Branding Strategy for the Danube Region

Analysis and Recommendations

ROUTES4U

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PREFACE

Welcome to the Branding Studies for the Danube Region, a study carried out by Routes4U, a joint programme of the Enlarged Partial Agreement on Cultural Routes of the Council of Europe (EPA) and the European Commission's Directorate-General for Regional and Urban Policy (DG REGIO).

This study will highlight how the Danube Region, with its rich and colourful heritage, offers many opportunities for branding. You will find a detailed study of the data, research and relevant information on cultural tourism entailed in developing successful strategies to promote sustainable tourism and capitalise on cultural, nature and tourism projects.

Developing a "Smart Destination Danube", promoting cultural heritage and building on the Cultural Routes of the Council of Europe such as the Art Nouveau Network, and new projects such as the Iron Age Route is vital for destinations to distinguish themselves from others in order to increase benefits for communities and regions. Branding is imperative in the creation and dissemination of an attractive image for tourists, through to investors.

Anyone interested in the process of branding in the Danube Region is sure to find this study useful. The recommendations of this study are published in the Tourism Catalogue of the Cultural Routes of the Council of Europe in the EU macro-regions.

Stefano Dominioni

Executive Secretary, Enlarged Partial Agreement on Cultural Routes, Council of Europe
Director, European Institute of Cultural Routes

The Routes4U project's essence lays in its capacity to make the link between the EU Strategy for the Danube Region and its cultural identity throughout the Cultural routes. Therefore, the following branding strategy will give some hints on the cultural identity of the Danube Region, promoting its unique natural beauty but also its diversity of landscape along the river basin.

I am confident that this study will provide important insight and contribution to enhance the cultural capacity of the EU Strategy for the Danube Region by encouraging all of the stakeholders within the EU Strategy for the Danube Region to define the perception of this unique cultural area.

The data and information collected on cultural tourism in the macro-region countries and the branding strategy will contribute to make the region even more attractive for investments and tourism activities. The European Territorial Cooperation plays a significant role in enhancing synergies amongst territorial actors in the Danube Region and it will continue to encourage the promotion towards European citizens.

Marc Lemaître
Director-General for Regional and Urban Policy,
DG REGIO, European Commission

INTRODUCTION

The present study on the development of a branding strategy for the Danube Region was developed within the Routes4U framework. Routes4U is a Joint Programme of the Council of Europe (Directorate General of Democracy – EPA on Cultural Routes) and the European Union (European Commission – DG REGIO) that aims to foster regional development in the four EU macro-regions through the Cultural Routes. This mission is in line with the objectives of the EU macro-regional strategies in the Adriatic and Ionian, the Alpine, the Baltic Sea and the Danube regions (EUSAIR, EUSALP, EUSBSR and EUSDR, respectively). The macro-regional strategies can contribute to the work of the Cultural Routes, and vice versa, as both tackle common issues, make use of shared opportunities and develop activities at a transnational level.

Cultural Routes act as a driver of economic development, social cohesion and transnational co-operation in line with the objectives of the four EU macro-regional strategies (EUSAIR, EUSALP, EUSBSR and EUSDR[1]). This is why three objectives of Routes4U have been identified:

► Fostering cultural co-operation;

►strengthening social cohesion;

►contributing to regional development.

One of the main fields of action is the development of new Cultural Routes and the extension of certified Cultural Routes in the Adriatic and Ionian, the Alpine, the Baltic Sea and the Danube regions. Several priority themes were identified, such as the development of a Cultural Route on the theme of the Iron Age in the Danube, the theme of Alvar Aalto in the Baltic Sea, the theme of Via Claudia Augusta in the Alpine Region and the extension of the Routes of the Olive Tree in the Adriatic and Ionian Region. Routes4U also provides support to certified Cultural Routes to strengthen their presence in the Adriatic and Ionian, the Alpine, the Baltic Sea and the Danube regions.

It is in this context that the present set of studies on creating a branding and marketing strategy in the four macro-regions through Council of Europe Cultural Routes have been developed. Their purpose is to analyse the current image of Cultural Routes, while identifying needs, gaps and challenges, as well as formulating recommendations for the creation of a Cultural Routes brand in the macro-regions. This work can be seen in line with other actions that complement these studies, such as the awarding of mini-grants to ensure the production of tourism products and services, the development of a tourism catalogue, the launch of a Cultural Routes Card, the creation of a trip-planner and the finalisation of an e-learning course including five modules with an extensive pool of data and information on Cultural Routes and macro-regional strategies.

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[1] EUSAIR – EU Strategy for the Adriatic and Ionian Region, EUSALP – EU Strategy for the Alpine Region, EUSBSR – EU Strategy for the Baltic Sea Region, EUSDR – EU Strategy for the Danube Region

Cultural Routes

The first Cultural Route of the Council of Europe was the Santiago de Compostela Route. Cultural Routes embody the core values of the Council of Europe, democracy and human rights as prerequisites for cultural diversity, intercultural dialogue and mutual respect: "to travel along these routes in order to build a society founded on tolerance, respect for others, freedom and solidarity".[2] By definition, a Cultural Route is

> "a cultural, educational heritage and tourism co-operation project aiming at the development and promotion of an itinerary or a series of itineraries based on a historic route, a cultural concept, figure or phenomenon with a transnational importance and significance for the understanding and respect of common European values.[3]

For Cultural Routes, the following main fields of actions are implemented at local, national and international level:

1.   Co-operation in research and development: projects must play a unifying role around major European themes, showing how these themes are representative of European shared values.

2.   Enhancement of memory, history and European heritage: projects must enhance tangible and intangible heritage, especially in remote areas, and explain their historical significance throughout Europe.

3.   Cultural and educational exchanges for young Europeans: projects must organise activities with young people in order to promote the concept of European citizenship.

4.   Contemporary cultural and artistic practice: projects must encourage activities and artistic practice which explore the links between their European theme and contemporary culture.

5.   Cultural tourism and sustainable cultural development: project must promote dialogue between urban and rural cultures, developed and disadvantaged regions, and between majority and minority. They must seek partnerships with tourism organisations to draw attention on their European heritage and be part of the sustainable territorial development.

EU Strategy for the Danube Region (EUSDR)

Following the successful launch of the EUSBSR, the EU Strategy for the Danube Region (EUSDR) was adopted and established in 2011. The EUSDR covers 14 countries along the Danube River and its specific characteristic includes the participation of both EU- and non-EU countries.

The region is home to 115 million people, or one-fifth of the EU's population, and includes nine EU member states – Austria, Bulgaria, Czech Republic, Croatia, Germany, Hungary, Slovak Republic,

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[2] Council of Europe (1987), Santiago de Compostela Declaration.
[3] Council of Europe, Resolution CM/Res(2013)66 confirming the establishment of the Enlarged Partial Agreement on Cultural Routes (EPA).

Slovenia and Romania and five non-EU countries – Bosnia and Herzegovina, Moldova, Montenegro, Serbia and Ukraine.

The EUSDR Action Plan is structured in four pillars and 12 priority areas. Each priority area is managed by two countries as Priority Area Co-ordinators (PACs). The four pillars are defined as follows:

1. Connecting the Danube region.

2. Protecting the environment in the Danube region.

3. Building prosperity in the Danube region.

4. Strengthening the Danube region.

Each EUSDR Priority Area has specific targets in order to establish a focus on the ongoing and future activities within the region. Culture and tourism are covered by Priority Area 3, "To promote culture and tourism, people to people contacts", defining seven targets to be achieved:

1. develop a Danube brand;

2. implement a harmonised monitoring system;

3. develop new and support existing Cultural Routes;

4. develop green tourist products;

5. create a "Blue Book" on cultural identity;

6. preserve cultural heritage and natural values in a sustainable way;

7. promote exchange and networking in contemporary arts field.

The EUSDR puts a strong emphasis on Cultural Routes already developed in the first Action Plan. As a direct result of the co-operation of Routes4U in the framework, the revised Action Plan focuses even more on the potential of Cultural Routes for cultural tourism:

The Council of Europe's Routes4U project started its work to foster regional development through some specific tools. For example, the first Routes4U meeting for the Danube Region contributed to identifying the regional needs of the Danube Region with regard to the Cultural Routes Programme and featured three (CultPlatForm21, ART NOUVEAU, Iron Age Danube) of the DTP pole 5a projects as contributing to already established cultural routes or with potential of being developed into new ones.

Actions are defined as follows:

1. Promote sustainable tourism in the Danube region and capitalise on EUSDR projects in the areas of culture, nature and tourism.

2. Support and promote cultural tourism in the Danube region.

3. Invest in sustainable quality products, services, innovative forms and infrastructure in the fields of tourism and culture, promote skills, education and creating jobs in the related areas.

4. Develop a "Smart Destination Danube".

5.   Promote and encourage the development of the cultural activities and creative sectors.

6.   Promote cultural heritage in the Danube region.

The concept of place branding

In the context of growing competition between destinations, it is crucial now for destination managers to understand how to distinguish one place from others and increase benefits for communities and territories. In this sense, the creation and dissemination of an attractive image of destination, branding, among different interested groups, from investors to qualified specialists and tourists, is becoming a powerful tool for regional development.

Although place branding seems closely related to product branding, place branding is not just commercially oriented. In 1969, researchers Philip Kotler and Sidney J. Levy emphasized the need to apply marketing mechanisms to non-business sectors.[4] In this sense place branding should be aimed at implementing long-term development strategies and contribute not only to the economic, but also social well-being of communities. The brand's goal is not only to give an impetus to the economic development of the city, but also to address existing social problems and build a "harmonious city" for everyone who is somehow involved in land use and management.[5]

Place branding is a complex and multifaceted phenomenon that involves many actors with a variety of interests. Place branding should not be associated only with a visual embodiment of products' or services' features, although visual identity plays an important role in branding. Visual elements of a brand with their specific significance can reflect brand values and convey a message to an audience, thereby increasing the visibility and recognition of the territory. However, it is only part of the process of branding.[6]

"Rather than advertising, per se, place promotion has sought to rebuild and re-construct the image of the city, allied to which has been a strategy of targeting specific types of activities which both reflect and bolster the image."[7]

Although there is no generally accepted definition of brand and branding, many researchers have attempted to contribute to the discussion about concepts. In particular, one of the pioneers in branding research Simon Anholt claims that "brand image is the set of beliefs or associations relating to that name or sign in the mind of the consumer", while a brand "is being within the domain of the product and consequently under the control of the producer".[8] He makes a distinction between these two concepts, trying to emphasise the dual nature of branding. On the one hand, the branding process starts with self-identification and the articulation of the identity of the place. Branding should thus reflect a set of values that are relevant to local stakeholders and respond to their needs, expectations, and concerns. On the other hand, brand image reflects the perception of a destination

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[4] Kotler P. and Levy S. J. (1969), Broadening the concept of marketing, *Journal of Marketing,* Vol. 33, No. 1, pp. 10-15.

[5] Paddison P. (1993), City marketing, image reconstruction and urban regeneration, *Urban Studies,* Vol. 30, No. 2, p. 340.

[6] Anholt S. (2010), Definitions of place branding – Working towards a resolution, *Place Branding and Public Diplomacy,* Vol. 6, pp. 1-10, available at https://link.springer.com/article/10.1057/pb.2010.3, accessed 21 April 2020.

[7] Paddison P. (1993), City marketing, image reconstruction and urban regeneration, *Urban Studies,* Vol. 30, No. 2, p. 340.

[8] Anholt S. (2010), Definitions of place branding – Working towards a resolution, *Place Branding and Public Diplomacy,* Vol. 6, pp. 1-10, available at https://link.springer.com/article/10.1057/pb.2010.3, accessed 21 April 2020.

by target audiences. However, unlike the articulation of a brand, this takes place in a different external dimension.

The aim of place branding is to achieve a desired brand image thought defining brand identity. If there is a gap between identity of the place and its image, branding will not achieve expected goals. To set up a link between brand image and identity, brand positioning is necessary. Brand positioning covers "4P" aspects (price, product, promotion and place), which are also called marketing mix and which relate to activities and initiatives that companies, or destinations, implement in order to "determine their position in the consumer's mind".[9]

It is important that advertising does not prevail in brand positioning. Real changes and improvements in products and services are needed. Regarding place branding, it can be infrastructural projects, for example, the creation of green spaces and bicycle lanes in areas that promote themselves as eco-destinations, or events organisation in those places that want to be recognised as festival destinations. Without positioning activities that support a brand message a brand will be not convincing. Moreover, the gap between the promoted image of the territory and reality may cause a negative experience for both visitors and residents themselves. The undermining of trust between stakeholders is one of the main reasons for the failure of brand strategies.

It is also important to understand that place brand is dynamic and cannot be created just once, to last forever. Numerous place identities expressed in the brand go through constant rethinking and reinterpretation. Place is a product of co-existence and co-operation of many communities. Each group has its practices related to land-use and a vision of territory's past, present, and future and these interactions cannot be neglected. Since branding is a process of the narrative creation, all ideas about the place should be reflected in a brand; otherwise a brand will not represent all the characteristics of the place and due to that will likely to fail. *Consistency between the reality and a brand message is crucial for the whole branding process.*

Involvement of stakeholders in the branding process plays a significant role. To build a successful branding strategy, stakeholders should work together to provide mechanisms for inclusive discussion about the sense of the space. Maheshwari V., Lodorfos G. and Vandewalle I. (2014) agree that different stakeholders may have conflicting interests that "have seen to erode unity of purpose and decision-making", which could impede the development of a strong brand.[10] If a promoted image does not reflect the full range of existing place identities, it will not be relevant for some actors and will not reach the maximum audience.

Regarding the Cultural Routes of the Council of Europe, the Cultural Routes aim at "raising awareness of the shared European heritage as a cornerstone of European citizenship, a means of improving the quality of life and a source of social, economic and cultural development" (CM/Res(2013)66).[11] Branding, as noted above, is recognized as a powerful tool for regional development, and in the

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[9] Chaves E. (2017), Identity, positioning, brand image and brand equity comparison: a vision about quality in brand management, *Independent Journal of Management & Production,* Vol. 8, No. 4, p. 1249, www.researchgate.net/publication/321441454_Identity_Positioning_Brand_Image_and_Brand_Equity_Comparison, accessed 21 April 2020.
[10] Maheshwari V., Lodorfos G. and Vandewalle I. (2014), Exploring the role of stakeholders in place branding: a case analysis of the "City of Liverpool", *International Journal of Business and Globalisation,* Vol. 13, No. 1, p. 105, www.researchgate.net/publication/264812860_Exploring_the_role_of_stakeholders_in_place_branding_-_A_case_analysis_of_the_%27City_of_Liverpool%27
[11] Resolution CM/Res(2013)66 confirming the establishment of the Enlarged Partial Agreement on Cultural Routes (EPA).

context of the EU macro-regional strategies, the rich tangible and intangible cultural heritage represented in particular by the Cultural Routes can serve as a strong basis for the formation of unifying macro-regional brands and increase visibility of macro-regions as a single space.

On the example of the Danube Region, what ideas can the region put at the core of its branding strategy to become relevant to wider audiences all over the world and contribute to the macro-regional strategy's objectives and local communities development?

PART I – BRAND AUDIT OF THE DANUBE REGION

1. BRAND AUDIT METHODOLOGY

The main objective of the branding strategy of the Danube Region (with regard to cultural tourism) is to create a new "umbrella" brand merging the Cultural Routes of the Council of Europe that cross the Danube Region while aiming to increase the visibility and the competitiveness of both the routes and the region as cultural tourism destinations.

In order to collect the information and data necessary for brand development, the brand audit process was performed using a multi-method approach, including desk research on cultural tourism in the macro-region countries, the creation and distribution of an online questionnaire among principal stakeholders, and phone interviews with principal stakeholders.

1.1 ONLINE SURVEY

Following thorough desk research, which showed a lack of available secondary data regarding Cultural Routes and cultural tourism in the Danube Region, primary research was carried out consisting of two online surveys.

The research was developed following the guidelines from the World Tourism Organization's *Handbook on Tourism Destination Branding* (2009) and the *Handbook on Marketing Transnational Tourism Themes and Routes* (2017).

