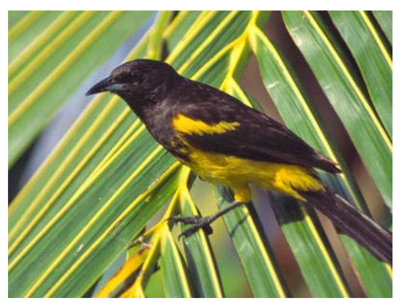
Developing a Niche Tourism Market Database for the Caribbean



20 Niche Market Profiles

For: Caribbean Tourism Organisation

From: Acorn Consulting Partnership Ltd

Date: February 2008

acorn
Acorn Consulting Partnership Ltd
tourism development consultants

TABLE OF CONTENTS **PAGE**

1. INTRODUCTION

A niche tourism market is a specific market segment, usually with a well-defined product, that can be tailored to meet the interests of the customer. Examples for the Caribbean include golf, bird watching and diving. Note that "niche" does not necessarily mean "small" – niche markets can generate large numbers of tourists. It should also be noted that niche market tourists are not necessarily high spenders (although many are). Therefore developing niche market tourism does not necessarily increase the average spend of tourists. However niche markets are good for diversifying the product, minimizing the effects of seasonality, and reducing pressure on "honey pot" areas by distributing tourists to lesser-visited places on the islands.

This report presents detailed profiles of 20 niche tourism markets. All of these niche markets are already available in many Caribbean countries, although their level of product development and sophistication varies. A table in Section 2 of the report shows which countries are currently offering which niche markets, whilst Section 3 describes the format of each niche market profile and also includes the profiles themselves.

The report is written in such a way that readers can dip in and out, reading only those sections that are of interest to them, and undertaking further research on the areas that most interest them by using the information and web links provided. None of the profiles are intended to be exhaustive, but rather to give the reader an overall knowledge and understanding of each niche market, and provide enough knowledge to be able to make initial decisions on whether to pursue their particular interest.

2. NICHE MARKETS IN CTO COUNTRIES

Many countries in the Caribbean already offer niche tourism products, although in several cases these are in the early stages of development. However, the table in this Section shows which niche products are already offered by each CTO member country.

Directors of Tourism in each CTO member country were emailed the niche product table during the week of the 4th February for comments. All responses received were incorporated in the table presented below.

In order to clarify what (for the purposes of the table) constitutes the presence of a niche market, the following definitions have been applied:

- **Bird Watching**: country must have bird watching facilities, i.e. a reserve or hide, or over 200 species of bird present.

- **Charity Tourism**: country must have volunteer, conservation or charity programmes that are available for foreign tourists to participate in.

- **Culinary Tourism**: country must hold a food festival of international repute.

- **Cultural, Heritage and Historical Tourism**: country must have historical, cultural or heritage attractions.

- **Cycling**: country must be able to offer bicycle hire and/or cycle tours.

- **Diving**: country must have at last one PADI, NAUI, BSAC or CMAS certified dive operator.

- **Extreme Sports**: country must offer one or more of: bungee jumping, paragliding, kite-boarding, land yachting, hang-gliding, caving, white-water rafting, or similar activity.

- **Festivals**: country must hold a national festival.

- **Fishing**: country must have facilities for the hire of fishing equipment and/or boats, for freshwater or saltwater fishing.

- **Golf**: country must have at least one 18-hole golf course.

- **Health, Wellness and Spa**: country must have spa (or similar) facilities, whether they be a specific spa resort or 'hotel & spa' combination.

- **Homestays**: country must be able to offer homestay accommodation (staying with a local family).

- **MICE (Meetings, Incentives, Conference, Exhibition)**: country must have a facility that has the capacity to hold a meeting for at least 10 delegates.

- **Sailing**: country must have the facility for yacht charter (bareboat or flotilla) or dinghy hire/instruction.

- **Set Jetting**: country must have been used as a film location for an international movie.

- **Soft Adventure**: country must have facilities for adventure/outdoor activities that require little or no experience and are low risk, such as horse riding, snorkelling, canoeing/kayaking and walking.

- **Sports Tourism**: country must have held an international spectator-sporting event in the last 5 years.

- **Trekking**: country offers trekking routes that are over 5 hours long (constitute a day of walking).

- **Weddings and Honeymoons**: country has the legal and administrative system in place for holidaymakers to get married, or they must market themselves as a honeymoon destination.

- **Wildlife Tourism**: country offers unique fauna, or has one of the following products: turtle nesting grounds, whale/dolphin watching.

