable tourism economy through a partnership of government, private sector, and civil society to expand employment, entrepreneurial opportunity, social benefits, industry profits and state revenue

Goal - Double Jordan's tourism economy by 2010 in real terms

Tactics

Despite being hit by a series of serious events in 2005 – British tourists in a bus crash and hotel bombings in Amman, as well as the London tube train bombings - Jordan pressed ahead with its new strategy involving:

- rebranding
- new advertising and promotional budgets
- new Minister
- new head office team
- new outlook

The campaign in the British market involved:

- advertising and promotion as well as PR
- activities geared towards both the travel trade AND travelling public
- continued without a break or direct response to the negative events as these occurred

Albania Culture Marketing Strategy

Web page targeting public



Financial support to tour operator

Traveller-directed campaign supporting tour operators

150 Taxis



Results

British Visitor Numbers

Year	British Visitors	% change
2000	47,000	
2001	49,000	4
2002	20,000	-59
2003	26,000	30
2004	48,000	85
2005	56,000	17
2006	48,000	-14
2007	64,000	33
2008	69,000	8
2009	67,600	-2

In 2000 there were 64 tour operators featuring Jordan; a level that has risen to 100 in 2010. Jordan now features in over 320 separate tours run and managed by tour operators, the biggest increases in tour operator uptake occurring between 2005 – 2007.

Press Trips: over 350 journalists have visited Jordan since 2001, with 280 of those since October 2003. These trips have resulted in editorial coverage equivalent to over £4.5 million in paid advertising.

In the same period JTB has spent under £2 million on straight consumer advertising

Conclusion

In view of its geographic location and the continuing perception of Jordan as an unsafe destination, the country has to undertake a continuing programme of

marketing activities to offset these events and build up a more positive view of it as a place to visit.

In essence, it is faced with a situation that 'it is not over when it is over' because another problem development will almost certainly happen within the next month or so that will again pull down the destination's reputation – even though it has nothing whatsoever to do with Jordan.

It is essential to target both the travel trade and the traveller.

For the tour operator, Jordan is a niche destination. It might sell 1,000 to 2,000 packages to Jordan so featuring it on a page in the brochure with financial assistance from the tourist board is not a high risk strategy for it.

For the traveller, there is a two-pronged approach.

It is necessary for the tourist board to 'drive the desire' to visit the country, stressing the attractions of the country. Its messages do not talk about safety, but concentrate on the things for tourists to see and do. The omission of any reference to the issue of personal security is intended to convey the message that this issue is not a significant one.

The other part of the strategy targeted at the traveller is to generate editorials by arranging and supporting media trips. Such editorials provide the reassurance the traveller is seeking about the destination's safety.

The goal is to build interest and the desire to visit so that any concerns the prospective visitor might harbour about safety is outweighed by the aspiration to visit Jordan.

B.2.3 Montenegro



Challenges:

1. Montenegro experienced an uncontrolled increase in demand, mostly for its beach product, from the early 2000s. It has recognised that, unless this demand is managed, the tourism boom will soon evaporate as product and service levels, and particularly the unprotected environment, fail to meet client requirements.
2. Poor product and service standards especially for beach holidays bring the risk of developing a down market destination image
3. Tourism is highly seasonal due to lack of awareness of shoulder and off-season attractions
4. Tourism is concentrated on the coastal resorts – rural attractions and activities not well known or well promoted

Albania Culture Marketing Strategy

5. Environmental degradation – water, sewage, litter, uncontrolled development, etc. – a major threat

Strategy:

1. Improve product standards to meet market needs – legislation and controls
2. Create additional product to meet seasonal, regional and growth goals
3. Improve human resources
4. Market Montenegro as a year-round destination with a diversity of product offers
5. Integrate the concept of sustainability in all activity
6. Create a distinctive brand

Tactics:

- A. Development
 1. Enhanced legal basis for tourism development
 2. Strict enforcement of accommodation and restaurant standards through programme of seasonal inspections
 3. Establish “clean image” of Montenegro – legislation and clean-up campaign
 4. Well resourced National Tourism Organisation with well trained staff
- B. Marketing
 1. Integration of “Wild Beauty” brand image in all activity
 2. Establishment of efficient marketing structures - NTO and a network of representative offices in the leading countries with a long-standing tourist tradition
 3. Promotion of regional clusters to strengthen tourism potential in all regions and sub-regions
 4. Establishment, promotion and marketing of tourist attractions and activities
 5. Provision of support to cultural events
 6. Collection and presentation of historic and traditional legends, fairy tales, myths, etc of different regions and cultures of Montenegro

Conclusions

Montenegro has adopted a policy of emphasising the positive in its marketing strategy in order to achieve its objectives of better seasonal and geographic spread of tourists. In its development work it has paid close attention to improving the standards and business practices of its core beach tourism suppliers. At the same time it has sought to develop nature based tourism so as to attract additional market segments and spread tourism. The marketing activity has emphasised the diversity of the product offer (to increase geographic spread) and promoted the off-season specifically.