Sofia, Bulgaria. Photo by Jim Black/Pixabay.

The questionnaire was designed to gain insights into the respondents' view of the Danube Region, the Cultural Routes in the region, their tourism potential, travel motivation, and the best marketing and communication strategies. The questionnaire combines both closed and open questions, allowing respondents to rate some responses on relevant Likert scales, as well as to provide more personalised responses.

In order to obtain a comprehensive view of cultural tourism in the Danube Region and having in mind the scope of the branding strategy, the respondents were carefully selected from two main

stakeholder groups: members of Cultural Routes of the Council of Europe from the Danube Region and representatives from culture and tourism sectors in the Danube Region (public institutions, universities, tourism boards, DMCs[12], local and regional authorities, NGOs, candidates for Cultural Routes and different regional platforms).

For the distribution of the questionnaires to the selected participants, an online platform – SurveyMonkey – was used.

1.2 SEMI-STRUCTURED INTERVIEWS

With the aim of obtaining more in-depth insight into and understanding of stakeholders' views of the Daube Region and the creation of the new brand, respondents to the online survey were asked to participate in short, anonymous phone/Skype interviews. Although the response was very limited, several semi-structured phone interviews were conducted with the respondents from both groups (Cultural Route members and stakeholders from the cultural and tourism sectors). The average interview lasted between 10 and 15 minutes and addressed different topics, including the tourism potential of the Danube Region and its Cultural Routes, its strengths and weaknesses, and possible promotional strategies.

2. SURVEY RESULTS

2.1 CULTURAL ROUTES QUESTIONNAIRE

The EUSDR Cultural Routes Questionnaire comprised 33 questions divided into three distinct areas:
Section 1 – the Danube Region Brand: 20 questions;
Section 2 – Cultural Routes: 11 questions
Section 3 – Personal Information: two questions

The questionnaire was e-mailed on 29 April 2019, and the last reminder was sent out on 2 September, to the members of the Danube Region's 21 Cultural Routes that cross the Danube Region (Impressionisms Routes, Phoenicians' Route, European Mozart Ways, European Routes of Jewish Heritage, Cluniac Sites in Europe, Routes of the Olive Tree, Saint Martin of Tours Route, TRANSROMANICA, Iter Vitis Route, European Cemeteries Route, European Route of Cistercian abbeys, European Route of Historic Thermal Towns, European Route of Ceramics, the Huguenot and, Waldensian trail, ATRIUM, Réseau Art Nouveau Network, Via Habsburg, Destination Napoleon, Roman Emperors and Danube Wine Route, Charlemagne Route and Santiago de Compostela Pilgrim Routes).

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[12] Destination management companies

The five new routes crossing the Danube Region that were certified in 2019 (European Route of Industrial Heritage, Iron Curtain Trail, Routes of Reformation, Liberation Route Europe and Le Corbusier Destinations: Architectural Promenades) were also included in the research, with the first e-mail sent on 17 June 17 and the last reminder on 2 September.

By 18 September, a total of 20 completed questionnaires were received from 10 Cultural Routes, from eight different countries (Romania, Germany, Croatia, Serbia, Hungary, Bulgaria, Slovenia and Austria).

Bratislava, Slovakia. Photo by Martin Katler/Unsplash.

2.1.1 OVERVIEW OF THE RESULTS

For the majority of the respondents, the idea they most readily associate with the Danube Region is its river, followed by culture and history, while history, architecture and gastronomy are aspects that best define the region. Art Nouveau is recognised as an art and architectural movement especially associated with the Danube Region. Christianity, Nikola Tesla's work, wine and fish dishes are the most commonly cited when speaking about religious movements, scientific discoveries, and food and beverages in the Danube Region.

Most of the respondents broadly agree that history, landscape, monuments and heritage sites make the Danube Region unique. However, only 25% consider that Cultural Routes represent the unique aspect of the region.

Asked to imagine that the Danube Region were a person, most respondents would describe the Danube Region as beautiful, elegant and unique.

A typical Danube Region traveller is seen as middle-aged, a nature lover, a cultural tourist, curious and open-minded, and interested in history. Although history and culture are recognised as the main motivations for a typical Danube Region traveller, most of the respondents agree that the Danube Region is not considered a famous cultural destination, and it is not a preferred choice for a cultural holiday. Furthermore, only 5% think that it has a good name and reputation among travellers.

However, most of the respondents consider that the Danube Region brand exists (79%), although no one sees it as extremely strong. Respondents agree that the image of the

Danube Region is characterised by beautiful landscapes and a variety of flora and fauna. The Alpine Region is considered as the main competitor to the Danube Region.

A Cultural Route traveller is described as a middle-aged, well-educated person interested in history and culture, whose main motivation is learning more about history and visiting monuments and heritage sites.

Worryingly, only 25% of respondents have statistical data about visitors to their Cultural Route or particular sites on the route.

Only eight respondents (40%) provided information about local products promoted and/or produced through the Cultural Route.

Websites and social media are seen by most respondents as particularly important channels for the marketing strategies of Cultural Routes. Most of the respondents advocate greater use of new technologies to achieve higher visibility of Cultural Routes. The majority of the respondents are to some degree satisfied with the communication strategy for their Cultural Route, and only 20% of respondents provided additional comments on their needs regarding marketing and communications.

Almost all respondents had indicated country and town of origin, but surprisingly only 75% indicated the Cultural Route they belong to. Only 25% of respondents expressed a willingness to take part in a short phone interview.

2.1.2 ANALYSIS OF THE QUESTIONNAIRE

QUESTION 1
Respondents were asked to write down the first three words that come into their mind when thinking of the Danube Region, in order of importance.

The most chosen words, ranking from most important to least important, were:

1st word:
- River (20%)
- Diversity (15%)
- History (5%)

2nd word:
- Culture (40%)

3rd word:
- Landscape (15%)

Having in mind the total number of answers for all three words, the most chosen words were:
- Culture (15%)

- River (10%)
- History (8.3%)
- Landscape (6.6%)

QUESTION 2
Respondents were asked which aspects best define the Danube Region. They were
presented with seven alternatives and asked to rate these from least to most relevant
on a Likert scale ranging from 1 to 7 respectively (where 1 equals the lowest value and
7 the highest value). Respondents also had an opportunity to give additional input,
under a section entitled "Other".

The list below shows the distribution of all responses at the higher end of the scale
(from 5 to 7).

- History (100%)
- Architecture (80%)
- Gastronomy (75%)
- Art (50%)
- Religion (50%)
- Science (20%)
- Other (10%)
- The respondents did not offer additional input under a section entitled "Other"

The list below shows the distribution of the responses with the highest value (7)

- History (65%)
- Architecture (25%)
- Gastronomy (20%)
- Art (20%)
- Religion (10%)

- Other (5%)
- Science (0%)

QUESTION 3
When asked about a historical period especially associated with the Danube Region, the most common response was:

- Roman Empire (20%)

QUESTION 4
When asked about an art movement especially associated with the Danube Region the most common response was:

- Art Nouveau (20%)

QUESTION 5
When asked about an architectural style especially associated with the Danube Region the most common response was:

- Art Nouveau (25%)

QUESTION 6
When asked about a religious movement especially associated with the Danube Region the most common responses were:

- Catholicism (20%)
- Christianity (15%)
- Orthodox (15%)

QUESTION 7
When asked about a scientific discovery especially associated with the Danube Region the most common response was:

- Nikola Tesla's work (10%)

QUESTION 8
When asked about a specific food or beverage especially associated with the Danube Region the most common responses were:

- Wine (50%)

- Fish/Fish Dishes (25%)
- Paprika/paprika-based meals (20%)

QUESTION 9

Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (from 1, totally disagree, to 5, totally agree) with statements about the characteristics of the Danube Region. They were presented with seven options.

The list below shows the percentage of respondents that totally agree with the following statements.

- The Danube Region has a rich cultural heritage (80%)
- The Danube Region nature is beautiful (80%)
- The Danube Region has a rich history (70%)
- The Danube Region has an exciting culture overall (45%)
- The Danube Region has vibrant cities with many attractions (45%)
- The Danube Region has a unique atmosphere (35%)
- The Danube Region has exciting Cultural Routes (25%)

QUESTION 10

Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (from 1, strongly disagree, to 5, strongly agree), with statements on the uniqueness of the Danube Region. They were presented with nine options.

The list below shows the percentage of respondents that strongly agree with the following statements.

"The Danube Region is unique because of its …"

- history (55%)
- landscapes (55%)
- monuments and heritage sites (45%)
- hospitality of the people (40%)
- diversity (30%)
- Cultural Routes (25%)
- gastronomy (20%)
- museums and arts centres (15%)
- cultural festivals (10%)

Respondents also had an opportunity to give additional input under a section entitled "Other". The following are quotes taken from this section:

- *"Multiculturalism"*

- *"EuroVelo 6 cycling route"*
- *"Cultural Routes (20 certified by the Council of Europe in this region) are not visible enough"*

QUESTION 11
Respondents were asked to write down three different characteristics that would best describe the Danube Region if it were a person.

The most chosen characteristics were:
1st word:
- Beautiful (30%)
- Elegant (15%)

2nd word:
- Interesting (10%)
- Funny (10%)
- Beautiful (10%)

3rd word: there were no characteristics chosen.

Having in mind the total number of answers for all three words, the most chosen are:

- Beautiful (15%)
- Elegant (5%)

QUESTION 12
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (1 being "not at all descriptive" and 5 being "extremely descriptive")

with statements on the personality traits of the Danube Region. They were presented with 17 options.

The list below shows the percentage of respondents that find the following characteristics extremely descriptive.

- Authentic (55%)
- Natural (50%)
- Cultural (45%)
- Unique (40%)
- Humane (25%)
- Lively (25%)
- Cool (20%)
- Down to earth (20%)
- Passionate (20%)
- Refreshing (15%)
- Up to date (10%)
- Family-oriented (10%)
- Successful (5%)
- Trendy (5%)
- Comfortable (0%)
- Dynamic (0%)
- Experiential (0%)

Respondents also had an opportunity to give additional input under a section entitled "Other". The following are quotes taken from this section:

"Sophisticated"

QUESTION 13
When asked to describe a typical Danube Region visitor most of the respondents answered:

- Interested in culture and history (40%)
- Curious (30%)
- Active/nature lover/adventurous (20%)

QUESTION 14
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (1 being "not at all influential", 5 being "extremely influential") with statements about the motivation for Danube Region visitors. They were presented with 10 options.

The list below shows the percentage of respondents that find the following motivations extremely influential for visitors to the Danube Region.

- History (55%)
- Natural environment and scenery (40%)
- Monuments and heritage sites (35%)
- Gastronomy (30%)
- Culture (museums, music, art, dances, festivals, etc.) (20%)
- Interaction with local communities (10%)
- Visiting friends and relatives (5%)
- Voluntourism (visiting a destination while engaging in volunteering activities) (0%)
- Extreme sports (0%)
- To increase self-status and prestige (0%)

Respondents also had an opportunity to give additional input under a section entitled "Other". The following are quotes taken from this section:

"Experience nature through active tourism"

QUESTION 15
Respondents were asked to write down, in order, three keywords or phrases that would differentiate the Danube Region visitor from other macro-region visitors.

1st word:
- Explorer/adventurous/curious (30%)

2nd word:
- Individual travellers (10%)

3rd word:
- Nature lover (10%)
- Interested in culture (10%)

Having in mind all three words, the most chosen ones were:
- Explorer/adventurous/curious (13%)
- Multicultural (4.4%)
- Nature (2%)

QUESTION 16
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (1 being strongly disagree and 5 strongly agree) with statements about the average Danube Region tourist's opinion about the region. They were presented with 16 options.

The list below shows the percentage of respondents that strongly agree with the following statements.

- This region has a rich history (50%)
- The culture here is interesting (45%)
- The people here are hospitable (40%)
- I can trust the Danube Region for a fulfilling cultural experience (35%)
- In the Danube Region, I can have an authentic cultural experience (35%)
- I enjoy visiting the Danube Region (25%)
- I would recommend my friends/relatives to visit the Danube Region (25%)
- The Danube Region is a famous cultural destination (20%)
- This region has a personality (20%)
- I can rely on there being a good atmosphere (20%)
- The Danube Region would be my preferred choice for a cultural holiday (15%)
- The Danube Region met my expectations (10%)
- When thinking about culture, the Danube Region comes to my mind immediately (5%)
- The characteristics of this region come to my mind quickly and clearly (5%)
- It has a good name and reputation (5%)
- My friends would think highly of me if I visited the Danube Region (0%)

QUESTION 17
Respondents were asked to rate on a scale of 1 to 4 (non-existent, existent, slightly strong, extremely strong) the current strength of the Danube Region's brand.

The list below shows the percentage of respondents that consider the Danube Region brand to be:

- Existent (58%)
- Slightly strong (21%)
- Non-existent (21%)
- Extremely strong (0%)

QUESTION 18
Respondents were asked to rate from the least to most relevant, on a Likert scale ranging from 1 to 7 (1 being the lowest value and 7 the highest value), the aspects that characterise the image of the Danube Region. They were presented with 12 alternatives.

The list below shows the distribution of all responses at the higher end of the scale (from 5 to 7).

- Beautiful landscapes (100%)

- Variety of flora and fauna (95%)
- Interesting local customs (95%)
- Safe place (90%)
- Place to rest (90%)
- Pleasant destination (90%)
- Exciting destination (85%)
- Good value for money (85%)
- Selection of gastronomy (80%)
- Cultural Routes (75%)
- Entertainment (70%)
- Quality of service (65%)
- Quality accommodation (50%)
- Sports facilities (50%)
- Ease of getting around (65%)

The list below shows the distribution of the responses with the highest value (7).
- Beautiful landscapes (65%)
- Variety of flora and fauna (40%)
- Interesting local customs (25%)
- Cultural Routes (20%)
- Safe place (20%)
- Exciting destination (20%)
- Good value for money (15%)
- Selection of gastronomy (15%)
- Place to rest (15%)
- Entertainment (10%)
- Quality accommodation (5%)
- Quality of service (5%)
- Sports facilities (5%)
- Pleasant destination (5%)
- Ease of getting around (0%)

QUESTION 19
Respondents were asked to name three main competitors to the Danube Region brand, in order of their importance.

Competitors named as most important:
- the Mediterranean Region (20%)
- the Adriatic-Ionian Region (20%)
- the Alpine Region (15%)

Competitors named as second most important:
- the Alpine Region (30%)
- the Adriatic-Ionian Region (15%)

Competitors named as third most important:
- the Baltic Sea Region (25%)

Having in mind all three places in the ordered list, the most chosen regions were:
- the Alpine Region (16%)
- the Mediterranean Region (8%)
- the Baltic Sea Region (11%)
- the Adriatic-Ionian Region (11%)

QUESTION 20
Respondents were asked to rank the Danube Region brand alongside its three main competitors.

- The responses to this question were inconclusive.

QUESTION 21
When asked to describe Cultural Route visitors most of the respondents answered:

- Interested in history (or similar: historical) (25%)
- Interested in culture (25%)
- Middle-aged (15%)

QUESTION 22
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (1 being not at all influential, 5 being extremely influential) with statements about what motivates visitors to a Cultural Route. They were presented with 10 options. Respondents also had an opportunity to give additional input under a section entitled "Other".

The list below shows the percentage of respondents that found the following motivations extremely influential for visitors to their Cultural Route.

- History (70%)
- Monuments and heritage sites (60%)
- Gastronomy (45%)
- Culture (museums, music, art, dances, festivals, etc.) (40%)
- Natural environment and scenery (15%)
- Interaction with local communities (10%)
- Visiting friends and relatives (10%)
- Voluntourism (visiting a destination while engaging in volunteering activities) (5%)
- Extreme sports (5%)

- To increase self-status and prestige (0%)

The respondents did not provide additional input under the section entitled "Other".

QUESTION 23
Respondents were asked to provide keywords or phrases, that differentiate visitors to their Cultural Route from the other Cultural Routes' visitors.
The most repeated answer was:

- Interested in history/history lover

QUESTION 24
Respondents were asked if they have any kind of statistical data on visitors to their Cultural Route or particular sites on the route.

