



Outgoing tourism market research (statistics, needs, other useful information)

PART II

FEBRUARY, 2008

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GEOGRAPHIC AND ACTIVITY-BASED MARKET RESEARCH FOR ARMENIA TOURISM

VOLUME 2

August 2007

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VOLUME 2

Disclaimer: The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government

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ACTIVITY-BASED RESEARCH

18. Adventure

1. tourismbc.com/PDF/TAMS_USA_OutdoorAdventurers.pdf
2. www.gov.ns.ca
3. <http://www.iexplore.com/about/usatoday.jhtml>
4. U.S. Travel Activities and Motivations Survey, [www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20\(FINAL\).pdf](http://www.tourism.gov.on.ca/english/research/travel_activities/TAMS%202006%20Overview%20U.S.%20Report%20(FINAL).pdf)
5. <http://www.hnl.ca/pdf/annualreport/2006USTAMSHikingClimbingandPaddling.pdf>
6. www.xolaconsulting.com
7. www.infohub.com

MARKET PROFILE [2], [4], [5]

According to the survey conducted by Adventure Travel Trade Association (Adventure Travel Industry Survey, Practices and Trends, 2006) women comprise the greater part of adventure travelers worldwide (52%)¹:

- 41-60 year olds comprise the highest participating age group
- South America is the highest in terms of increasing destination interest among travelers.
- 50% of tour operators who do not currently use travel agents to sell their product plan to do so in the future.
- Average land cost for an adventure travel trip is \$2,122

Leading adventure travel markets are (outbound):

- Germany – Walking and hiking
- UK – Interest in extreme or ‘adrenaline’ sports
- France – Climbing, tennis, golf, mountain biking, trekking, skiing
- Netherlands – Walking, cycling, camping

Size of European adventure travel market (2001):

Independent adventure	197,350
Package adventure	245,680

¹ Hiking is a category of adventure travel

Total 443,030

Table 18-1
Source Markets (2001)

Country	% of European Travel Market	Approximate No. of Adventure Trips to Europe
Germany	23	102,000
Great Britain	16	71,000
France	7	31,000
Netherlands	6	27,000
Italy	5	22,000
Switzerland	4	18,000
Belgium	4	18,000
Sweden	3	13,000
Russia	3	13,000
Spain	3	13,000
Others	26	115,000

Figure 18-1
Top Four Generating Markets for Adventure Travel (2001)

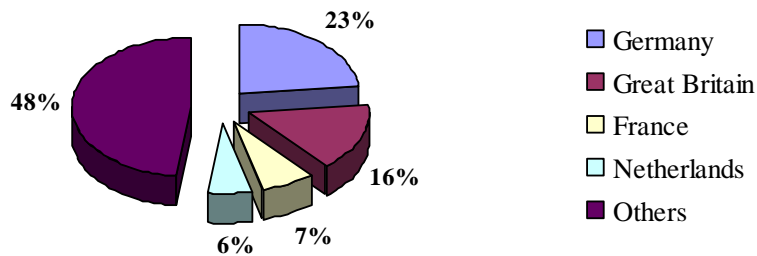


Table 18-2
Outbound and Inbound tourism for leading travel markets

Country	Outbound Trips (2001)	Average Trip Cost (US\$)	Top 5 Destinations
Germany	74,400,000	922	Netherlands, Great Britain, Switzerland, Italy, France
Great Britain	53,800,000	930	France, Germany, Ireland, Netherlands, Belgium
France	19,300,000	1,366	Germany, Great Britain/Ireland, Netherlands, Belgium/Luxemburg, Italy
Netherlands	14,200,000	1,256	Germany, Great Britain, Belgium, France, Italy

Table 18-3
*Annual No. of Adventure Trip Arrivals to Eastern European Countries, by Originating Country
 2001–2004*

Country	2001	2002	2003	2004
Poland				
Germany	4,400,000	4,160,000	4,520,000	5,230,000
Russia	980,000	940,000	790,000	700,000
Belarus	2,080,000	1,700,000	1,620,000	1,460,000
Ukraine	3,080,000	2,930,000	2,480,000	2,340,000
Lithuania	840,000	840,000	825,000	815,000
Latvia	330,000	320,000	330,000	305,000
Estonia	190,000	160,000	150,000	130,000
Czech Republic	230,000	230,000	240,000	210,000
Slovakia	80,000	60,000	80,000	85,000
Other	2,790,000	2,640,000	2,685,000	3,015,000
Total	15,000,000	13,980,000	13,720,000	14,290,000
Czech Republic	5,194,000	4,579,000		
Hungary	15,340,000	15,870,000		
Croatia	6,544,000	6,944,000	7,152,000	7,602,000
Slovenia				
Croatia	76,851	269,035	320,342	
Italy	269,338	274,792	288,507	
Germany	234,209	229,211	229,372	
Austria	174,403	193,422	201,367	
UK	40,423	46,117	50,220	
Netherlands	34,813	38,682	46,762	
Israel	14,372	31,972	39,852	
Hungary	32,607	32,774	37,111	
France	23,452	27,863	34,745	
Scandinavia	26,963	27,854	32,712	
United States	28,254	30,103	29,647	
Switzerland	17,555	20,626	22,514	
Russia	15,514	15,370	16,030	
Total	1,218,721	1,302,019	1,373,137	
Slovakia	1,219,000	1,399,000		
Bulgaria				
Germany		480,000	531,000	
Greece		391,000	474,000	
Macedonia		211,000	209,000	
UK		111,000	154,000	

Country	2001	2002	2003	2004
Russia		99,000	120,000	
Serbia & Montenegro		107,000	108,000	
Czech Republic		48,000	78,000	
Sweden		55,000	70,000	
Israel		64,000	67,000	
Slovakia		42,000	64,000	
Poland		49,000	61,000	
Finland		38,000	49,000	
Denmark		32,000	42,000	
Ukraine		39,000	42,000	
France		31,000	35,000	
Total		1,797,000	2,104,000	
Romania	3,300,000	3,204,000		

Table 18-4
Overview of Adventure (Extreme) Sports by Traditional Locations

Activity	Key and Traditional Locations
Stunt plane	New Zealand, United States
Stunt helicopter	New Zealand
Bungee jumping	Australia, Canada, Costa Rica, Japan, Nepal, south Africa, Switzerland, UK, United States and Zimbabwe (Victoria Falls)
Canyoning	Australia, UK, United States, New Zealand, Chile, France, Netherlands, Jordan, Dominican Republic, Canada, Italy, Costa, Rica Nepal
Cliff jumping	UK, United States, Canada
Coasteering	UK
River bugging	New Zealand, UK
Scad diving	Germany, UK
Free climbing	United States
Free diving	United States, South Africa
Sky running	United States, Italy, France, Spain, Switzerland
Ice climbing	United States, Canada
Kayak Surfing	United States, UK
White water kayaking	Canada, United States, UK
Body boarding	United States, Australia
Hydrospeed / riverboarding	New Zealand, United States, Europe

Round-the-World Travel/Backpacking (2006)

According to consumer research for 2006, almost 20 million people expressed an interest in traveling around the world for the first time, while almost 8 million were keen to go on a backpacking holiday.

The emergence of China will add an Asian influence into the America-South Africa-Australasia loop.

The 'grown-up' gap year is set to increase quite significantly in coming years with the trend for more flexible working practices allowing professionals to take extended leave and sabbaticals to embark on round-the-world and backpacking trips.

The shift towards shorter trips will persist and these kinds of itineraries are ideally suited towards the simplicity and convenience of new technology, with WAP mobile phone, iPods, Internet/emails and e-tickets increasingly expected to cater for research, guides and bookings.

Internet penetration has risen by over a third during the last five years and frequent web users show an above average likelihood of taking RTW and backpacking holidays. Amongst heavy Internet users, the proportion of respondents aspiring towards round the world travel rises to almost 50%.

Although students are expected to owe almost US\$20,600 upon graduating, it does not appear to have affected their ability to travel—some 61% of students have taken a holiday in the previous twelve months.

Hiking, Climbing and Paddling

In 2005–2006, 18.1% (40,009,742) of adult Americans went hiking, climbing or paddling (i.e., same-day hiking excursion, freshwater kayaking or canoeing, overnight hiking or backpacking in wilderness areas, white-water rafting, mountain climbing or trekking, rock climbing, wilderness skills course, ice climbing) while on an out-of-town overnight trip or one or more nights. A one-day hiking tour was the most popular activity in this activity segment (13.3% of adult Americans). Among hikers, climbers, and paddlers, 35.1% (14,055,755) reported that these activities were the main reason for taking at least one trip in the past two years. The majority of those who went wilderness hiking or backpacking for one or more nights (62.0%) reported this activity as the main reason for a trip.

Table 18-5
Popularity of Various Adventure Tour Types

Tour Type	Size of U.S. Market	Percent of Holiday Travelers (of 170,510,241 Total)*
Hiking, Climbing, Paddling (Canada and U.S. travelers)	40,009,742	23.5
Same-day hiking excursion	29,504,764	17.3
Freshwater kayaking or canoeing	8,520,835	5.0
Hiking or backpacking in wilderness areas with overnight	7,407,837	4.3

camping or lodging		
White-water rafting	5,067,027	3.0
Mountain climbing or trekking	4,749,048	2.8
Rock climbing	3,272,907	1.9
Wilderness skills courses	1,484,124	0.9
Ice climbing	251,587	0.1
Participated in all eight activities	16,911	0.1

Holiday travelers are defined as people who have taken at least one out-of-town, overnight pleasure trip of one or more nights in the last two years. This reports the percent of holiday travelers who participated in each activity on at least one trip in the past two years.

Hiking is becoming more popular every year. Seventeen percent of American travelers and 23% of Canadians took a hiking trip over two-year period (2005-2006). For 25% of all these people hiking was the main reason for their trip.

Most hikers participate in other outdoor activities such as cycling, camping, bird watching, flora and fauna viewing. They also shop and go to museums, art galleries, and local festivals.

Accommodations

	Hikers/ Climbers/ Paddlers
<i>Size of Market</i>	40,009,742
Public Campground in a National, State, Provincial or Municipal Park	48.4%
Seaside Resort	36.2%
Lakeside / Riverside Resort	28.8%
A Private Campground	26.3%
Ski Resort or Mountain Resort	24.4%
Camp Site in a Wilderness Setting (Not a Campground)	16.5%
Wilderness Lodge You Can Drive to by Car	11.6%
Motor Home or RV while Traveling or Touring (Not a Camping Trip)	9.1%
Health Spa	7.5%
Farm or Guest Ranch Country Inn or Resort with Gourmet	5.1%
Restaurant	5.0%
On a Houseboat	4.1%
Remote or Fly-In Wilderness Lodge	2.7%
Remote or Fly-In Wilderness Outpost	1.8%
Cooking School	1.6%
Wine Tasting School	1.3%

Segment

U.S. hiking travelers are more educated and wealthy than the average U.S. traveler—they average 43 years, slightly younger than the average U.S. traveler.

Canadian travelers who hike have average education and income levels, and tend to be

Grade	Category	Description	Example of European Holiday
A	Easy	Short day walks and rambles at low altitudes. No preparation required	Rambling in Portugal Azores Island Hopping
A/B	Easy/Moderate		Hiking the Bernese Oberland Walking in Tuscany
B	Moderate	Some 4-6 hours walks/day, usually below 3,000 meters. Some previous hill walking experience beneficial	Aegean Islands Hike Hiking in the Dolomites
B/C	Moderate/Strenuous		Iceland Volcano Hike On Foot in the Pyrenees
C	Strenuous	6 to 8 hours walk, may involve up to 900m or more ascent or descent. Consecutive days walking, often at higher altitudes. Higher level of fitness required.	Alpine Trails Arctic Trek, Greenland
C/D	Strenuous/Tough		Not available in Europe

younger than the average traveler—39 years vs. 43 years.

Hikers, Climbers and Paddlers segment (U.S. travelers):

- Male
- 18–54 age
- Married
- Household income (\$83,957) and education levels are above-average
- More likely to live in large cities with populations of 2 million or more

This segment was much more likely than the average holiday traveler to practice a full range of outdoor activities on trips, and especially nature-oriented activities (e.g., wildlife viewing, cross-country skiing and snowshoeing, horseback riding), as well as to participate in culture and entertainment activities with a nature theme (e.g., archaeological sites and digs, aboriginal cultural experiences, garden theme attractions, agro-tourism).

The following characteristics are defined for the segment:

- People for whom hiking experiences are either the main reason or an important factor in selecting a destination for a vacation experience.
- People who take day hikes of varying lengths and experiences.
- People who go backpacking and camping—a much smaller segment.

Categorization of hiking/walking and trekking holidays:

Source of Information

Most Hikers, Campers and Paddlers use the Internet to plan their trips. They obtain information from travel guide books, official government travel guides and visitor information centers. The most effective media for reaching this segment includes nature and science magazines and television programs and travel related websites, magazines and television programs.

Destinations

Hiking, walking, and trekking destinations in Europe:

- Albania
- Austria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Greece
- Iceland
- Ireland
- Italy
- Mallorca, Malta, Gozo
- Norway
- Poland
- Portugal, the Azores and Madeira
- Romania
- Slovakia
- Spain
- Switzerland
- Sweden
- Turkey
- UK

Destination Attributes:

- Feeling safe at the destination
- Lots of things for adults to see and do
- Convenient access by car
- No health concerns at the destination
- Availability of mid-range accommodation
- Information about the destination available on the Internet
- Availability of budget accommodation
- Low cost package deals available for the destination
- Direct access by air
- Lots of things for children to see and do
- Being familiar with the culture and language of the destination
- Availability of camping
- Great shopping opportunities
- Having friends or relatives living there
- Being at a place that is very different, culturally than mine
- Availability of luxury accommodation
- Convenient access by train/bus

- Destination is disabled-person-friendly

The following table breaks down the reasons for selecting travel destinations among the 40,009,742 hikers, climbers, and paddlers in the U.S. market.

Table 18-6

Reasons of U.S. Hikers, Climbers, and Paddlers for Selecting Vacation Destination, 2005-2006

Reason	%
SUMMER	
Started with a desired destination in mind	58.7%
Started by considering specific activities wanted to do	11.6%
Started with a certain type of vacation experience in mind	18.1%
Looked for packaged deals—no destination in mind	1.2%
Considered something else first	3.7%
Don't know / Other	6.8%
WINTER	
Started with a desired destination in mind	58.2%
Started by considering specific activities wanted to do	15.4%
Started with a certain type of vacation experience in mind	15.3%
Looked for packaged deals—no destination in mind	1.5%
Considered something else first	4.0%
Don't know / Other	5.6%

One of the main factors for destination selection is a trail system. The trail features are described below:

- Variety of trail lengths, hike durations, and level of difficulty.
- High quality and diverse scenery and landscapes, particularly coastal countryside
- Diverse terrain
- Opportunities to view wildlife and natural features
- Good signage, both to the trailhead and on the trail; interpretive information and good information on the types of trail experiences offered, including maps and levels of difficulty
- Parking and basic infrastructure at trailhead—picnic tables, garbage bins, washrooms

Other services that hikers seek are

- Roofed accommodations or camping near trail
- Quality dining
- Evening entertainment
- Ability to experience the local culture, points of interest

SWOT

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Convenient scenery and landscapes (beautiful nature, mountainous landscape) • Interesting flora and fauna • Online travel information • Online visa access • Different types of accommodation available (especially in Yerevan) • Safety (Armenia is not associated with terrorism) 	<ul style="list-style-type: none"> • Poor information on worldwide hiking market • Weak infrastructure (diversity of equipment, lack of specialized maps) • Monotone hiking tours • Difficult transportation outside the capital • Huge gaps in providing services in regions • Lack of specialized (hiking, adventure) information available in foreign languages • Lack of information on fun and entertainment
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • High demand in adventure market • Travelers are interested in new destinations • Organization of different adventure tours (cycling, paddling, mountainous hiking, etc.) • Providing trail system 	<ul style="list-style-type: none"> • Lack of promotion as adventure (hiking) destination • Lack of activities preferred by hikers while on a trip (archaeological sites and digs, aboriginal cultural experiences, garden theme attractions, agro-tourism, etc.) • Lack of trail system

MEDIA [1]

Magazines and Journals

Name	Details	Contacts
Gordon's Guide—Adventure & Active Travel Worldwide	The company publishes magazine-style travel guides and website. It offers information on 10,000 trips, 3,000 destinations, 126 countries.	Hilda Martinez Director of Public Relations Phone: (559) 490-2800 ext. 128 www.gordonsguide.com
World Hiking Directory	Directory of hiking related websites from around the world.	www.worldhiking.com
National Geographic Adventure Magazine	Magazine for active, imaginative people who like to try new outdoor pursuits and want to travel to wild corners of the planet.	www.nationalgeographic.com
Adventure News	Newsletter	www.adventurecenter.com
Adventure Travel Magazine	Adventure Travel Magazine is all about getting out there and enjoying outdoor activities throughout the world, no matter what your experience level and no matter where.	www.atmagazine.co.uk/
Adventure Travel Journal	The Adventure Travel Journal has been created as a place to share fantastic adventure stories with others and encourage those who are having second thoughts about embarking on the Journey of a lifetime.	www.journal.discoverytreks.com/
Adventure Travel Media Source	Publish and distribute a biweekly newsletter.	www.atmstravelnews.com/default.asp

Internet Sources

Name	Details	Contacts
Internet portal	Travel portal for activity holidays, adventure sports courses, adventure holidays, active holidays and much more.	www.adventuresportsholidays.com
	Online tourist offices worldwide	www.trekking.net
	Information portal	http://adventuretravel.about.com/od/hikingwalking/
The Away Network	The Away Network is the leading online provider of information about active travel and the outdoor lifestyle.	gorp.away.com
	Information on hiking (trails, destinations, etc.)	www.hikingwebsite.com

TRAVEL INDUSTRY [3], [6]

60.8% of hikers, campers and paddlers use the Internet to book travel online (U.S.—2005-2006).

Online Sale

Website	Details
www.iExplore.com	4,000 tours through about 100 tour companies
www.adventureseek.com	About 4,000 active tours from 250 North America-based outfitters.
www.away.com	Travelers can choose from among about 1,000 tour companies. Trips are categorized by activity, destination and channel
www.gorp.com	3,500 tours through 450 operators worldwide

Industry estimates suggest the majority of adventure travel providers are small to medium-sized businesses.