This was a well integrated and well funded marketing campaign. The National Tourism Organisation has developed into a skilled, professional and dynamic organisation over the last few years.

The innovative branding permeates all promotional activity and is proving to be increasingly successful.

Albania Culture Marketing Strategy

Montenegro is fortunate enough to be able to afford media advertising both regionally (TV and billboards) and internationally (TV). This is backed up by a well maintained website providing information and a degree of additional promotion. There is nonetheless a strong emphasis on media relations to increase destination and specific product awareness. Much of this is achieved through local representatives and contacts made at exhibitions.

Information is disseminated largely through a well-maintained destination website.

A key to progress is a well-trained and motivated NTO staff.

B.2.4 South Africa



Challenges:

1. Negative perceptions prevalent in most source markets concerning general and personal safety – political instability since transition to democracy in 1994, health issues, high crime rate, road conditions, etc.
2. Perception as a high cost destination
3. Uneven spread of tourism – 75% of revenue in just three of the nine provinces.
4. Need to develop a range of markets to avoid potential negative impact of political or natural catastrophes
5. Quality standards and the need to involve the “disadvantaged majority” more in tourism

Strategy:

1. Enforce quality standards strictly
2. Focus on most productive markets – regional and ten long haul markets
3. Develop strong brand image
4. Use (sporting) events to raise international profile
5. Concentrate marketing on media relations

Tactics:

- C. Development
 1. Tourism Grading Council ensures high quality accommodation standards are maintained
 2. Development of comprehensive tourism statistics and research programme to facilitate marketing and development planning
 3. Competing for major events – Rugby World Cup, Soccer World Cup, etc. as spur to develop and improve facilities

4. Consistent funding of South African Tourism

- D. Marketing
 1. Market analysis for the selection of prime target markets and segments based on their potential to meet objectives
 2. Network of ten offices in priority longhaul markets
 3. Intensive programme of media visits and media relations through network of offices / representatives
 4. Use of interest in major events to encourage both visits and additional destination publicity

Conclusions

South African Tourism is well aware of its negative images – potentially unstable political situation, high crime levels, health issues and quality of some product and services. It seeks to dispel these both by acting where it can to improve industry standards – an efficient Tourism Grading Council – and by obtaining as much positive media coverage as possible. This is partly by routine tourism related media activity – study visits, releases, etc. – and partly by competing for high profile sporting events, which transcend the general weaknesses.

Although Albania may not be able to adopt an events-led policy on the scale South Africa (and Dubai) has done, its existing events, mainly festivals, can be used to raise the destination profile. The philosophy is to accentuate the positive while quietly addressing the negative issues out of the public eye.

The NTO's (South African Tourism) marketing planning is highly professional, as is the implementation of its activities. Although they have had a series of high profile (ex ambassador) chief executives, the routine operations have been led by a well qualified permanent team. This stability of operations has been assisted by a consistent level of funding.

South African Tourism concentrates its long haul marketing on relatively few destinations in order to be cost effective. However, it also maintains its promotional activity within Southern Africa to attract a high volume of (sometimes) lower spending visitors, who also help achieve its seasonal and geographical spread objectives.

B.2.5 Bosnia - Herzegovina



Challenges

- Though improving, BIH as a country still faces an unfavourable image in Europe, this of war conflict. This is more from lack of international awareness on BIH as a potential visitor destination, than from the recent years of conflict.