Country	Bird Watching	Charity Tourism	Culinary Tourism	Cultural/ Heritage	Cycling	Diving	Extreme Sports	Festivals	Fishing	Golf	Health, Wellness and Spa	Homestays	MICE	Sailing	Set Jetting	Soft Adventure	Sports Tourism	Trekking	Weddings and Honeymoons	Wildlife Tourism
Anguilla	X	-	X	X	X	X	-	X	X	X	X	-	X	X	-	X	X	-	X	X
Antigua & Barbuda	X	X	X	X	X	X	-	X	X	X	X	X	X	X	-	X	X	X	X	-
Aruba	X	X	X	X	X	X	X	X	X	X	X	-	X	X	-	X	X	-	X	X
Bahamas	X	X	X	X	X	X	X	X	X	X	X	-	X	X	X	X	X	-	X	X
Barbados	X	X	X	X	-	X	X	X	X	X	X	-	X	X	-	X	X	-	X	X
Belize	X	X	X	X	X	X	X	X	X	X	X	-	X	X	X	X	X	X	X	X
Bermuda	X	-	X	X	-	X	-	X	X	X	X	-	X	X	X	X	X	X	X	-
Bonaire	X	-	-	X	X	X	X	X	X	X	X	-	X	X	-	X	-	-	X	X
British Virgin Islands	X	X	-	X	X	X	X	X	X	X	X	-	X	X	-	X	-	-	X	X
Cayman Islands	X	-	-	X	X	X	-	X	X	X	X	-	X	-	-	X	X	-	X	X
Cuba	X	X	-	X	X	X	X	X	X	X	X	X	X	X	-	X	X	X	X	X

Country	Bird Watching	Charity Tourism	Culinary Tourism	Cultural/ Heritage	Cycling	Diving	Extreme Sports	Festivals	Fishing	Golf	Health, Wellness and Spa	Homestays	MICE	Sailing	Set Jetting	Soft Adventure	Sports Tourism	Trekking	Weddings and Honeymoons	Wildlife Tourism
Curacao	x	x	x	x	-	x	-	x	x	x	x	-	x	x	-	x	-	-	x	x
Dominica	x	-	-	x	x	x	-	x	x	-	x	-	x	-	x	x	-	x	x	x
Dominican Republic	x	x	x	x	x	x	x	x	x	x	x	-	x	x	x	x	x	x	x	x
Grenada	x	x	-	x	x	x	x	x	x	-	x	x	x	x	-	x	x	x	x	x
Guadeloupe	x	-	x	x	x	x	x	x	x	x	x	-	x	x	x	x	-	x	x	x
Guyana	x	x	-	x	-	-	x	x	x	-	-	x	x	-	-	x	x	x	-	x
Haiti	x	-	-	x	-	-	-	x	-	-	-	-	x	-	-	x	-	x	x	x
Jamaica	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	-	x	x
Martinique	x	-	x	x	x	x	-	x	x	x	x	-	x	x	x	x	-	x	x	-
Montserrat	x	-	-	x	x	x	-	x	x	-	-	x	x	-	-	x	-	-	x	-
Puerto Rico	x	x	x	x	x	x	x	x	x	x	x	-	x	x	x	x	x	x	x	x

Country	Bird Watching	Charity Tourism	Culinary Tourism	Cultural/ Heritage	Cycling	Diving	Extreme Sports	Festivals	Fishing	Golf	Health, Wellness and Spa	Homestays	MICE	Sailing	Set Jetting	Soft Adventure	Sports Tourism	Trekking	Weddings and Honeymoons	Wildlife Tourism
St. Barts	-	-	-	X	-	X	-	X	X	-	X	-	X	X	-	X	-	-	X	-
St Eustatius	-	X	-	X	-	X	-	X	X	-	-	-	X	-	-	X	-	X	X	X
St Kitts & Nevis	X	-	X	X	X	X	X	X	X	X	X	X	X	X	-	X	X	-	X	X
St Lucia	X	X	X	X	X	X	X	X	X	X	X	-	X	X	-	X	X	X	X	X
St Maarten / St Martin	X	-	-	X	X	X	X	X	X	X	X	-	X	X	X	X	-	-	X	-
St Vincent & the Grenadines	-	X	-	X	X	X	-	X	X	X	X	X	X	X	X	X	X	-	X	X
Suriname	X	-	-	X	X	-	X	X	X	-	-	-	X	-	-	X	-	X	-	X
Trinidad & Tobago	X	X	X	X	X	X	X	X	X	X	X	-	X	X	X	X	X	X	X	X
Turks & Caicos	X	X	X	X	X	X	X	X	X	X	X	-	X	X	-	X	-	-	X	X
US Virgin Islands	X	-	X	X	X	X	-	X	X	X	X	-	X	X	X	X	-	-	X	-
Venezuela	X	X	X	X	X	X	X	X	X	X	X	X	X	X	-	X	X	X	-	X

3. NICHE MARKET PROFILES

This Section includes niche market profiles for the 20 niche markets that have been identified for analysis as part of this study. The format of each profile is the same, and is structured as follows:

- Definition – detailed definition of the niche market, where possible drawing on international concepts and definitions.