Tour Operators and Travel Agents

Name	Details	Contacts
Adventure Center	More than 1,000 adventure vacations worldwide including hiking and biking trips, cultural tours, African safaris, Antarctic expedition cruises, etc.	tripinfo@adventurecenter.com
Wikinger Reisen	The website in German	www.wikinger-reisen.de
DAV Summit Club	The website in German	www.dav-summit-club.de/
Ikarus Tours	The website in German	www.ikarus.com
Explore Worldwide	Explore Worldwide was set up in the early 1980s with the aim of providing pioneering adventure holidays. In March 2000, they became part of Holidaybreak plc.	www.explore.co.uk
Exodus	Exodus is the leading adventure travel company in the UK. They offer an unrivalled selection of over 500 tours, planned and operated by experts who share a passion for travel. Their eight programmes cover some 90 countries worldwide.	www.exodus.co.uk/
Guerba	Their trips are for travellers with a yearning to get off the beaten track, Intrepid Guerba opens up a whole new world. With a huge variety of travel styles available, they explore the world's most amazing places—discovering real people, real cultures and having incredible real life experiences along the way.	www.guerba.com/
Travelbag adventures	N/A	www.travelbag-adventures.co.uk/
Discover the world	Discover the World is one of the UK's leading tour operators, with seven specialist travel programmes including Arctic Experience.	www.discover-the-world.co.uk
Walks worldwide	Walks Worldwide is a unique specialist travel company. They offer an unusually broad range of walking holidays.	www.walksworldwide.com
Atalante	The website in French	www.atalante.fr
Nouvelles Frontieres	The website in French	www.nouvelles-frontieres.fr/
Terres d'Adventure	N/A	16, Rue St. Victor 75005 Paris, France Tel: (0033) 1 5373775 Fax: (0033) 1 4046952
Aktiva Tours	The website in Dutch	www.aktivatours.nl/
Boabab Reizen	The website in Dutch	www.boabab.nl/

Name	Details	Contacts
Djoser	Djoser is a tour operator based in the Netherlands but with a large U.S. office. Djoser's active, affordable holidays offer a blend of nature, culture and authentic local experiences. This company offers cultural tours, African safaris and wildlife vacations all over the world.	www.djoserusa.com
Avventure Nel Mondo	The website in Italian	www.viaggiavventurenelmondo.it/
Incredible Adventures	Feeling the "etc" in MIGS etc. just couldn't hold all the new stuff, the company was rechristened Incredible Adventures, Inc. In January of 1996, controlling interest in the company was sold to Norman Fast, a venture capitalist with experience in the adventure travel industry.	www.incredible-adventures.com
KUDU Travel	Kudu Travel specializes in guided walking holidays with music festivals, opera, art & architecture, bird watching, wildlife and gourmet food & wine.	www.kudutavel.com/
Huck Finn	Huck Finn specializes in adventure, eco and sustainable tourism and work closely with Riverfree – a canoe club, outfitter and environmental non-profit organization.	www.huck-finn.hr
Stopa-sts.sk	STOPA–STS is an incoming tour operator located in Slovakia, managing holidays for groups and individual travelers from all over the world.	www.stopa-sts.sk
KE Adventure Travel	KE Adventure Travel is a worldwide adventure travel company with headquarters in the UK and a U.S. office for North American clients.	www.keadventure.com/
LaTura Extreme	Offers complete Adventure programmes in which spectacular mountain sports are harmoniously blended with visits to historic and tourist sights.	adventure-tourism.latura.ro
Adventure Transylvania	Adventure Transylvania is an A-Licensed tour-operator Adventure Transylvania is a subsidiary of Diversis Travel Ltd. Diversis Ltd. was established in 1991. The company is based in Satu Mare, in north-west of Romania.	www.adventuretransylvania.com/
Sport-S	Outdoor programmes in the Czech Republic. Sport-S is one of the largest providers of outdoors programmes in Bohemia since 1990	www.sport-s.cz/
Inteco Travel	Inteco Travel is an independent locally based travel agency, and during the last years it was built a reputation for quality and unforgettable travel experiences.	www.intecotravel.com
Just Slovenia	The company specializes in Slovenia holidays. Using their expertise, they have put together a range of holidays in Slovenia to suit all tastes	www.justslovenia.co.uk/

ASSOCIATIONS/CLUBS

Organization	Details	Contact Information
American Hiking Society	American Hiker magazine	www.americanhiking.org
Superior Hiking Trail Association	Online store	www.shta.org
The Mountaineers	Washington hiking and mountaineering club. Large membership and big variety of activities	www.mountaineers.org

Organization	Details	Contact Information
Adventure Travel Trade Association	International adventure travel trade association: travel agencies, operators, industry partners, individuals	www.adventuretravel.biz
Adventure Tours Operators Association of India	Promote adventure tourism in India and create awareness overseas about the potentials of adventure tourism in India.	www.indianadventure.com
Sierra Club	One of oldest and largest hiking clubs in the United States	www.sierraclub.org

FAIRS

Trade Fair, Hiking and Trekking

Date: August 31–September 2, 2007

Venue: Messegelände Düsseldorf, Messeplatz D-40474 Düsseldorf

2006 Statistics

Trade visitors 30,000

Contacts

P.O. Box 10 10 06

D-40001 Düsseldorf

Tel: +49 (0)211 / 4560-900

Fax: +49 (0)211 / 4560-668

Web-site: www.messe-duesseldorf.de

Adventure Travel and Backpackers Expo

Date: 22-24 February, 2008

Place: Royal Exhibition Building, Melbourne

Contacts

P O Box 103, The Gap,

Queensland 4061, Australia

Tel: +61 (0)7 3300 9571

Fax +61 (0)7 3312 2035 |

E-mail: info@backpackersexpo.com

Web-site: www.backpackersexpo.com/new/html/melbourne.html

Daily Telegraph Adventure Travel Show

Date: 25-27 January, 2008

Venue: Business Design Center, Islington, London

2006 Statistics

Trade visitors 30,000

Exhibitors 250

Contacts

Expomedia Events, Meridien House,
69–71 Clarendon Road, Watford,
WD17 1DS

Tel: 020 8387 3200

Fax: 020 8387 3201

E-mail: michelle.higgins@eme-uk.com

Web-site: www.adventureshow.co.uk

TRAVEL PACKAGES [7]

Name/Country	Activity	Details
Jaguar–hiking, biking and sea kayaking adventure in Peru	Hiking & Trekking Canoeing/Kayaking/Rafting	Tour Duration: 14 day(s) Group Size: 4–14 people Season: January–December Airfare Included: No Tour Customizable: No Minimum Per Person Price: 2,499 US\$ Maximum Per Person Price: 2,499 US\$
Undiscovered Ireland North GUIDED Walking / Hiking Tour	Hiking and Trekking	Tour Duration: 8 day(s) Group Size: 2–12 people Season: August–September Minimum Per Person Price: 2,499 (US\$) Maximum Per Person Price: 2,499 (US\$) Tour price includes: 7 nights' 3-4 star accommodation en suite, all land transportation, evening entertainment, 7 breakfasts, 7 packed lunches, 5 evening meals, and service of guide / guides throughout.
Hiking the Tiger Leaping Gorge/ China	Hiking & Trekking Cultural Journey	Tour Duration: 7 day(s) Group Size: 2–8 people Season: May–September Price Per Person: 1,290 (US\$) INCLUSIONS <ul style="list-style-type: none"> • 4-star hotels and guesthouses based on double occupancy, including tax and service • All meals as stated in the itinerary highlighting the local cuisine with water, tea, coffee, local beer, and soft drinks. • Group airport arrival and departure transfers • All ground transportation in private air conditioned vehicle with bottled water and snacks on coach. • All sightseeing, entrance fees. • Services of local guides, site experts, and other support personnel. EXCLUSIONS <ul style="list-style-type: none"> • International airfare • Any en route stopovers, hotels, and meals to and from China • Excess baggage charges and airport taxes • Passport and visa fees. • Items of a personal nature such as, laundry, mail, phone calls, faxes, spa treatments, hard liquor • Normal level of gratuities for local guides and drivers. • Trip cancellation, travel delay or baggage insurance.
Dubrovnik Escape Tour/Croatia	Hiking & Trekking Walking Tours	Tour Duration: 8 day(s) Group Size: 2–16 people Season: April–November Airfare Included: No Minimum Per Person Price: 770 Euro

Name/Country	Activity	Details
		<p>Tour price includes: Transfers from (and to) the airport Dubrovnik, to (and from) accommodation, transfers between destinations during trips.</p> <p>Accommodation is provided in private houses (apartments or rooms) in Dubrovnik or Dubrovnik proximity (Mlini, Cavtat).</p> <p>Meals and beverages: all breakfasts, welcome and goodbye dinner. Lunch during visit Sipan included, beverages are not included except water during daily outdoor activities.</p> <p>Guided tours by English speaking Croatian guide, entrance fees, tickets and tickets for the boats are included.</p>
<p>Hiking Highlights 19 Day Flexible Hiking Tour South-North/ New Zealand</p>	<p>Hiking and Trekking</p>	<p>Tour Duration: 19 day(s) Group Size: 1–12 people Season: September–April Minimum Per Person Price: 4425 New Zealand Dollar (NZD) Tour includes:</p> <p>Airport Transfers (Day 1 : 7am-2pm & Day 19 : 7am-3.30pm)</p> <p>Accommodation: 18 nights in hotels/motels</p> <p>Meals: 1 lunch–Hangi Lunch in Rotorua (breakfast and picnic lunch can be shared & prepared together / the tourguide will collect NZ\$100–optional)</p> <p>Minibus</p> <p>Boat transfer in Queen Charlotte Sound</p> <p>Luggage transport during the Queen-Charlotte Walk</p> <p>Ferrycrossing Picton–Wellington</p> <p>Entry Whakarewarewa Thermal Village with performance & hangi lunch</p> <p>All National Park and other entry fees, except the “optional” ones</p>

19. Bird Watching

1. http://www.buzzle.com/chapters/sports-and-recreation_outdoor-adventure-and-activities_bird-watching.asp
2. <http://www.birdwatching.com/>
3. http://www.diynetwork.com/diy/hb_bird_watching/article/0,2033,DIY_13872_2276391,00.html
4. http://www.tq.com.au/fms/tq_corporate/research/fact_sheets/birdwatching_tourism.pdf
5. www.exoticbirding.com

MARKET PROFILE [1], [2], [3]

Birdwatchers observe wild birds in their natural habitat. Birdwatching means learning to identify the birds and understand what they are doing. In North America, there are over 800 species of birds. Birding is the fastest-growing outdoor activity in America. According to a survey by the U.S. Fish and Wildlife Service, 51.3 million Americans report that they watch birds. And more are taking it up all the time.

Activities undertaken by birdwatchers include:

- Half day, full day tours
- Accommodated (or camping) tours
- Guided tours (by an ornithologist tour guide – someone who is skilled in ornithology and can describe birds)
- Photography
- Bird walks
- Birdwatching (identification of bird species)
- Customized tours
- Bird counts

Accommodation

Large numbers of birdwatchers are reported to be visiting friends and relatives (VFR) and many are willing to offer accommodation to others interested in the activity whether or not they have personally met them (2002).

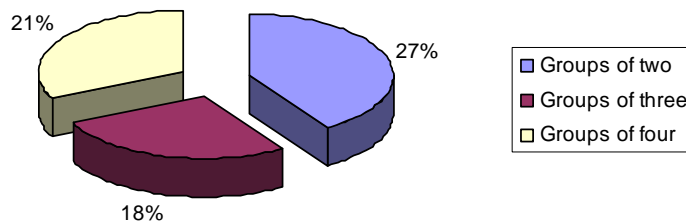
<u>Accommodation Type</u>	<u>%</u>
Camping/Caravan Park	70
Hotel/Motel	55
Lodge/Bed and Breakfast	42
Friends/Relatives House	36
Guest House	27
Resort	15
Hostel	9
Other	9

Travel Companions

Generally birdwatchers undertake the activity by themselves or with one other person (usually their spouse or partner). While larger groups (usually 10 people maximum) do go birdwatching, their occurrence is somewhat rare. This can be attributed to the nature of the activity, as large groups of people exploring delicate natural environments for bird species are likely to scare birds away.

Figure 19-1

Travel Party of Birdwatchers to Australia (2002)



Birdwatching Tools

Birdwatcher and his or her binoculars are practically a cliché. For the serious birdwatching enthusiast, another useful tool is the scope.

Birdwatching Sites

City parks, forest preserves, beaches, lakes, rivers, bogs and wetlands, idle farmland pastures, and other natural areas are good, places to observe bird behaviors.

Best Birding Sites

Birdwatchers travel specifically to see birds and are therefore attracted to locations where either the biodiversity (i.e. large numbers of species) or the chance to see particular species is high. They do not typically travel to places of unknown birding status.

- Europe
 - Denmark
 - Netherlands
 - Northern Adriatic
 - Norway
 - Switzerland
 - Belgium
 - Birds of Foula (Shetland)
 - Ireland
 - Northern Ireland
 - Hungary
- Australia
 - National Botanic Gardens
 - Queensland
 - Southern Queensland
- New Zealand—Royal Albatross Colony
Otago Peninsula
- Asia
 - Bahrain
 - Indonesia
 - Japan, Shiokawa Tidalflat
 - Taiwan
- Antarctica
- Africa
 - Zaire
 - Zimbabwe
 - South Africa
- United States
 - Arizona, Southeast
 - Connecticut
 - Delaware
 - Illinois, Chicago area
 - Maine
 - Minnesota
 - Nebraska, Spring Migration
 - New York, Westchester County
 - New York, Central Park
 - New York, Long Island
 - North Carolina, Triangle Area
 - Ohio, Cincinnati/Dayton
 - Oregon, Klamath Basin
 - Oregon, Malheur
 - Pennsylvania, Hawk Mountain
 - Texas, Gulf Coast
 - Texas, El Paso Birding Sites
- Canada
 - British Columbia, Victoria
 - Ontario
 - Quebec
- Central America and the Caribbean
 - Belize
 - Costa Rica
 - Bonaire, Washington-Slagbaai
National Park
 - Trinidad & Tobago
- South America
 - Tandayapa Bird Lodge, Ecuador
 - Bellavista, Ecuador

Segment

- Birdwatching is a serious and passionate recreational activity for a significant number of people in many (mainly Western) countries.
- Birdwatching is an activity that is greatly enhanced and enriched by travel. Indeed, for all but novice birdwatchers, travel away from home is an essential pastime, as to see new birds, one must travel to new places.
- Birdwatchers tend to have strong learning motivation, are generally interested in other wildlife, are keen to see as many new species as possible and seek bird rich sites.
- Birdwatchers tend to do considerable background planning before their trip. They are strong users of the Internet and birding networks for information.
- For many birdwatching tourists, the primary objective is to see the largest number of new or different species in the most cost-effective manner.

Demographic

- The international birdwatchers' markets are generally 40+ old
- International birdwatchers tend to be highly educated and affluent. Almost 75% of U.S. birdwatchers had achieved degree level education or greater
- Most international birdwatchers are likely to be members of their local birdwatching clubs
- The major international source markets are reported to be the United Kingdom, Europe and the United States.

Birdwatching tourists can be classified into the following categories:

- General birdwatchers
- Specialist birdwatchers with restricted budgets
- Specialist birdwatchers willing to pay to see more birds
- Specialist birdwatchers requiring packaged birding.

Motivation

- Fun. Something deep seems to get fulfilled. A connection is made with the immense beauty of nature.
- Satisfaction. Birding invokes people primeval hunting instincts. It delivers all the satisfaction of the hunt, even though the prey itself escapes unharmed. Birding is the perfect sport for the 21st Century.
- Health. Birding gets people vertical. It gets people outside and walking. But it's effortless, because the attention is on the birds. Nevertheless, after a little birding, travelers usually covered quite a bit of ground.
- Family. Birding unites people across generations. By taking up birding, parents or grandparents can introduce their children to an interest in nature that will stay with them all their lives.

- **Companionship.** Birding is the ideal social activity. A birder need never be lonely. And because birders love to share their knowledge, newcomers are always welcome.
- **Solitude.** Birding is also the ideal solitary sport. There's a special pleasure in going out alone to bird. Birding is a sport of many moods, and it serves the causes of companionship and solitude equally well.

Attribute of Bird Watching

- Dress in accordance to the weather and be prepared to be sweaty and even muddy. An umbrella is useful against rain and for sun protection. Bring water, sun block lotion, food, a notebook and wear a cap. Pack these in a small backpack.
- Best time for watching is from 5 –7 am and from 5-6.30pm. On light rainy days birds normally are active most of the day.
- Wear light clothes of natural colors – preferably khaki, green etc..
- Keep always your binocular perfectly clean and dry.
- At all times make as little noise as possible and talk with low voice or whisper in order not to scare the birds away.
- Walk slowly around and make no speedy movements. This may scare the birds. Do not bring dogs with you. Birds are scared of dogs.
- If you can hide in the vegetation or stand right next to a tree while observing the birds, you may get the birds closer to you.
- If you are a group of bird watchers and in order to give everyone equal chance to see the birds, always stay together in one flock so that no one walks ahead or falls behind.
- Do not stay near nests of birds and never take their young or their eggs.
- Report the rare and unusual birds to the Wild Bird Club Records Committee. If you are really keen and do regularly bird watching, always make notes in the field of what species you see, count the numbers of them, note where you see them (their habitats) and note human activities (hunting, land conversion like reclamation, forest or grass fires).
- If you don't know what species it is try to make a simple sketch of it and describe what you see (size like a maya or a wild chicken, form and length of beak, legs, tail, wings, colors and patterns). This may help later to make the final identification.

Armenia (a country the size of Belgium or the U.S. State of Maryland) has an extraordinary 346 species of birds whereas the whole of Europe has 550. Currently Armenian Ecotourism Association is involved in birdwatching related activities (www.ecotourismarmenia.com).

SWOT

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Variety of birds • Interesting nature and convenient landscape • Online visa access • Variety of accommodation • Availability of National Parks • Armenian Ecotourism Association (including bird watching) 	<ul style="list-style-type: none"> • Difficult transportation outside the capital • Huge gaps in providing services in regions • Not all information available in foreign languages • Lack of specific information on birdwatching • Lack of specialized tour operators • Lack of birdwatching guides and products • Lack of special facilities for birdwatching (viewing platform)
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Growth in birdwatching travel • Travelers are interested in new destinations • Organization of special events/festivals • Promotion of the country as birdwatching destination • Membership (different organization throughout the world related to birdwatching) 	<ul style="list-style-type: none"> • Lack of political stability • High prices for air tickets from many countries • High competition (Australia, New Zealand, etc.)

MEDIA

Name	Details	Contacts
Bird Watching Magazine	A social sciences journal focusing upon the academic perspectives of tourism.	www.birdwatchmagazine.blogspot.com/
World Birdwatch	International magazine about birds	N/A
Birding World	Monthly essential magazine for keen birdwatchers in Britain and throughout Europe	www.birdingworld.co.uk
British Birds	British Birds is a monthly journal for all keen birdwatchers.	www.britishbirds.co.uk/
Dutch Birding	Birdwatching journal targeting Dutch	www.dutchbirding.nl
Nomad adventure journals	Nomad Bird Watching Journals are great gifts for bird watching enthusiast. These journals help bird watchers preserve the experience	www.nomadjournals.com/bird_watchers.cfm

Internet

Name	Details	Contacts
Birdwatching	Information portal + news letter. About wild birds and the sport of birding. It's for everyone who's interested in birdwatching and enjoying nature.	www.birdwatching.com
Bird Watcher's Digest	Online resource center	www.birdwatchersdigest.com
GeoBirds	Online birding community	www.geobirds.com
Travellingbirder.com	Private website constructed by birders	www.travellingbirder.com
Birdwatching Dot Com	Information website about wild birds and the sport of birding + newsletter.	http://www.birdwatching.com/birdingtips.html

INDUSTRY

Tour Operator/Travel Agency

Name	Details	Contacts
Churchill Wild	Offers special tours on birds, bear and belugas	www.churchillwild.com/geninfo.html
Exotic Birding and Photo Tours	Provides small group birding and nature photo tours to Costa Rica, Belize, Trinidad, Panama, and Ecuador featuring master guides who teach their skills	www.exoticbirding.com
Field Guides Birding Tours Worldwide	Offers professionally led tours, plus travel services for groups and individuals.	www.fieldguides.com
Victor Emanuel Nature Tours	Offers worldwide birding tours and cruises.	www.ventbird.com
Junglelore Birding Tours	Offers tours in the Himalayan region and wetlands of India.	www.junglelore.com
Indicator Birding	Birding tours, guiding, information, and eco-tourism development in Gauteng and eastern South Africa.	www.birding.co.za
Bird Treks	Offers birdwatching tours in the Southwestern U.S. and Latin America.	www.birdtreks.com
Ventures, Inc.	Offers birding and natural history tours for small groups in North, Central, South America, Europe, Australia, and Africa.	www.birdventures.com
Eagle-Eye Tours	Birding and nature tours provided by professional guides in small groups worldwide.	www.eagle-eye.com
Birdwatching Breaks	Specializes in wildlife observation vacations and birdwatching holidays	www.birdwatchingbreaks.com
Free-living	Offers directory of information on birdwatching holidays worldwide.	www.free-living.com
North West Birds	Offers birdwatching mini breaks in the North West of England.	www.nwbirds.co.uk
Borderland Tours	Offers tours to birding, cultural, and natural history destinations	www.borderland-tours.com
Tanager Tours	Specializes in bird watching tours throughout southern Peru.	www.tanagertours.com
Birding Tours Australia	Offering one and two day tours around Newcastle, NSW	www.birdingtours.com.au
Santa Rita Lodge	In Madera Canyon, offers morning bird walks and natural history classes; includes information on several species of hummingbirds	www.santaritalodge.com
Brian Patteson, Inc.	Offers pelagic birdwatching trips from North Carolina Outer Banks and Virginia Beach	www.patteson.com