Albania Culture Marketing Strategy

- The BIH political divisions tend to create barriers for business and government collaboration.
- Because of the intricate BIH political structure, a national tourism ministry does not exist. The public sector in tourism is fragmented. Tourism is placed under the entities' authority.
- There is weak government recognition of tourism as strategic for economic development, particularly at state level.
- The responsible ministry lacks sufficient capacity to lead the development of the BIH tourism sector.
- No national policy for tourism development; lack of tourism vision.
- Marketing efforts are not adequately segmented and targeted.
- Lack of focus on international markets within the hospitality industry.
- Dependence on regional markets.
- BIH and its three regions suffer a lack of image consistency in the promotion of BIH as a destination, risking loss of promotional impact. The design, logos, style, layout, structure, colours, paper quality and brochure sizes vary.
- BiH (Sarajevo, Mostar) are only occasionally packaged as a destination.
- Tourism data are still collected and analyzed with outdated methods.
- Poor public/private cooperation and vertical linkages within the industry.
- Lack of knowledge amongst public sector and private sector trade associations
- There is little or no meaningful research relating to generating markets, products, and demographics.
- Inadequate level of human resources (vocational and academic in tourism and training). There is a shortage of well-trained staff in the hospitality industry.
- Lack of world-class, well-known attractions and tourism products. Lack of hotels near attractions in some regions.
- Poor quality of facilities and services (sanitation, furnishings and cleanliness) within hotels and lack of international standards. Insufficient and inadequate inspection services.
- There are few inbound operators.
- Internet service and capacity are limited.
- General poor level of infrastructure.
- Weak public transportation system (trains).
- Weak environmental protection, particularly waste management.

The Strategy

BIH doesn't have a national tourism strategy. Different actions and activities are undertaken in the tourism sector by international donors; USAID project - Cluster Competitiveness Activity (USAID CCA) and GTZ.

Commentary/Conclusions

BIH suffers from weak government recognition of tourism, particularly at state level. Tourism in Bosnia and Herzegovina reflects the situation of current administrative and political organization of the country, too. Bosnia and Herzegovina consists of two entities (Republic of Srpska and Federation of Bosnia and Herzegovina) and one district (Brcko District).

Even the actions undertaken by USAID CCA and GTZ aim to support tourism development in BIH remain separated actions. There is a need for a national tourism strategy and a master plan for tourism development in BIH. This is a case of relevance to Albania, too. While the national tourism strategy will give the strategic directions to the development of tourism at the national level, developing a tourism

Albania Culture Marketing Strategy

development plan is necessary to give the guidance for physical / spatial planning for tourism and tourism investments in Albania.

The USAID Cluster Competitiveness Activity (USAID CCA) supported the BIH Ministry of Foreign Trade and Economic Relations and other stakeholders, including the Tourism Association in BIH, Foreign Trade Chamber and Entity Ministries of Trade and Tourism with a four-year project funded by USAID, which was launched in 2005. The CCA brought together a broad range of stakeholders, including representatives of BiH tourism organizations, ministries, hotels and restaurants, transportation services, travel agencies, educational institutions, trade associations and leaders of various sport clubs and firms providing a wide range of tourist attractions to visitors.

The USAID Cluster Competitiveness Activity, on behalf of the BIH tourism cluster, has supported tourism activities in BiH focused in three targeted geographic areas:

- the Sarajevo region - for cultural and sport tourism;
- Herzegovina - for religious and cultural tourism; and
- the northwest region of BiH, known as Krajina - for ecological and sport tourism and has facilitated the formation of working groups to deal with key competitiveness challenges in tourism. The CCA functioned as the "Institute for Collaboration" (IFC) of the BIH Tourism cluster. USAID Cluster Competitiveness Activity (CCA) has supported the publishing of TOUR BIH, the BIH Tourism cluster's newsletter.

The CCA's activities included:

- formulation and implementation of an industry-wide strategy for BiH tourism sector development;
- improving BiH tourism recruitment initiatives and retention of workers;
- training and professional development for current and prospective employees in the tourism sector;
- supporting specific project initiatives in the three geographic regions;
- upgrading existing tourism packages;
- assisting trade associations in serving industry needs;
- promoting BiH tourism both domestically and internationally.

USAID CCA was involved in organising, supporting or financing activities such as:

- "Clean is Beautiful" campaign branding concept, encompassing initiatives such as: visual materials and promotional clips, projects with primary school students, BIH Parliamentary committee debates, spring cleaning activities and a TV, radio, and billboard media campaign.
- The Conference "One Million Visitors", where Sarajevo Region Tourism Cluster was established to help enable better positioning of Sarajevo on the world market and increase the number of tourists coming to the city.
- Financing the training for skippers from clubs and agencies operating on the Una, Vrbas, Neretva and Tara Rivers.
- Supported "Una-Aquarius" Center, initiating a "Summer Diving School", to improve the quality of the BiH experience according to international diving standards.
- In cooperation with Tourism Association of Bosnia and Herzegovina conducted the first organised visit of four journalists from Holland, Belgium and Czech Republic specialized in covering adventure tourism.
- Arranged visits for three Dutch groups of campers to Bihać and Jajce with one-day excursions to Banja Luka, Travnik, Sarajevo, National Park "Sutjeska" and Mostar, as a result of BIH promotions at the trade fair in Utrecht, and the participation of Op Pad magazine reporters in familiarization trips to BIH rivers.
- Organised in cooperation with British Airways the first visit of British tour operators and reporters to the country.