- Responded negatively (55%)
- Responded affirmatively (25%)
- Did not respond (20%)

QUESTION 25
Respondents were asked to provide a list of local products produced by and/or promoted through the Cultural Route, related to the specific theme of the Cultural Route.

- 40% of respondents provided an answer.

The following are quotes taken from this section:
1.
- **Name of the product:** kosher sauvignon blanc wine
- **Description of the product:** kosher wine from Sremski Karlovci
- **Information on the producer (name and address):** Veritas Winery, 105 Ešikovac, Sremski Karlovci, Serbia
- **Places of distribution and name of the entity in charge of distribution**:
  Veritas Winery, 105 Ešikovac, Sremski Karlovci, Serbia
  Jewish Community of Novi Sad, 1 Jevrejska Street, Novi Sad
- **Any data on sales trends if available: N/A**

2.
- **Name of the product:** wood carvings
- **Description of the product:** cups, kitchen items, icons, old-style homes
- **Information on the producer (name and address):** there are many across the Marmaures Region

- **Places of distribution and name of the entity in charge of distribution:** Sighet, Baia Mare and cities
- **Any data on sales trends if available: N/A**

3.
- **Name of the product**: replica Roman coins
- **Description of the product:** jewellery from Roman coins
- **Information on the producer (name and address):** www.muzej-sisak.hr/
- **Places of distribution and name of the entity in charge of distribution**: City museum
- **Any data on sales trends if available: N/A**

4.
- **Name of the product:** natural soap
- **Description of the product:** natural soaps made to the original recipe once used by the Roman emperor Galerius, born near Gamzigrad, near Zajecar, where today lay remains of the palace built in the 4th century A.D., Felix Romuliana
- **Information on the producer (name and address):** workshop for producing domestic soaps – Lady Emilly, Vojnička 44
- **Places of distribution and name of the entity in charge of distribution:** various locations and places in Serbia
- **Any data on sales trends if available: N/A**

5.
- **Name of the product:** thermal cosmetics
- **Description of the product:** cosmetics made with thermal water
- **Information on the producer (name and address):** Budapest Spas
- **Places of distribution and name of the entity in charge of distribution:** Thermal baths in Budapest
- **Any data on sales trends if available: N/A**

6.
- **Name of the product:** extracurricular learning location
- **Description of the product:** workshops and projects with school classes
- **Information on the producer (name and address):** Imperial Cathedral Königslutter
- **Places of distribution and name of the entity in charge of distribution:** Verein Braunschweiger Kulturbesitz
- **Any data on sales trends if available: N/A**

7.
- **Name of the product:** Mozartkugel
- **Description of the product:** sweet
- **Information on the producer (name and address):** various
- **Places of distribution and name of the entity in charge of distribution:** various
- **Any data on sales trends if available: N/A**

8.
- **Name of the product:** ceramics
- **Description of the product:** tableware, decorative items
- **Information on the producer (name and address):** various
- **Places of distribution and name of the entity in charge of distribution:** outlet stores, factory stores
- **Any data on sales trends if available: N/A**

QUESTION 26
Respondents were asked to provide a list of any additional local products produced by and/or promoted through the Cultural Route.

- Only 20% of respondents provided an answer.

The following are quotes taken from this section:

- *"Jam, honey, wine, ceramics"*
- *"Weaving, jewellery"*
- *"Honey production, Vladimir Hunjadi, 56 Mažuranićeva Street, Petrovaradin"*

QUESTION 27
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (1 being not at all important and 5 being extremely important) of the importance of the stated activities for the marketing strategies of their Cultural Route. They were presented with seven options. Respondents also had an opportunity to give additional input under a section entitled "Other".

The list below shows the percentage of respondents that find the following activities extremely important for the marketing strategies of their Cultural Route.

- Website (45%)
- Social media (30%)
- Events (30%)
- Apps, geolocation maps (25%)
- Online advertising (20%)
- Public relations (20%)
- Printed material (brochure, maps, and information, material, etc.) (15%)
- Other (please specify) (5%) – The respondents did not provide additional input under the section entitled "Other".

QUESTION 28
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (1 being poor quality and 5 being excellent) with the performance of

the stated activities for the marketing of their Cultural Route. They were presented with seven options.

The list below shows the percentage of respondents that considered the following activities to be excellent for the marketing strategies of their Cultural Route.

- Website (40%)
- Social media (25%)
- Online advertising (15%)
- Events (15%)
- Public relations (10%)
- Printed material (brochure, maps, information, material, etc.) (5%)
- Apps, geolocation maps (0%)
- Other (please specify) (0%) – The respondents did not provide additional input under the section entitled "Other".

QUESTION 29
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (1 being not at all important and 5 being extremely important) with the importance of the stated actions for the successful visibility of their Cultural Route. They were presented with five options.

The list below shows the percentage of respondents that found the following activities extremely important for the successful visibility of their Cultural Route:

- For successful visibility, a Cultural Route should use new technologies that increase opportunities for innovation (55%)
- For successful visibility, a Cultural Route should work in terms of communities of interest: successfully identify the organisations, media, blogs and all those who will be naturally drawn to the theme (50%)
- For successful visibility, a Cultural Route should work with the media, using the existing resources of the project's partners (45%)
- For successful visibility, a Cultural Route should fully use social networks and digital marketing (45%)
- For successful visibility, a Cultural Route should be present and visible at travel trade industry events, to meet and talk to tour operators, cruise operators and other professionals (25%)

QUESTION 30
Respondents were asked to rate their level of satisfaction on a five-level Likert scale (1 being not at all satisfied and 5 being extremely satisfied) with the communication strategy for their Cultural Route.

- Very satisfied (50%)
- Moderately satisfied (35%)
- Not at all satisfied (5%)

- Slightly satisfied (10%)
- Extremely satisfied (0%)

QUESTION 31
Respondents were asked to provide additional comments on their needs regarding their next marketing and communications project.

- Only 20% of respondents provided an answer.

The following are quotes taken from this section:

- *"More communication"*
- *"Focus on communication between the Cultural Routes and communication with the Institute of Cultural Routes"*
- *"More meetings for the members of the route"*
- *"Minister of Tourism should be much more involved and promote our region"*

QUESTION 32
Respondents were asked to provide personal information about their:

a. country – 19 (95%) respondents stated their country of origin
- Germany (4)
- Austria (1)
- Hungary (2)
- Romania (5)
- Serbia (2)
- Slovenia (1)
- Bulgaria (1)
- Croatia (3)

b. town – 18 (90%) respondents stated their town of origin

c. Cultural Route – 15 respondents (75%) stated their Cultural Route

QUESTION 33
Respondents were asked to take part in a short phone interview.

- 75% responded negatively
- 25% responded positively

2.2 CULTURE AND TOURISM STAKEHOLDERS' QUESTIONNAIRE

The Cultural and Tourism Stakeholders' Questionnaire comprised 22 questions divided into two distinct areas:

Section 1 – the Danube Region brand (20 questions)
Section 2 – Personal Information (two questions)

The questionnaire was e-mailed on 29 April 2019, and the last reminder sent out on 2 September, to different stakeholders form the culture and tourism sectors in the Danube Region: public institutions, universities, tourism boards, DMCs, local and regional authorities, non-governmental organisations, candidates for Cultural Routes and different regional platforms.

By 17 September, a total of 24 completed questionnaires were received from different stakeholders, from 12 different countries (Romania, Croatia, Serbia, Hungary, Bulgaria, Slovenia, Austria, Moldova Ukraine, Montenegro, Bosnia and Herzegovina, and the Czech Republic).

2.2.1 OVERVIEW OF THE RESULTS

The majority of the respondents consider history, architecture and gastronomy as aspects that best define the Danube Region, while the first words that come into their mind when thinking about the Danube Region are culture and river.

The period of the Austro-Hungarian Empire was recognised by most of the respondents as the historical period most associated with the Danube Region. When speaking about art and architecture the majority of the respondents identified the Danube Region with the Art Nouveau movement. In the field of religion and science, Christianity and Nikola Tesla's work were the most repeated answers. As for gastronomy, respondents broadly agree that wine and fish dishes are especially associated with the Danube Region.

Most of the respondents broadly agree that landscape, monuments and heritage sites, diversity and history are what make the Danube Region unique. However, only 40% consider that Cultural Routes are a unique aspect of the region.

If it were a person, most respondents would describe the Danube Region as beautiful, strong and diverse. Authentic, natural, unique and cultural are also used by many respondents to describe the Danube Region.

A typical Danube Region visitor is perceived as a curious person who appreciates good food, adventure and nature.

For many respondents, natural environment and scenery are the main motivation for a typical Danube Region visitor, followed by history, monuments/heritage sites and gastronomy. Interest in history and culture and curiosity are the aspects that make the Danube Region visitor different from other macro-region travellers.

Most of the respondents agree that the Danube Region has a rich history and interesting culture, yet only 20% think that the Danube Region is the preferred choice for a cultural holiday. Worryingly, only 16% consider it has a good name and reputation.

The majority of the respondents consider that the Danube Region brand exists (79%), although only 4% perceive it as extremely strong.

Respondents broadly agree that the image of the Danube Region is characterised by beautiful landscapes, a variety of flora and fauna and a selection of gastronomy. The Alpine Region is considered as the main competitor to the Danube Region.

Only 33% of respondents expressed a willingness to take part in a short phone interview.

2.2.2 ANALYSIS OF THE QUESTIONNAIRE

QUESTION 1
Respondents were asked to write down the first three words that come into their minds when thinking of the Danube Region, in order of importance.

The most chosen words were:

1st word:
- River (16.6%)
- Co-operation (12.5%)

2nd word:
- Culture (12.5%)
- Heritage (12.5%)

3rd word:
- Culture (12.5%)

Having in mind the total number of answers for all three words, the most chosen one is:
- Culture (13.3%)

QUESTION 2
Respondents were asked which aspects best define the Danube Region. They were presented with seven alternatives and asked to rate these from least to most relevant on a Likert scale ranging from 1 to 7 respectively (1 being the lowest value and 7 the highest value). Respondents also had an opportunity to give additional input under a section entitled "Other".

The list below shows the distribution of all responses at the higher end of the scale (from 5 to 7).

- History (95.8%)
- Gastronomy (87.5%)
- Architecture (75%)
- Art (54.1%)
- Religion (37.5%)
- Science (33.3%)
- Other (12.5%)
- The respondents did not provide additional input under the section entitled "Other"

The list below shows the distribution of the responses with the highest value (7)

- History (58.3%)
- Architecture (29.1%)
- Gastronomy (29.1%)
- Art (16.6%)
- Science (4.1%)
- Religion (0%)

- Other (0%)

QUESTION 3
When asked about a specific food or beverage especially associated with the Danube Region most of the respondents answered:

- Wine (37.5%)
- Fish/fish dishes (33.3%)
- Beer (16.6%)

QUESTION 4
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (from 1, totally disagree to 5, totally agree) with statements about the characteristics of the Danube Region. They were presented with seven options.

The list below shows the percentage of respondents that totally agree with the following statements.

- The Danube Region has a rich cultural heritage (87.5%)
- The Danube Region nature is beautiful (87.5%)
- The Danube Region has a rich history (79.1%)
- The Danube Region has vibrant cities with many attractions (75%)
- The Danube Region has an exciting culture overall (66.6%)
- The Danube Region has a unique atmosphere (58.3%)
- The Danube Region has exciting Cultural Routes (41.6%)

QUESTION 5
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (with 1 being strongly disagree and 5 being strongly agree) with statements about the uniqueness of the Danube Region. They were presented with nine options.

The list below shows the percentage of respondents that strongly agree with the following statements.

"The Danube Region is unique because of its …"

- landscapes (62.5%)
- monuments and heritage sites (50%)
- diversity (50%)
- history (45.8%)
- museums and arts centres (41.6%)
- gastronomy (37.5%)

- hospitality of the people (33.3%)
- Cultural Routes (25%)
- cultural festivals (25%)

Respondents also had an opportunity to give additional input under a section entitled "Other". The following are quotes taken from this section:

- *"Protected areas"*
- *"From west to east, many different countries and ethnicities"*
- *"The Danube River itself as a strong personality and character"*

QUESTION 6
Respondents were asked to write down three different characteristics, in order, that would be best suited to describe the Danube Region if it were a person.

The most chosen characteristics were:
1st word:
- Beautiful (41.6%)
- Strong (12.5%)

2nd word:
- Diverse (12.5%)

3rd word:
- Cultural (12.5%)

Having in mind the total number of answers for all three words, the most chosen was:
- Beautiful (20%)

QUESTION 7
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (from 1,not at all descriptive to 5,extremely descriptive) with statements about the personality traits of the Danube Region. They were presented with 17 options.

The list below shows the percentage of respondents that found the following characteristics extremely descriptive.

- Authentic (66.6%)
- Natural (62.5%)
- Unique (54.1%)
- Cultural (54.1%)
- Lively (33.3%)
- Passionate (29.1%)

- Dynamic (29.1%)
- Down to earth (16.6%)
- Refreshing (16.6%)
- Humane (16.6%)
- Cool (12.5%)
- Trendy (8.3%)
- Family-oriented (4.1%)
- Successful (4.1%)
- Up to date (0%)

Respondents also had an opportunity to give additional input under a section entitled "Other". The following are quotes taken from this section:

"Colourful"
"Exciting, rich in history/culture, diverse"

QUESTION 8
When asked to describe a typical Danube Region visitor most of the respondents answered:
- Food lover (20%)
- Curious (16.6%)
- Nature lover (16.6%)
- Adventurer (12.5%)

QUESTION 9
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (1 being not at all influential and 5 being extremely influential) with statements about the motivations for visitors to the Danube Region. They were presented with 10 options.

The list below shows the percentage of respondents that found the following motivations extremely influential for visitors to the Danube Region.

- Natural environment and scenery (50%)
- History (33.3%)
- Monuments and heritage sites (29.1%)
- Gastronomy (29.1%)
- Culture (museums, music, art, dances, festivals, etc.) (25%)
- Interaction with local communities (20.8%)
- Visiting friends and relatives (12.5%)
- Voluntourism (visiting a destination while engaging in volunteering activities) (4.1%)
- Other (4.1%)
- Extreme sports (0%)
- To increase self-status and prestige (0%)

Respondents also had an opportunity to give additional input under a section entitled "Other". The following are quotes taken from this section:

"Experience of different cultures/sights/diversity (e.g. river cruise)"
"Authenticity of landscapes and intangible heritage"

QUESTION 10
Respondents were asked to write down, in order, three keywords or phrases that differentiate the Danube Region visitor from visitors to other macro-regions.

1st word:
- History lover (12.5%)
- Interested in culture (12.5%)

2nd word:
- Curious/explorer: (16.6%)

3rd word:
- Interested In culture (16.6%)

Having in mind all three words/phrases, the most chosen word or phrase was:
- Interested in culture (11.6%)

QUESTION 11
Respondents were asked to rate their level of agreement or disagreement on a five-level Likert scale (with 1 being strongly disagree and 5 being strongly agree) with statements about the average Danube Region tourist's opinion about the region. They were presented with 16 options.

The list below shows the percentage of respondents that strongly agree with the following statements.

- This region has a rich history (62.5%)
- The culture here is interesting (62.5%)
- I would recommend my friends/relatives to visit the Danube Region (41.6%)
- I enjoy visiting the Danube Region (37.5%)
- In the Danube Region, I can have an authentic cultural experience (33.3%)
- I can trust the Danube Region for a fulfilling cultural experience (29.1%)
- The people here are hospitable (29.1%)
- The Danube Region is a famous cultural destination (25%)
- I can rely on there being a good atmosphere (25%)
- The Danube Region met my expectations (25%)
- This region has a personality (20.8%)
- The Danube Region would be my preferred choice for a cultural holiday (20.8%)
- It has a good name and reputation (16.6%)
- My friends would think highly of me if I visited the Danube Region (12.5%)
- When thinking about culture, the Danube Region comes to my mind immediately (8.33%)
- The characteristics of this region come to my mind quickly and clearly (8.33%)

QUESTION 12
Respondents were asked to rate on a scale of 4 (non-existent, existent, slightly strong, extremely strong) the current strength of the Danube Region brand.