Name	Details	Contacts
Westport Seabirds	Making scheduled pelagic birding and birdwatching trips in the northeastern Pacific	www.westportseabirds.com
Wings Birdwatching Tours	Small group birding travel in 60 countries on seven continents.	www.wingsbirds.com
St. Paul Island Tours	Alaska birding tours, showing the rich diversity of seabirds, fur seals, arctic foxes, and wildflowers, amidst the cliffs and beaches of the Pribilof Islands.	www.alaskabirding.com
Amazilia Tours	Trilingual guide leads birding tours to the neotropics of Central America and the West Indies.	www.amaziliatours.com

ASSOCIATIONS [3]

Organization	Details	Contact Information
American Birding Association	The ABA is a nonprofit organization that provides leadership to birders by increasing their knowledge, skills, and enjoyment of birding.	www.americanbirding.org
Dutch Birding Association	The Association website in Dutch	www.dutchbirding.nl
African travel & Tourism Association	ATTA have members with presence in countries across Africa and the Indian Ocean Islands. Each of these members provides unique services.	www.atta.co.uk
RSPB	The RSPB is the UK charity working to secure a healthy environment for birds and other wildlife, helping to create a better world for us all.	www.rspb.org.uk
American Birding Association	Encourages conservation of birds and their habitats by developing and disseminating information, and promoting economic and environmental values of birding.	www.americanbirding.org
American Bird Conservancy	Programs, grants, field guides, and more.	www.abcbirds.org
Ornithological Society of the Middle East	Supporting bird conservation, research, and birdwatching in the Middle East, the Caucasus, and Central Asia.	www.osme.org
Neotropical Bird Club	Aims to foster an interest in the birds of the Neotropics (Central America, South America and its associated islands and the Caribbean) and their conservation.	www.neotropicalbirdclub.org
African Bird Club	Aims to provide a focus for African ornithology and promote conservation in the region	www.africanbirdclub.org
National Bird-Feeding Society	Provides information on attracting and feeding wild birds.	www.birdfeeding.org
Oriental Bird Club	Encourages an interest in the birds of the oriental region and their conservation	www.orientalbirdclub.org
Hong Kong Bird Watching Society	Activities, news, gallery, and more	www.hkbws.org.hk
BirdWatch Ireland	Active voluntary conservation organization primary interested in the conservation of wild birds and their habitats throughout Ireland.	www.birdwatchireland.ie
North American Rare Bird Alert	Notifies subscribers of rare bird sighting throughout the United States and Canada.	www.narba.org
Southeastern Arizona Bird Observatory	Promotes conservation of birds and their habitats in southeastern Arizona through science, education, and ecotourism development. Offers birding, nature activities, and travel information.	www.sabo.org

Organization	Details	Contact Information
Birding In Taiwan	Site of the International Taiwan Birding Association. Features information about Taiwan, birds, habitats, species accounts, and endemics.	www.birdingintaiwan.com
Gay Birders Club	A club for lesbian and gay birders in the U.K. and overseas. Organizes birding events, publishes a newsletter, and welcomes new members.	www.gbc-online.org.uk
Brooklyn Bird Club	Includes checklists, maps, and hotspot information.	www.brooklynbirdclub.org
Brooks Bird Club	Promotes the study of birds and natural history in West Virginia. Includes events and foray calendar.	www.brooksbirdclub.org

TRAVEL FAIRS [2]

British Birdwatching Fair

Date: 15-17 August, 2008

Venue: Egleton Nature Reserve, Rutland Water, Oakham, Rutland

2006 statistics:

Exhibitors	300
Trade visitors	19,000

Contacts

Birdfair Office, Fishponds Cottage

Hambleton Road, Oakham

Rutland, LE15 8AB

Tel: 01572 771079

Fax: 01572 756611

General enquiries: info@birdfair.org.uk

Exhibiting enquiries: exhibiting@birdfair.org.uk

Events enquiries: events@birdfair.org.uk

Website: www.birdfair.org.uk Tour Packages

Package name/country	Details	Website
Brazil birding tour (Pantanal, Itatiaia, and Iguassu Falls)	15 days, 14 nights, October 12–26, 2007 \$3950, single supplement \$325 Pantanal and Itatiaia Internal flights within Brazil not included in tour price	www.exoticbirding.com
Vancouver Island British Columbia for Sky Lark (Canada)	5 days and 4 nights \$1,295 per person/double occupancy, including expert guide service, lodging for 4 nights, all meals, entrance fees, ferry rides, and ground transportation from Seattle.	www.birdtreks.com
Georgia: The High Caucasus	26 April–4 May 2008 price about \$3,600, single occupancy supplement \$100	www.wingsbirds.com

20. Cultural and Heritage Travel

1. "Cultural & Heritage Tourism in the US",
<http://www.pcah.gov/pdf/05WhitePaperCultHeritTourism.pdf>
2. CULTOUR, www.cultourfair.com
3. ICOMOS, <http://www.international.icomos.org/publications/93touris18.pdf>
4. Culture & Travel magazine, <http://www.cultureandtravel.com/>
5. Annals of Tourism Research,
http://www.elsevier.com/wps/find/journaldescription.cws_home/689/description#description
6. <http://www.vision3.com/stuff/culturalHeritage/site/resources.htm>
7. www.tia.org/travel/geo03_es.pdf
8. www.infohub.com

MARKET PROFILE [1], [6], [7]

The quest for culture is becoming one of the most dominant influencing factors in leisure travel. Travelers who engage in cultural tourism activities visit the following:

- Art galleries, theater and museums
- Historic sites, communities or landmarks
- Cultural events, festivals and fairs
- Ethnic communities and neighborhoods
- Architectural and archaeological treasures

Cultural and heritage tourism is different from other "mass market" travel industry segments in several ways. First, many cultural and heritage institutions are nonprofit organizations where tourism is only one strategy that meets their mission. In many cases, funds are dedicated to an artistic or educational mission or the preservation, interpretation and management of a resource rather than to marketing. Second, limited capacity or the fragility of cultural, natural and heritage resources and sites sometimes constrains the number of visitors that can be hosted annually or seasonally. Overuse or excess capacity can result in negative impact on resources and can diminish the quality of the visitor and resident experience.

Profile of all cultural travelers (2002-2003–worldwide):

- Average expenditure for a cultural trip: \$457
- Average age: 47
- 16% of world's cultural travelers are retired
- 19% of them have a graduate degree
- 55% use a hotel, motel or B&B
- 12% are likely to spend \$1,000+/-:
- 16% travel by air
- Average length of trip 3.4 nights
- Cultural travelers are seeking experiences to enrich their lives.

Cultural Travel in United States

In 2004, according to the U.S. Department of Commerce, there were over 10.6 million overseas visitors to United States who participated in cultural and heritage tourism activities while within the country. The top five markets interested in cultural and heritage tourism as a share of their total visitors are:

- United Kingdom
- Japan
- Germany
- France and Australia.

The average overseas cultural and heritage tourism traveler visits United States for over 19 nights. They are more willing to visit more than one state (41%) compared to only 30% for all overseas visitors.

Nearly 118.1 million American adults say they included at least one of fifteen arts, humanities, historic or heritage activities or events while traveling in 2002. This equates to more than half of the U.S. adult population (56%). One quarter of these cultural travelers take three or more of these trips per year. In fact, historic/cultural travel volume is up 13 percent from 1996, increasing from 192.4 million person-trips to 216.8 million person-trips in 2002.

Thirty percent or 35.3 million adults say that a specific arts, cultural or heritage event or activity influenced their choice of destination. In fact, many travelers will extend their stay because of an arts, cultural or heritage event or activity.

In 2003, more than half of the traveling American public considered it important to experience or learn about cultures other than their own when they traveled. Over 95 million (62%) believed it was important to learn about other cultures when they traveled. Half of all travelers (50%) expressed a similar sentiment that it is important to learn about people with ethnic heritages different from their own. 89 million (58%) viewed travel as an opportunity to try local foods or cuisine, and 54% said that it gives them the chance to explore off the beaten path hotels and places frequented by locals.

Authenticity is a primary theme when examining travelers wants and needs. Four in ten (41%) travelers said their experience was better when they can see and do something authentic. In addition, half of all travelers preferred to experience the local culture (49%) and support local businesses (49%) at their destinations.

Travelers' positive attitudes about culture and history extend to the activities they choose to do at home and while traveling. Furthermore, half (50%) of all travelers said they eat in ethnic/specialty restaurants in their local area, and nearly as many attend community festivals and ethnic celebrations (45%). Many (44%) like to read books/magazines or watch movies/videos about history and culture.

Four in ten travelers (40%) said they visited historic sites and museums in their local areas. Over one quarter of all travelers attended performing arts events (28%) and/or visited art museums/galleries (26%) in their local areas.

SWOT

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Museums, art galleries, concert halls • Historical places • Churches, medieval monasteries in different regions • Annual festival of cinema in summer • Online visa access • Specialized tour operators • Promotion of Armenia as a destination for cultural travel 	<ul style="list-style-type: none"> • Difficult transportation outside the capital • Huge gaps in providing services in regions • Not all information available in foreign languages • Lack of specific information on cultural and historical sites
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Growth in cultural travel • Huge Armenian Diaspora interested in the cultural heritage and history of Armenia • Travelers are interested in new destinations • Organization of special events/festivals 	<ul style="list-style-type: none"> • Lack of political stability • High prices for air tickets from many countries

MEDIA [4], [5]

Culture & Travel, <http://www.cultureandtravel.com/>

ASSOCIATIONS [3]

Organization	Details	Contact Information
Europa Nostra	Also known as the International Federation of Nongovernmental Associations for the Protection of Europe's Cultural and National Heritage. Created to awaken the pride of European peoples in their common inheritance of architecture and natural beauty. Organized the Historic Towns Forum.	86 Vincent Square London SW1P 2PG, United Kingdom Tel. 8345886
International Council on Monuments and Sites (ICOMOS)	Has an International Committee on Cultural Tourism. Publishes quarterly, "ICOMOS Information."	75, rue du Temple 75003 Paris, France Tel. (1) 42.77.35.76

TRAVEL FAIRS [2]

Cultour

Date: 12-15 June 2008

Venue: Kölnmesse, Hall 11 (Cologne, Germany)

Service	Description	Price*
Modular furnished single stand (for one exhibiting company use)	Includes: up to three walls, one table and three chairs, 20 characters company sign, carpet, two lights, one electric outlet, paper basket, daily cleaning, responsibility insurance covering KoelnMesse, 3 exhibitor badges, up to ten pre-arranged meetings with hosted buyers, transfers to/from official hotels-KoelnMesse, eligibility to organize a pre or post fam tour of buyers to the exhibitor venue.	5,478 \$/3x3m stand
Modular furnished shared stand	Includes: up to three walls, two tables and six chairs, two 20 characters company signs, carpet, two lights, one electric outlet, paper basket, daily cleaning, responsibility insurance covering KoelnMesse, 3 exhibitor badges, two sets of up to ten pre-arranged meetings with hosted buyers (total up to 20 appointments), transfers to/from official hotels-KoelnMesse, eligibility to organize a pre or post fam tour of buyers to the exhibitor venue.	6,858 \$/3x3m stand
Floor space	minimum 18 sq.m; includes: two sets of up to ten pre-arranged meetings with hosted buyers, transfers to/from official hotels-KoelnMesse, eligibility to organize a pre or post fam tour of buyers to your venue, 6 exhibitor's badges, maximum one extra set of 10 appointments per each contracted extra 9sq.m.	411 \$/sq.m

*Seven percent tax added to all prices.

Contacts

E-mail: pat.ciruelos@gsamark.com (Patricia Ciruelos)

Website: www.culturfair.com

TRAVEL PACKAGES [8]

Name	Highlight	Activity	Duration (days)	Price (US\$ per person)*	Season	Destination
Cities of Wonder	This remarkable tour of some of the most bewitching and memorable cities on the planet begins in the Czech Republic's capital city, Prague.	Cultural expeditions, history tours	16	3,067	May–September	Czech Republic
Czech Republic	Sample of the exquisite sceneries, cultures and attractions unique to the heart of Europe!	Cultural expeditions, history tours	9	1,825	May–September	Czech Republic
Czech & Slovak Republics	Sometimes dubbed Prague the Golden; sometimes Prague, Czech Republic's capital may be known by several names, but it is without doubt the only one of its kind.	Cultural expeditions, art, architecture	13	2,365	May–September	Czech Republic Slovakia
Czech Republic, Slovak Republic & Hungary	We land in the heart of Europe when we touch down in the Czech Republic and the ever-exciting atmosphere and stunningly attractive setting of Prague!	Cultural expeditions, history tours	21	4,342	May–September	Czech Republic Slovakia Hungary
Czech Republic, Slovak Republic, Hungary & Romania	Experience the best of culture, spectacle and nature on this adventure through four highly memorable tour destinations in the heart of Europe.	Cultural expeditions, history tours	28	6,080	May–October	Czech Republic Hungary Romania
Czech Republic & Slovakia	Stimulating expedition in the Czech Republic and Slovakia!	Cultural expeditions, history tours	16	2,689	May–September	Czech Republic Slovakia
The Adriatic	An ancient, romantic town reminiscent of Vienna and Prague, albeit considerably smaller, Ljubljana is Slovenia's capital city and our first destination on this tour of discovery in Adriatica.	Cultural expeditions, history tours	13	2,905	May–October	Czech Republic Slovenia
Czech Heritage Tour	A short introductory tour to encounter five of the eleven UNESCO World Heritage Sites in Czech Republic, as well an immense number of fascinating castles, churches and other	Cultural expeditions, castles, palaces	8	2,470	March–October	Czech Republic
Highlights of Eastern Europe	The highlights of this tour are Vienna, Ljubljana, Lake Bled, Zagreb, Budapest, Krakow, Auschwitz, Jasna Gora, Warsaw, Poznan, Berlin, Dresden, Prague, Lednice	Cultural expeditions, walking tours	18	2,775	April–September	Hungary Czech Republic Germany
Prague and Budapest	Your journey to these "Cities of Enchantment" begins in the "Golden City" of Prague in the Czech Republic.	Cultural expeditions, history tours	12	1,549	May–November	Czech Republic Hungary

Name	Highlight	Activity	Duration (days)	Price (US\$ per person)*	Season	Destination
Warsaw, Budapest, Vienna & Prague	Get immersed in culture on this Old World Europe tour of palaces and castles, art and architecture.	History tours, art, architecture	14	4,890	April–October	Poland Hungary Czech Republic
Magnificent Cities of Central and Eastern Europe	Your journey to Central and Eastern Europe includes the “Golden City” of Prague in the Czech Republic where you’ll enjoy a panoramic tour through the city.	Cultural expeditions, walking tours	14	1,949	May–November	Czech Republic Poland Austria
Prague, Vienna & Budapest	This sightseeing tour of Eastern Europe starting and ending in Munich brings to you the highlights of three historical and beautiful cities: Prague, Vienna and Budapest.	Cultural expeditions, walking tours	10	770	March–December	Czech Republic Austria Hungary
Imperial Capitals	England, Belgium, Luxembourg, Germany, Austria, Hungary, Slovakia, Czech Republic on this Imperial Capitals tour.	Cultural expeditions, walking tours	17	1,580	February–December	England Luxembourg Czech Republic
Prague, Saxony and the Elbe	Cycling is mostly on the flat or downhill though there are several short uphill sections, generally when ascending out of river valleys.	Bicycle touring, cultural expeditions	8	920–940	May–September	Czech Republic Germany
Danube River Cruise with Prague	Danube River Cruise with Prague	Art, architecture, cultural expeditions	10	1,739–1,099	November	Czech Republic Austria Germany
The Czech Republic between Vienna and Prague	Thrilling, relatively easy cycling and exploration on quiet roads and forest trails!	Cultural expeditions, bicycle touring	8	2,295–2,395	June–September	Czech Republic
Winter Waltz	This trip will give you an in-depth insight into European history and culture.	Cultural expeditions, art, architecture	15	1,705	January–December	Italy Austria Czech Republic
Winter Rhapsody	Beginning in Vienna, the city of the waltz, baroque architecture and palaces, we travel north to Prague, one of the most stunning and exciting capitals in Europe.	Cultural expeditions, art, architecture	10	1,200	January–December	Austria Czech Republic Germany
Prague Express	This tour shows you the highlights of some of Europe’s most exciting cities–Paris, Munich and Prague.	Cultural expeditions, cruising	7	890	January–December	Czech Republic France Germany

Name	Highlight	Activity	Duration (days)	Price (US\$ per person)*	Season	Destination
Taste of Eastern Europe	This tour shows you the highlights of some of Europe's most exciting cities—Prague, Berlin and Amsterdam.	Cultural expeditions, history tours	8	1,015	January–December	Czech Republic Germany Netherlands
Prague Castle and Lesser Town	Visit the beautiful Prague, the most extraordinary places and you will never forget the beauty of Prague!	History Tours	1day	EUR80	January–December	Czech Republic
Vysehrad Castle and National Cemetery	Visit the unique Vysehrad Castle and other cultural and historic sites of Prague!	Castles, palaces, archeology, history	1	EUR80	January–December	Czech Republic
Prague & Tatra Mountains Family Holiday	Action-packed activities in the Western Tatra Mountains combined with the culture of Prague	Holiday tours, cultural expeditions	10	1,145–1207	May–August	Czech Republic
Cities of Wonder	This remarkable tour of some of the most bewitching and memorable cities on the planet begins in the Czech Republic's capital city, Prague.	Cultural expeditions, history tours	16	3,067	May–September	Austria Czech Republic
Bohemia & Moravia Rambler	Touching down in Vienna, the 'City of the Waltz,' in Austria!	Cultural expeditions, art, architecture	14	3,080	May–September	Austria
Best of Germany & Austria	Tour of Germany & Austria with highlights to include, Frankfurt, Rhine Valley, Cologne, Hamburg, Berlin, Bayreuth, Wurzburg, Rothenburg Munich, Salzburg, Danube Valley, Vienna, etc...	Cultural expeditions, cruising	15	2,199	April–October	Germany Austria
Switzerland & Austria	Tour of Switzerland & Austria with highlights to include, Zurich, Liechtenstein, Salzburg, Danube Valley, Vienna, Graz, Piber, Innsbruck, St. Moritz, Stresa, Zermatt, etc...	Cultural expeditions, walking tours	14	2,290	May–October	Switzerland Austria
Magnificent Cities of Central and Eastern Europe	Your journey to Central and Eastern Europe includes the "Golden City" of Prague in the Czech Republic where you'll enjoy a panoramic tour through the city...	Cultural expeditions, walking tours	14	1949	May–November	Czech Republic Poland Austria
Prague, Vienna & Budapest	This sightseeing tour of Eastern Europe starting and ending in Munich brings to you the highlights of three historical and beautiful cities, Prague, Vienna and Budapest.	Cultural expeditions, walking tours	10	770	March–December	Czech Republic Austria Hungary
Magnificent Europe	A grand cruise from Amsterdam to Budapest.	Cruising, cultural expeditions	16	2,999	May–November	Netherlands Hungary Austria
Christmas Markets Danube River Cruise	Christmas Markets Danube River Cruise	Shopping trips, cultural expeditions	8	1,389–899	November	Austria Germany

Name	Highlight	Activity	Duration (days)	Price (US\$ per person)*	Season	Destination
Danube River Cruise with Prague	Danube River Cruise with Prague	Art, architecture, cultural expeditions	10	1,739–1,099	November	Czech Republic Austria Germany
Austria: Vienna to Budapest along the Danube River	A relaxed trip following the Danube River on level terrain accessing the rich art history and architecture of the Austro-Hungarian Empire.	Cultural expeditions, bicycle touring	8	3,245–3,395	August–September	Austria
Eastern Explore	A short tour that gets to the heart of Italy's gems, visits both rural and urban Croatia, sees spectacular Lake Bled and ends with a Viennese whirl in Austria's capital.	Cultural expeditions, art, architecture	10	1,270	January–December	Italy Croatia Austria
Winter Waltz	This trip will give you an in-depth insight into European history and culture.	Cultural expeditions, art, architecture	15	1,705	January–December	Italy Austria Czech Republic
Winter Rhapsody	Beginning in Vienna, the city of the Waltz, baroque architecture and palaces, we travel north to Prague, one of the most stunning and exciting capitals in Europe.	Cultural expeditions, art, architecture	10	1200	January–December	Austria Czech Republic Germany
Mediterranean Magic	Spanning 6 countries, this tour has it all. From the architectural wonders of Vienna, the ancient Colosseum and Pisa's leaning tower to the modern malls and boutiques of Barcelona.	Cultural expeditions, Art, Architecture	21	2,600	January–December	Austria Slovenia Croatia
Eastern Delight	An orientation tour of Vienna is followed by free time for you to 'venture a little further' in this wonderful city of Strauss, Beethoven and Sigmund Freud.	Cultural expeditions, history tours	9	1,085	January–December	Austria Slovenia Croatia
European Waltz	A tour which introduces the major cities and highlights of Europe, encompassing spectacular scenery, art, and culture along the way.	Cultural expeditions, art history	19	2,490	January–December	Italy Austria Hungary
European Rhapsody	From Vienna's palaces and boulevards we head east to Budapest's citadel and fortified castle district.	Cultural expeditions, art, architecture	12	1,720	January–December	Austria England Germany
Hiking Austria and Bavaria	From Tyrolean mountain huts to a King's Fairy Tale Castles—a magnificent hiking vacation in the European Alps in Austria and Germany, Bavaria.	Hiking, history tours	8	2,600	June–September	Austria Germany
Music Cruise	Join a cruise on the Danube River passing through the European cities that gave us the best classical music composers of all times!	Performing arts, arts festivals	8	1,799–2810	May–October	Austria Hungary
Sound of Music Super Package	The hills are alive—this is our super package All Inclusive Sound of Music!	Performing arts, film, film history	2–5	380–535	January–December	Austria

Name	Highlight	Activity	Duration (days)	Price (US\$ per person)*	Season	Destination
Deluxe Sound of Music Palace Weekend	World renowned as the original film location of “The Sound of Music”, Schloss Leopoldskron is now offering deluxe weekend packages in the original setting of the Sound of Music.	Castles, palaces, film, film history	3	525	January–December	Austria
A Musical Taste of Vienna	Experience fantastic Vienna in a special package designed for music lovers,	Performing arts, art, architecture	5	795	January–December	Austria
The Best of Mozart	Package includes “On the Traces of Mozart” sightseeing tour, and a “Best of Mozart Concert” ticket in the best seating.	Performing arts, art history	3	295	March–January	Austria
Cities of Wonder	This remarkable tour of some of the most bewitching and memorable cities on the planet begins in the Czech Republic’s capital city, Prague.	Cultural expeditions, history tours	16	3,067	May–September	Austria Czech Republic
Bohemia & Moravia Rambler	Six UNESCO World Heritage Sites, Vienna’s Schonbrunn Palace, Chateaux in Lednice–Valtice Area Renaissance square in Telc, Medieval town of Cesky Krumlov, Rustic baroque, village of Holasovice.	Cultural expeditions, history tours	14	3,080	May–September	Austria Czech Republic
Bohemia & Moravia Rambler	World-famous attractions that lure flocks of travelers the world around.	Cultural expeditions, history tours	14	3,080	May–September	Austria Czech Republic

*US\$ except where indicated otherwise.