Albania Culture Marketing Strategy

- Performed a survey among western tour operators on the opportunities and interest to include BiH, Sarajevo and Mostar in their permanent offer.
- Contracted a specialised company to conduct a survey among tourism related businesses in Bosnia and Herzegovina. The purpose of the survey was to obtain an overview of the industry, to determine the business outlook of owners and managers, and to assess the level of interest in improving business and operations strategies.
- Organised the competition for the best tour package in Sarajevo. The objective of this competition was to encourage representatives of the private tourism sector to develop high-quality, competitive products.
- Helped the tourism firms develop joint product packages and prepare professional promotion materials for their participation at the Utrecht, Holland "Vakantiebeurs" fair, as well as software tools for managing customer contacts and follow-BIH exhibitors in Utrecht up from the show.
- Supported the publication of "Sarajevo Navigator", a calendar of cultural and sport events for tourists in Sarajevo.
- Supported the production of seven "Tourism Plus" shows, broadcasted on public, private and cable TV stations in BiH.
- Supported the production of the television spot, "Enjoy Life in Bosnia and Herzegovina" in an effort to raise international awareness of BiH as a tourist destination.
- Enjoy Life, which portrays the beauty and spirit of the country, emphasis the diversity of culture heritage and four-season mountain terrain for outdoor recreation product offer, the distinct competitive advantage of BiH over its popular Croatia neighbour.
- "Enjoy Life in Bosnia and Herzegovina" is a winner in the 9th International Tourfilm Festival SEIFT 2006 – CRO, held in Split, Croatia in October 2006. Also, the film was awarded the silver "Golden City Gate 2007" award for the "Enjoy Life BiH" tourism promotional video at the Sixth International Film Competition at ITB.
- Organized and supported design and production of the new promotional stand to be used at tourism fairs. At the World Travel Market 2007 (WTM), the Bosnia & Herzegovina stand was selected for the "Best Stand Feature" award, out of over 200 stands.
- Provided technical and financial support to the BiH travel industry to participate at the World Travel Market 2007. Organised and supported production of marketing and PR materials, and identification of travel industry business contacts for appointments at the fair.
- Supported the initiation of the branding process for Bosnia & Herzegovina as a tourism destination, aiming to improve the image of BiH in the international market, which must be conducted within the process of the country branding of BiH.
- Organized in cooperation with Green Visions a round table to develop specific tourism products in Geo tourism.
- Supported in cooperation with Mostar City Administration of the Tourism Community of Herzegovina – Neretva Canton, to install of new pedestrian tourism signage.
- The establishment of the Working Group to improve tourism statistics, a significant step forward in establishing the TSA in BiH.

The German Development Agency (GTZ) provided support, too:

- It engaged a specialized German public relations agency for BiH and held a press conference in ITB Berlin 2007 that was attended by more than 80 foreign reporters.

Albania Culture Marketing Strategy

- GTZ also organized workshops on coach tours with the aim of including as many BIH destinations as possible in European tour operators brochures.

B.2.6 Macedonia



Challenges:

- The image of Macedonia as a tourism destination is very weak internationally.
- Lack of government support to tourism sector.
- Lack of implementation of tourism policy and planning papers.
- Lack of enforcement of hospitality law.
- Slow increase in demand. International visitors only surpassed the 2000 figures for the first time in 2007 - around 700.000.
- Tourism is highly dependant in Balkan region markets.
- The geographic concentration of tourism activities in just a few locations (in the capital city Skopje (almost 50 per cent of foreign visitors) and in Ohrid lake and other lake and mountain destinations).
- Highly seasonality in Ohrid lake (only 45 – 60 days a year) due to lack of awareness of off-season attractions.
- Poor product (narrow product range) and poor quality (service standards).
- The accommodation categorisation criteria and its implementation are not aligned to international standards.
- Low percentage of accommodation in hotels, only 20%, and a shortage of quality accommodation (4 and 5 stars hotels) outside of Skopje, Ohrid, Struga and Mavrovo.
- There is almost no provision for proper rest areas for transit tourists (estimated at some 3.5 million every year) that transit the country via Corridor X.