The list below shows the percentage of respondents that considered the Danube Region brand to be:

- Existent (50%)
- Non-existent (25%)
- Slightly strong (20.8%)
- Extremely strong (4.1%)

QUESTION 13
Respondents were asked to rate, from the least to most relevant, on a Likert scale ranging from 1 to 7 (with 1 the lowest value and 7 the highest value), the aspects that characterise the image of the Danube Region. They were presented with 12 alternatives.

The list below shows the distribution of all responses at the higher end of the scale (from 5 to 7).

- Beautiful landscapes (95.8%)

- Variety of flora and fauna (95.8%)
- Selection of gastronomy (91.6%)
- Pleasant destination (83.3%)
- Interesting local customs (83.3%)
- Exciting destination (83.3%)
- Safe Place (79.1%)
- Place to rest (75%)
- Good value for money (70.8%)
- Cultural Routes (66.6%)
- Ease of getting around (62.5%)
- Entertainment (62.5%)
- Quality of service (58.3%)
- Sports facilities (45.8%)
- Quality accommodation (33.3%)

The list below shows the distribution of the responses with the highest value (7)
- Beautiful landscapes (62.5%)
- Variety of flora and fauna (45.8%)
- Pleasant destination (41.6%)
- Selection of gastronomy (33.3%)
- Interesting local customs (25%)
- Safe place (25%)
- Place to rest (55%)
- Exciting destination (25%)
- Cultural Routes (20.8%)
- Good value for money (20.8%)
- Ease of getting around (20.8%)
- Entertainment (16.6%)
- Quality accommodation (12.5%)
- Quality of service (12.5%)
- Sports facilities (4.1%)

QUESTION 14
Respondents were asked to name, in order, three main competitors to the Danube Region brand.
Competitors named as most important:
- the Alpine Region (20.8%)
- the Adriatic-Ionian Region (12.5%)

Competitors named as second most important:
- the Mediterranean Region (20.8%)

Competitors named as third most important:
- the Alpine Region (12.5%)

Having in mind all three competitors by order, the most chosen were:

- the Alpine Region (41.6%)
- the Mediterranean Region (29.1%)
- the Baltic Sea Region (25%)
- the Adriatic-Ionian Region (25%)

QUESTION 15
Respondents were asked to rank the Danube Region's brand strength alongside its three main competitors.

- The responses to this question were inconclusive.

QUESTION 16
Respondents were asked to provide personal information regarding their:

a. country – 22 respondents stated their country of origin
- Austria (5)
- Hungary (3)
- Croatia (3)
- Ukraine (3)
- Romania (1)
- Serbia (1)
- Montenegro (1)
- Slovenia (1)
- Bulgaria (1)
- Moldova (1)
- Czech Republic (1)
- Bosnia and Herzegovina (1)

b. town – 23 (95.8%) respondents stated their town of origin

15 respondents (83.3%) stated their company/organisation
- Ministry of Trade and Tourism (4)
- Tourism board (3)
- Public institution (3)
- University (2)
- DMC (1)
- Regional authority (1)

- Ministry of Culture (1)

Vienna Austria. Photo by Daniel Plan/Unsplash.

PART II – BRAND STRATEGY DEVELOPMENT OF THE DANUBE REGION

1. INTRODUCTION

The main objective of the Danube Region Branding Strategy is the creation of a culture-based macro-regional brand for the Danube Region, in line with the objectives of the EU Strategy for the Danube Region, with regard to the Cultural Routes of the Council of Europe. The objective is to create a new "umbrella" brand merging the two (the Cultural Routes and the Danube Region).

The Danube Region encompasses 14 countries,[13] which are crossed by 25 Cultural Routes[14] covering different themes, from art and architecture to agriculture, history, society and spirituality. This wide diversity is both an advantage and a challenge for the development of the Danube macro-regional brand. The specific aim of the strategy is to find common ground, shared values that can form the basis of a truly shared macro-regional brand that different stakeholders from different countries can relate to.

2. ANALYSIS OF THE PERCEPTION OF THE DANUBE REGION

2.1 ANALYSIS OF THE QUESTIONNAIRES

Analysis of the received questionnaires revealed many common elements regarding the perception of the Danube Region among principal stakeholders (members of the Cultural Routes from the Danube Region, public institutions, universities, tourism boards, DMCs, local and regional authorities, NGOs, candidates for Cultural Routes and different regional platforms).

When asked to write down the first three words that come into their mind when thinking of the Danube Region, in order of importance, the majority of the respondents associated the Danube Region with its river, culture and history.

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13. Austria, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Germany, Hungary, Moldova, Montenegro, Romania, Serbia, Slovakia, Slovenia and Ukraine.

14. Impressionisms Routes, Phoenicians' Route, European Mozart Ways, European Routes of Jewish Heritage, Cluniac Sites in Europe, Routes of the Olive Tree, Saint Martin of Tours Route, TRANSROMANICA, Iter Vitis Route, European Cemeteries Route, European Route of Cistercian abbeys, European Route of Historic Thermal Towns, European Route of Ceramics, Huguenot and Waldensian trail, ATRIUM, Réseau Art Nouveau Network, Via Habsburg, Destination Napoleon, Roman Emperors and Danube Wine Route, Santiago de Compostela Pilgrim Routes, European Route of Industrial Heritage, Iron Curtain Trail, Routes of Reformation, Liberation Route Europe, Le Corbusier Destinations: Architectural Promenades.

Regensburg, Germany. Photo by analogicus/Pixabay.

The respondents consider history (60%), architecture (27%) and gastronomy (25%) to be the aspects that best define the Danube Region. The period of the Austro-Hungarian Empire (30%) and the Roman Empire (15%) were recognised as historical periods especially associated with the Danube Region. Art Nouveau (27%) is considered as an art and architectural movement particularly associated with the Danube Region. In the field of religion and science, Christianity (25%) and Nikola Tesla's work (10%) were the most chosen answers. As for gastronomy, respondents broadly agree that wine (39%) and fish dishes (30%) are especially associated with the Danube Region.

All the respondents agree that the Danube Region has a rich cultural heritage and the vast majority (97%) agree that the Danube Region has a rich history and beautiful nature.

Most of the respondents broadly agree that landscape (100%), monuments and heritage sites (93%), history (93) and diversity (88%) are aspects that make the Danube Region unique. However, only 65% consider that Cultural Routes are a unique aspect of the region.

If it were a person, most respondents would describe the Danube Region as **beautiful** (48%) and **strong** (16%). **Elegant**, **diverse**, **cultural**, **serious** and **interesting** are also used by many respondents to describe the Danube Region.

Authentic (95%), **cultural** (93%), **natural** (90%) and **unique** (84%) are considered as very descriptive personal traits that describe the Danube Region.

A typical Danube Region visitor is seen as a **curious**, **open-minded cultural** tourist, interested in **history**, **nature**, **good food** and **adventure**.

For many respondents, natural environment (95%) and history (88%) are the main motivations for a typical Danube Region visitor, followed by monuments/heritage sites (81%), gastronomy (79%) and culture (79%).

Being interested in culture and history, adventurous and curious are the characteristics that make the Danube Region visitor different from other macro-region travellers

The majority of the respondents consider that a Danube Region brand exists (75%), although only 10% perceive it as strong.

Most of the respondents concur that the image of the Danube Region is characterised by beautiful landscapes (93%) and a variety of flora and fauna (75%), giving the impression of a pleasant destination (68%).

The Alpine Region (45%) is considered as the main competitor to the Danube Region, followed by the Mediterranean region (25%).

In both questionnaires, respondents had an opportunity to provide additional input. Most of the answers emphasised the diverse and multicultural nature of the region and the curious and open-minded character of its visitors.

About the Danube Region

► "The region is multicultural, multi-ethnic and multi-denominational, and that is exactly its uniqueness."
► "The Danube Region will offer you a unique, breath-taking and eye-opening journey through the past and present of this melting pot of different cultures."
► "From west to east, many different countries and ethnicities."
► "The total history of the region is impressive"
► "The Danube River itself has a strong personality and character"

About the Danube Region and Cultural Routes' visitors and their motivation:

► "Interested in different cultures along his journey."
► "Interested to discover the different cultures."
► "Interested in the unknown."
► "Curious for different experiences."
► "Self-discovery, simplicity, authenticity, "slow movement" instead of an opulent demonstration of wealth and influence."

2.2 SWOT ANALYSIS

A general SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis is created based on the gathered information from questionnaires, interviews, national SWOT analyses and available strategy documents. The most competitively significant strengths, weaknesses, opportunities and threats are compiled having in mind the competitive context in which the Danube Region operates as a tourism destination. The majority of the respondents consider the Alpine and Mediterranean regions as the main competitors to the Danube Region.

STRENGTHS	WEAKNESSES
Rich culture	Not a homogenous tourism destination
Rich history	No sense of common identity
Diversity (of cultures, ethnicities, languages, religions, traditions, landscapes)	Important discrepancies in the level of socio-economic development among countries in the region
Beautiful landscapes	Different stages of tourism development among countries in the region
Monuments and heritage sites	Poor basic and tourism infrastructure in some parts of the region
Gastronomic variety	Insufficient cross-border co-operation among countries in the region
Mainly undiscovered area offering new and off-the-beaten-track experiences	Lack of co-ordination and effective communication among different stakeholders
All-year-round tourism	Low level of market valorisation of tangible and intangible cultural and natural heritage
Authenticity	Lack of qualified personnel working in the tourist industry
Urban lifestyle in large cities	Insufficient and partial data on tourism performances
Attractive nightlife in large cities	No regional destination management organisation that can co-ordinate tourism initiatives in the Danube Region
	Low level of nature and culture preservation with cases of illegal development, especially in some protected areas

OPPORTUNITIES	THREATS
Current tourism trends in favour of new destinations and unique, authentic experiences	Political and economic instability in the region
Current tourism trends for self-arranged holidays	Floods and climate change
Current tourism trend European travellers prefer to travel within the EU	Devastation of nature and cultural resources
Demand for "new" products and attractions	Expectations from modern tourists of high-quality level of services
Search for off-the-beaten-track destinations.	Visa regime

There is a European trend for holidays that combine nature and regional culture, so nature-related tourism along the Danube (best in combination with authentic culture) will also find a steadily growing target group	Strong competitiveness in the international tourism market but many countries have separate tourism strategies

Strengths

No doubt that one of the main strengths of the Danube Region is its immensely rich culture and history, part of which can be appreciated through numerous monuments and heritage sites, as well as different expressions of the intangible heritage throughout the region.

The Danube is the most international river basin in the world, from its origin in the Black Forest in Germany to its delta at the Black Sea, passing through 10 countries (Austria, Bulgaria, Croatia, Germany, Hungary, Moldova, Romania, Serbia, Slovakia and Ukraine) and with a drainage basin that includes four more countries (Bosnia and Herzegovina, the Czech Republic, Montenegro and Slovenia).

Danube River in Orşova, Romania. Picture by David Marcu/Unsplash.

Since ancient times, the Danube River has always been one of the most important exchange corridors in Europe, not only of products and goods but of cultures and ideas. Home to different ethnic groups, religions, traditions and languages, the Danube Region is often considered as a melting pot of civilisations and cultural influences that in many ways shaped European history and identity. A cradle of ancient civilisations, the northern border of the Roman and the Ottoman Empires, the centre of the Habsburg Monarchy, a witness to both World Wars and divided by the Cold War, the Danube was often a border, but, even more, it was a bridge and connecting element between nations and cultures.

Centuries of important historical processes and a striking diversity of cultures and civilisations have left an indelible trace in the tangible and intangible heritage, from prehistoric archaeological sites, Roman ruins, medieval fortresses, abbeys and monasteries, Art Nouveau buildings or industrial heritage to different traditions, performing arts and gastronomy.

This unique mixture of history and culture represents an immense potential for the development of cultural tourism. Some of it has been recognised and included in the Cultural Routes of the Council of Europe, like Romanesque architecture, European ceramic heritage, historical locations from the Second World War, a spa culture, historic synagogues, winemaking or Mozart's music, among other things.

Other identified strengths of the Danube Region are attractive landscapes of preserved nature and pristine areas on the banks of the Danube with diverse flora and fauna (national parks like the Iron Gates and the Danube Delta), vibrant cities with an urban lifestyle and attractive nightlife (Vienna, Budapest, Bratislava or Belgrade) and a favourable climate that allows all-year-round tourism.

Weaknesses

However, the above-mentioned heterogeneity is also reflected in the unequal economic and social development of the different countries in the region, representing one of its main weaknesses. The Danube Region includes the richest but also some of the poorest regions in the EU: the wealthiest region's GDP per capita in 2015 being around six times higher than that of the poorest (Centre for European Economic Research 2015).

There is a significant gap in tourism infrastructure and development between the western/upper Danube Region countries and the eastern/lower Danube. Poor basic infrastructure (lack of sewage and water-treatment systems and insufficient waste-management systems, for example) and weak transport infrastructures and flight connections in the less-developed parts hamper the flow of tourists.

This is clearly reflected in the number of international tourist arrivals:[15]

> Fifty-five per cent of the tourist arrivals to the Danube Region are concentrated in the most developed parts of the region (Bavaria, Baden

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15. According to World Tourism Organization (2019b), International Tourism Highlights, the following list details the number of international tourist arrivals in the Danube Region countries:
1.   Germany – 38 881 000
2.   Austria – 30 816 000
3.   Hungary – 17 152 000
4.   Croatia – 16 645 000
5.   Ukraine – 14 207 000
6.   Czech Rep – 10 611 000
7.   Bulgaria – 9 273 000
8.   Slovenia – 4 425 000
9.   Romania – 2 797 000
10.   Slovak (2017) – 2 162 000
11.   Montenegro – 2 077 000
12.   Serbia – 1 711 000
13.   Bosnia and Herzegovina – 1 053 000
14.   Moldova – 160 000

Württemberg, Austria), while only around 10% of tourists visit less-developed parts of the region.[16]

Different parts of the region are in the different phases of tourism development. While some destinations can be categorised as already developed destinations, others are still at the beginning of the development phase. This difference is clearly illustrated in the latest Travel & Tourism Competitiveness Report 2019 (World Economic Forum's Platform 2019), which measures the set of factors and policies that enable the sustainable development of the travel and tourism sector. The difference in the overall ranking (total of 140 countries) between the best-positioned Danube Region country – Germany – and the worst positioned – Bosnia and Herzegovina – are 102 positions; Germany (3), Austria (11), Croatia (27), Slovenia (36), Czech Republic (38), Bulgaria (45), Hungary (48), Romania (56), Slovak Republic (60), Montenegro (67), Ukraine (78), Serbia (83), Moldova (103) and Bosnia and Herzegovina (105). Most of the Danube Region countries are below the European average in terms of air transport infrastructure and ground and port infrastructure, while only half of the countries are above the European average in tourist service infrastructure.[17]

Ljubljana, Slovenia. Photo by Bram van Geerenstein/Unsplash.

Although many of the Danube Region's countries share a common past and similar values and traditions, a sense of common identity does not exist, and this absence is perceived as one of the main weaknesses.

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16. Roadmap for the Danube Region, Strengthening regional development through the Cultural Routes of the Council of Europe Council of Europe, April 2019, p. 43.
17. ETTC 2019 ranking on different aspects (total of 140 countries):
Air transport infrastructure: Germany (16), Austria (34), Croatia (44), Slovenia (79), Czech Republic (51), Bulgaria (73), Hungary (52), Romania (72), Slovak Republic (113), Montenegro (60), Ukraine (71), Serbia (76), Moldova (104), Bosnia and Herzegovina (110).
Ground and port infrastructure: Germany (6), Austria (13), Croatia (47), Slovenia (20), Czech Republic (17), Bulgaria (76), Hungary (41), Romania (83), Slovak Republic (40), Montenegro (67), Ukraine (77), Serbia (85), Moldova (106), Bosnia and Herzegovina (118).
Tourist service infrastructure: Germany (13), Austria (2), Croatia (4), Slovenia (27), Czech Republic (32), Bulgaria (12), Hungary (49), Romania (54), Slovak Republic (61), Montenegro (24), Ukraine (65), Serbia (77), Moldova (104), Bosnia and Herzegovina (76).
Natural resources: Germany (30), Austria (24), Croatia (20), Slovenia (26), Czech Republic (93), Bulgaria (40), Hungary (81), Romania (56), Slovak Republic (48), Montenegro (79), Ukraine (116), Serbia (127), Moldova (139), Bosnia and Herzegovina (132).
Cultural resources and business travel: Germany (6), Austria (26), Croatia (32), Slovenia (68), Czech Republic (39), Bulgaria (48), Hungary (43), Romania (44), Slovak Republic (73), Montenegro (130), Ukraine (55), Serbia (67), Moldova (117), Bosnia and Herzegovina (87).