21. Cycling

1. Cycling Association of Yukon, <http://www.tirc.gov.yk.ca/pdf/PotentialforMtnBikeTourisminYT2004.PDF>
2. <http://hnl.nf.ca/pdf/annualreport/2006USTAMSCyclingWhileonOvernightTrips.pdf>
3. European Cyclists' Federation, www.ecf.com
4. Saddle Skedaddle (tour operator), cycling.skedaddle.co.uk
5. Western Spirit, www.westernspirit.com
6. www.cyclevents.com
7. www.endlessride.com
8. www.ridebig.com

MARKET PROFILE [1], [2], [3]

During 2005-2006, 4.9% (10,787,235) of adult Americans went cycling while on an out-of-town trip of one or more nights. 3.8% reported going recreational cycling or taking a same-day excursion by bicycle; 1.5% went mountain biking and 0.4% went on an overnight touring trip by bicycle. Only 0.1% participated in all three cycling activities.

Of those who cycled (US market), 27.4% reported that cycling was the main reason for taking at least one trip in the past two years. 60.0% of those who went on an overnight cycling touring trip reported that this activity was the main reason for taking a trip compared to 31.3% of those who mountain biked and 22.5% of those who went recreational cycling. Of the entire U.S. market of 170,510,241, 10,787,235 are cyclists.

Activities	No. of Cyclists	% of All Holiday Travelers
Cycling (all activities)	10,787,235	6.3%
Recreational cycling, same day excursion	8,382,597	4.9%
Mountain biking	3,397,384	2.0%
Overnight touring trip	958,583	0.6%
Participated in all three cycling activities	219,777	0.1%

Segment

Holiday cyclist: Holiday cyclists are mainly couple, family or friends. They are looking for a holiday where there are opportunities to cycle, perhaps not every day but on several occasions during their stay. They prefer to organize themselves rather than buy a package holiday. They are more likely to take their own bikes on holiday. They will probably cycle between 15-25 miles per day.

Short-break cyclist: Short-break cyclists seek to get away from it all and choose packages that provide sound local knowledge and comfortable accommodation. They tend to travel as couples or small groups of friends. They will probably cycle 15-25 miles per day.

Day excursionists: This group consists of fair weather casual cyclists who seek out an easy circular ride of approximately 10-15 miles. They prefer off-road cycles routes but quiet and signed back lanes are acceptable to those who cycle more regularly. This segment chooses to take his or her own bike(s) and hire is becoming less important, taking into account about 28-30% of users.

Cyclists segment characteristics (US travelers):

- Male
- 35–54 age
- Married with children under 18 living at home
- High household income and university education

Cyclists are active and perform a variety of outdoor activities while on trips. The majority of cyclists have participated in ocean activities, hiking, climbing and paddling, wildlife viewing, and boating and swimming. Cyclists are likely to engage in exhausting physical activities, including both winter (extreme skiing, cross-country skiing and snowshoeing, downhill skiing and snowboarding, ice-skating) and summer activities (rollerblading and skateboarding, extreme air sports, scuba and snorkeling). Cyclists are active in competitive activities (e.g., games and individual sports, team sports, golfing) and non-competitive activities (e.g., fitness and jogging, sailing and surfing, horseback riding, motorcycling).

While in trip cyclists perform cultural and entertainment activities such as:

- Casino, theatre and comedy clubs
- Rock concerts and recreational dancing
- Fine dining and spas
- Wine, beer and food tasting
- Science and technology exhibits
- Garden theme attractions
- Theme parks and exhibits
- Fairs and festivals
- Agrotourism
- Professional sporting events

- Equestrian and western events
- Amateur tournaments
- High art performances
- Film and musical Festivals
- Historical sites, museums and art galleries
- Archaeological digs and sites
- Shopping and dining
- Participatory historical activities
- Aboriginal cultural experiences
- National and international sporting events

Table 21-1
Grading of Cycling Adventure Holidays

Grade	Category	Description	Example of European holiday
A	Easy	Suitable for anyone who can ride a bike	Swiss Rhone
B	Moderate	Occasional cyclist + exercise once or twice a week	Pyrenees to the Med, Spain
C	Strenuous	Fit & confident riders + exercise 2-3 x per week	Arcadian trails, Greece
D	Tough	Long cycling days, tougher terrain on and off road	Tuscan trails, Italy
E	Very tough	Expedition type tour for experienced, fit cyclists. High level of fitness	Not available in Europe

Table 21-2
Trip Description

Type	Profile/nature of activities
Half day and day Casual Home based Tourer	Occasional rider from home base. Single and couple, age 24-45, also families. Increasingly using cars to transport bikes.
Half day and day Casual Mountain Bikers	Occasional rider from home base. Single and couple, age 24-45. Higher proportion of males and fewer females. Cycling approximately 10-20 miles. Increasingly using cars to transport bikes. Socioeconomic
Half day and day Cycle Hirer	Infrequent rider-more likely not to have bicycle or use when on holiday. Wider age profile of 18-55. Families strong market. Cycling 10-20 miles. Socioeconomic
"Do it yourself" Cycle Tourer	Organizes day ride or cycling tours from an independent base. Keener cyclists, young people hostellers, increasingly using car to transport bikes. More likely to be professional/managerial
"Do it yourself"	Organizes day ride or cycling tours from an independent base. Seeking more strenuous off-road routes, but fewer families and slightly younger age profile. Use of leaflets and guide books. More likely to be professional/managerial
Organized independent self guided, cycling holidays/tourers and mountain bikes	Participants book and organize holiday (routes, accommodations, etc.) but travel as a couple or groups of friends. More likely to be professional/managerial
Organized group cycling holidays	Participants book and organize holiday (routes, accommodations, etc.). Make up a group for guided tour. More likely to be professional/managerial
Group holidays	Participants book and organize holiday (routes, accommodations, etc.). Booking made for groups as part of multi-activity or cycling holiday. Incorporate day hire of cycle fleets by school and youth clubs
Club rider	Keen riders: knowledgeable, self-arranged, long distance day and holidays
Sport competitors	Mainstream cycling as a sporting activity
Event riders	Cycling for charity mainly

Motivation

All cyclists have similar needs in terms of safety and security of cycle. The reasons for undertaking a cycling holiday are

- Relax
- Be fit/healthy
- Be closer to the nature
- Practice some sport
- Be with friends
- Be with the family
- Discover landscape
- Be alone
- Discover cultural sights

Means of information used to organize cycling holidays

- Tour operators
- No means
- Maps
- Word of mouth
- Tourist guides/tourist offices
- Cycle guides/cycle magazine
- Accommodation (hotels, bed and breakfast)
- Bike clubs, associations
- Bike hire shops

Length of cycling trip (Europe, 2003)

On average, the majority of cyclists prefer 1 week cycling trip for long distance and 1 weekend—for short one (in town)

Preferred Itineraries (Europe, 2003)

Countryside	58.5%
Woods, forest	40.9%
Wild nature	27.7%
Seaside	26.9%
Mountain	16.8%
Others	3.3%

Accommodation

The most common types of vacation accommodations that cyclists used during the trips are public campgrounds in national, state / provincial or municipal parks, and resorts in various settings (i.e., seaside, lakeside / riverside, skiing or mountain resorts). The entire market size is 10,787,235.

Table 21-3
Most Popular U.S. Cyclist Vacation Accommodations

Type of Accommodation	Share (%)
A public campground in a national, state, provincial or municipal park	49.4
Seaside resort	44.0
Lakeside / riverside resort	32.9
Ski Resort or mountain resort	30.2
Private campground	29.0
Camp Site in a wilderness setting (not a campground)	18.5
Motor Home or recreational vehicle while traveling or touring (not a camping trip)	11.5
Wilderness lodge you can drive to by car	11.0
Health spa	10.6
Country inn or resort with Gourmet	
Restaurant	6.6
Farm or guest ranch	5.7
On a houseboat	5.6
Remote or fly-in wilderness lodge	2.9
Remote or fly-in wilderness outpost	2.5
Cooking school	2.4
Wine tasting school	2.0

Destination

Main destinations for cycling in Europe:

- Austria
- Bulgaria
- Croatia
- Czech Republic
- Estonia, Latvia and Lithuania
- France
- Germany
- Hungary
- Greece
- Ireland
- Italy
- Portugal, the Azores and Madeira
- Spain
- Switzerland
- Turkey
- The UK

Eurovélo in the idea of a giant European network to develop the cycling amenities and to welcome cycling holiday travelers.

Destination Attributes

- Feeling safe at the destination
- Lots of things for adults to see and do

- Convenient access by car
- No health concerns at the destination
- Availability of mid-range accommodation
- Information about the destination available on the Internet
- Low cost package deals available for the destination
- Availability of budget accommodation
- Direct access by air
- Lots of things for children to see and do
- Being familiar with the culture and language of the destination
- Availability of camping
- Great shopping opportunities
- Being at a place that is very culturally different than their own
- Availability of luxury accommodation
- Having friends or relatives living there
- Convenient access by train/bus
- Destination is disabled-person-friendly

Mountain biking

Mountain bike tourism has significant potential for growth as a niche Armenian tourism market. Mountain biking is one of the most popular adventure sports in the world. In the past 25 years, millions of people around the world have tried the sport and become dedicated enthusiasts. Mountain bike tourism is a growing segment of the adventure tourism market. Twelve million people in the US mountain bike regularly, with per capita rates of participation (approximately 4%) estimated to be similar in Canada, the UK, and German-speaking Europe.

Mountain bikers are:

- Well educated
- Males
- 25-45 years of age
- With high household income (64% of U.S. mountain bikers had household income of \$500,000 or higher)
- High education
- Single or married
- Are likely to not have children at home

Support services for independent travelers:

- Suitable accommodation, including campgrounds, hotels, B&Bs, huts, preferably with safe bike storage and located in close proximity to riding areas
- Reliable and professional mountain bike repair and retail shops
- Transportation services such as bike shuttles
- Maps and guidebooks for riding areas
- Showers and bike washes

- Restaurants, brew pubs, grocery and liquor stores

Mountain bikers tend to prefer the sport over other activities, participate in it frequently, and maintain this participation over the long-term. A large percentage of mountain bikers travel, and participate in the sport during their mountain bike trips. Mountain bikers show a strong preference for single-track² and their willingness to pay in the travel decision making context is directly related to the abundance and variety of single-track.

In the US, about 46 million people rode a bicycle (2003). Between 1994 and 2003, regular participation ranged between 4-6% of the nation's population, representing approximately 14 million riders.

In the UK, statistics point to similar per capita levels of participation. In the UK, cycling and mountain biking accounted for 4% of an estimated 1.3 billion countryside leisure day visits for 2002-2003. Of the estimated 11.8 million people who own a mountain bike in the UK, approximately 1.3 million ride off-road a minimum of 2-4 times per month.

In Germany, 3.5 million of the nation's 7.2 million recreational cyclists are mountain bikers. The per capita populations of recreational cyclists in Switzerland and Austria are very similar to Germany, suggesting that there are about 800,000 mountain bikers total in these countries. Other major mountain biking nations in Europe include Italy, Spain, France, Belgium, and the Netherlands.

Between 2002 and 2003 in the US, women's participation in the sport increased 33.9%, as compared to 5.6% growth overall. Women's representation in the sport will continue to grow, as it has in other adventure sports such as snowboarding and skiing.

Mountain bike tours encompass a wide range of riding experiences and options, from 14 day hut-to-hut tours in the Italian Alps to day-long fly-in wilderness epics in the Southern Chilcotin Mountains of British Columbia.

² Single-track refers to a trail or pathway that is only wide enough to accommodate users traveling in single file.

SWOT

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Convenient scenery and landscapes (mountainous landscape) • Interesting flora and fauna • Online travel information • Online visa access • Different types of accommodation available (especially in Yerevan) • Safety (Armenia is not associated with terrorism) 	<ul style="list-style-type: none"> • Difficult transportation outside the capital • Huge gaps in providing services in regions • Lack of specialized (cycling) information available in foreign languages • Lack of information on fun and entertainment • Undeveloped routes (maps) • Lack of bike repairs • Lack of promotion of the country as cycling travel destination • Lack of specialized tour operators/travel agencies • Lack of special cycling supporting organizations (equipment rent, etc.) • Lack of cycling associations/unions
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Cycling tourism is growing • Travelers are interested in new destinations • Organization of special events related to cycling (competitions, contests) • Promotion of the country in numerous specialized media • Creation of partnerships with different cycling organizations (associations) 	<ul style="list-style-type: none"> • Political stability • Low exchange rate of foreign currency • Competition (other countries)

MEDIA [1]

Journals and Magazines

Name	Details	Contacts
Adventure Cyclist	Adventure Cyclist is the one bicycling magazine truly dedicated to bicycle adventure. Through feature accounts of bicycle journeys of discovery across the US and around the globe	www.adv-cycling.org/bicycling-magazine.cfm
Bikemag.com		www.bikemag.com/

Name	Details	Contacts
Single-track magazine	Information related to mountain biking	www.singletrackworld.com/
What Mountain Bike	All the best routes and trails. Best bikes and latest accessories	www.whatmtb.com/
Cycling Plus	The magazine is for people who love to ride—Britain's best-selling road cycling monthly magazine.	www.cyclingplus.co.uk
Ride Guide	TV show related to mountain biking (Canada)	
Mountain Bike		www.bicycling.com
Bike Magazine		www.bikemagazine.co.uk/
Dirt Rag Mountain Magazine	Information on mountain biking	www.dirtragemag.com

TRAVEL INDUSTRY

Travel Agency/Tour Operator

Organization	Details	Contacts
Western Spirit Cycling Adventures	Cycling trips	www.westernspirit.com/
Fernie Fat Tire Adventures		www.ferniefattire.com/
Bush Pilot Biking		www.bushpilotbiking.com/
Big Mountain Bike Adventures	Biking, cycling trips	www.ridebig.com/
Endlessride	On-line mountain biking booking	www.endlessride.com
Discover France	Offers walking and biking tours focusing on the cultural, historical, and other unique characteristics of France.	www.discoverfrance.com/
DuVine Adventures	Offers group or customized personal bike and wine tours in Burgundy, France.	www.duvine.com/
TerraTrek	Offers luxury bicycling and multi-sport vacations throughout the U.S.	www.goterratrek.com/
Cyclevents	Cross state bicycle rides and international tours in North America, Europe, Asia, and the South Pacific.	www.cyclevents.com
WomanTours	Offers bicycle tours for women only. Trips are inn-to-inn bike tours designed to ensure opportunities for touring, adventure, and camaraderie.	www.womantours.com
Andiamo Adventours	Offers bicycle, hiking, and activity combination vacations in Italy, Switzerland, France, and California	www.andiamoadventours.com
Freewheeling Adventures	Creatively guided bike trips with food, inns, and van support in Atlantic Canada, Ireland, Scotland and Israel. With hiking and sea kayaking options	www.freewheeling.ca
Sherpa Expeditions	Specialized in operating walking and cycling holidays throughout the world.	www.sherpa-walking-holidays.co.uk
Euro Bike and Walking Tours	Offers luxury tour packages throughout Europe.	www.eurobike.com
Experience Plus	Runs guided bicycle, hiking, and walking tours in Italy, France, Spain, and Latin America.	www.experienceplus.com

Organization	Details	Contacts
VBT Bicycle Tours and Vacations	Offers bicycle tours and bike vacations and adventures worldwide.	www.vbt.com
Trek Travel	Luxury cycling tour operator leading leisurely and challenging rides throughout North America and Europe.	www.trektravel.com
Bike Riders Tours	Offers bicycle vacations in New England, Canada, Spain, Ireland, and Portugal. Bicycle tours travel in small groups. Custom cycling and self-guided tours are available.	www.bikeriderstours.com
Easy Rider Tours	Offers bicycle tours and walking vacations in Ireland, Portugal, Spain, Canada, and New England	www.easyridertours.com
Randonnee Tours	Specializes in self-guided walking and cycling tours of France, Europe, and Canada.	www.randonneetours.com
Island Bike Hikes	Biking tours and vacations in St. Lucia, Caribbean. Mountain bikes and rainforests	www.cyclestlucia.com/
Saddle Scedaddle	Mountain biking, cycling and multi-activity short breaks and holidays in small groups to the United Kingdom, Europe, North America, Latin America and India.	www.skedaddle.co.uk
The Mountain Bike Adventure	Guided mountain biking in Lagos Portugal.	themountainbikeadventure.com
Bike Tours Direct	One-Stop Resource for Bike Tours in Europe. Travel with European bike tour.	www.biketoursdirect.com

ASSOCIATIONS [4]

Organization	Details	Contact Information
Adventure Cycling Association	Adventure Cycling is working with the American Association of State Highway Transportation Officials, federal and state agencies and lots of bicycling groups on a major project to establish an official U.S. Bike Route System – what could be the world's largest such route system.	www.adv-cycling.org
European Cyclist Federation	Is an umbrella organization for national cycling organizations throughout Europe (more than 40 members)	www.gtp.gr
European Cyclist Union	Organization for national cycling organizations	www.ecf.com

FAIR [5]

International Bicycle Trade Exhibition

Date: August 30–September 2, 2007

Venue: Neue Messe, Friedrichshafen, Germany

2006 statistics

Trade visitors	31,810
Participating countries	76
Exhibitors	826
Journalists	1064

Service	Description	Price
Stand rental fee*	Hall	\$ 221
	Open grounds	\$ 78
Media entry fee	obligatory	\$ 252

*Stand rental fee is only for the pure floor space and does not include walls, carpets. etc.