Strategy

- Development of iconic products and general tourism products.
- Quality international hotel chains to be considered for bigger urban areas.
- On the E-10 and E-8 corridors, budget hotels to be established.
- Development of the Lake Ohrid area as a year round hotel-based conference destination.
- Improve interpretation of heritage attractions
- Develop human resources
- Improve protection of natural and cultural heritage
- Strengthen tourism capacity building

Albania Culture Marketing Strategy

- Further develop and expand the national tourism portal *exploringmacedonia.com*. The Macedonian official tourism portal, was established in February 2005 aiming to promote the national, cultural and natural treasures of the country. This site incorporates travel information as well as information on hotels, restaurants, agencies, including attractions, tours and events. It has many strengths:
 - Diversity of content reflecting the diversity of Macedonia's attractions
 - Regularly updated
 - Prompts bookings
 - Marketed effectively to search engines, achieving high selection positions
 - Self-financing

Tactics

Development

- Establish a well resourced marketing department within the Agency for Promotion and Support of Tourism
- Establish street level Tourist Information Centres in town centres in all major tourist areas.
- Develop and maintain a central tourism product and services information database as a resource for marketing and media.

Marketing

- Improve the collection, analysis and dissemination of tourism statistics
- Further develop and expand the national tourism portal as the comprehensive and impartial data source for information on tourism opportunities in Macedonia
- Develop a powerful tourism destination brand and communicate its components to tourist source markets – domestic as well as international.
- Build and establish the perception of Macedonia as a tourism destination capable of satisfying the needs and interests of an extensive range of markets and market segments.
- Marketing of Macedonian tourism destinations and attractions internationally
- All publications to reflect the tourism brand and designated design style.

Commentary /Conclusions

Even though a comprehensive National Tourism Development Strategy 2009-2013 has been approved, no action has been taken to implement it. An Agency for the Promotion and Support of Tourism has not yet been organised on the lines recommended in the strategy, although it is an important step forward to the strengthening and further institutionalization of the Government's obligations for tourism promotion and the achievement of the objectives to attract international tourists to the country. Without a strong national tourism organisation, the image amelioration and growth in tourism are not likely to be achieved. Its website (<http://www.tourismmacedonia.gov.mk>) is a poor and out of date corporate website. The information given on it merely repeats that in the Macedonian tourism website (<http://www.exploringmacedonia.com>).

It seems that in Macedonia there is a story of producing policy and planning documents, but not implementing them. The same has happened with the "Master Plan Study for Tourism in the Republic of Macedonia" produced in 2003, which has not

Albania Culture Marketing Strategy

yet been implemented. This demonstrates the lack of government support to tourism sector.

This case study is a lesson relevant to Albania which has a similar history in implementation of tourism policy papers. Never mind how well and professionally a strategy is prepared, what is important is the willingness and persistence of the government to implement it.

B.2.8 Overview of Case Study Destinations

Destination	Montenegro	Macedonia	Bosnia-Herzegovnia	Jordan (in UK)	South Africa
Population	672,180	2,071,210	3,767,000	6,316,000	49,320,500
GDP per Capita \$	6,150	8,200	3,808	4,906	3,844
Visitors	1,211,673	ca. 1,000,000	n/a	67,600	9,591,828
Tourism Revenue (\$million)	418	140	n/a		11,250
Website	www.montenegr.o.travel	www.exploringmacedonia.com	www.bhtourism.ba	www.visitjordan.com	www.southafrica.net

Marketing Tools (* refers to relative importance of this tool in the marketing mix)

Destination	Montenegro	Macedonia	Bosnia-Herzegovnia	Jordan (in UK)	South Africa
NTO marketing budget - \$	n/a	140,000	n/a	230,000	62,500,000
Print advertising	*	*	*	*	**
Roadshows	*	*	*	*	*
Bill boards	**	*	*	*	*
TV advertising	***	*	*	*	***
Promotional print	***	***	*	***	***
Promotional CDs, DvDs etc.	***	**	*	**	***
Media visits	****	***	***	*****	****
Tour Operator visits	****	***	***	****	***
Tourism Exhibitions	****	***	**	****	****
Representatives	****	*	*	****	****
Website	****	****	***	****	****

C. Terms of Reference

Albania Culture Marketing Strategy - Terms of Reference (TOR)

1. Background

Albania has been described as the last secret of Europe. Almost unknown internationally, its rich and diverse cultural heritage is undervalued within the country, much of it having been suppressed or neglected during the long years of isolation. Today's reality is very different: three UNESCO World Heritage Sites are complemented by extremely valuable intangible cultural heritage, which testify to the meeting of different peoples and civilizations, and a history of harmonious coexistence over nearly three millennia.