Lack of co-ordination and effective communication among stakeholders from different sectors and at all levels, and insufficient cross-border co-operation among countries in the region are also stated as some of the main challenges for tourism development in the Danube Region.

Furthermore, low awareness among the local population of the potential for cultural tourism development for the creation of new business opportunities, together with a lack of market orientation and specific knowledge among local stakeholders, is perceived as an important weakness for the development of cultural tourism.

Opportunities

There are several tourism trends that have been identified as favourable for tourism development in the Danube Region: demand for new and off-the-beaten-track destinations, experiential travel with its quest for authenticity and local experiences, increasing demand for destinations that combine cultural and natural experiences and offer a break from frenetic lifestyles.

One of the main global trends in the tourism industry is the quest for local, authentic experiences. Tourists are more experienced, better informed, more sophisticated and more demanding. They are interested in "real", genuine experiences, rather than those designed for tourists. They want to feel immersed in the local culture, looking for a more interactive cultural experience and connection with local people.

This demand for experiential travel shows no signs of slowing down. Several studies show that new generations (Generation Z) value adventure experiences such as exploring and trying new things more than anything else. Many DMOs[18] and tourism boards add to their websites elements that feature locals who provide off-the-beaten-path recommendations and share personal stories.

It is also noted that European travellers, as the largest international source market (48%), are searching for destinations closer to where they live. According to the World Tourism Organization's 2019 International Tourism Highlights report, four out of five tourists travel within their region.

The Danube Region is in a position to respond well to these trends and tendencies. Although international travel arrivals are increasing in almost all the countries of the region, the vast part of the region is still "undiscovered" for tourists. Bearing in mind the enormous richness and cultural and natural diversity, the Danube Region has great potential to offer a wide range of authentic and off-the-beaten-track experiences.

With its undiscovered and lesser-known cultural sites and a landscape created by the unhurried pace of the majestic river, it is a perfect destination for visitors who are looking to escape the frenetic city life in search of tranquillity, freshness and breathing space.

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[18] Destination management organizations

One of the important pillars of experienced-based travel is culinary travel, with food-based activities on the rise (market visits, "cooking with grandmother" experiences, sharing a meal with the locals, treading wine grapes or truffle hunts). The Danube Region, with its rich and diverse yet unknown gastronomy, can be an ideal destination for adventurous foodie travellers.

Furthermore, with its characteristics, the Danube Region can satisfy the needs of two rapidly growing segments in the tourism market: the senior travellers looking for soft adventure and cruises, and the millennials who focus more on exploration, interaction and emotional experience.

Threats

The Danube Region has had a turbulent past, and political and economic instability in the region is seen as the main threat to tourism development. Other identified threats are climate change (especially the recent floods), the visa regime, which affects the mobility of travellers, and strong competition in the global tourism market.

Recommendation
In the further stages of the Danube Region brand development, it is recommended to develop the SWOT analysis for each identified key market segment based on a thorough market analysis of the whole region. The SWOT analysis must be periodically updated.

3. DESTINATION BRANDING

Tourism is one of the most competitive industries. To attract visitors, the destination must offer very good reasons to choose it over hundreds of other, sometimes very similar, destinations.

In the words of Simon Anholt: "Unless a place can come to stand for something, it stands little chance of being remembered for long enough to compete for any of this precious attention" (Anholt 2006).

The process of destination branding is about defining the destination's most compelling and competitive assets, which will differentiate it from the competitors and attract visitors.

The main objectives of destination branding, defined in the Handbook on Tourism Destination Branding by the UNTWO/ETC (2009), are:

• differentiation from competitors;
• an increase in awareness and recognition of the destination for future potential visitors;
• the creation of a positive image;
• the development of a strong brand identity.

As emphasised in the Council of Europe Cultural Routes Management Handbook (Council of Europe 2015), in its guidance for the creation of a brand for Cultural Routes, there are four important factors to have in mind when designing a branding strategy: consistency and resilience; authenticity and values; uniqueness and differentiation; and a recognisable visual identity.

3.1 BRAND-BUILDING MODELS

There are several brand-building models used by destination marketing professionals and academics. They all share the same objective – to establish a brand's core essence and values, which will be used as a base for all marketing activities.

Prague, Czech Republic. Photo by Felix Mittermeier/Pixabay.

The aim of all brand-building models, as stated in the UNWTO guidelines (World Tourism Organization, 2009) is to find answers to the following questions on behalf of potential visitors:

- What are the main things I like about the destination?
- What sort of place is it?
- How does it make me feel?
- How would I describe it in one sentence?
- What makes it different from all other destinations?

3.2 BRAND PYRAMID MODEL

Morgan, Pritchard and Pride (2004) introduced the five-level Brand Personality and the Benefit Pyramid as practical tools for defining the core values of a brand and understanding the relationship between the destination and the visitors.

For the development of an initial brand concept for the Danube Region in a structured manner, a six-stage brand pyramid model is used, as described in the *Handbook on Tourism Destination Branding* (World Tourism Organization, 2009). The process starts

from the bottom with an assessment of the destination's main strengths and ascends through each stage towards a distillation of its essence.

Attributes
What are the tangible, verifiable, objective, measurable characteristics of a destination?

Rational benefits
What benefits for the tourist result from the destination's features?

Emotional benefits
What psychological rewards or emotional benefits do tourists receive by
visiting the destination? How does the tourist feel?

Brand personality
What key traits and characteristics of the destination should be
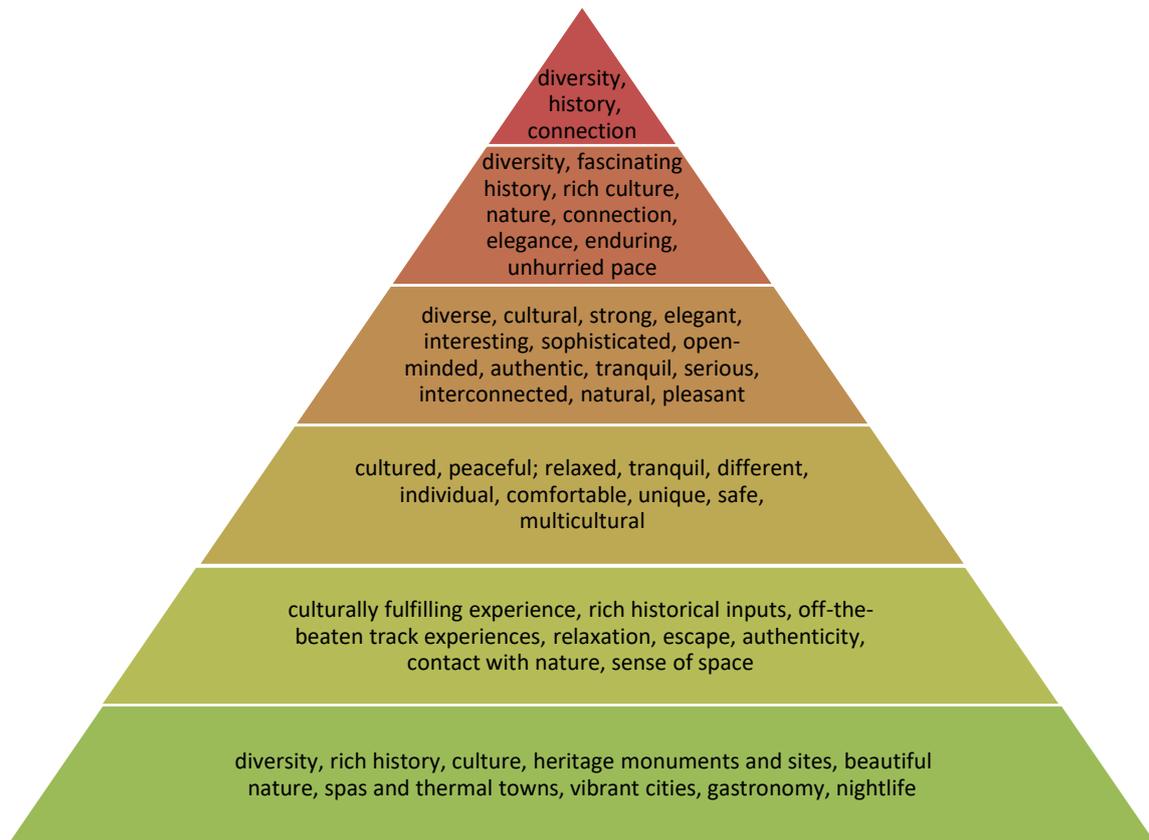*communicated by the brand?*

Brand values
What values does the destination instil?

Brand essence
What is the essential nature and character of the destination?

3.3 THE DANUBE REGION BRAND PYRAMID

Based on the research output received through the audit phase and posterior SWOT analysis, the following six-stage Danube Region brand pyramid was developed.

Adapted from the World Tourism Organization's Handbook on Tourism Destination Branding 2009, p. 45

The following statements can be used to express the brand essence of the Danube Region:

The spirit of Europe
The place where Europe meets
The river of history
Meet your history
The story of Europe
Live the history/feel the history

Based on the input from the audit phase the answers to the main brand-building questions would be as follows.

a) **What are the main things I like about the Danube Region?**
Its culture, history and diversity, its landscape and gastronomy.

b) **What sort of place is the Danube Region?**
The Danube Region is a vast territory of peaceful and beautiful nature, with many different ethnicities, customs and traditions. It is a place of important historic events, a cradle of European history and a melting pot of cultures.

c) How does the Danube Region make me feel?
The Danube Region makes me feel relaxed, culturally fulfilled, connected to other cultures, elegant and sophisticated.

d) What makes the Danube Region different from all other destinations?
Its history and its diversity.

3.4 BRAND ASSETS TEMPLATE

One of the most important aspects of destination branding, especially when speaking of macro-regional branding, is to convince a wide range of stakeholders from different sectors and different countries to adopt and implement the suggested brand values in their own marketing activities and communication.

In order to connect brand values at a conceptual level with concrete tourism products and experiences, it is recommended that the Brand Assets Template (UNWTO & ETC, 2009) is used. With this practical tool, different stakeholders can easily apply suggested brand values to their products and experiences, matching the existing products to selected core brand values.

The Danube Region's products and experiences	BRAND VALUES OF THE DANUBE REGION		
	DIVERSITY	HISTORY	CONNECTION
Product 1			
Product 2			
Experience 1			
Experience 2			

3.5 BRAND POSITIONING

Tourism is a highly competitive industry and when creating a destination brand it is necessary to provide potential visitors with convincing reasons for choosing one destination over its competitors. However, these reasons must be relevant to consumers' needs. A successful brand responds to a clear market demand.

For a potential visitor, the brand represents the personality of the destination. More than just a summary of the destination's attributes and attractions, it has to represent a character of the destination, a promise of the experience that differentiates it from all the competitors.

Clear positioning of the brand in the customers' mind is essential for its success. Kotler et al. (2017: 263-264) offer three distinct levels of brand positioning: the lowest level – positioning the brand on product/destinations attributes; the second level – positioning the brand by associating its name with a desirable benefit related to customer experience; and the third and strongest level – positioning the brand on strong beliefs and values. Successful brands engage customers on a deep emotional level.

According to the results of the audit phase, the personality of the Danube Region is marked by its diversity and its fascinating historical circumstances, which have made this majestic river sometimes a bridge and sometimes a border. The diversity of cultures, religions, ethnicities, customs and traditions is what makes the Danube Region special and unique compared with other regions. Travelling along the Danube, within hours, will give the visitor the opportunity to hear languages from different linguistic groups (Slavic, Germanic, Finno-Ugric, Romance), try different culinary specialities (from Sachertorte to Papanași and Tulumba) and see different customs and traditions. Nevertheless, it is also easy to notice the interconnection of the region, not only through the similar landscape, common words and shared recipes but also through the shared pride of being part of the unhurried pace of the magnificent river. Despite its complexity, the Danube Region seems to be united.

The essence of the Danube Region is represented in its core values: diversity, history and connection.

4. RECOMMENDATIONS

The proposed brand concept for the Danube Region is based on the results of the audit phase that included a survey of a limited number of Cultural Routes and regional stakeholders and a literature review of available national strategy documents and tourism data. To develop a strong and successful long-term Danube Region brand, it is necessary to realise a comprehensive destination audit in close interaction with different stakeholders' groups (Cultural Routes' stakeholders, local businesses, local and regional authorities) as well as consumer perception research (including actual and potential visitors). It is highly recommended to include key stakeholders from the beginning of the branding process and organise consultation on a regular basis (through interviews and focus groups), for every stage of the brand development process. The certification/evaluation cycle encompasses a period of 10 months. The process goes through many steps and takes time.

PART III – BRAND IMPLEMENTATION OF THE DANUBE REGION

1. INTRODUCTION

After the assessment of the Danube Region's main strengths, defining its most compelling and competitive assets to achieve differentiation from the competitors, and establishing the core values to better understand the relationship between the Danube Region and its visitors, the process of destination branding should include specific guidelines for the Danube Region's brand implementation.

Every aspect of marketing communication needs to convey the Danube Region's personality and project its core values. The brand's visual identity elements must be created to reflect it. All communication activities should endorse the Danube Region's brand values and respect defined visual guidelines, so, regardless of the channel, the destination will always look like itself and will be easily differentiated from the competitors.

The aim of the following brand personality and visual guidelines are to contribute to the effective application of the Danube Region's brand values in marketing communication, ensuring consistency in the presentation of the destination.

2. THE DANUBE REGION'S BRAND PERSONALITY GUIDELINES

According to Morgan, Pritchard and Pride (2004), a successful destination brand should be credible, deliverable, differentiating, conveying powerful ideas, enthusing for partners and stakeholders and resonating with visitors. By satisfying these six requirements, the brand will be able to create an emotional reaction with tourists and become a competitive brand.

The brand must reflect reality; it cannot be based on the imaginary or desired idea of the destination. If the destination's brand values are not based on reality, the visitor experience will not match the brand promise. Furthermore, if the stakeholders do not share the same vision and brand values, they will not reflect it adequately in their marketing communication and behaviour. It can even be contradictory.

"Any disconnect between the brand promise, as projected in the destination's marketing, and the visitor's experience in the destination will erode confidence in the destination brand" (World Tourism Organization 2009: 97).

The brand promise defined as "the expectations that visitors have of the likely destination experience, as a result of the destination's marketing communications" (World Tourism Organization 2017) must be clear, honest and realistic.

The Danube Region promises a **connection with other cultures, with other times, with nature**. It promises a **relaxing, unique, cultural experience in the cradle of European history**.

The Danube Region brand proposition describes the key functional, emotional and self-expressive benefits delivered by the brand to its audience. The functional benefits are the destination's main attributes. The Danube Region offers to its visitor **rich culture, history, diversity, heritage monuments and sites, beautiful nature/landscape, spas and thermal towns, vibrant cities, gastronomy, nightlife**. However, these benefits are not enough to create a strong emotional connection. Other destinations can offer similar benefits, although, due to the intrinsic nature of a tourism destination, it can never be identical. In a time-poor context of modern travellers, decisions are rarely based only on a comparison of the functional benefits of the destinations. A successful destination brand needs to provide multiple benefits, creating a strong relationship based on an emotional attachment.

The emotional benefits of the Danube Region's brand are related to visitors' emotional responses to the experience. When visiting the Danube Region visitors **feel connected with other cultures, relaxed, connected with nature, different, comfortable and safe**.

Through self-expressive benefits, a brand can contribute to fulfilling the visitor's need for self-expression. The Danube Region's visitors are **cultural, interesting, open-minded, European and sophisticated**.