Contacts

Tel.: +49 7541 708-404, /405

Fax: +49 7541 708-110

Website: <http://www.eurobike-exhibition.de>

TOUR PACKAGES [4], [5], [6], [7], [8]

Cycling

Package Name and Location	Details	Website
France–Burgundy–Vintage Burgundy	8 days, Grade 2, £525.00 Half Board Option -£105.00 Offsetting Emissions- £1.00 Bike Hire -£75.00 Single Room Option -£175.00 Insurance -£21.00 Tour details Place to place, 6 nights hotel (breakfast provided), 5 days biking Minimum 2 people Departures daily Luggage transfers Self guided	www.skedaddle.co.uk
Undiscovered California	Road Bike Tour, 5 Days Northern California Inns/Hotels Advanced \$1995, \$400 single supplement Start/End: Santa Rosa, CA	www.westernspirit.com
Italy's Veneto & the Dolomites	July 04–12, 2007, \$3,235 Tour Price, \$450 Single Supplement Includes: Use of a quality 24-27 speed bicycle; 9 days, 8 nights, 6 dinners with wine, 1 wine tasting, 1 lunch & all breakfasts Begin/End: Castelfranco Veneto/Brunico Arrive/Depart: Venice/Venice, Innsbruck or Munich Total Distance: 369-381km Daily Distance: 0-73 km (0-45 miles) What to Expect: Flat cycling for a day then steeper climbs in the mountains. Optional Sella Massif Ride with four passes in one day. Optional mountain hike.	www.cyclevents.com

Mountain Biking

Package name/country	Details	Website
Chalet Berger and Sapin–Premier (Premier catered service chalets)	<p>Prices are for 7 nights: Saturday–Saturday only</p> <p>Date: June 16–23, 540–580 €</p> <p>June 30–Aug 18, 640–680 €</p> <p>Aug 25–Sept 1, 580 €</p> <p>Prices per person and are based on two people sharing a room.</p> <p>Return–Geneva airport transfers</p> <p>accommodation</p> <p>breakfasts</p> <p>afternoon tea</p> <p>six 3 course evening meals with wine</p>	www.endlessride.com
Italy: La Dolce Vita	<p>Medieval Flow: All-Mountain</p> <p>8 Days</p> <p>Land Cost: \$2,090 Start–Milan</p> <p>Own equipment</p> <p>Expert</p> <p>Accommodation in 3-star Arco hotel.</p> <p>All meals except lunches and one dinner</p> <p>Airport pick-up and all transportation including: shuttle vehicle and lift.</p> <p>Detailed pre-departure information</p> <p>Big Mountain t-shirt</p>	www.ridebig.com
Catalonia Mountain Bike and Girona	<p>Self-Guided or guided</p> <p>Moderate level, 5 nights, 22 miles/day average</p> <p>Departure dates: daily, year-round</p> <p>Base price: self-guided: €590, guided: €990</p> <p>Start City: Girona; End City: Girona</p> <p>5 nights accommodation</p> <p>Transfers to and from Girona train or bus station</p> <p>Mountain Bike hire</p> <p>Guided tour includes 4 days mountain bike guide and 1 day guided cultural tour of Girona city including entry to the Arab baths, Jewish museum and the Cathedral</p>	www.biketoursdirect.com

European Cyclist Federation Members

Organization (country)	Website
ARGUS (Austria)	http://www.argus.or.at/
Fietsersbond (Belgium)	http://www.fietsersbond.be/
Fietsersbond (Netherlands)	http://www.fietsersbond.nl
GRACQ (Belgium)	http://www.gracq.org/
Udruga BICIKL (Croatia)	http://www.bicikl.hr/
Dansk Cyklist Forbund (DCF) (Denmark)	http://www.dcf.dk/
HePo (Helsingin Polkupyöräilijät) Finland)	http://gamma.nic.fi/~hepo/
AF3V (Association Française des Véloroutes et Voies Vertes, France)	http://www.af3v.org/
FUBicy (Fédération Française des Usagers de la Bicyclette, France)	http://www.fubicy.org/
ADFC (Allgemeiner Deutscher Fahrrad Club, Germany)	http://www.adfc.de/

Filoi tou podèlatou (Friends of the Bicycle, Greece)	http://www.filoi.eie.gr/
Magyar Kerékpáros-Klub (Hungary)	http://www.kerosz.hu/mk.htm
LHM (Landssamtök hjólreiðamanna–Icelandic Cyclists' Federation (Iceland)	http://hjol.org/
LHM (Landssamtök hjólreiðamanna–Icelandic Cyclists' Federation (Iceland)	http://hjol.org/
Dublin Cycling Campaign (Ireland)	http://home.connect.ie/dcc
FIAB (Federazione Italiana Amici della Bicicletta)	http://www.fiab-onlus.it/
Latvijas Velocelojumu Informācijas Centre (Latvia)	http://www.velokurjers.lv/
Lithuanian Cyclists' Community (Lithuania)	http://www.bicycle.lt/
LVI (Lëtzebuurger Velos-Initiativ)	http://www.lvi.lu/
Vänta Aga (Estonia)	http://www.bicycle.ee/
Cycling Touring Club Malta (Malta)	
SLF (Syklistenes Landsforening, Norway)	http://www.slf.no/
FPCUB (Federação Portuguesa Ciclismo e Utilizadores de Bicicleta, Portugal)	http://www.fpcubbicicleta.com/
CCN (Clubul de Ciclism Napoca, Romania)	http://www.ccn.ro/
Russian Cycle Touring Club (Russia)	http://www.rctc.ru/
Yugo Cycling Campaign (Serbia and Montenegro)	http://bicikl.info.yu/
Slovenský Cykloklub (Slovakia)	
Slovenska Kolesarska mreza (Slovenian Cyclists' Network)	http://www.kolesarji.org/
ConBici (Spain)	http://www.conbici.org/
CCUB (Coordinadora Catalana d'Usuaris de la Bicicleta, Spain)	http://www.ccub.org/
Cykelframjandet (Sweden)	http://www.cykelframjandet.se/
IG Velo Schweiz (Switzerland)	http://www.igvelo.ch/
Bisiklet Sevenler Derneği (Turkey)	http://www.bisikletdunyasi.net/
CCN [31] (Cycle Campaign Network, United Kingdom)	
CTC (Cyclists' Touring Club, United Kingdom)	

National Federations-Associations

- Albanian Cycling Federation, Tirana, Albania
- Austrian Cycling Federation, Vienna, Austria
- Azerbaijan Cycling Federation, Baku, Azerbaijan
- Belgian Cycling Federation, Brussels, Belgium
- Bosnia & Herzegovina Cycling Federation, Banja Luka, Bosnia and Herzegovina
- British Cycling Federation, Manchester, United Kingdom
- Bulgarian Cycling Federation, Sofia, Bulgaria
- Croatian Cycling Federation, Zagreb, Croatia
- Cyprus Cycling Federation, Nicosia, Cyprus
- Czech Cycling Federation, Prague, Czech Republic
- Danish Cycling Federation, Broendby, Denmark
- Estonian Cycling Federation, Tallinn, Estonia
 - Finnish Cycling Federation, Helsinki, Finland
 - French Cycling Federation, Rosny-Sous-Bois, France

- German Cycling Federation, Frankfurt, Germany
- Hellenic Cycling Federation, Metamorfossi, Greece
- Hungarian Cycling Federation, Budapest, Hungary
- Irish Cycling Federation, Dublin, Ireland
- Israel Cycling Federation, Tel Aviv, Israel
- Italian Cycling Federation, Rome, Italy
- Latvian Cycling Federation, Riga, Latvia
- Liechtenstein Cycling Federation, Schaan, Liechtenstein
- Lithuanian Cycling Federation, Vilnius, Lithuania
- Luxembourg Cycling Federation, Luxembourg, Luxembourg
- Malta Cycling Federation, Gzira, Malta
- Moldavian Cycling Federation, Chisinau, Moldova
- Monaco Cycling Federation, Monte Carlo, Monaco
- Norwegian Cycling Federation, Rud, Norway
- Polish Cycling Federation, Warsaw, Poland
- Portuguese Cycling Federation, Caldas Da Rainha, Portugal
- Romanian Cycling & Triathlon Federation, Bucharest, Romania
- Russian Cycling Federation, Moscow, Russia
- Serbia & Montenegro Cycling Federation, Belgrade, Yugoslavia
- Slovak Cycling Federation, Bratislava, Slovakia
- Slovenian Cycling Federation, Ljubljana, Slovenia
- Spanish Cycling Federation, Madrid, Spain
- Swedish Cycling Federation, Sigtuna, Sweden
- Swiss Cycling Federation, Berne, Switzerland
- The Netherlands Cycling Federation, Woerden, Netherlands
- Ukrainian Cycling Federation, Kiev, Ukraine

22. Genealogy

1. <http://www.groople.com/>
2. http://blog.eogn.com/eastmans_online_genealogy/2004/06/new_genealogy_t_1.html
3. <http://www.yourfamilytreemag.co.uk/>
4. http://www.culturaltravels.jp/services/Tour_Hosts/A_OperatorsH_M.idc

MARKET PROFILE [1], [2], [3]

Genealogical tourism is becoming more and more popular in cities around the United States, where new research libraries are continually cropping up to put visitors in touch with their heritage. Groups that are interested in knowing where they come from may enjoy visiting local genealogical or historical societies as part of a larger tour or even as the main thrust of a visit.

U.S. Overview

In the US the most popular with genealogists are places like Salt Lake City, home to the world's largest repository of genealogical information, and Fort Wayne, Ind., where a new facility is being constructed to handle the thousands of visitors who come yearly to peruse government and military records. Visitors to genealogical hubs come for libraries and historical societies, which are often founts of information for those plotting their family trees.

The Allen County Public Library in Fort Wayne is so popular with genealogists that it's in the midst of a two-year renovation that will more than double the amount of space available for historical research.

The Kentucky Historical Society in Frankfort has also seen an increase in visitors, who browse genealogical records from the Kentucky Archives. The society's special-collections library houses additional historical or extremely rare records for research.

Des Moines, Iowa, is home to one of the country's biggest spots for family research. The Iowa Genealogical Society, which offers in-house information and electronic uplinks to nationwide data, can host a lot of genealogists.

The Family Research Library is the fourth-most-visited place in Utah. It is the largest genealogical library in the world. They have over 2 billion names available for public use and over 2.4 million rolls of microfilm records. The library was founded in 1894 by the

Church of Jesus Christ of Latter-day Saints, which encourages family research among its members, and offers records from more than 110 countries on all six major continents.

Although genealogical pilgrimages have typically been an individual holiday market, these cities have seen an increase in the number of groups planning trips specifically to visit historical libraries.

Groups generally stay in Salt Lake City for five to seven nights usually stay at the library from open to close, but some will plan a day trip or arrange dinners at a restaurant in the city. A majority of people are 55 age and up.

Genealogy is attractive for tour companies. Because many libraries charge no admission and because researchers rarely venture out into town, tours are affordable and easy to organize. The Kentucky Historical Society holds a special weeklong event each year specifically for senior travelers.

SWOT

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Different types of accommodation available • On-line visa access • Cultural sightseeing 	<ul style="list-style-type: none"> • Difficult transportation outside the capital • Huge gaps in providing services in regions • Not all information available in foreign languages • Lack of specialized tour operators/travel agencies
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Armenian Diaspora throughout the world 	<ul style="list-style-type: none"> • Lack of specific information (libraries, archives)

MEDIA

Journals and Magazines

Name	Details	Contacts
Eastman's Online Genealogy Newsletter		http://blog.eogn.com/eastmans_online_genealogy/2004/06/new_genealogy_t_1.html
Your Family Tree	The most respected genealogy magazine. Offers practical advice on family history research.	http://www.yourfamilytreemag.co.uk/

Internet sources

http://ancestraltravel.net/	Website provides complete resource for people wishing to research, plan or make reservations for travel to visit their ancestral homelands.
Genealogical Vacations	Information on different types of genealogical tours (Jewish, American Irish, etc.) http://www.budgettravelonline.com/bt-dyn/content/article/2005/06/04/AR2005060400732_pf.html
www.genhomepage.com	This site provides an abundance of links on such topics as how to do genealogical research, genealogy links all over the world, religious genealogy resources, genealogy societies and software.

TRAVEL INDUSTRY—TRAVEL AGENCY/TOUR OPERATOR

Organization	Details	Contacts
Rabbie's Travel Services	Tailormade tours and packages for groups and individuals. Corporate, incentive and conference travel, activity breaks and genealogy tours.	www.rabbies.com
Ardoch Guides	Special packages to customers' requirements e.g. genealogy and historic sites. Driver / Guide car tours.	www.ardochguides.co.uk
Detour Travel	Themed tours, including gardens and genealogy. Golf, fishing and other activities. Business services—meetings, incentives, pre and post conference	www.detourtravel.com
European Focus, Inc.	Personalized tours of ancestral towns in Germany, Switzerland, Ireland, Scotland, and Alsace led by a former Navy photojournalist.	www.eurofocus.com .
P.A.T.H. Finders International	Family reunions in ancestral towns and villages in the Czech Republic (but also tours to Poland, western Ukraine, Slovakia, and Hungary).	www.pathfinders.cz

ASSOCIATIONS

Organization	Details	Contacts
Irish Family History Foundation	The Irish Family History Foundation is the coordinating body for a network of government approved genealogical research centers in the Republic of Ireland (Eire) and in Northern Ireland which have computerized tens of millions of Irish ancestral records of different types	www.irish-roots.net
Association of Professional Genealogists	APG is an independent organization whose principal purpose is to support professional genealogists in all phases of their work: from the amateur genealogist wishing to turn knowledge and skill into a vocation, to the experienced professional seeking to exchange ideas with colleagues and to upgrade the profession.	http://www.apgen.org/

TOUR PACKAGES [4]

Name/Country	Details
Irish Family History Foundation Tour Host ID: 672	Plan a trip around finding your roots. There has been a growing interest among those of Irish ancestry in tracing their Irish roots in recent years. With the advent of computers, genealogy in Ireland has come of age. It is now possible to have research carried out on one's family history from the millions of genealogical records computerized at the Irish Family History Foundation's network of research centers in Ireland.
LynchPin Tours Tour Host ID: LY316 Error! Hyperlink reference not valid.	We will move heaven and earth to give you a holiday in Ireland that is memorable for all the right reasons. Your Hosts, David and Lowell know every inch of Ireland; North, South, East and West. So whether you're after Golf at Portmarnock, Cooking in Cork, or a Historical Pub and Genealogy Tour, they can give you the holiday of a lifetime. Whatever your interest, budget or timeframe, Lynchpin Tours will create a tour that is tailor made to your interests! Customization: that's what these guys are all about.
Ancestral Roots Travel Ltd	All tours and trips are fully customized and based around your particular interests and wishes. Based upon your initial thoughts and ideas we will design a no obligation itinerary and pricing for you. We can then further tailor the plans until you are completely happy and ready to confirm your trip.

23. Incentive

1. <http://strategis.ic.gc.ca/epic/site/imr-ri.nsf/en/gr118944e.html>
2. IMEX, <http://www.imex-frankfurt.com/>
3. Summit Performance Group, <http://www.summitpg.com/>
4. Conference and Incentive Travel Magazine, <http://www.citmagazine.com/>
5. Incentive Travel & Corporate Meetings, <http://www.incentivetravel.co.uk/>
6. meetpie.com, <http://www.meetpie.com/>
7. Meetings & Incentive Travel, <http://www.meetingscanada.com/index.jsp>
8. Association for Conferences and Events, <http://www.martex.co.uk/ace/>
9. ICCA, <http://www.iccaworld.com/>
10. Eventia, <http://www.eventia.org.uk/>
11. MiMegasite, <http://www.mimegasite.com>
12. Maritz, http://www.maritz.com/incentive_travel.html
13. <http://www.mayfloweroceanlines.com/incentive.htm>
14. <http://www.sportstravel.com/theater/new-york-theater-after-christmas-package.php>
15. <http://www.sportstravel.com/formula-1-irl/italian-grand-prix.php>
16. <http://www.sportstravel.com/horse-racing/kentucky-derby/-kentucky-derby-radisson-plaza-lexington.php>

MARKET PROFILE [1], [13]

Incentive travel has steadily evolved into a popular global management tool. Many businesses use incentive travel as a means of acknowledging their employees increased fulfillment of organizational goals, dedication to professionalism or a high level of ethical performance. Rewarding distinguished employees with memorable and exciting travel opportunities is considered to be an excellent way to both honor and encourage such exemplary behavior.

As a separate segment of the Business meetings industry, Incentive Travel represents a considerable sector of the holiday industry. According to Corporate Meetings &

Incentive's (United States) Annual Incentive Trends survey conducted in 1999, it was concluded that travel is by far the main form of incentive offered by corporations to their high-performing staff. The statistics show that Travel accounts for 60% of incentives, while Merchandise and Cash account for 21% and 19% respectively. There is consensus in the fact that Travel is considered a more memorable incentive, reaping higher satisfaction ratings than any other form of incentive.

According to the survey:

- The average length of incentive travel in 1999 was 4.8 days (mainly weekdays, thus allowing for time off during the weekend). 70% of corporations held trips in excess of 4 days.
- The main objectives for holding Incentives trips are:
 - Motivate
 - Recognize
 - Improve productivity
 - Increase overall quality
 - Promote employee bonding
 - Allow for exchange of ideas and concepts.
- The average amount spent per person by companies on their incentive trips in 1999 was \$2,716. Nearly 15% of companies spent more than \$4,000 per person.
- Spouses accompanied on average 50% of Incentive travel recipients. Family plans (with Kids) are becoming increasingly popular with American corporations.
- Incentive travel is on the rise; In 1997 15% of surveyed respondents held more incentive programs than in the previous year; in 1998 23% held more and 1999 saw an increase of 26% in incentive travel.