- Estimate of Global Market Size – an estimate of the number of international trips taken by tourists each year, for which the main purpose is for the niche market being profiled.

- Potential for Growth – expected levels of growth, in terms of tourist numbers and interest, in the niche market in the future.

- Brief Profile of Consumers – demographics and trip characteristics of consumers who participate in the niche market.

- Main Source Markets – those countries that generate the largest number of tourists for the niche market being profiled, or whose residents have an above average propensity to participate in the niche market. Some profiles include "Emerging Markets", which identify countries that at present generate only a small number of international arrivals, but are expected to grow sharply over the next 5-10 years.

- Main Competing Destinations – those destinations that tend to attract the highest numbers of tourists for the niche market being profiled. These countries tend to have a well-developed product, and specifically market this product to consumers in other countries.

- Key Tour Operators – a list of around five tour operators that specialise in the niche market being profiled. These are **not** necessarily the largest or leading tour operators. They have been selected to provide the reader with a broad cross-section of companies, and thereby provide an understanding of the different products that are being sold in the marketplace.

- Key Points for Marketing and Distribution – this section identifies publications, websites, clubs, associations and other forums where products could be marketed and distributed to consumers interested in the niche market being profiled. In some niche market profiles, there are sections on ***Social Networks***, which identify blogs and/or chat-room style websites for enthusiasts, and ***Trade Fairs***, which lists international exhibitions.

- Additional Information – this section includes any other information, mainly websites, which may be useful when researching further a niche market. This section also includes (for some profiles) ***Industry Standards***, which identifies any particular standards or affiliations that might help (or be essential to) selling a niche product, and ***Organisations/Institutions in the Caribbean***, which lists any organisations, clubs or associations in the Caribbean that represent the niche market.

BIRD WATCHING

Definition

Tourist travel for the specific purpose of observing wild birds, otherwise known as *avitourism* or *birding*. People at all levels of fitness and ornithological knowledge can participate. Many countries have thriving bird watching societies, which promote and sponsor trips to destinations where there is an abundance of bird life.

Estimate of Global Market Size

An estimated 3 million international trips are taken each year for the main purpose of bird watching. However, there is considerably more interest at a domestic level. Around 20 million US citizens took bird watching trips in 2007, of which most were within the country.

It should be noted that bird watching is often a secondary purpose of trip. For example, visitors to game reserves are often attracted by large mammals, but also enjoy exotic bird life at the same time.

In the USA, birdwatchers are estimated to spend over $2.5 billion each year. In the UK, expenditure is estimated at $500 million each year.

Potential for Growth

Bird watching is reported as being the fastest growing outdoor activity in America with 51.3 million Americans claiming to watch birds (US Fish and Wildlife Service). The Royal Society for the Protection of Birds (RSPB) in the UK has membership of over 1 million people.

There can be no doubt that bird watching has the potential to be a significant tourism market segment. However it will always remain a niche market, although growth is expected to be strong over the next 10 years.

Brief Profile of Consumers

Bird watchers are usually highly educated, affluent, interested in wildlife, keen to see as many species as possible, and travel to areas where bird life is abundant. They are roughly evenly split between women and men, and are almost exclusively white. Almost 75% of US bird watchers have achieved degree level education or better.

For many bird watching tourists, the primary objective is to see as many species as possible in the most cost-effective manner. Bird watching operators report that clients usually travel by themselves or with one other person (usually spouse or partner). Large groups of bird watchers may travel together though the incidence of these groups is somewhat rare.

The US and Australian markets seem to be dominated by the 40-49 year olds, however it is suggested that the average age is slightly older than this. Most international bird watchers are likely to be members of their local bird watching clubs.

Main Source Markets

- United States
- United Kingdom
- Continental Europe (in particular Germany, Netherlands, France)
- Australia

Main Competing Destinations

Due to the migratory instincts of the indigenous American birds, the main competing birding destinations for US consumers are Mexico and Colombia, with secondary destinations being Venezuela, Costa Rica and Panama.

In terms of international places of interest, the main bird watching destinations for European consumers are situated in Africa, with Kenya, Tanzania, Uganda, Botswana and Namibia being the leading destinations. Other key destinations include New Zealand, Indonesia, Papua New Guinea, Brazil and Colombia while all countries on migratory routes are looking to develop this type of tourism e.g. India. Ecuador and Galapagos Islands tend to attract a significant number of organised bird watching tours.