3. THE DANUBE REGION'S BRAND VISUAL GUIDELINES

Budapest, Hungary. Photo by Dan Freeman/Unsplash.

The Danube Region's brand values must impregnate all aspects of marketing communication to achieve consistency in the presentation of the destination.

Based on the audit phase findings, the Danube Region's brand pyramid was developed (cf. p.37 of this report)

Visual identity elements (logo, font, colour palette) must be created to reflect the Danube Region's brand personality and used consistently and uniformly throughout the whole process.

3.1 LOGO

A logo is a crucial element of a destination brand that allows a destination to be easily identified and recognisable. However, it must not be confused with the brand itself. The logo is a symbol, a visual signature that represents a destination; it is a valuable tool that is used to communicate the destination's identity and its values, creating an emotional response aligned with the destination's essence.

Researchers agree that logo design can be an important contribution to the development of the associations and images about a destination (Hall 1992; Connolly and Davidson 1996). It is often the first impression of a brand, able to establish an emotional connection with the viewer.

Some of the most famous logos that have become lasting icons of the destinations are "I Love New York" and "I amsterdam". Their success is contributed to their ability to evoke positive emotions among visitors and residents.

A logo aims to increase awareness about the destination and contribute to being differentiated from its competitors. As a main graphic symbol of a destination, the logo should appear in all marketing communications: digital media, television, packaging, letterheads, business cards, signs, printed advertisements, reports and product designs. To have an important impact and achieve recognition, it should be consistently used over a significant period.

Different studies emphasise three main characteristics of a successful logo design:
- **Recognisable** – The logo should be easily recognised, creating a sense of familiarity. Logos that look familiar are usually perceived and processed faster.
- **Meaningful** – The logo should have a clear meaning that is difficult to misinterpret. That makes it easily linked to the destination.
- **Affective** – It is essential to design a destination logo that evokes positive feelings for internal and external audiences.

An inappropriately designed logo will be difficult to store in the memory and easily forgettable. If it fails to create a sense of meaning and an adequate emotional response, it can harm a destination's image.

According to the UNWTO Handbook (World Tourism Organization 2017), the logo should be simple (no more than three visual components), distinctive, impactful, memorable and attractive. The successful logo must be visually striking and impactful above all else.

The Danube Region's logo has to reflect the Danube Region's personality and project its core values: diversity, a fascinating history, a rich culture, nature, connection, elegance, enduring, unhurried pace.

It is almost impossible to successfully communicate all these values through a simple graphic design. As emphasised in the UNWTO Handbook (UNWTO, 2017), a logo that tries to cover too many aspects of the destination becomes "unrecognisable, unmemorable and fails to act as a visual trigger for people to recognise what it represents" (World Tourism Organization 2009: 90) However, it should capture some of the destination's essence, its DNA.

To stand out among its competitors the Danube Region's logo has to distil the elegance and the importance that comes from the centuries of its fascinating history and cultural diversity. The logo should symbolise the connection and the richness of diverse cultures, ethnicities, religions, traditions and gastronomy, which can be appreciated when following the river's flow. It should represent the importance of the major historical events that shaped European history and the elegance, which oozes from the amazing architecture of the major cities situated on its banks (Vienna, Bratislava, Budapest) and the Danube's peaceful landscape.

There are different types of logos, from word marks and associative logos to entirely abstract logos. Bearing in mind the personality and values of the region, it is recommended to create an abstract or semi-abstract logo, which will reflect the above-mentioned values. It could be an elegantly stylised letter D or a completely abstract symbol with many lines representing the connection of different cultures.

Another aspect to have in mind when designing the Danube Region's logo is that there are numerous companies, initiatives, projects, NGOs and official bodies that have the Danube in its name and have created associative and abstract logos using the River Danube as its main symbol.

When aiming to achieve an impactful, differentiating and visually striking logo it is advisable to avoid blue and green colours as well as common symbols that represent the river, already used in many logos related to the Danube, as some of the following examples illustrate.

Danube Cultural Cluster

DRC
Danube Rectors' Conference

danube connects

FAST DANUBE

DANUBE
UPPER AUSTRIA

DANUBE
SCHOOLS
SERIES

BLUE DANUBE
ROBOTICS

BLUE DANUBE™

BLUE DANUBE
PRODUCTIONS

EDA

Recommendation

The development of the destination's logo should be an interactive process where different creative solutions are explored and discussed. It is essential for the success of the logo to be accepted and internalised by the main stakeholders (Cultural Route members), which will secure its widespread usage in their marketing communications and secure greater impact and recognition for the destination. It is highly recommendable to test the logo in the market before making the final decision. The logo should be tested, not only with visitors but with residents as well, as its success depends on the emotional connection with both groups.

When designing the Danube Region's logo, the following aspects should be considered to achieve satisfying results.

- **Adaptability** – Design a logo with the flexibility to adapt well to different formats and media: electronic, print, outdoor. It should be flexible in colour and size.

- **Colour** – Develop a colour palette and create distinct colour variations of the logo, allowing flexibility with different types of backgrounds and media.

- **Size** – Establish a minimum size for the logo and an exclusion zone to ensure correct legibility and avoid distortion and a blurring effect.

- **Usage and placement** – To achieve an important impact, the logo should appear in all marketing communications in a prominent position: digital media, television, merchandise, signs, print advertisements, reports, presentations, letterheads, business cards. When designing a logo, it is especially important to consider its use on different electronic devices: desktop, tablet and mobile, where it should be visible without scrolling or additional clicking. Clear technical instructions should be given to enable its correct visibility while considering space constrictions associated with mobile and websites that are not scalable.

- **Technical specifications** – Once the logo design is approved, detailed technical design specifications must be created in the form of an instruction manual for all interested stakeholders. The manual should contain a logo library containing all versions of the logo in different formats and technical instructions for its use in different formats and sizes. It should also include basic rules that will ensure its correct use (avoid using the logo over a busy background, do not reposition different elements of the logo or use it separately, do not change the hue to better fit the background, etc.).

3.2 SLOGAN

A slogan can be a powerful communication element. Used together with the logo it can contribute effectively to conveying destination's essence in a powerful way. The best slogans emphasise the affective component in the message.

"Slogans can serve as 'hooks' or 'handles' in capturing the meaning of a brand and in relaying what makes the brand special" (Kohli, Leuthesser and Suri 2007: 416).

According to the Council of Europe (2015) Handbook *Cultural Routes Management: from Theory to Practice*, the main objectives of a slogan are to:

- clarify the brand by confirming its identity;
- convey unique attributes that point to the brand's key factors of differentiation;
- affirm the uniqueness and positioning of the brand in a single phrase.

The ideal slogan should be short, impactful, memorable and capture the essence of the destination. It is also advisable to be entertaining, credible, durable, unique, concise, direct and appropriate.

However, the slogan is not an essential element of brand communication, and it should be used only if it adds value. If the slogan fails to express the destination's essence in a unique way, it could easily become a marketing cliché often shared with other destinations.

One of the most important aspects of a slogan is its dynamism. Unlike other elements (brand name and logo), a slogan can be easily changeable without affecting brand values. The slogan can be tailored to target different market segments, adapted to specific products and specific communication objectives (for example, "The Year of Gastronomy", "The Year of Culture", etc.).

As with the logo, the Danube Region's slogan should reflect some of the most distinctive brand values: diversity, a fascinating history, a rich culture, nature, connection, elegance, enduring and unhurried pace.

The following statements, based on the input from the audit phase, can be used as a baseline for creating the Danube Region's slogan:

The place where Europe meets
The spirit of Europe
The river of history
Meet the history
The story of Europe
Live the history/Feel the history
The river that connects

While *The place where Europe meets*, *The spirit of Europe* and *The river that connects* reflect the connection and diversity of cultures*, The river of history* and *The story of Europe* convey the sense of rich history and endurance. *Live the history/Feel the history/Meet the history* are invitations to a traveller to experience the region. This can be adapted to *Live your history/Feel your history/Meet your history* to target visitors from the Danube Region.

When creating a slogan, especially in the case of a macro-regional brand, it is important to find a creative solution that will be equally effective in many different languages.

Nezbudská Lúčka, Slovakia. Photo by Branislav Knappek/Pixabay.

3.3 FONTS AND COLOURS

The design of the slogan (colours, size, font) should be consistent with the design of the logo and reinforce the overall brand image.

The chosen colours should convey the strong, elegant and sophisticated personality of the Danube Region. Ivory and cream are seen as sophisticated colours, which can often evoke a sense of history and elegance. Tones of golden and black, as well as darker shades of red are also used to express power, elegance and sophistication.

The font can also evoke sensations and influence how people perceive the brand. Any selected font should be visually consistent with the logo, expressing the character and spirit of the brand through each word.

It has to be clear and easily legible with options in the Latin and Cyrillic alphabets. A chosen font should work well in multiple sizes and weights to maintain readability in every size.

It is highly recommended to choose a primary and secondary font. A secondary font should be used only when the primary font is not available. However, both fonts should be "web-safe fonts" – supported by all major web browsers by default.

Once both fonts are selected, detailed specifications should be provided about the weights and variants used for different types of text, such as headlines, body copy and subheads.

> **Recommendation**
>
> The recommendation for visual identity elements was based on the findings of the audit phase (throughout extensive literature review and primary surveys undertaken in the macro-region). The main stakeholders should be consulted on all the visual elements, which should also be tested in the market before a final decision is made.

3.4 PHOTOGRAPHY

One of the most powerful and visually striking communication tools in destination branding is photography. Like all the other elements in brand communication, photography should reflect the character of the destination and its brand values.

The general guidelines for images of the Danube Region are as follows.

▶ Photography should be real and authentic, just like the experiences offered in the Danube Region.

▶ A combination of cultural and natural heritage is one of the main assets of the Danube Region. That should be represented in a photo, whenever possible.

▶ Gastronomy is one of the main assets and a lively and dynamic gastronomic experience rather than studio photos of food should be used.

▶ Photos should cover the four seasons, reflecting different weather conditions, as the Danube Region offers all-year-round tourism.

▶ Diversity is one of the main values of the Danube Region brand. Photos should reflect that.

►Photos should be taken from a traveller's perspective, avoiding the sensation of "staged photos". People and the action should look natural and unstaged.

►Glamourous models and extensive use of Photoshop should be avoided.

►Visitors' photos can be used for a specific message. However, as a rule, photos should be commissioned. Stock images should be avoided.

►Photos should tell a story but do not need to contain everything in one image.

►The focus should be on real people doing real things. Overly happy and overly romantic images should be avoided.

►Landscapes should be photographed with and without people.

►Photos should be taken at a different time of day, as different light exposure can significantly change the image.

►Colours should not be over-saturated and there should be a good balance of light and dark tones.

►Photos should be always captioned.

►The image library should be created and shared with all stakeholders.

3.5 TONE OF VOICE

Tone of voice can be a very powerful expression of brand identity and it can be crucial for earning customer loyalty and be an element that differentiates the brand from the competition.

A brand's tone of voice should be an expression of a destination's personality and values, across all verbal communication. It has to be unique and recognisable. Bearing in mind the mass of available communication channels, consistency is especially important. Customers expect a common tone of voice regardless of the medium (be it a printed brochure, website or Instagram post).

Recent research (Barcelos, Dantas and Senecal 2019: 173-189) on the tone of voice of tourism brands on social media confirmed that tone of voice can make customers pay more attention to certain parts of the hotel brand page than others, and this has implications for communication strategies.

The Danube Region's brand promises to visitors that they will experience a connection with other cultures, with history and with nature. The tone of voice needs to capture that and evoke the travellers' feelings when visiting the Danube Region: feeling unique, different, relaxed and safe.

Recommendations

Below are some general recommendations for creating a unique and distinctive tone of voice for the Danube Region.

► The Danube Region's brand is diverse and open-minded. The tone of voice should be inviting and inclusive, avoiding overly complicated sentences and too formal a style.
► Sentences should be short and not too complicated.
► The communication should be personal, directed to the reader using a conversational style.
► The active voice should be used whenever possible.
► It should be real and genuine. The Danube Region has a fascinating history and rich culture, so there is no need to exaggerate it.
► Avoid an overload of dates, facts and figures.
► It is recommended that specific technical guidelines including references for the specific media channels to be used are provided.
► Bearing in mind that the Danube Region is a macro-regional brand, it is important to include cultural considerations in the guidelines.

4. DANUBE REGION BRAND PRODUCT DEVELOPMENT

Based on the characteristics of the Danube Region, current tourism trends and the research findings, the Danube Region's tourism products should be based on sensorial and participative experiences, built around cultural heritage, specifically the Cultural Routes' content, gastronomy and nature. There is significant potential in the Danube Region for gastronomic experiences, a combination of cultural and natural activities, and experiences that include interactions with local people.

4.1 GASTRONOMIC EXPERIENCES IN THE DANUBE REGION

According to the World Tourism Organization, gastronomy or food tourism is:

"a type of tourism activity which is characterised by the visitor's experience linked with food and related products and activities while travelling. Along with authentic, traditional, and/or innovative culinary experiences, Gastronomy Tourism may also involve other related activities such as visiting the local producers, participating in food festivals and attending

cooking classes. Eno-tourism (Wine Tourism), as a sub-type of Gastronomy Tourism, refers to tourism whose purpose is visiting vineyards, wineries, tasting, consuming and/or purchasing wine, often at or near the source. (World Tourism Organization 2019a)

Gastronomic experiences include a host of different activities, from foodie tours, hands-on cooking classes, traditional market visits, and food and wine tastings to tours of farms and local produces estates, gastronomic festivals, cooking shows and demonstrations, or any other tourism activity related to food.

The modern gastronomic experience has become much more than visiting local restaurants and trying culinary specialties of the region. It is an interactive, social experience, which allows tourists to access the cultural and historical heritage of destinations through interaction with the local community. It includes experimentation and learning from different cultures:

> "Gastronomy embodies all the traditional values associated with the new trends in tourism: respect for culture and tradition, a healthy lifestyle, authenticity, sustainability, experience … It makes it possible to approach culture in a more experiential and participatory way that is not purely contemplative. (Gaztelumendi, 2012)

The Danube Region is an area of rich and diverse gastronomy, yet quite unknown to the international tourist.[19] According to the primary research findings, food and beverages especially associated with the Danube Region are wine, beer, fish dishes, sausages and sweets.

Vineyards near Wachau, Austria. Photo by jggrz/Pixabay.

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19. Out of 14 Danube Region countries, the famous Michelin Guide selections currently include only Austria, Croatia, the Czech Republic, Germany and Hungary, with the inclusion of Slovenia expected in 2020: https://guide.michelin.com/en/restaurants.

Although gastronomy is considered one of the main motivations for the Danube Region visitor, the offer of gastronomic experiences in most of the countries of the region is quite limited.

There are numerous possibilities for the Cultural Routes of the Danube Region to create, in collaboration with local stakeholders, different gastronomic products and experiences, and integrate them into its cultural tourism offer.

Routes that are directly related with gastronomy and wine culture like the Iter Vitis Route, Roman Emperors and Danube Wine Route and Routes of the Olive Tree, can diversify their offer by creating specific tours of local wine/olive oil producers along the route, organising olive harvest or grape treading experiences, creating cooking classes based on these ingredients and many other things.

Even when the theme of the route is not directly related to gastronomy, gastronomic experiences can be integrated into their offer. The possibilities are infinite: from incorporating cooking practices from the period or theme related to the route (for example, the Phoenicians' Route, the European Mozart Ways or the European Routes of Jewish Heritage), to creating food and wine experiences (tastings, events, fairs) in unusual places along the route (for instance, the European Route of Historic Thermal Towns, the Réseau Art Nouveau Network, ATRIUM).

With gastronomy being an intrinsic part of cultural heritage in a territory, it can be successfully associated with almost any activity. Furthermore, the UNWTO's Second Global Report on Gastronomy Tourism recommends that food experiences should be integrated into other experiences, and not treated as a stand-alone product (World Tourism Organization 2017).