SWOT

Strengths

- Different types of accommodation available
- Possibilities to arrange different events
- Online visa access

Weaknesses

- Difficult transportation outside the capital
 - Huge gaps in providing services in regions
 - Not all information available in foreign languages
 - Lack of promotion of the country
 - Lack of specialized tour operators/travel agencies
 - Lack of special information (especially in foreign language)
-

*Opportunities**Threats*

- Travelers are interested in new destinations
- Lack of political stability in the region

MEDIA [4], [5], [6], [7], [11]**Journals and Magazines**

Name	Details	Contacts
Conference and Incentive Travel	UK's leading publication for the meeting and incentive travel industry	http://www.citmagazine.com/
Incentive Travel & Corporate Meetings	Latest news from hotels, conference centres, unusual venues and destinations.	http://www.incentivetravel.co.uk
Meetings & Incentive Travel	Canada's leader in the meeting and incentive travel industry. Targets professionals in Canada who plan and organize meetings, conferences, conventions, expositions, special events or incentive programs.	http://www.meetingscanada.com/index.jsp

Internet Sources

Name	Details	Contacts
meetpie.com	The meetings and events industry portal	http://www.meetpie.com/
MiMegasite	MiMegasite is a complete online source for news and information for the meeting, convention, incentive and trade show professionals	http://www.mimegasite.com

TRAVEL INDUSTRY [3], [12]—TRAVEL AGENCY/TOUR OPERATOR

Organization	Details	Contacts
Summit Performance Group (SPG)	SPG is a full-service conference management and incentive travel, site selection and sports event coordination company	http://www.summitpg.com/
Maritz	Incentive travel agency	http://www.maritz.com/incentive_travel.html

ASSOCIATIONS [6], [8], [9], [10]

Organization	Details	Contact Information
Association for Conferences & Events	Independent information centre and forum for members involved in the creating, marketing, organizing, accommodating and servicing of events	http://www.martex.co.uk/ace/
International Congress & Convention Association (ICCA)	ICCA represents the main specialists in handling, transporting and accommodating international events and comprises over 800 member companies and organizations in 80 countries worldwide	http://www.iccaworld.com/
Eventia	Eventia is the hub for conference and incentive travel organizers, live communications agencies, producers of experiential marketing activity,	http://www.eventia.org.uk/

	performance improvement companies and corporate entertainment agencies	
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TRAVEL FAIRS [2]

IMEX

Date: 22-24 April 2008

Venue: Messe Frankfurt (Germany)

2007 statistics

Exhibitors	3,400
Participating countries	150
Total exhibiting space	17,000 sq.m

Service	Description	Price
Shell scheme	Basic shell scheme includes white walls, carpet, ceiling grid and fascia board.	€910*
Space only		€840*

* Plus 19% VAT per sq.m

Contacts

Tel.: +44 1273 224955 (sales team direct line)

Main tel.: +44 1273 227311

Fax: +44 1273 227312

E-mail: heather@imex-frankfurt.com (Heather Gough – sales director)

Website: <http://www.imex-frankfurt.com/>

TRAVEL PACKAGES [14], [15], [16]

Package name/Country	Details	Links
New York Theater After Christmas Standard Package/ United States	Three night accommodations at the Hotel Edison; orchestra or Front Mezzanine seating to show of your choice (2 days). Starting from \$745.	http://www.sportstravel.com/theater/new-york-theater-after-christmas-package.php
2007 Italian Grand Prix Package (Formula 1)/ Italy	4 night accommodations at the Grand Hotel Di Como; ticket in Prima Variante Esterna # 8 (3 Day Ticket); Roundtrip Deluxe Motorcoach Transfers to the Circuit	http://www.sportstravel.com/formula-1-irl/italian-grand-prix.php
2008 Kentucky Derby Lexington Deluxe 5 Night Package/ United States	5 night deluxe accommodations at the Radisson Plaza Hotel in beautiful downtown Lexington; First Floor Grandstand seating for the Oaks; First Floor Grandstand seating for the Kentucky Derby	http://www.sportstravel.com/horse-racing/kentucky-derby/-kentucky-derby-radisson-plaza-lexington.php

24. Religious and Pilgrimage

1. www.packagedtravelinsider.com
2. http://germany-travel.suite101.com/article.cfm/religious_travel_in_germany
3. <http://www.premiertourismmarketing.com/fyi/religious.html>
4. Religious Tourism and Pilgrimage Festivals Management, Razaq Raj and Nigel D.Morpeth, Leeds Metropolitan University (2007)
5. <http://www.religioustravelassociation.com/expo.html>
6. www.koinexpo.com
7. Los Angeles Times, www.globusjourneys.com/images
8. http://www.tia.org/researchpubs/travel_market_segments.html
9. http://www.ntaonline.com/staticfiles/map_religious.pdf
10. MTS Travel, <http://www.mtstravel.com/tours/rtourFPKM08.html>,
<http://www.mtstravel.com/tours/hltourHLPSW07.html>
11. Pilgrim Tours, <http://www.pilgrimtours.com/>

MARKET PROFILE [1], [2], [3], [4], [7], [8]

There are about 2 billion people in the world who consider themselves Christians, Muslims—1.5 billion, Hindu—900 million, Buddhist—400 million, Sikh—23 million, Jewish—14 million. This figures as well as myriad other religions highlights the huge opportunity of potential pilgrims and religious tourists across the globe.

The religious travel market exceeded \$18 billion in 2006 and has developed from niche to mainstream in recent years. According to the World Travel Organization, religious travel is one of the fastest growing segments of tourism.

Every year huge numbers of Muslims visit Mecca. In January 2006 the number of religious travelers was over 2 million.

U.S. Religious Travel Market (Domestic and International, 2003).

Religious services are often an important part of any travel experience. One-fourth (28%) of adult travelers in the U.S. went to a church, temple, mosque or other place of worship to attend a regularly scheduled religious service while on a trip of 100 miles or

more, one-way, in 2003. This equates to nearly 43 million U.S. adults Residents of the West South Central region (Arkansas, Louisiana, Oklahoma and Texas) reported the highest attendance while traveling (37%). Residents in New England (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont) registered the lowest (21%).

Among those who attended a religious service during a trip one-half of them were on trips to visit friends and relatives (50%) and one-fourth traveled for other leisure reasons (23%). Nine percent traveled for business reasons and 18 percent traveled for other reasons. One-half of travelers (51%) who attended a religious service had their spouse with them on their most recent trip and over one-third had children with them (34% own children/4% grandchildren).

In the United States tour operators and travel agencies have very sophisticated marketing programs that involve more than just a visit to a temple, church or synagogue. The target market is mainly Baby Boomers (42-61 old): they love the idea of soft adventure and they want to travel in smaller groups. They also want to have more free time, flexibility, and some independence. Most religious travelers come from Christian denominations. Nowadays there are more and more Generation Xers³ turning to Catholicism, so travel planning for a Catholic group should keep the interests of this generation in mind:

- They spend more per trip,
- Eager to pay for “eye-catching” extras,
- They are not brand loyal,
- Plan closer to the trip,
- And are more likely to plan online

Segments of other religions travel as well, include Jews and Muslims.

More than 600,000 Americans travel annually for religious purposes, and there are over 50,000 church travel programs sponsored nationwide, which is an increase of over 20% during the 2001-2006 years. The members of the religious community of North America are numerous, committed, and willing to spend money to learn more about their religion, to further its cause, or simply to travel for pleasure with those who share their beliefs. Since of this religious/spiritual seeking, many tour operators/agencies have seen increases in religious travel customers.

U.S. residents going overseas citing religion as the main purpose for their trips grew 16.9% from 2002 to 2004, matching the percentage growth in total overseas travel. By adding people who listed religion as only one of the reasons, the growth was 22.5%.

Segment characteristics:

³ Generation X - Americans and Canadians born from 1961 to 1981. The generation X period saw the rise of hippies and countercultures across the Western world. By the time older gen-Xers became teenagers, the personal computer revolution had begun.

- Religion tourists are among the most loyal and resilient of all travelers
- With few catering to the religious market, it remains one of the most underserved yet lucrative segments of travel
- Religious groups want to travel together to provide fellowship and community as well as to enrich their lives and their religion

Types of Religious Travel

The world's most visited sites for religious travel are Rome, Lourdes, Israel, Mecca.

Pilgrimage or reaffirmation—historically overseas to destinations such as Israel, Greece and Italy have dominated this market, but due to world conditions, a larger shift to domestic destinations is underway.

Missionary—giving back to those less fortunate is an integral part of the religious foundation, and missionary travel plays hand-in-hand to this. Missionary work is performed domestically as well as overseas. While these groups are budget conscious, and often stay with community members while traveling, they do take time out for fun activities, meals, sightseeing and some entertainment.

Fellowship—religious institutions are promoting leisure group trips that allow for bonding among community members—very important in today's society, as well as providing a fund-raising opportunity for the church with a portion of the trip price donated back to the church. This provides a sense of purpose for those traveling, especially among desirable demographic audiences.

According to European Travel Commission (Tourism Trends for Europe, September 2006) there will be increasing demand for spiritual travel products based on inner experience.

Motivation

Religious groups have already shown a tendency to travel to events and religious landmarks, or merely to travel together to destinations with those that are either “like-minded” or share their actual faith.

There are numerous reasons why people perform religious/pilgrimage trips, however the main purpose is that people are “seeking an intimate, personal experience” with their religions. Travelers consider that only religious travel enables to experience the belief physically, spiritually, socially, emotionally, and intellectually:

- Spiritual motivation
- Impulse visiting
- Family connection
- Connections with famous people or literary connections
- Interest in architecture

While planning religious tour (considering different special interest groups) the several factors should be taken into account:

- Figure out what type of religious sites you have in your travel areas that can handle a group.
- Decide which religions your sites are suited for (and the hotels and restaurants that will fit with the religion).
- Find out if the group needs time for activities such as prayer and study
- Find out special needs or requirement of each religion you are reaching out to (dietary, times of worship, etc.).

There are number of forces influencing the increase of religious tourism:

- A drive from consumers for more authentic experience, such as immersing themselves in the spiritual and cultural traditions associated with specific religions and pilgrimage sites
- The emergence of a more diverse tourist product as national tourist boards and tourism providers seek to extend the traditional tourist season
- Travel agents' number increase in offering religious tourism, pilgrimages and church tours
- More and cheaper intra-European flights making it easy for Europeans
- Tourists' number increase in choosing to travel in their own country due to the perceived threat of terrorism
- A global culture where people seek more unusual holidays or more diversification within a trip
- Religious trips being regarded as a way of verifying personal beliefs and spirituality
- Recognition of the role that religion and spirituality can play in preserving cultures and traditions
- Changing work and leisure patterns that see tourists opting for shorter and more frequent breaks
- The high media profile given to many of the world's great pilgrimage sites and religious shrines
- The need to generate revenue in order to help conserve the world's religious and architectural heritage
- The global trend in the development of more sustainable tourism products
- A general expansion in the world tourist market
- More competitively-priced long-haul flights
- The widespread use of Internet and online booking

Destinations

Christianity

- Israel: Jerusalem, Bethlehem, Nazareth
- UK: York Minster, Canterbury (about 3 million annually visitors), Westminster Abbey, Chester Cathedral, St Paul's Cathedral, Stonehenge, Glastownbury, Walsingham
- Ireland: Croagh Patrick (about 20,000 annually visitors), Knock (about 1.5 million annually visitors), Lough Derg
- Germany: Wittenberg, Cologne, Kevelaer (about 500,000 annually visitors),
- Norway: Trondheim,
- France: Chartres, Nevers, Lourdes, Lisieux, Rocamadour, Puy-en-Velay, Paray-le-Monial, St Anne d'Auray, Mont St Michel
- Portugal: Leiris (Fatima—174,150 pilgrims, 2004)
- Italy: Vatican City, Assisi, Turin
- Spain (763,700—2003): Barcelona, Santiago de Compostela (Galicia), Guadalupe
- Poland: Czestochowa (507 pilgrims, 2002)
- Malta: Mellieha, Mdina, Valletta
- Bosnia-Herzegovina: Medjugorje
- Jordan: Mount Nebo
- Egypt: Mount Sinai

Islam

- *Saudi Arabia*: Mecca (Hajj—2,564,468 pilgrims, 2005), Medina
- *Iran*: Mashhad
- *Israel*: Bethlehem
- *Jordan*: Mount Nebo

Hinduism

- *India* (70 million—2004): Prayag, Ujjain, Haridwar, Nashik, Jammu, Kashmir (85,000—2004)

Buddhism

- India: Bodh Gaya, Sarnath, Kushinager
- Nepal: Lumbini

Sikhism

- *India*: Amritsar

Judaism

- Israel: Jerusalem, Hebron, Bethlehem, Yad Vashem, Masada, Safed, Tiberias
- Jordan: Mount Nebo

There are number of typical approaches in providing information on religious places:

- Guided tours
- Recommended routes
- Guide books
- Foreign language guidebooks and leaflets
- Displays and exhibitions
- Volunteers or stewards to welcome visitors
- Education programs
- Children's programs

Transportation

The current religious traveler utilizes all forms of transportation for domestic travel, but almost exclusively uses air travel for overseas pilgrimages.

Special Considerations

Different denominations sometimes require different features to be a part of their packaged travel products. While the individual group leader is the best source for each trip, there are some general considerations to keep in mind.

- Catholic travelers, especially those on a packaged tour with a religious theme, may desire the opportunity to say Mass each morning. This 45 minute service is said daily in many of the world's Catholic churches and may be given in Latin, the local vernacular, or a combination of languages. Communion is taken daily by some Catholics. Catholic groups will often want to celebrate Mass at their destination, participating in a shared Mass if a cathedral, basilica or active church is on the itinerary.
- Orthodox Jews, who would be much more likely to travel by plane than by motor coach, require a kosher diet. This is difficult to provide in most areas especially in the more rural areas. Conservative and Reform Jews are less stringent in observance of the biblical dietary laws. When organizing packaged travel for the Jewish community, the group leader should always be consulted, but at a minimum these guidelines should be followed:
 - Do not plan meals that contain pork or shellfish.
 - Most Jews also avoid leavened products (bread, corn, cakes) during the celebration of Passover (in the spring, the week following Good Friday).
 - The Jewish Days of Awe, or High Holy Days, falling in September or October, is a busy and sacred time for Jews, not conducive to group touring. Families may gather together for the first holiday (Rosh Hashanah, the Jewish New Year), the second holiday is Yom Kippur, a day-long period of prayer and fasting.

- Moslem group will not partake of pork. They are also required to stop five times daily, bow toward Mecca (in Saudi Arabia) and recite prayers from the Koran.
- The members of a Hindu group will not consume beef.
- Observant Mormons do not partake of coffee, tea or alcoholic beverages. Therefore a cocktail party as a component of packaged travel for a Latter-day Saints group would be inappropriate and alternative drinks should always be available for meals.
- Mormon groups will want to worship on Sundays in a Mormon church or meetinghouse. Religious productions or Pageants depicting Latter-day Saints history are also popular.
- The Frequent Independent Traveler (FIT) is a growing phenomenon that must be addressed by the tour operators. More consumers are preferring to buy what the tour operator has to sell, but without traveling with 40 other people.
- FITs in the religious market can include small groups within a congregation, groups of clergy taking a FAM tour to determine future viability for trips for their congregations, small groups attending religious conferences or individual families just enjoying religious heritage. These are but a few of the many possibilities for FIT packaging that the tour operator of the future should plan for, and be willing to adjust operational procedures to accommodate.

SWOT

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Easy recognizable religion • Numerous churches to visit • Old Christian monuments • One of the first countries that adopted Christianity • Old/rich Christian history • Matenadaran (collection of old manuscripts) 	<ul style="list-style-type: none"> • Difficult transportation outside the capital • Huge gaps in providing services in regions • Not all information available in foreign languages • Lack of specific information on Christian sites • Lack of promotion of the country as religious travel destination • Lack of specialized tour operators/travel agencies
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Religious tourism is growing • Travelers are interested in new destinations • Celebration of adoption of Christianity 	<ul style="list-style-type: none"> • Lack of worldwide famous sacred site to visit • Mainly Christian sites related to Apostle Orthodox direction

- Organization of special events/festivals related to religion
- Lack of special religious travel programs (education, children, volunteer)

MEDIA [1]

Journals and Magazines

Name	Details	Contacts
Christian Travel & Cruise Guide	Bimonthly magazine targets the travel planners and decision makers in the largest churches and mega churches in the US. Circulation–20,000	www.christiantravelandcruise.com
Going On Faith	Bimonthly America's Newspaper for Traveling Religious Groups. Circulation–5,500 travel planners for churches, synagogues and religious organizations. Its printing format keeps advertising rates very inexpensive.	www.goingonfaith.com

Internet sources

Name	Details	Contacts
www.sacred-destinations.com	Internet travel guide specified in religious/pilgrimage tours	webmaster@NOSPAMsacred-destinations.com
Religious Travel Directory	Religious travel industry resource directory	Premier Tourism Marketing 621 Plainfield Road, Suite 406 Willowbrook, IL 60527 Tel.: 630-794-0696 Fax: 630-794-0652 www.religioustraveldirectory.com
www.allwonders.com	Pilgrimage destinations in India, information portal	202 Shrikant Chamber Near R K Studios, S. T. Road, Chembur Mumbai-400071 Tel: +91-22-25218542 mumbai@infobase.in www.allwanders.com
Online Christian Mall	Information on Christian businesses and services on the net	www.onlinechristianmall.com
Christian Traveler	Information portal	www.christiantraveler.com
Christian Websites Directory	Christian travel and vacation websites	www.christianlink.com/travel

TRAVEL INDUSTRY [3]

A lot of travel agencies and tour operators consider the changes in the religious market, which has transitioned from a 'poverty/penitential travel mentality' to a first-class travel mentality.

Travel agency/tour operator

Organization	Details	Contacts
MTS Travel	One of the leading travel company specialized in religious tours	www.mtstravel.com Tel: (877)908-8899 service@mtstravel.com

Organization	Details	Contacts
Christian Travel Finder	Christian Travel Finder provides Christian Cruises and vacations specifically for Christian interests	1250 Pacific Coast Highway, Suite C Seal Beach, CA 90740 Tel.: 888-518-7571 Fax: 562-683-0380 www.christiantravelfinder.com
Horizon Tours and Travel, Inc	Offer and organize Christian tours	14915 Royal Port San Antonio, Texas 78247 Local-(210) 657-7120 Toll Free-1-888-700-8410 arlie@horizontoursandtravel.com www.horizontoursandtravel.com
Worldwide Christian Travel	Specialize in providing travel for Christian groups to the traditional pilgrim sites. Organizes special trips to many other destinations as well.	info@christian-travel.com www.christian-travel.com
PilgramTours.com	Organize Holy Land Tours	www.pilgrimtours.com
Journey of Faith	Christian tours to Europe	Journeys of Faith Tours 954 Sheffield Forest Court Wildwood, MO 63021 Tel: 816.261.0258 Fax: 636.227.1978 E-Mail: info@joftours.com www.joftours.com
World Missions Tours	Specializes in Christian and group travel and Holy Land tours.	www.womito.com
Globus	Offers different tours all over the world including religious	www.globusjourneys.com/Faith
Pilgrim Tours and Travel, Inc.	Vacation packages worldwide in addition to Christian themed tours to Israel and Europe.	www.pilgrimtours.com
Templeton Tours	Offers charter Christian cruises to the Bahamas and Alaska and Holy Land tours with Bible study, speakers, and song.	www.templetontours.com
Unitours	Provides Catholic tours and pilgrimages to the Holy Land, Israel, Greece, Italy, Marian Shrines throughout Europe.	www.unitours.com
Pax Travel	Pax Travel is a small tour operator based in London, specialized in providing pilgrimage tours	www.paxtravel.co.uk/

ASSOCIATIONS [5]

Organization	Details	Contact Information
World Religious Travel Association	WRTA exists to bring the trade and consumer together for the purpose of promoting and providing quality religious travel experiences around the globe. Tour Operators, Cruise Lines, Tourist Boards and Travel Wholesalers, Travel Suppliers and Vendors, Travel Agencies and Consortiums, Religious Suppliers and Vendors, Churches, Religious and Non-profit Organizations, Individuals and Clergy Media	www.religioustravelassociation.com Tel: (800) 657-1288. 8156-E. South Wadsworth Blvd., #338 Littleton, CO 80128 (USA)
Churches Tourism Association	England's leading body for religious heritage tourism, representing and developing the tourism potential and visitor experience of a unique part of historical and contemporary religious heritage.	www.churchestourismassociation.info Address: c/o Churches Conservation Trust 1 West Smithfield London EC1A 9EE England

TRAVEL FAIRS [6]

World Religious Travel Expo

Date: Fall 2008 (3 days)

Place: Florida, USA

Contacts

Tel.: 800-657-1288

ExpoCatólica, International Fair for Religious Tourism

Date: August 16-19, 2007

Venue: ExpoCenter, Peregrinus' Hall Norte, San Paulo (Brazil)

Participants: travel agents, sector professionals, religious personnel and potential tourists.