This peaceful multicultural coexistence presents Albania with a unique opportunity: to utilize its culture as an instrument in shaping its new national identity, as its government, economy and people move away from isolation to a greater participation on the world's stage. This identity is central to social and economic renewal and growth, both at home and abroad. As the image of Albania returns to a more stable and positive one, Albania's diverse heritage can be exploited for not just social and economic development, but for human development as well.

However, fundamental changes still need to occur at all levels of government and society for Albania's new national identity to be recognized as interrelated with culture. Most importantly, there is a lack of awareness of how culture can be used as a tool for sustainable development, and conversely, how such development can be used as a catalyst for culture.

2. Culture and Heritage for Social and Economic Development Project

The Joint Programme "Culture and Heritage for Social and Economic Development" is primarily designed to achieve outcomes derived from the national priorities of Albania that are consistent with the Millennium Development Goals and the One UN programme, approved by the Albanian Government in October 2007. Sectoral priorities for culture and culture-related issues in Albania focus predominantly on rehabilitating cultural monuments, with a secondary priority for leveraging Albania's culture as a tourist attraction. Joint programme outcomes are designed to expand these two concerns to meet wider development objectives.

As the lead agency in charge of culture in Albania, the Ministry of Tourism, Culture, Youth and Sports is the primary implementing partner for this joint programme of activities between UNDP and UNESCO. Other national government bodies, such as the Prime Minister's Office, the Ministry of Foreign Affairs, the Ministry of Education, the Institute of Cultural Monuments and the National Tourism Organization, will be involved as implementing partners. Other actors, such as civil society organizations, universities, municipalities and the private sector, will also contribute towards the achievement of these joint programme outcomes.

Albania Culture Marketing Strategy

The proposed joint programme is built upon five achievable results, and based on national, sub-national and sectoral priorities for culture and development:

1. Achieve a transparent and accountable government, developing and implementing effective national policies on culture and cultural-related issues
2. Create an enabling environment to ensure people's access to cultural heritage and participation in cultural heritage decision-making at the local, regional and national levels
3. Increase capacities to manage, preserve and present cultural heritage and cultural industries in an efficient, transparent, accountable and equitable manner
4. Assure an increased role of cultural heritage in social and economic opportunities and in engaging community participation in regional and local development strategies
5. Promote an increased awareness of Albania's cultural heritage internationally as a means to promote cultural understanding and religious tolerance

This joint programme will focus in particular on such transformative activities as: the conversion of the National History Museum into a modern cultural institution; protection of and access to two of the country's most important archaeological parks, Apollonia and Antigonea; strengthening the capacities of state employees and other cultural professionals to manage, preserve and present Albania's cultural heritage; demonstrating the viability of new economic opportunities through cultural tourism in Gjirokastra and Berat; strengthening of national policies to safeguard Albania's cultural heritage; and developing new national capacities to promote a more accurate image of Albania's culture abroad.

The joint programme is being implemented by a full-time programme unit, comprised of an international director, a national project manager and a support team. The Offeror will report to the programme unit.

3. Culture Marketing Component

The Culture Marketing Component developed under Joint Programme under Outcome 5 is to provide technical assistance and support to the National Tourism Agency in the Ministry of Tourism, Culture, Youth and Sports in developing a five-year strategy and one-year action plan for marketing Albania's culture in order to make the country more attractive for cultural tourism and strengthen its image abroad.

Within one year, the CHSED Joint Programme will also provide for three to five new marketing tools (products, activities or events) about Albanian culture to be accessible to target clients abroad (Albanian embassies, foreign cultural institutions, Albanian and foreign NGOs and businesses). The tools shall be available to, or benefit, Albania's Ministry for Tourism, Culture, Youth and Sports and its National Agency for Tourism, but also the Ministry for Foreign Affairs which is presently taking steps to develop its cultural diplomacy.