4.2 IMMERSIVE LOCAL EXPERIENCES IN THE DANUBE REGION

One of the main global tourism trends is the increase in experiential travel with more immersive, local, authentic experiences. Not only do people want to avoid "tourist traps" and "typically tourist" activities, but they also want to experience a destination like a local, do what locals do and eat what where locals eat. They want to be immersed in the local culture. In that quest for authenticity, travellers prefer recommendations from local people concerning restaurants and activities, but they also want to visit private homes, workplaces, schools and hospitals in order to gain deeper inside knowledge about local culture.

According to Terry Dale, the President/CEO of the United States Tour Operator Association (USTOA) "travelers want to forge deeper connections to the people, traditions and customs of the places they are visiting, and these experiences add a meaningful and memorable component to a vacation" (Skift and Peak 2014).

Numerous companies have developed different services to respond to this increased demand for immersive experiences. Many DMOs feature on their websites sections where locals provide off-the-beaten-path recommendations and share personal stories. Even big industry players like Airbnb offer an option to book a local experience with a destination native.

Cultural Routes offer specific cultural experiences related to particular themes, which are by their nature strongly related to the territory. This attraction can be emphasised by designing activities that will contribute to a truly immersive experience within a destination. These experiences can be directly related to the theme of the routes: for example, creating tours where local people share tales about how certain historical periods have influenced their lives (in the cases of the ATRIUM, the Liberation Route or the Iron Curtain Trail).

Dimitrovgrad, Bulgaria. (ATRIUM) Photo by Jo Re/Pixabay.

In addition to the main Cultural Route experiences, other immersive local experiences can be created in collaboration with local stakeholders. These could include off-the-beaten-track tours with locals of different neighbourhoods, visiting nearby farms, behind-the-scenes tours of traditional events and festivals with a local host and many other things.

4.3 COMBINATION OF CULTURAL AND NATURAL ACTIVITIES

The demand for tourism that combines natural and cultural heritage has increased especially among European travellers. Furthermore, younger generations of travellers (Millennials and Generation Z) are increasingly aware of and concerned about sustainability, and demand more "green", "eco" and organic tourism services and products.

Beautiful landscapes of preserved nature and pristine areas on the banks of the Danube with diverse flora and fauna (national parks like the Iron Gates and the Danube Delta) have been recognised as some of the main assets of the Danube Region. All the respondents in the online questionnaire agreed that landscape is one of the aspects that make the Danube Region unique.

There are numerous providers and agencies, especially in the Upper Danube Region, dedicated to nature-based and adventure activities, like cycling, hiking, canoeing or kayaking, mushroom and berry picking, birdwatching and wildlife tracking. Educational activities like ecological tours, professional training and summer camps are also offered in many areas of the Danube Region's natural parks (Baumgartner and Blumer 2012).

Creating synergies with local providers, all Cultural Routes in the Danube Region can develop comprehensive packages combining cultural and natural activities available in the areas close to the route.

4.4 DANUBE REGION CULTURAL CARD

The tourist card is an important destination marketing tool, which integrates a variety of tourism services (attractions, events, transportation, restaurants and accommodation) provided by different stakeholders, usually at a discounted price. It is a practical and flexible tool that enables visitors to discover the diversity of a destination's products and experiences.

Tourist cards have been successfully used as an audience development model in many European cities and regions. One of the most important regional initiatives is the Museums-PASS-Musées, which includes admission to 335 museums, castles and gardens in France, Switzerland and Germany.[20] Econometric analysis of the effects of the Dutch museum pass (which includes 400 Dutch museums) on museum visits and museum revenues showed strong benefits in terms of both financial returns to museums and the total number of museum visits.[21]

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20. www.museumspass.com/en/about.

21. "It is found that owners of a museum pass visit a museum three times as much as they would have done when they would not own a museum pass. We estimate that in 2012, the 900,000 owners of a museum pass made 3.4

The main offers usually included in tourist cards are free admission or discounts at museums, heritage sites and monuments, excursions, free use of public transport, a guidebook with map, discounts in restaurants, shops and leisure parks, guided tours, events, car rental, bike rental, urban parking, etc. The cardholder benefits not only by saving money but also saving time as well, which significantly improves the overall tourist experience.

With tourism cards, a destination can achieve an increase in the number of visits and revenue from different products and services, but, more importantly, it can diversify tourism, promote less-visited sites and contribute to the better distribution of tourist flows. It is also an important source of information on consumers' habits, which enables the destination to better understand tourists' behaviour and respond to their evolving needs.

The creation of the Danube Region Cultural Card can be highly beneficial for overall tourism development in the region and specifically for the Cultural Routes.

Some Cultural Routes have already developed similar products. In order to boost the commercialisation of different products along the route and increase the number of visitors, the El Legado Andalusi Route, in collaboration with a local travel agency, has introduced the Legado Andalusi Card. It is an online product that offers the chance to create a personalised tour, choosing from among different cultural attractions along the route, gaining at the same time significant discounts and economic advantages.

Creating a cultural card at a regional level in the Danube Region will multiply the positive effects and distribute them throughout the region. It will increase the visits to the Cultural Route's sites and address tourist flows to less-visited parts of the region. This is especially important in the Danube Region, where the difference in international tourist arrivals among countries is extremely significant.

Furthermore, the creation of a cultural card will enhance co-operation and create synergies among different stakeholders leading to the development of new products and experiences in the Danube Region.

Keeping in mind the specific nature of the Danube Region and the importance of cruise tourism, an integrated cultural card will allow a cruise tourist to visit different sites on the Cultural Routes at each stop. Furthermore, the information received through the cultural card can significantly contribute to promoting the destination's brand values and can inspire future trips to the region.

The Danube Region's cultural card should include different benefits like:

- free admission or discounts at all Cultural Routes' sites and attractions;
- fast-track entry to the main sites and attractions;

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million additional visits to participating museums because of the museum pass", p. i, SEO Economisch Onderzoek (2014), "The effects of the Dutch museum pass on museum visits and museum revenues".

- discounts and premium features on all Cultural Routes' products and experiences;
- a guidebook and a map;
- discounts on public transport and bike and car rentals;
- discounts in restaurants and accommodation facilities along the Cultural Routes;
- discounts and special promotions on nature-based activities along the routes.

It is highly recommended that the Danube Region's cultural card is distributed through online and offline channels in all the countries of the region. In the further stages of development is advisable to create a virtual cultural card through a specific smartphone application.

The Danube Region's cultural card is an incentive to travel along the Cultural Routes of the region, and will successfully address the EUSDR objectives to develop green tourism products in the Danube Region and to ensure the sustainable preservation of cultural heritage and natural values by developing relevant clusters and networks of museums and interpretation and visitors' centres within the Danube Region.

The cultural card should comply with the Danube Region's brand's visual recommendations and visibility clauses and the requirements on the use of the logo "Cultural Route of the Council of Europe" and the logo of EUSDR.

5. DANUBE REGION BRAND COMMUNICATION ACTIVITIES AND TOOLS

Different brand communication activities and tools can be used to promote the brand values of the Danube Region and products developed by the Cultural Routes of the Council of Europe, and other regional tourism and cultural stakeholders. The current highly fragmented media landscape offers numerous possibilities, but the destination's core brand values must be incorporated into all communication activities.

5.1 ANALYSIS OF THE QUESTIONNAIRES

In order to gain insights on Cultural Routes' communication strategies, part of the online questionnaire distributed to the Cultural Routes' members was dedicated to the assessment of the marketing and communication of the routes.

When asked to rate marketing activities in terms of importance to their Cultural Route, most respondents agreed that websites (85%) and social media (85%) are the most important, together with public relations (75%). Given the importance of digital media like websites and social networking sites, surprisingly only 50% considered online advertising, and 60% considered apps and geolocation maps, as important communication tools. Printed material was considered important for only 55% of respondents.

Mostar, Bosnia and Herzegovina. Photo by Faruk Kaymak/Unsplash.

In terms of performance, 85% of respondents evaluated their website performance as positive while 70% thought the same about the performance of their social media and events. However, printed material and public relations are evaluated as positive by 50% of the respondents, while the performance of online advertising and of apps and geolocation is considered below average, 35% and 30% respectively.

In order to ensure successful visibility of a Cultural Route, more than half of the Cultural Routes members (55%) agreed that the use of "new technologies that increase opportunities for innovation" should be privileged. Half of the participants also agreed with the idea that "a Cultural Route should work in terms of communities of interest: successfully identify the organizations, media, blogs and all those who will be naturally drawn to the theme". In general, for the majority of the network members, the use of web-based content (websites, online advertising and social media) seems to be the privileged path in the context of a successful marketing strategy.

The majority of the respondents (95%) were to some degree satisfied with the communication strategy of their Cultural Route. Nevertheless, nobody was extremely satisfied and 5% were not satisfied at all.

Some respondents provided additional comments about their needs for marketing and communications:

"More communication."
"Focus on communication between the Cultural Routes and communication with the Institute of Cultural Routes."
"More meetings for the members of the route."
"The Minister of Tourism should be much more involved and promote our region."

5.2 RECOMMENDATIONS FOR COMMUNICATION ACTIVITIES AND TOOLS

An analysis of the questionnaire reveals that Cultural Routes' stakeholders consider new technologies and digital marketing as the most important communication tools for achieving greater visibility, much more so than printed material. Low importance given to the presence and visibility at travel industry events shows a lack of interest or capacity in the commercialisation of Cultural Routes products.

Having in mind current travel and marketing trends, the specific characteristics of the Cultural Routes and the Danube Region and cost-effectiveness, digital marketing with special emphasis on user-generated content (UGC) is the most appropriate strategy for the Danube Region, and its application will be discussed in more detail in the following chapter.

However, traditional marketing channels like print publications, radio, television, billboards, signage and events can still have an important impact among certain market segments (middle-aged and senior travellers), which can be important source markets for the Danube Region.

No matter which communication channel is used, all the activities should promote the Danube Region's brand values and respect defined visual guidelines, so that regardless of the channel (traditional or digital) the destination will always look like itself and will be easily distinguishable from competitors.

5.3 DIGITAL MARKETING ACTIONS AND TOOLS

Digital technology has revolutionised the tourism industry, bringing changes to all stages of the travel experience. Digital platforms have transformed the way consumers prepare, book, enjoy and share their trips.

Different segments of the trip (transport, accommodation, activities) are easily planned and booked through OTAs (online travel agencies), search and meta-search engines. Travellers share their memories and opinions on social media platforms, travel blogs or through commercial channels like Tripadvisor. User-generated content has become a very important source of information.

According to research findings from Google and Phocuswright (Think with Google 2018), almost half of travellers worldwide are comfortable researching, booking and planning their trip using only a mobile device. That percentage is even higher when talking about in-destination planning. Over 70% of US travellers say that they "always" use their

smartphones when travelling (to research activities or attractions, to locate shopping areas and restaurants, or to look up directions).

The digital environment represents an important opportunity for destinations to increase visibility, get closer to their audience and send them customised messages. It is a highly segmented landscape and different audiences communicate in different ways and on different channels.

However, there are some general recommendations regarding digital marketing. [22]

► Ensure that offline and online marketing strategies are consistent.

► Test the online performance of all your brand's language and visuals.

► Make two-way use of user-generated content.

► Control the domain names that affect the brand.

► Connect with different audiences across a wide variety of channels.

► Different channels have to tell a unified story (rooted in the Danube Region's brand values).

► All content should encourage action.

► Regularly analyse and evaluate data on consumer behaviour.

5.4 CONTENT

The main objective of the entire destination marketing communication is to develop and distribute content that will create an emotional connection with potential travellers, inspire their travel decision, help them plan the trip and share their experience. Content can come in many forms through online and offline channels. Undoubtedly, in the travel industry, online channels are gaining more and more importance each year.

Digital content comprises anything that can be published on a digital platform: texts, photo galleries, infographics, images, videos, including live videos, virtual tours, 360°

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22. Adapted from ETC/UNWTO Handbook on E-marketing for Tourism Destinations (2008), ETC/UNWTO Handbook on Tourism Destination Branding (2009) and the UNWTO's Handbook on Marketing Transnational Tourism Themes and Routes (2017).

videos, interactive content like quizzes and games, and more. This content can be distributed through different online channels like websites, blogs, chatbots, social platforms, e-mails, apps, and online events (webinars).

To successfully transmit the Danube Region's brand message it is highly recommended that a specific content strategy is developed, which will be based on the overall branding objectives and thorough research of the audience and industry trends. Content strategy should contain specific communication goals based on audience segmentation, and detailed guidelines to prepare, publish and distribute relevant and tailored content to the targeted audience group, and measure and evaluate its impact. The effective content strategy will help determine the most suitable online channels for

Sibiu, Romania. Photo by George Tudor/Pixabay.

different types of content. The published content should be tailored and optimised specifically for each and every platform. One size does not fit all, and there is some content that can have a great impact on Instagram, for example, while going unnoticed on the destination's website.

The Danube Region's content has to express the essence of the region and reveal everything it has to offer, in a compelling way. The information has to be interesting, relevant and useful. But above all, it has to connect emotionally with travellers, to inspire them. Storytelling has proved to be a very successful way to engage the visitor with stories they can relate to in some way.

In the words of Daniel Levine, a travel trend expert, "Don't just tell them what they'll get while they're there – tell them what they'll take home at the end of the journey."[23]

One of the main advantages of online content is its dynamism. Content on social networks can and must be regularly updated. Outdated, irrelevant or duplicated content can harm the destination's image. Online content can be easily evaluated by using adequate key performance indicators (KPIs). For websites that could be the number of visits, time spent or traffic sources, while content on social media can be measured through likes, shares, comments, etc.

According to the Content Marketing Institute,[24] valuable content should be:

23. www.thinkdigital.travel/experts/daniel-levine/.
24. https://contentmarketinginstitute.com/wp-content/uploads/2016/08/Checklist2016_AhaMediaEdits.pdf

- findable: using hashtags, metadata, links to other related content and ALT [25]tags for images;
- readable: using an inverted pyramid writing style, headers, chunking, bullets/numbered lists, following the style guide;
- understandable: the user has to understand the context, using an appropriate content type (text, video, etc.) and respecting the audience's reading and understanding level;
- actionable: a call to action, including a place to comment, an invitation to share, links to related content;
- shareable: a reason to share (something to provoke an emotional experience, for example), an easy way to share (such as through the use of widgets) and personalisation (adding hashtags to tweets).

VIDEOS

Creative, inspiring, high-quality videos are probably the most powerful communication tool for destinations. Videos usually have a very high conversion rate. Video can tell a more captivating story than static images or written words and transmits not only sights but also sounds, experiences and emotions. It is storytelling in motion. Good video inspires action and converts the viewer into a customer.

Videos can be distributed through online channels (websites, social media, e-mails) and offline channels (TV, events). The use of video on digital platforms has shown an impressive increase in the last decade. According to Cisco's Visual Networking Index, global internet traffic from videos will make up 82% of all internet traffic by 2021. YouTube is the second largest search engine after Google. Mobile video usage has increased by nearly 10 million daily viewing minutes in the last two years. Video streaming is becoming very popular. Many social networks allow users to broadcast live. Live videos on Facebook have an engagement rate of 4.3% compared to 2.2% for non-live videos.[26]

Through audio-visual content, the Danube Region should communicate the brand's personality and transmit the emotions of the visitors to the region. The video should reinforce the feeling of connection with other cultures, with other times, and a connection with nature that visitors will experience in the Danube Region. The Danube Region video should create a sensation of being immersed in the destination, in its nature, history and especially in its gastronomy, showcasing the experience that tourists will have and creating an emotional connection with the viewer. It should tell a story that people would like to live and share.

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[25] Alternative tags

26. https://blog.hubspot.com/marketing/visual-content-marketing-strategy.

Video must be produced in high definition (HD). Having poor-quality videos is worse than not having any. Videos that are too long can discourage viewers. The average length should be 30 seconds and it must feel real.

USER-GENERATED CONTENT

Advances in internet technology and the increased use of web 2.0 have radically changed the way people access and share information. User-generated content (UGC) has become an important part of the decision-making process. It has had a particularly significant impact on the tourism industry, where, due to the intangible nature of tourism products (which cannot be tested before consumption), user-generated content has become a reliable and trustworthy source of information.