Contacts

Av Guacá 1.44902435-001 San Paulo–Mandaqui (Brazil)

Tel.:+55 1162571688

Fax+55 1162571584

E-mail marketing@promocat.com.br

Website www.peregrinus.com.br

TRAVEL PACKAGES [10], [11]

Package Name and Location	Details	Links
In the footsteps of Paul: Turkey–Greece–Italy	Price: US\$4,850 per person (based on sharing a double room). Tour price includes: round-trip airfare from JFK Airport, New York; accommodations in four-star hotels; breakfast and dinner daily; services of experienced, English-speaking licensed guides; transportation in air-conditioned motorcoach; sightseeing and entrance fees; service charges and local taxes; portorage of one suitcase per person at hotels; airline taxes and fuel surcharges (currently \$271; subject to change); tips to guides, drivers and hotel staff; visa for Turkey	http://www.mtstravel.com/tours/rtourFPKM08.html
A Holy Land Pilgrimage to Israel and Jordan	13 days; price: US\$3,334 per person (based on double occupancy). Tour price includes: round-trip air fare from Pittsburgh (New York: JFK or Newark) to Tel Aviv; lodging in first class hotels and kibbutzim; meals as mentioned itinerary; services of experienced licensed guides: Israel and Jordan; airport transfers in Israel/Jordan; sightseeing and entrance fees on included features; tips to drivers, guides and hotel staff; Jordanian visa	http://www.mtstravel.com/tours/hltourHLPSW07.html
8-day Tour	8 days; US\$1848 – 2038; price includes:	http://www.pilgrimtours.com/

and Cruise, Egypt	airfare from JFK airport (New York) to Cairo, hotel and cruise transfers, 3 nights 5 star cruise on the Nile, English-speaking tour guide, breakfast & dinner daily, 5 star hotels, baggage handling.	
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25. Rock Climbing

1. Rock & Ice, <http://www.rockandice.com/>
2. Rock, <http://www.rock.com.au/>
3. Climbing magazine, <http://www.climbing.com/>
4. Vertical Jones, <http://verticaljones.com/>
5. Rockclimbing.com, <http://www.rockclimbing.com>
6. River Deep Mountain High, <http://www.rdmh.com.au/about.asp>
7. Access Adventure Travel, <http://www.accesstrips.com/company/>
8. Adventures International Inc. Mountain Guides, <http://exploreyourplanet.com/index.html>
9. Adventure Tours India, <http://adventure-tours.indianholiday.com/>
10. Travel Himalayas, <http://www.travel-himalayas.com>
11. <http://www.travel-himalayas.com/himalaya-adventure-activities-sports/rock-climbing.html>
12. Trans Nature Outdoor Company, <http://www.transnature.com.tr/eng/index.html>
13. ENJOY PERU, <http://www.enjoyperu.com/multimedialogallery/escalada/>
14. Adventure Dynamics International, <http://www.adventuredynamics.co.za/main.htm>
15. Paddle Asia, <http://paddleasia.com/destinations/rock-climbing.htm>
16. Climbing Wall Association, <http://www.climbingwallindustry.org/climbsmart.htm>
17. Thai Ecotourism and Adventure Travel Association (TEATA), http://www.teata.or.th/?l=EN&p=content&content_id=9
18. BIG3, <http://www.big3.com.au>
19. Exhibition Showcases Fell and Rock Climbing Club, <http://www.abc-of-iceclimbing.com/news/200707/exhibition-showcases-fell-and-rock-climbing-club.asp>
20. <http://adventure-tours.indianholiday.com/rock-climbing-in-india.html>
21. <http://www.tourism.md/eng/facility/17/174/>
22. http://www.fwi.uni-bayreuth.de/Workingpapers/WP_02-07.pdf
23. http://www.infohub.com/TRAVEL/SIT/sit_pages/17732.html
24. http://www.infohub.com/vacation_packages/6995.html
25. http://www.infohub.com/vacation_packages/756.html

MARKET PROFILE [11], [20], [21], [22]

The sport of free climbing—climbing rocks using equipment for safety only—has grown very popular, in part because of advances in climbing equipment that make climbing safer. Rock climbing is not very different from mountaineering except that instead of snow there are rocks involved. Rock climbing's most basic features include climbing a rock face, using only hands, feet, and a safety rope.

Rock climbing for some is to challenge their spirits and explore new heights, to give an incentive to their unbounded imaginations; for others, it is a way of telling the world that he/she has finally arrived. For many of the professional rock climbers, it is not a sport. Rock climbing is an adventure of the greatest magnitude; it is a fight against self, against the elements, and the ultimate goal is to reach the summit and return back alive.

Rock climbing is a test of strength, concentration and coordination as well as skill and technique. A climber learns from experience that the mountain must not be taken for granted. As a sport, climbing continues to offer a thrill and challenge that is compulsive.

In India, rock climbing, like most other adventure sports, is a relatively new sport. However, in a short time, it has become the most popular adventure sport. Many mountaineering clubs in the country are imparting training to the novice. Since it is a part of any expedition, the mountain climbing enthusiasts have to learn and practice this game before one can think of joining the expedition.

Factors influencing the choice of destination:

- Destination novelty seeking
 - New place
 - Famous routes and areas
 - New cultures
 - New landscapes
 - Regional cooking
- Climbing tourism infrastructure
 - Inexpensive accommodation
 - Supplies
 - Route safety
 - Rocks accessible
 - Area easy to reach
 - Information
 - Comfortable accommodation
- Non-climbing sport and holiday activities
 - New sport and holiday activities
 - Activities besides climbing
 - Climbing scene venue
 - Familiar area
 - Climbing novelty seeking
 - New climbing experiences

- New rocks and routes
- Climbing conditions (weather, choice of routes)
 - Ideal weather
 - Choice of routes
- Quietness and recreation
- Reclusiveness
 - Not too touristy
 - New people
 - Not overcrowded

Table 25-1

Demographic Profile of the Four Segments of European Rock Climbing Tourists (2007)

Demographic profile	Expenses (in € per person per day)	Duration of stay (nights)	Climbing Vacation Frequency (per year)	No. of Destinations for Last five Climbing Vacations	No. of Activities besides Climbing	Age	Climbing Experience (years)	Average Route Difficulty Rating
Loyal scene climbers	33.26	4.43	9.19	3.31	2.84	35.75	10.42	6.887
Adventure climbers	27.61	3.1	10.4	3.44	2.71	31.95	9.82	7.385
Novelty-seeking tourists	32.4	3.61	7.66	3.48	3.54	34.22	9.88	6.424
Sport and holiday tourists	43.13	3	6.02	3.81	3.64	34.32	10.25	6.599

Adventure climbers have by far the highest values for the climbing novelty seeking motivation dimension, which encompasses the search for new and extraordinary climbing experiences. At the same time this group has lower than average motivation factor scores for most of the other dimensions. Especially they care less than the other segments about sport and holiday activities besides climbing, quietness and recreation and the social interaction with other climbers described in the climbing scene venue motivation dimension.

A segment that is interested in vacation experiences apart from climbing are the Novelty seeking tourists. They search most for new and extraordinary vacation experiences with the highest values on the destination novelty seeking dimension. This customer group is also most motivated by non-climbing sport and holiday activities. Not surprising this segment is least interested in the motivation dimension reclusiveness.

The last resulting segment, labeled Sport and holiday tourists is the largest customer group and attaches high importance to general tourism-related motivations as well. The demand for sport and holiday offerings besides climbing is highest. Additionally, relaxed and convenient climbing vacations in the form quietness and recreation and convenient climbing conditions are relatively important for this group. These motivational statements

are supported by the highest average of different sport and holiday activities pursued besides climbing and the highest spending per day of all segments. The Sport and holiday tourists attach least value to the motivation dimension Destination Novelty Seeking.

SWOT

<i>Strengths</i>	<i>Weaknesses</i>
<ul style="list-style-type: none"> • Rock routes in different regions • Beautiful nature • Numerous rocks • Some local tour operators organize rock climbing tours 	<ul style="list-style-type: none"> • Difficult transportation outside the capital • Huge gaps in providing services in regions • Not all information available in foreign languages • Lack of specific information on sites for rock climbing • Lack of promotion of the country
<i>Opportunities</i>	<i>Threats</i>
<ul style="list-style-type: none"> • Rock climbing is becoming more popular • Significant advance in climbing equipment 	<ul style="list-style-type: none"> • Armenia is located in a seismic zone • Lack of political stability

MEDIA [1], [2], [3], [4], [5]

Journals and Magazines

Name	Details	Contacts
Rock & Ice	A magazine offering climbing news, profiles of climbers, critical gear reviews, miniguides to newly discovered crags, expert performance tips, and climbing photography.	http://www.rockandice.com/
Climbing Magazine	Contains information about climbing destinations, equipment, training and techniques, as well as first-hand accounts, profiles, and photos.	http://www.climbing.com/

Internet sources

Name	Details	Contacts
Rockclimbing.com	The largest interactive rock climbing destination site for climbers and enthusiasts.	http://www.rockclimbing.com
Rock Climbing Portal	The site provides with everything related to the sport such as various styles, skills, and techniques.	http://www.abc-of-rockclimbing.com/

TRAVEL INDUSTRY [6], [7], [8], [9], [10], [12], [13], [14], [15]

Organization	Details	Contacts
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Organization	Details	Contacts
River Deep Mountain High	In 2001, the Adventure & Photographic Company merged two businesses, to provide a more diverse and comprehensive adventure portfolio for the clients. These businesses, River Deep, Mountain High (RDMH) and Blue Mountains Ropewerx (BMR), are the only operator able to offer both hard and soft adventure activities.	http://www.rdmh.com.au/about.asp
Access Adventure Travel	Offers trips in all continents except Antarctica and currently specializes in snowboarding, skiing, surfing, mountain biking, sea kayaking, whitewater kayaking and rock climbing tours. Their instructors are among the best in the world.	http://www.accesstrips.com/company/
Adventures International Inc. Mountain Guides	Mountain Bike/Climbing Expeditions	http://exploreyourplanet.com/index.html
Adventure Tours India	India's Leading tour operator since 1990.	http://adventure-tours.indianholiday.com/
Travel Himalayas	This travel guide is a stepping stone into the beautiful world of India, a land of contrast.	http://www.travel-himalayas.com
Trans Nature Outdoor Company	Organizes specific interest tourism activities amongst which: rafting, trekking, canyoning, rock climbing, abseiling, paragliding, camping tours, plateau tours and other activities that are being introduced to local as well as foreign tourists.	http://www.transnature.com.tr/eng/index.html
ENJOY PERU	Operates inbound travel programs in Peru, Chile, Argentina, Ecuador, Bolivia and Patagonia for individuals, travel agencies and corporations, in all major markets worldwide.	http://www.enjoyperu.com/multimeddiagallery/escalada/
Adventure Dynamics International	Specialized in organizing Mountain and trekking logistics and guided mountaineering expeditions worldwide.	http://www.adventuredynamics.co.za/main.htm

ASSOCIATIONS [16], [17]

Organizationx	Details	Contact Information
Climbing Wall Association	Maintains the ClimbSmart!™ program, a national public awareness campaign addressing the elements of risk in climbing sports, climbers' safety, and personal responsibility.	http://www.climbingwallindustry.org/climbsmart.htm

TRAVEL FAIRS [18], [19]

Big3 International Trade Expo Board/Sports/Beach

Date: 2-21 February, 2008

Contacts

Address: Suite 1111, 1 Queens Rd,
Melbourne, VIC 3004 Australia

Tel.: (+613) 9863 9288

Fax: (+613) 9863 9268

E-mail: info@expotrade.net.au

Website: <http://www.big3.com.au>

TRAVEL PACKAGES [22]

Package name/Country	Details	Links
Tent Peak Climb / Nepal	17 days; group of 15 people; price: US\$746 – 1894 (airfare not included) Cost includes: all meals and best available Lodge/tea house accommodation during the trek; service of trek guide & assistant; climbing permit & Annapurna conservation entry permit; climbing guide, 0068is wage and equipment allowance; portorage charge to and from base camp; accident insurance for staffs and porters; arrival and departure transfers; local / public transport as shown in the program	http://www.infohub.com/TRAVEL/SIT/sit_pages/17732.html
The Machame Route / Tanzania	6 days; group of 2-12 people; price: US\$1200 – 1400 (airfare not included)	http://www.infohub.com/vacation_packages/6995.html
Climb Matterhorn Course / Switzerland, Italy	4-5 days; group of 2 people; price: €1785 (airfare not included)	http://www.infohub.com/vacation_packages/756.html

26. Snow Sports

Mintel, http://www.mintel.com/docs/trade_abta_snowsports.htm

26. Cross Country Skiing Magazine, <http://www.crosscountryskier.com/>

27. Powder Magazine, <http://www.powdermag.com/>

28. Snow Goer Magazine, <http://www.snowgoer.com/>

29. Snowboarder Magazine, <http://www.snowboardermag.com/>

30. Snow Week Magazine, <http://www.snowweek.com/>

31. <http://travel.dotheresearch.com/travelmagazines/snowsports.html>

32. Snow sports directory, http://www.navsports.com/nav_index.php?sport=26

33. J2SKI, <http://www.j2ski.com/>

34. OnTheSnow, <http://www.onthesnow.com/>

35. Snow Forecast, <http://www.snowforecast.com/>

36. SkiCentral, <http://www.skicentral.com/>

37. Transworld Snowboarding, <http://www.transworldsnowboarding.com/snow/>

38. SnoCountry, <http://www.snocountry.com/>

39. Snowsports Association of Ireland, <http://www.snowsports.ie/>

40. Canadian Snowsports Association, <http://www.canadaskiandsnowboard.net>

41. International Gay & Lesbian Snowsports Association, <http://www.gayskiers.org/>

42. North American Snowsports Journalists Association, <http://www.nasja.org/>

43. Crystal Holidays, <http://www.crystalholidays.ie/>

44. <http://www.crystalski.ie/>

45. Inghams, <http://www.ingham.ie/>

46. Thomson, http://www.thomsonski.co.uk/extras/f5_snowboarding.html

47. SkiTops, <http://www.skitops.com/>

48. Ski Solutions, <http://www.skisolutions.com>

49. SnowSports Trade Show, <http://www.biztradeshows.com/trade-events/snowsports-trade-show.html>

50. Metro Ski & Snowboard Show, <http://www.metrokishow.co.uk>

51. , <http://www.naturediscovery.org/nmccskiclub/>

52. , <http://www.haustanne.de/english/package/package.asp>

MARKET PROFILE [1]

An estimated 27.6 million Europeans went on a snowsports holiday of one night or more in 2002. The German and French dominated European skiers. Almost a fifth of the French skied annually compared to 12% of Germans, but due to the presence of vast Alpine regions within France there were much more leisure skiers in France than holidaymakers whereas the Germans have to travel further to reach ski facilities and thus were more likely to stay overnight becoming holidaymakers.

The success of a season is very much dependent on the levels of snow. A lack of snow or warm temperatures can lead to reduced skiers as can too much snow as access to roads are blocked leading to traffic problems and skiers going elsewhere. As much as resorts are dependent on nature for their livelihood the situation has been overcome to some extent by an increased reliance on man made snow. However snow making machines can be detrimental to the fragile mountain ecosystems as they are dependent on huge supplies of water.

Snowsports travel in the UK:

In the five years to the 2005/06 winter season, the number of snowsports holidays grew by 16% to over 1.2 million, with a market value of **£737 million**. According to Mintel snowsports holidays are expected to grow by a further 12.7%, approaching £820 million in value by 2011/12 – but operators will need to “soften” these holidays by providing non ski alternatives as well as pampering and spa treatments.

France is traditionally the most popular ski destination, due to its proximity, followed by **Austria** as a very close second. The Alps are followed by the Pyrenees (Andorra) and the Rockies in North America, which have been boosted by the weak dollar.

UK's snowsports travelers' profile & preferences (2006)

- Generally, only 13% of all adults have ever skied. Just 6% of adults make up the core target market for ski holidays, but there are a significant 20% interested in taking such a holiday in the future.
- The main barrier towards skiing is the expense. For the majority of consumers, summer sun remains a priority and snowsports often feature as a secondary holiday. Eastern European resorts with low-cost tie-ins may represent a cheaper alternative.
- The physical nature of snowsports can be off-putting to many potential customers. European resorts need to follow the example of the US, where skiing is considered much more of a leisure activity than a sport. The introduction of dry-slopes and other entertainment facilities could go some way to achieving this.
- The dominance of young people interested in snowsports is apparent from the high response from 15-24-year-olds towards the importance of good snow

conditions. Discounted student and schools trips will reap dividends for the industry in the long term, with language students another key market.

- Relatively high levels of snowsports participation amongst the youth market will ensure continued future demand. The industry must convert this interest into holidays through family holidays (free child places, learn-to-ski packages) and by sponsoring local ski clubs and dry slopes. The spread of dry slopes across the UK can push skiing into the leisure mainstream and hopefully produce a new generation of converts, seeking to test themselves out on real snow
- Only a fifth of skiers prefer to pre-book their equipment and ski-passes despite the discounts offered by tour operators for paying in advance. In general, pre-booking should be sold as much for its time as its cost savings.

Types of trips

- Bus Trips: Usually weekend trips (2 1/2 and 3 1/2 day) to nearby snow resorts
- Hut Trips: Multiday in-and-out and hut-to-hut trips to various parts of the hut system. Usually in addition to conventional transportation includes transportation by carpooling.
- Overnight Car Trips: Multi-day, usually extended-weekend, trips to various places. It could include transportation by carpooling.

The European outbound snowsports holidays market by source market

<u>Country</u>	<u>2001/2002 (in 000)</u>
Germany	7,800
France	6,135
Austria	3,900
Switzerland	2,500
Netherlands	1,450
Italy	1,000
UK	954
Belgium	800
Spain	600
Scandinavia	1,000
Eastern Europe	1,500
Total	27,639

Table 26-1

Holiday skiers by nationality, 2001

	Germany	UK	France	Italy	Spain
Base: adults aged 15+	10,366	24,659	10,014	10,131	10,215
Snowsports holidaymakers %	2	1	3	114	0
Leisuresnowsports%	12	4	20	3	4
Ski (leisure)%	10	4	18	3	4

⁴ Mountain holidays

Snowboarding (leisure)%	3	1	3	0	1
Ski jumping (leisure)%	1	0	1	0	0

American skiers made 54.2 million ski visits during 2001/2002 season, down 5.5% from the record 2000/2001 season. Snowboarding is slightly more popular in the United States than Europe with snowboarders accounting for 29% of visits in 2001-2002.

During the 2001/2002 winter season 18% of Canadians participated in snowsports representing 4 million people, 3% of which snowboarded exclusively.

SWOT

Strengths

- Mountainous landscape
- Availability of a winter resort
- Availability of high quality equipment for location
- Professional coaching
- Online visa access
- Availability of different types of accommodation

Weaknesses

- Not a famous place to visit
- Difficult transportation outside the capital
- Huge gaps in providing services in regions
- Not all information available in foreign languages
- Lack of specific information on snowsports resorts
- Lack of promotion of the country as religious travel destination
- Lack of specialized tour operators/travel agencies

Opportunities

- **More & more young people are interested in snowsports holidays**
- **Travelers are interested in new destinations**

Threats

- For the majority of consumers snowsports is a secondary holiday
- Lack of political stability
- High prices for air tickets from many countries

MEDIA [2], [3], [4], [5], [6], [7], [8], [9], [10], [11], [12], [13], [14]

Name	Details	Contacts
Powder Magazine	Presents the latest information on extreme and power skiing, exotic destinations and product tips.	http://www.powdermag.com/
Snow Goer Magazine	Edited for the sport hard-core enthusiasts, each issue features head-to-head comparisons, product evaluations, owners surveys and technical how-to articles. You'll also get owner's reports, technical updates, how-to tips and personality profiles in each issue.	http://www.snowgoer.com/

Snowboarder Magazine	Includes killer photos, features on exotic travel, advanced tips and tricks, and hot product reviews in every issue.	http://www.snowboardermag.com/
Snow Week Magazine	Provides information on racing, performance products, machine set-up and snowmobile industry news and rumors.	http://www.snowweek.com/

INTERNET SOURCES

Name	Link
Snow sports directory	http://www.navsports.com/nav_index.php?sport=26
J2SKI (Ski resorts, snow reports & forecasts for the independent skier)	http://www.j2ski.com/
OnTheSnow (Snow skiing reports, ski trips, skiing reviews)	http://www.onthesnow.com/
Snow Forecast (official resort forecasts)	http://www.snowforecast.com/
SkiCentral (search site for skiing and snowboarding)	http://www.skicentral.com/
Transworld Snowboarding	http://www.transworldsnowboarding.com/snow/
SnoCountry (mountain reports)	http://www.snocountry.com/

TRAVEL INDUSTRY [1], [19], [20], [21], [23]

In 2006 snowsports tour operators in the UK remain in a stronger position than mainstream operators. Crystal continues to be the largest ski operator by some margin with 24% of the tour operator market, followed by Inghams (18%), and Thomson (15%). Snowsports tour operators have also adapted well to the changing market conditions, such as offering a range of holidays to suit various budgets.