Albania Culture Marketing Strategy

The three to five marketing tools will be selected and produced on the basis of the culture marketing strategy and action plan. They will be targeted cultural products that will promote Albania as a society of cultural understanding and religious tolerance. In order to facilitate the work of the future contractor a background study on Albania's cultural tourism marketing efforts over the last five years has been undertaken. The study provides an overview on the Albanian institutional setting with regard to tourism marketing, its strategic guidelines on cultural tourism, and an assessment of Albania's tourism marketing activities from a local perspective.

A donor mapping document in the area of cultural heritage has also been developed by the programme team and will serve as a complementary guiding tool regarding the sector. These background studies, along with other main strategic documents of the Albanian Government will be made available to the Contractor and will feed into the development of a national culture marketing strategy.

4. Scope of Work and Expected Outputs

The Offeror is expected to analyze the culture marketing activities of Albania and to lead the process of developing a culture marketing strategy and action plan. Culture Marketing is understood to be all official and semi-official presentations, events, materials, campaigns and other efforts made abroad concerning Albania's culture and heritage, including, but not limited to, marketing of cultural tourism. More specifically, the tasks of the Offeror are as follows:

1. Develop a Culture Marketing Strategy for Albania in line with the existing strategies on Tourism (2007) and on Cultural and Environmental Tourism (2005). The strategy should, among others,
 - 1.1 identify and assess Albania's cultural assets for tourism development and marketing over the next five years, breaking down Albania's cultural assets in sites, institutions and events;
 - 1.2 review and evaluate all aspects of the comprehensive background study on Albania's efforts in cultural tourism marketing produced by the CHSED JP;
 - 1.3 identify and describe priority markets for Albania's culture marketing efforts, including countries and client groups, priority marketing tools and priority cultural tourism products; and
 - 1.4 make an integrated set of recommendations concerning Albania's culture marketing which are realistic in terms of the country's human and financial capacities, for targeting these markets. Creative and innovative recommendations are preferable.
2. Develop an action plan for the first year of implementation of the Strategy after its adoption by the Albanian Council of Ministers.
3. Develop five strategic interventions/marketing tools in the field of culture and heritage, and produce at least three of them, that are in line with the Culture Marketing Strategy and the country's needs for tourism development, from a coherent set of activities relating to, and reinforcing each other.
4. Propose institutional or organizational structures and business models, possibly including Public-Private Partnerships and others to be newly-established, which are expected to take over the implementation of the strategy as well as the long term task of Albania's cultural marketing abroad.

The contractor is expected to cooperate in a fully participatory fashion with key stakeholders such as the Ministry for Tourism, Culture, Youth and Sports and its subordinate institutions, the Ministry of Foreign Affairs, the National Tourism Agency and other relevant cultural institutions and destinations to capture their suggestions and needs and incorporate them into the strategy.

4.1. Specific activities

The following is a list of activities grouped in distinct phases that will guide the work of the Contractor throughout the implementation stage:

Phase 1: Inception Phase (indicative time frame 1 month)

The following activities will be carried out during Phase I:

- Mobilization of the Consultancy Team, including the Team Leader and any other key and non-key staff, international and national
- Deployment of the above team in the country (Albania)
- Identification of institutional stakeholders and holding meetings with them in order to gauge their inputs and make them part of the process
- Familiarization with relevant policy documents such as sectoral strategies of tourism, culture and environment in the wider context of the National Strategy for Development and Integration and background studies in cultural tourism marketing
- Holding a participatory Inception and Planning Workshop with relevant stakeholders
- Draft Inception Report paving the way to the development of the strategy

Phase 2: Development of the national Culture Marketing Strategy and a proposal for improved institutional structures to undertake culture marketing activities (indicative time frame: 3 months)

The following activities will be carried out during Phase 2:

- Submit an outline of the strategy for review to the programme team
- Review and finalize the outline
- Submit draft strategy and action plan for review by stakeholders and Joint Programme
- Submit a concept proposal on the improvement of institutional structure, (including capacities) to undertake culture marketing activities
- Review and finalize concept proposal
- Develop proposal with elaborate recommendations

Phase 3: Development of five immediate interventions / marketing tools in the field of culture and heritage aligned with an Action Plan for the implementation of the strategy (indicative time frame: 3 months)

The following activities will be carried out during Phase 3:

- Finalization of Strategy, Action Plan and institutional proposal after having received comments from the Government of Albania and the Joint Programme

Albania Culture Marketing Strategy

- Submit draft proposal on five specific interventions / marketing tools to be developed
- Review and finalize the proposal.