Furthermore, UGC is becoming one of the most important deciding factors in the travel booking process. Different studies have confirmed that people believe that posts from other users are more objective and unbiased in comparison to official tourism websites and mass media (Shuqair and Cragg 2017).

User-generated content is anything created by a consumer, in the form of text (posts, stories, tweets, comments, reviews, tips) photos, videos, infographics, time lapses, boomerangs and gifs, among other things. For a potential visitor, other travellers' opinions are extremely influential as they are seen as genuine and reliable sources of information that reflect the destination most accurately. Users are increasingly creating and sharing content in real time, which can inspire travellers in situ and means that UGC has an impact at all stages of the trip.

Major UGC Travel Platforms are blogs, Facebook, Instagram, Snapchat, Tripadvisor, Twitter, and YouTube. Tripadvisor is the largest digital travel platform worldwide. It had an average of 456 million monthly users accessing the site in the second quarter of 2018, reaching one in 11 travel researchers.

The extraordinary growth in UGC presents new opportunities for destinations to increase their market presence and reach many more people in many more markets than ever before. As a valuable travel research and brand marketing tool, UGC must be incorporated in the Danube Region marketing strategy. Some of the following activities can serve as an example.

►Include a UGC area on the Danube Region's website for visitors to post comments, photographs and videos of their holiday experiences.

►Create a branded hashtag (such as #connectwithDanube, #Danubestory) and encourage sharing to increase engagement with a searchable hashtag.

►Inspire travellers to post during their vacations.

> ►Encourage travellers to share post-trip.
>
> ►Link the websites to Tripadvisor and provide website visitors with independent reviews.
>
> ►Establish collaboration with influencers to increase reach and awareness among selected target audiences.

UGC is an important source of valuable information about travellers' preferences and travel styles, which can be used to improve destination product development and overall marketing.

Given the increasing importance of UGC, The World Committee on Tourism Ethics has drawn up Recommendations on the Responsible Use of Ratings and Reviews on Digital Platforms.[27] These are the recommendations for destination managers, service providers and other tourism stakeholders.

In general terms
• *Regularly monitor digital platforms where the company is listed and make sure that the information displayed about their products and services is accurate and up to date.*
• *Clearly label advertisements as paid-for promotion in order to differentiate them from the online listing of regular services, ratings and reviews.*
• *Ensure that staff is trained to deal with ratings and reviews, is aware of any conflict of interest and understands the importance of providing honest information.*
• *Remember that reviews and ratings offer providers a valuable user feedback; hence companies should encourage clients to comment on their experience freely and honestly.*
• *Bear in mind that the large majority of reviews are unproblematic, either positive or negative; both tend to be well-founded.*

When dealing with controversial reviews
• *Gather information about the complaints that triggered the negative reviews and write, without delay, honest and informative replies that are useful to consumers in general.*
• *Contact the site hosting the content in case of suspicion of fake reviews.*

In any case
• *Refrain from bribing or buying off clients in exchange for reviews.*
• *Never write reviews about their own products or those of other competitive businesses nor encourage friends and relatives to do the same.*
• *Make sure that their external marketing or communication agencies do not issue*

27.webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2019-12/wcterecommendationsratingsandreviewsenweb.pdf.

fake reviews in order to increase the amount of positive feedback for the company, and never commission any individual or organisation to create fake reviews on their behalf.[28]

Belogradchik, Bulgaria. Photo by Arvid Olson/Pixabay.

5.5 THE DANUBE REGION WEBSITE

The importance of websites in destination marketing is undeniable. According to the results of the survey among Cultural Routes' stakeholders, websites are the most important communication tools for the Cultural Routes.

The Danube Region website should be a visually appealing source of information on all the Cultural Routes crossing the region as well as the region itself. It should include information on products, experiences, and activities, practical information, maps, photos, videos, live content, public reviews and traveller stories. An effective website should help visitors at different stages of the journey, dreaming, planning, booking, experiencing and sharing. It should be the main promotional tool that will allow potential visitors to discover the destination, organise the trip, and ideally book at least some part of the trip (accommodation, experiences and products). Preferably, a website should offer the chance for Cultural Routes and local cultural and tourism businesses to promote and commercialise their products as well. That could be done by incorporating a booking engine and payment options into the site's structure or linking it to other booking websites.[29]

Like all other communication tools, the Danube Region website must convey the destination's brand values. Diversity, a fascinating history, a rich culture, nature, connection, elegance, enduring and an unhurried pace should all be expressed through

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28.webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2019-
12/wcterecommendationsratingsandreviewsenweb.pdf

29. The research also underlines the importance of online booking and electronic payment options on a DMO website: see Luna-Nevarez and Hyman (2012), pp. 94-106.

its design and content. The website should be created on the basis of the previously mentioned guidelines about visual identity and content.

The website is probably the most powerful marketing tool for tourism destinations. However, inadequately designed and managed websites can seriously harm the image of a destination. There are several basic guidelines that all tourism destination websites need to respect to avoid the creation of a negative image.

Websites should:

► be responsive
► be multilingual
► contain regularly updated content
► feature modern design
► be linked to social networks
► be well positioned in the main search engines
► be easy to navigate with an intuitive user interface
► have a fast loading time

However, all this may not be enough to capture the attention of the visitor. According to several studies, first impressions of a website are formed in 0.05 seconds. That means that the home page must be persuasive and eye-catching, in order to attract the user's attention.

When creating the Danube Region's website there are several important things regarding design and content to have in mind.

- **Design**. The design should be minimalistic and sophisticated, following the new trends in website design, but without losing the region's personality. The overall design should exude elegance, sophistication and the sense of tranquillity and vastness that is characteristic of the Danube Region. As a general rule, website design should not be complicated: unnecessary design elements make the site difficult to navigate and understand. The website should peacefully "flow", just like the River Danube. Consistency is an important element. The look and feel of the site should be consistent with brand values and uniform throughout the entire website.

- **Content**. The information architecture needs to be carefully planned, offering helpful and relevant information while avoiding information overload. The aim is to make a potential visitor imagine the destination and dream about the experience, not overwhelm them with historical or architectural details. The information hierarchy should be respected, guiding visitors to the most important elements. The website needs to be dynamic and transmit the information in an engaging manner through videos (360º videos and live streaming), high-quality photos, interactive maps and virtual tours, using

augmented or virtual reality. It is advisable to include more interactive and engaging content like "Ask a local", where tourists can contact local people directly through chat functions.

- **Personalisation**. With new technologies, it is possible to personalise the website content and present tailored and more relevant offers to different market segments. Results from Skift and Adobe's 2018 Digital Transformation Report shows that younger travellers view personalised experiences as an expectation when choosing their favourite travel brands.[30] Behavioural and geolocation data are used to move away from generic to more targeted content. The tourism board for Washington DC uses geolocation targeting to deliver customised content based on what might be most relevant to these locations (such as content related to short weekend visits for New Yorkers, or more cultural imagery for Los Angeles-based users[31]). The San Francisco Travel Association also uses geolocation to send a targeted message (for example, the headline for New Yorkers on the San Francisco page might be "Escape the cold. Visit San Francisco"[32]). The possibility of creating a tailored itinerary is another option of content personalisation based on behavioural data. It would be very useful to integrate this option into the Danube Region's website, especially with all the different itineraries possible with 25 Cultural Routes crossing the Danube Region.

- **Links**. It is important to include relevant links to other websites, like popular travel review sites (Tripadvisor) and the sites of all the Cultural Routes crossing the region. The website should also contain links to the relevant institutional websites, such as the European Commission (and to its relevant thematic DGs such as DG REGIO), private and public-sector partners and international organisations operating in the area and other Interreg programmes, as well as ensuring a link to the Routes4U and EUSDR websites.

5.6 SOCIAL MEDIA

The results of the survey of Cultural Routes' stakeholders showed that social media is considered one of the most important communication tools, together with websites. Social media represents the most effective way to categorise the audience and communicate directly with the chosen target group.

Researchers agree that in the last decade the influence of social media on travel decisions and travel behaviour has become crucial. The simplicity of searching on social media and the value of shared information by other users have become key success factors for why more and more people are using these platforms for inspiration (Chung and Koo 2015; Varkaris and Neuhofer 2017; Zeng and Gerritsen 2014).

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30. https://skift.com/2018/04/27/understanding-travels-personalization-revolution/.
31. https://econsultancy.com/how-tourism-boards-are-using-personalised-content/.
32. https://destinationsinternational.org/changing-role-website-destination-marketing.

This is especially evident among younger generations (Generation Z and Millennials). According to research from Booking.com,[33] 57% of those belonging to what is termed Generation Z say they are interested in travelling somewhere that will look good in pictures, while 33% of them take over 50 photos a day while on vacation. Millennials (63%) are the generation most likely to share their photos on social media followed by of those from Generation Z (57%).

Instagram is the social media site with the highest influence on travel decisions, and destinations are trying hard to become "instagrammable". According to the numbers presented by the company, there are one billion monthly active Instagram users, and travelling is one of the top three followed subjects on Instagram (63% of all people on Instagram are following Instagrammers who are posting travel content). The number of people choosing a travel destination after seeing it on Instagram is rising every year.[34] Based on research from the Big7Travel Company, Lonely Planet has published a list of most instgrammable destinations in the world.[35] Companies like Easyjet and Airbnb have introduced features such as Look&Book (Easyjet) and Travelstories (Airbnb) that allow users to search on their app using Instagram photos and then generate potential flights/accommodation to that destination.

While many parts of the Danube Region are "unknown" to the wider public, Instagram and other social networks and channels, mainly Facebook, Twitter, Pinterest and YouTube, can be a valuable tools for promoting these hidden gems and unknown places in the region.

A social media strategy has to be carefully created and co-ordinated. One of the main values of social networks for the travel industry is the ability to micro-segment the market and deliver a tailored message to the specific target group through direct communication. Some brand values might be more appealing to one segment than others and consequently used in a communication to attract that specific group. However, all the social media networks, as well as all other digital and printed material, mst reflect the Danube Region's essence and tell a unified story.

Furthermore, every social media channel has its own specific characteristics and the communication strategy should be adapted to it. The following general recommendations have been adapted from the European Commission's Digital Toolbox.[36]

33. https://news.booking.com/gen-z-and-social-media/.

34. A study by Schofield's Insurance found that 40% of people in the 18 to 33 age bracket are choosing their travel location based on "Instagrammability". Big 7 Travel surveyed travellers and found that 67% say they have visited a new destination after seeing it on Instagram. The Booking.com survey found that 17% of users paid attention to where celebrities stay and look for similar places.

35. www.lonelyplanet.com/articles/most-instagrammable-destinations-2019.

36. Tourism Business Portal Digital Toolbox, European Commission, https://ec.europa.eu/growth/sectors/tourism/business-portal_en.

Tips for writing posts on Facebook:

• Keep posts short (80-160 characters)
• Offer some interesting information to catch people's interest
• Use striking images to illustrate your posts
• Ask a simple question to start a discussion and engage followers
• Provide a clear call to action

Tips for posting on Instagram:

• Use relevant hashtags to reach your target audience
• Include mentions when appropriate to encourage collaboration
• Use teaser photos to build curiosity around the new offerings
• Be creative – unusual images will help catch people's attention

Tips for posting on Twitter:

• Keep tweets short
• Use hashtags
• Add images or videos to your tweets
• Follow other organisations/people to ensure you get followed back
• Connect with others using "mentions" and replies

Tips for posting on Pinterest:

• Build content-rich pin boards
• Use keywords in your content to ensure it is easily found in searches
• Add captions and a call to action (such as a link to your website) to each photo

5.7 TRADITIONAL MARKETING ACTIVITIES AND TOOLS

The importance of digital marketing in the travel industry is undeniable, and its influence is increasing every year. Nevertheless, traditional marketing activities and tools like print publications, radio, television, billboards, signage and events still have an important impact on many market segments, especially middle-aged and senior travellers. A combination of both based on thorough audience research and segmentation can bring the best results.

Bled, Slovenia. Photo by Miguel Henriques/Unsplash.

The most important factor in all brand communication activities is consistency, and, regardless of distribution channel and type of content and activity, the Danube Region's message should always reflect its personality and the core Danube Region's brand values, as well as respect the visual identity guidelines.

PRINTED PUBLICATIONS

Printed material like brochures, flyers, maps and guides are still an effective communication tool. Although in the research phase consumers prefer digital platforms, once at the destination printed material can be very handy and helpful as carry-on material. A strategically located brochure or flyer (in a tourist information centre or accommodation facility) can attract visitors to the specific attraction or experience. They are also often used in industry meetings and trade shows as presentation material.

The Danube Region's printed material has to be well designed, fresh and eye-catching, using high-quality images. It is highly recommended to create user-friendly maps, which can be focused geographically or thematically (on a whole region with its main attractions and Cultural Route points as well as on smaller areas, or gastronomic maps of the whole region, for example) and which will offer helpful practical information and serve as a teaser to raise awareness about other destinations on the map.

TRADE SHOWS AND EVENTS

Trade shows, fairs and other travel industry meetings represent an important opportunity to meet different local and regional stakeholders and key industry players (wholesalers, tour operators) and to develop business relationships that can create synergies in terms of product development, commercialisation and promotion. The Danube Region's brand should be present at the main general European trade shows (ITB Berlin, WTM London, etc.), as well as at smaller trade shows targeting specific segments (culture, nature, cruises).

Specific events, like The Danube Region's Day, should be created and periodically organised in all Danube Region countries to raise awareness about the brand and the tourism on offer. These events can address a wide audience or a specific market segment. They can be individual events or organised as a part of a bigger event or festival.

MEDIA COVERAGE

Generating positive media coverage is an important step in raising awareness about the destination. A media kit should be prepared and distributed to selected print, broadcast and online media. The Danube Region's media kit should contain media releases and promotional material in different formats, with special emphasis on high-quality images and audio-visual material, covering all aspects of the Danube Region, the Cultural Routes and the different products and experiences offered.

FAM TRIPS

It is advisable to organise fam (familiarisation) trips for those in the tourism industry and media representatives (including social media influencers) so they can experience the Danube Region at first hand, and can help promote it and sell it better. The selection of the participants should correspond to carefully defined objectives based on market segmentation.

6. CONCLUSION

This report has provided a foundation for the Danube Region's brand strategy development and implementation based on the results of the audit phase, which included a primary survey of a limited number of Cultural Routes and regional stakeholders and an extensive literature review.

To develop a strong and successful long-term Danube Region brand, it is necessary to undertake a comprehensive destination audit in close interaction with different stakeholders groups (Cultural Route stakeholders, local businesses, local and regional authorities) and consumer perception research (of actual and potential visitors). Proposed brand values and the brand's essence should be reviewed with the key stakeholders. Proposed guidelines for the development of a visual identity should be discussed with the key stakeholders and tested on the market before making any final decision.

To ensure the success of the Danube Region brand, it is highly recommended that key stakeholders are included from the beginning of the branding process and that consultations are organised regularly (through interviews and focus groups), at every stage of the brand development process.

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List of abbreviations

ALT tags	Alternative tags
DG REGIO	Directorate-General for Regional and Urban Policy, European Commission
DMC	Destination management company
DMO	Destination management organization
ETC	European Travel Commission
EUSAIR	European Union Strategy for the Adriatic-Ionian Region
EUSALP	European Union Strategy for the Alpine Region
EUSBSR	European Union Strategy for the Baltic Sea Region
EUSDR	European Union Strategy for the Danube Region
ITB Berlin	Internationale Tourismus-Börse Berlin
KPI	Key performance indicator
NGO	Non-governmental organization
R4U	Routes4U
SWOT	Strengths, Weaknesses, Opportunities, Threats
UGC	User-generated content
UNWTO	United Nations World Tourism Organization
USTOA	United States Tour Operator Association
WTM London	World Travel Market London

Routes4U

Cultural Routes of the Council of Europe in the | Adriatic-Ionian, Alpine, Baltic sea and Danube macro-regions

The Member States of the European Union have decided to link together their knowhow, resources and destinies. Together, they have built a zone of stability, democracy and sustainable development whilst maintaining cultural diversity, tolerance and individual freedoms. The European Union is committed to sharing its achievements and its values with countries and peoples beyond its borders.