Organization	Details	Contacts
Crystal Holidays	Ireland's # 1 ski operator, offers ski and snowboarding holidays to Europe and America	http://www.crystalholidays.ie/
Inghams	Today Inghams five defining products are: Inghams Worldclass Ski and Snowboarding, Inghams Luxury Ski, Inghams Lakes & Mountains, Just France and Eurobreak.	http://www.inghams.ie/
Thomson	Offers ski holidays	http://www.thomsonski.co.uk/extras/f5_snowboarding.html
Ski Solutions	Independent ski travel agency (UK)	http://www.skisolutions.com

ASSOCIATIONS [15], [16], [17], [18], [22]

Organization	Details	Link
Snowsports Association of Ireland	National Governing Body in respect of recreational and national and international competitive skiing and ski teaching including but not limited to Alpine, Nordic, Snowboarding, Surf and Freestyle. The Principal objectives of the association are the	http://www.snowsports.ie/

	promotion of the sport of Irish national and international skiing	
Canadian Snowsports Association	Federation of nine ski and snowboard disciplines, whose mandate is the development of elite amateur athletes and the pursuit of excellence at national and international level competitions for all disciplines.	http://www.canadaskiandsnowboard.net
International Gay & Lesbian Snowsports Association	Was created to bring together snowsports enthusiasts worldwide who are gay or lesbian.	http://www.gayskiers.org/
North American Snowsports Journalists Association	A professional group of more than 300 writers, authors, photographers, filmmakers and broadcasters who report ski- and snowboard-related news, information and features throughout the United States, Canada and Mexico, via the various media	http://www.nasja.org/
SkiTops	Ski Tour Operators Association	http://www.skitops.com/

TRAVEL FAIRS [24], [25]

Snowsports Trade Show

Date: 29 January – 1 February 2008

Venue: Mandalay Bay Convention Center (Las Vegas, Nevada, USA)

Contacts

8377-B Greensboro Drive

McLean, Virginia, USA

Tel.: +(1)-(703)-5569020

Fax: +(1)-(703)-8218276

Metro Ski and Snowboard Show

Date: 24 – 28 October 2007

Venue: Olympia Exhibition Centre (London, UK)

Service	Description	Price
Space only		475 \$/sq.m
Shell Scheme		576 \$/sq.m
Show guide entry	compulsory for all exhibitors	412 \$

Contacts

Westgate House

120/130 Station Road

Redhill, Surrey RH1 1ET

United Kingdom – UK

Tel.: +44 (0)1737 855000
 020 8515 2035–Sales Manager
 Fax: +44 (0)1737 855475
 E-mail: jamesnathan@dmgworldmedia.com
 Website: <http://www.metroshow.co.uk>

TRAVEL PACKAGES [19], [26], [27]

Package name/Country	Details	Links
Allgau/ Germany	A 10 day program for a group of 4-6 persons between December and February with appropriate winter activities	http://www.haustanne.de/english/package/package.asp
Mid-term break in France/ France	7 nights at Club Hotel La Brunerie in the resort of Les Deux Alpes. €1199 per person.	http://www.crystalski.ie/
Ski Andorra/Andorra	7 nights in 4* Hotel St Gothard on half board from €489 per person.	http://www.crystalski.ie/

27. Spa Travel

Spa Magazine, <http://www.spamagazine.com/>

53. SpaFinder, <http://www.spafinder.com/index.jsp>

54. DAYSPA, <http://www.dayspamagazine.com/>

55. Organic Spa Magazine, <http://www.organicspamagazine.com/>

56. Pool & Spa Living, <http://www.poolspaliving.com>

57. Spa Life Magazine, <http://www.spalifemagazine.com/>

58. Worldwide Spa Review Magazine, <http://www.spareviewmag.com/>

59. Spa Fresh Magazine, <http://www.spafreshmag.com/>

60. The Spa Association, <http://www.thespaassociation.com/>

61. ISPA, <http://www.experienceispa.com/ISPA>

62. Spa & Resort Expo & Conference, <http://www.spaandresortexpo.com>

63. Sydney International Beauty Expo, <http://www.internationalbeautyexpo.com.au>

64. Thermalia Travel, <http://www.thermalia.co.uk/>

65. http://www.thermalia.co.uk/html/special_offers.shtml

66. The Medical Spa Association, <http://www.medicalspaassociation.org>

67. The Day Spa Association, <http://www.dayspaassociation.com/>

68. Kuoni, <http://www.kuoni.co.uk/spa/index.html>

69. <http://www.kuoni.co.uk/offers/offers.shtml>

70. A Spa to Life, <http://www.aspatolife.com>

71. http://www.aspatolife.com/slovakia/slov_hot_thermia.htm

72. Sunlover Holidays, http://www.sunloverholidays.com/spa_holidays/index.php

73. <http://www.thetravelinstitute.com/pdf/Spa%20Sample.pdf>

74. <http://spas.about.com/od/spareviews/a/topspatrends.htm>

MARKET PROFILE [19], [20]

In 2002-2003 in U.S. spa outlets collectively earned \$11 billion and approximately 45 million North Americans who made spa visits did so on both business trips and on vacations. According to International SPA Association (ISPA) one out of five Americans visited some type of spa in the period of June 2002–June 2003, and spa visits had

already increased by 71% between 1999 and 2001. In addition the number of spa locations is growing: the quality of treatment and the range of available experiences are growing even faster. Stress reduction and relaxation are the number-one reason for a spa visit.

In this specialized market consumers need careful guidance from educated travel professionals who understand the characteristics and need of spa-goers.

To effectively target the spa travel market, it is important to understand spa-goers profiles.

Figure 27-1

U.S. Spa Goers by Gender (2002–2003)

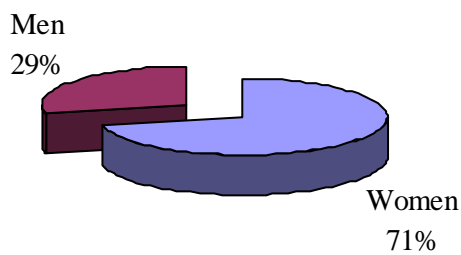
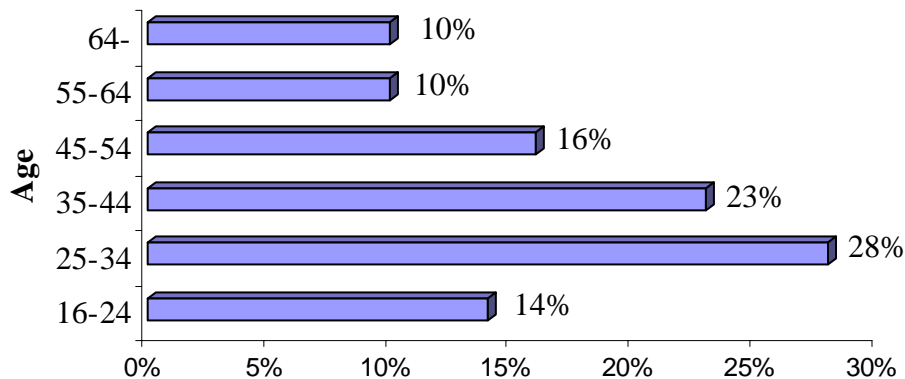


Figure 27-2

U.S. Spa Goers by Age (2002–2003)



Fifty-seven percent of all U.S. spa-goers (51% of men and 61% of women) went to spas alone. Of those who went to a spa accompanied, men are more likely to go with a significant other, while women more often were accompanied by a friend.

Spa-Goers Become Spa “Goal-ers”

Travelers hit destination and resort spas to quit smoking, recover from grief, achieve spiritual awareness, improve sexual health, or detox (which is shaping up to be an extremely popular spa pursuit in our toxic times). Men go for physical therapy and pain reduction treatments. They also discover that spa-grooming treatments have a positive impact on their business and personal life.

33% of holiday travelers say access to a spa is a primary consideration in making their travel plans. In 2005, major travel portals will enable these spa-focused online travelers to book spa vacations (and, soon, spa treatments) as part of their dynamic travel packages, along with rooms, rental cars, etc.

Reasons for visiting a spa

- Relieve stress or feel relaxed
- Pampering and self-indulgence
- Feel better about yourself
- Redeem gift certificate
- Improve mental health
- Improve physical health
- Improve appearance
- Enjoy a special occasion
- Regulate body weight
- Prescribed by a medical doctor

According to ISPA the number one reason for a visit to a spa was to relieve stress or feel relaxed. 68% of U.S. spa-goers (63% of men and 71% of women) rated this as a driving force in booking spas. Pampering and self-indulgence is second, with 57% of spa-goers and 38% go to a spa to feel better about themselves.

Top Spa Trends 2006

- **McSpa**—Spas like Bliss Spas, Six Senses, Golden Door become well-defined “brands.” Skin-care companies like La Prairie, Sothys, Jurlique, and Avon introduce spa settings to market their products.
- **Spa I.Q. on the Rise**—Spa-smart consumers become even savvier in 2006. More people go to the spa with a clear idea of what spa treatments they want to experience. Spa consumers demand information, not just mystique. “What’s in the lotion? What’s in the water?” Spas should be prepared with answers. Spa consumers look for an appreciation for high-quality services and reward skilled therapists.
- **Home Sweet Spa**—Empty nesters recast unused bedrooms as spa-inspired spaces for fitness, meditation and massage. They transform traditional bathrooms into spa bathrooms. Watch for the spa lifestyle to enter every room of the house. Hotels are bringing massage tables and Jacuzzis into their rooms, and TVs, fireplaces into their spas, blurring the line between the spas and “home.”
- **Water, Water Everywhere**—Spas return to their origins as centers for bathing and water treatments. They rediscover traditional water therapies and reimagining them in new ways with color hydrotherapy baths, vapor caves, liquidsound, deluge showers, and spa water parks. There is also a revival of traditional natural thermae, thalassotherapy, Japanese onsen, Russian banyas and old-world bathhouses.

- **Medical and sanctuary tourism**—More Americans travel out of the country for alternative (or lower-priced) medical and aesthetic treatments. Spa-goers opt for more mind/body/spirit experiences, including labyrinth walks, energy work, chakra balancing, acutonics, meditation—and good old fashioned rest and sleep, aided by plush bedding and blackout shades. More couples, meanwhile, will opt for “spa honeymoons” and romantic spa vacations, foregoing the traditional travel whirlwind in favor of a bonding sanctuary-style spa experience.
- **The Yin of Luxury and Yang of Discount**—The spa industry will expand at both ends of the market. While luxury resort and hotel spas roll out \$1,000/night suites, private yachts and 6-hand massages, corner massage parlors and discount chains will offer an hour of quality massage for as low as \$39—without an appointment.
- **Macho, Macho Spa**—There are more men-only spas and grooming products , and co-ed spas cater more aggressively to men with old-school amenities like traditional barber services, boxing robes, bars, sports viewing, cigar rooms, pool tables and hardcore gyms. Destination spas offer adventure experiences and extreme boot camps.
- **The Pendulum Swings Back to a Pure Spa Experience**—Genre-defining destination spas like Miraval, Red Mountain and Cal-a-Vie, have broadened their markets by loosening up their diet, alcohol and minimum-age and length-of-stay restrictions. This year the pendulum should start swinging back toward a more traditional spa experience where temptations are limited. On the other hand, resort/hotel spas offer more fitness, health, diet and wellness elements.
- **“Ohmmm” Online**—With health-focused chat rooms, information-rich websites and e-newsletters, spas will transcend their physical walls to form virtual communities focused on healthy spa living.
- **Fun on the Spa Menu**—More spas become social scenes, with group-friendly activities/programs like Tango-Zen lessons, Texas Hold'em, group mud experiences, party packages and day spa singles' nights.

Most Popular Spa Treatments

- Massage
- Facials
- Body treatments like salt glows and body wraps
- Spa manicures and spa pedicures.

OVERVIEW OF CENTRAL AND EASTERN EUROPE SPA TOURISM

Czech Republic

The Czech spa market is largely dominated by a domestic clientele who generated 72% of total overnights in 2001. However, the foreign client segment grew at an average annual rate of 10% in terms of overnights over the previous period, while domestic overnights, after peaking in 1999, declined since. Czech spas enjoy a long average

length of stay at almost 16 days overall, a figure which rises to almost 19 days for domestic clients. Hungarian spa hotels average only 3.7 days. Czech spa clients undergo extensive medical treatment, whereas the Hungarian establishments are serving a more purely leisure oriented short-break customer.

Germans represent the principal incoming nationality. German overnights grew by 50% from 1998. The second foreign market, Russian clients, has exhibited an irregular pattern of frequentation. Israeli overnights have shot up almost six-fold since 1997, making it the third-ranked market well ahead of Austrian guests.

Table 27-1
Czech Spa Market Overview by Client Origin, 2001

Region	Arrivals	Nights	Length of Stay (Days)
Total	324,861	5,095,830	15.7
Domestic	196,617	3,670,483	18.7
Foreign of which:	128,244	1,425,347	11.1
Germans	78,154	887,587	11.4
Russians	16,466	227,641	13.8
Austrians	3,461	32,220	9.3
Slovaks	1,469	8,362	5.7
Israelis	5,000	60,832	12.2
Others	23,694	208,705	8.8

Hungary

The Hungarian spa market is fundamentally different from that of other Eastern European countries in that it is dominated by incoming tourists, who generate two-thirds of overnights. Also, the average length of stay is very short, at only 3.7 days. The volume of overnights is at about 1.5 million annually. Foreigners clearly dominate this market, although the average length of stay for the domestic customer has risen to 3.2 days, while it has fallen slightly for the incoming market. Overnights registered by Germans accounted for 43% of the foreign total in 2001. The second incoming market, the Austrians, managed a small increase in overnights last year, as did the third-ranked Swiss.

Table 27-2
Hungarian Spa Market Overview by Client Origin, 2001

Region	Arrivals	Nights	Length of stay (Days)
Total	377,707	1,406,961	3.7
Domestic	147,223	472,006	3.2
Foreign of which:	230,484	934,955	4.1
Germans	65,563	403,751	6.2
Austrians	37,465	139,278	3.7

Swiss	5,060	38,830	7.7
Americans	7,416	31,822	4.3
British	12,061	31,754	2.6
Others	102,919	289,520	2.8

Most visited regions in Hungary:

- Budapest
- Lake Balaton
- Matra-Buk
- Sopron-Koszeghegyalja

Slovakia

Slovakia boasts a large number of curative springs and extensive deposits of high-quality healing peat and mud. There are some 16 major water spa districts and six climatic spas. The spa sector has unquestionably benefited from strong growth in higher value-adding foreign clientele, whose numbers have grown by 65% in the period 1996–2001.

Arrivals and bed capacity at Slovak spas, 2001:

Number of beds	12,240
Total arrivals	141,452
Domestic arrivals	100,222
Foreign arrivals	41,230

The most famous Slovak spa resort is Piestany.

Poland

Polish spa tourism is heavily dominated by domestic guests, who accounted for 93% of overnights in 2001. The average length of stay is about 15 days, although foreign tourists register only 11 days.

Table 27-3

Arrivals and Overnights in Polish spas, 2001

Region	Arrivals	Nights	Length of stay (Days)
Total	369,200	5,472,100	14.8
Domestic	336,200	5,104,300	15.2
Foreign	33,000	367,800	11.1

There are more than 40 spa resorts. Almost 90% of total bed capacity is concentrated in four of Poland's 16 regions:

- Dolnoslaskie
- Malopolski

- Kujawsko-Pomorskie
- Sachnodniopomorskie.

Slovenia

Spas play an important role in Slovenia's tourism industry, as it is estimated that one-third of all incoming tourists visit a health resort. In 2000, 23% of all foreign and 44% of domestic overnights were spent at spa resorts, and overnights totaled 2,235,000. In 2002 domestic tourists accounted for 54.5% of all arrivals in spas, followed by Austrians (13%), Germans (8%), Italians (6%), Croatians (2.1%), and Russians (0.8%).

In 2000, earnings per spa guest were €262, or €50 per overnight stay, and total turnover for the sector amounted to some €110 million.

There are 15 registered health spas in Slovenia.

Romania

Romania's spa tourism has suffered along with the rest of the sector and the economy in general, which has struggled to recover from the effects of a deep recession in late 1990s, as well as the war in Kosovo.

Table 27-4

Arrivals and Overnights in Romanian Spas, 2001

Region	Arrivals	Nights	Days
Total	678,000	5,407,000	8.0
Domestic	653,000	5,266,000	8.1
Foreign	25,000	141,000	5.6

Romania's largest spa is the "Baile Felix", or "Spa of Happiness."

A full spa treatment including lodging, three meals per day, and antiageing therapy, can be had for as little as €600 for two weeks.

SWOT

Strengths

- Thermal water in Jermuk, Aghveran, etc
- Mud treatments
- Spa centers in Yerevan
- Different types of accommodation available

Weaknesses

- Difficult transportation outside the capital
- Huge gaps in providing services in regions
- Not all information available in foreign languages
- Lack of promotion of the country as a destination for spa holidays
- Lack of specialized tour operators/travel

agencies

- Opportunities
 - Threats
 - **Travelers are interested in new destinations**
 - Lack of special spa travel programs
 - Lack of political stability in the region
-

MEDIA [1], [2], [3], [4], [5], [6], [7], [8]

Journals and Magazines

Name	Details	Contacts
Spa Magazine		http://www.spamagazine.com/
DAYSPA	Spa business resource	http://www.dayspamagazine.com/
Organic Spa Magazine	Spa & sustainability	http://www.organicspamagazine.com/
Spa Life Magazine	A magazine devoted to the rejuvenation of body and soul	http://www.spalifemagazine.com/
Worldwide Spa Review Magazine		http://www.spareviewmag.com/
Spa Fresh Magazine		http://www.spafreshmag.com/

Internet Sources

Name	Details	Contacts
SpaFinder	Global spa resource	http://www.spafinder.com/index.jsp
	Information portal	www.spas.about.com/od/stressmanagement/a/spatrends06.htm

TRAVEL INDUSTRY [13], [16], [17], [18]

Travel Agency/Tour Operator

Organization	Details	Contacts
Thermalia Travel	Specialized in spa holidays	http://www.thermalia.co.uk/
Kuoni		http://www.kuoni.co.uk/spa/index.html
A Spa to Life	Offers a huge range of spa breaks in many exciting and unusual destinations across the world	http://www.aspatolife.com
Sunlover Holidays	Spa holidays in Australia	http://www.sunloverholidays.com/spa_holidays/index.php

ASSOCIATIONS [9], [10], [14], [15]

Organization	Details	Contact Information
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The Spa Association		http://www.thespaassociation.com/
International Spa Association	ISPA advances the spa industry by providing invaluable educational and networking opportunities, promoting the value of the spa experience and speaking as the authoritative voice to foster professionalism and growth.	http://www.experienceispa.com/ISPA
The Medical Spa Association		http://www.medicalspaassociation.org
The Day Spa Association		http://www.dayspaassociation.com/

TRAVEL FAIRS [11], [12]

Spa and Resort Expo and Conference

Dates: 8-10 September 2007 and 23–25 February 2008

Venue: Jacob Javits Convention Center (New York) and Los Angeles Convention Center (Los Angeles)

Contacts

New York:

Phone: 203-840-5546

Fax: 203-840-9546

E-mail: egallo@reedexpo.com

Los Angeles:

Phone: 203-840-5695

Fax: 203-840-9695

E-mail: toughran@reedexpo.com

Website: <http://www.spaandresortexpo.com>

Sydney International Beauty Expo

Date: 11-12 August 2007

Venue: Sydney Convention and Exhibition Centre

Contacts

Melissa McPhee—Account Manager

Phone: 61 2 9422 2525

Fax: 61 2 9422 2917

Email : melissa.mcphee@reedexhibitions.com.au

Website: <http://www.internationalbeautyexpo.com.au>

TRAVEL PACKAGES [13], [16], [17]

Package name/Country	Details	Links
Hotel: Sofitel Thalassa—Vilalara / Portugal	Includes: <ul style="list-style-type: none"> • Return flight by Easy Jet, Air Portugal , British Airways • Return transfers • 7 nights stay, Junior Suite – garden view • 10 yoga sessions, 3 Well-being seminars, 24 Thalasso treatments. • Full board meal plan (dietetic restaurant) 	http://www.thermalia.co.uk/html/special_offers.shtml

	<ul style="list-style-type: none"> • Free use of sauna, Turkish bath, fitness room. Price: £1289 based on 2 persons sharing a Junior Suite £247 single room supplement £40 single person transfer supplement.	
Maldives	7 nights in a 3.5* hotel "Cottage Club Kuramathi" (Beach Bungalow), room and breakfast. Price: from £775	http://www.kuoni.co.uk/offers/offers.shtml
A Taste of Piest'any / Slovakia	A 3 night package; includes a medical examination, 4 treatments and use of the pool	http://www.aspatolife.com/slovakia/slov_hot_thermia.htm