Phase 4: Closing up (indicative time frame: 3 months)

- Produce three to five culture marketing tools
- Draft final: report on the overall set of activities undertaken and results achieved.
- Organizatiion of a national event with the participation of pertinent national institutions from the public and private sector and the international donor community to present the results of the consultancy.

5. Logistics and Timing

The operational base of the project will be at the Culture and Heritage for Social and Economic Development programme premises in Tirana. However, the Contractor should be able to undertake on-site visits with local counterparts in Albania according to his/her needs.

The intended commencement date is 01 October 2009. The period of the implementation of the contract will be 12 months from the date of commencement. The time line for the completion of the activity is foreseen to be as follows:

Phase I
Oct 2009

Phase II
Nov 09 - Jan 10

Phase III
Feb - Mar 10
Apr - May 2010

Phase IV
Jun - Sep 10

6. Requirements

6.1 Personnel

Task Manager/Team Leader

The Team Leader will be responsible for the overall coordination and quality control of the products delivered by this consultancy. She/he is expected to provide guidance and leadership to the international and national experts with the aim of achieving the task assigned to the team. Additionally, the Team Leader will act as an advisor to the National Tourism Agency on the coordination of activities under the Culture Marketing Component.

Qualifications and skills:

- University degree in cultural and/or tourism studies, marketing, management and/or business administration;
- Post-graduate degree in marketing would be desirable;
- Outstanding analytical skills;
- Outstanding organizational and leadership skills;

Albania Culture Marketing Strategy

- Excellent communication skills;
- Fluency in written and spoken English;
- Computer literate.

Professional experience:

- At least 15 years of experience in the management of international projects and/or strategic studies related to culture, cultural tourism and/or marketing;
- At least 5 years of experience in leading positions in developing or transition countries;
- Excellent knowledge of the tourism business and tourism development trends globally, with a focus on Europe;
- Good understanding of the international institutional framework in the tourism and cultural heritage sectors;
- Proven track record in managing a team of experts; supervising and coordinating technical aspects of the project, ensuring good client communication;
- Knowledge of UN/UNDP rules and regulations is desirable.

Key Expert 1

Key Expert 1 will provide technical advice to the consultancy team with regard to policy approaches, strategy development and development of tools in the area of culture and heritage promotion, tourism development and/or international marketing with the aim of maximizing Albania's utilization of culture and heritage for social and economic development. S/He will be responsible for contributing parts of the Culture Marketing Strategy and Action Plan related to his/her respective field of expertise.

Qualifications and skills:

- University degree in cultural and/or tourism studies, marketing, management and/or business administration;
- Excellent analytical and strategy drafting skills;
- Excellent communication skills;
- Fluency in written and spoken English;
- Computer literate

Professional experience:

- At least 10 years of relevant professional consulting, business and/or research experience in the fields of culture and heritage, tourism, culture and/or cultural tourism marketing;
- Proven extensive experience in cultural tourism development and planning internationally and ideally in similar country (i.e. the Balkans and/or post-communist countries);
- Good knowledge of Albania's international situation and relations is a plus;
- Proven track record for innovative solutions or ground-breaking activities in her/his field is a plus;
- Knowledge of UN/UNDP rules and regulations is a plus.

Key Expert 2

Key Expert 2 will provide technical advice to the consultancy team with regard to policy approaches, strategy development and development of tools in the area of culture and heritage promotion, tourism development and/or international marketing with the aim of maximizing Albania's utilization of culture and heritage for social and

Albania Culture Marketing Strategy

economic development. S/He will be responsible for contributing parts of the Culture Marketing Strategy and Action Plan related to his/her respective fields of expertise.

Minimum qualifications and skills:

- University degree in the relevant field;
- Excellent communication skills;
- Fluency in written and spoken English;
- Computer literate

Professional experience:

- At least 5 years of relevant professional consulting, management, business and/or research experience in the fields of culture and heritage, tourism and/or marketing;
- Good knowledge of Albania's culture, international situation and relations is a plus;
- Knowledge of UN/UNDP rules and regulations is a plus.
- Proven track record for innovative solutions or ground-breaking activities in her/his field is a plus;
- Professional exposure to culture and tourism-related contexts.

The offeror is free to add further experts to the team as s/he feels suitable in order to complete the tasks under these Terms of Reference.

7. Reports

The contractor will be asked to submit the following reports:

- Inception report - at the end of the first month of contract implementation
- Mid-term report (including draft strategy and action plan) - at the end of the third month of contract implementation
- Final report - upon completion of the assignment.