One US company suggests the following top 10 bird watching destinations:

1. Panama: Canopy Tower
2. Belize: Chan Chich Lodge
3. Venezuela Ranches: Hato Pinero and Hato Cedral, or Brazil: Pantanal
4. Antarctica
5. Kenya
6. Namibia and Botswana
7. Australia and Papua New Guinea
8. Northern India and Bhutan
9. Manu Wildlife Centre in Peru, or Napo Wildlife Centre in Ecuador
10. US: the Texas Coast

Key Tour Operators

Victor Emanuel Nature Tours - Vent Bird
United States
http://www.ventbird.com
2525 Wallingwood Drive, Suite 1003, Austin TX 78746
Tel: 0800 328 VENT (8368)

Wings
United States
http://wingsbirds.com

1643 N Alvernon Ste 109, Tucson, Arizona 85712
Tel: 888 293 6443 (toll-free), 520 320 9868 (local)
Email: wings@wingsbirds.com

Bird Quest
United Kingdom
http://www.birdquest.co.uk
Two Jays, Kemple End, Stonyhurst, Lancashire BB7 9QY
Tel: (+44) 1254 826317
Fax: (+44) 1254 826780
Email: birders@birdquest.co.uk

Naturetrek
United Kingdom
http://www.naturetrek.co.uk
Tel: (+44) 1962 733051

Key Points for Marketing and Distribution

The media, in particular television utilising increasingly ingenious filming techniques for the coverage of bird life, have generated considerable interest in recent years. In the UK, "The Life of Birds" television series attracted 9 million viewers. This has in turn led to an increased circulation of bird publications that offer options for marketing and distribution of travel products, such as:

Bird Watchers Digest
http://www.birdwatchersdigest.com

Birder's World
http://www.birdersworld.com

Wild Bird Magazine
http://www.wildbirdmagazine.com

Birds and Blooms
http://www.birdsandblooms.com

Europe's Largest Birding website
http://www.fatbirder.com

Surfbirds – International birding website, featuring a guide to tour operators and a member's blog.
http://www.surfbirds.com

Targeted marketing can be undertaken using these journals and through direct mail to memberships of bird watching clubs and associations.

Social Networks

Birding trip reports – Guides to over 6,400 birding trips worldwide
http://www.travellingbirder.com

Worldbirds.org: their vision is to create a network of Internet systems that provides a

platform for the collection, storage and retrieval of bird observations worldwide. Each country has its own system and database that links into the worldbirds.org website.
http://www.worldbirds.org

eBird – portals from US and Canada to the US Virgin Islands, a real-time online checklist programme providing data on bird abundance and distribution.
http://ebird.org/content/ebird/index.html

Trade Fairs

Birdfair
The World's first and largest bird watching event
United Kingdom
http://www.birdfair.org.uk

Additional Information

General Information

Global partnership of conservation organisations for birds
http://www.birdlife.org

Bird watching resource website
http://www.birding.com

Organisations/Institutions in the Caribbean

SCSCB: Society for the Conservation and Study of Caribbean Birds
http://www.scscb.org/

eBird – US Virgin Islands
http://ebird.org/content/usvi/

eBird – Dominican Republic and Haiti
http://ebirdrg/content/hispaniola/

eBird – Puerto Rico
http://ebird.org/content/pr/

Guyana Birding – Guyana Tourist Authority
http://www.guyanabirding.com/

CHARITY TOURISM

Definition

Charity or aid tourism refers to trips taken to destinations for the purpose of assisting host communities by providing services that help in everyday life, or aid to disaster areas. This form of tourism has broadened out in recent years ranging from lengthy trips that involve construction work, community development, and/or conservation, to one or two day contributions, such as litter clearing whilst on a trek.

Estimate of Global Market Size

The global market size is currently estimated at 250,000 per annum, of which around one quarter (65,000) is US travellers going overseas to take part in volunteer vacations.

Potential for Growth

The so-called "gap year" (i.e. students taking a year off to travel either before or after studying at university) is seen by the youth of industrialised countries as virtually a rite of passage and, with the major contributor to charity tourism coming from gap year students (estimated at around 60%), this market is set to grow at a sustained and substantial rate over coming decades.

Consumer attitudes towards sustaining the world we live in are becoming increasingly intense, and in consequence, caring for the planet's natural resources and poor societies, is assuming a higher priority for large numbers of people. It can be assumed therefore that more people will actively seek to include themselves in conservation and other related projects, pushing up the demand for charity tourism. The growth of charity tourism is also being driven by post-career travellers (typically the over 55 age group). As the baby boom population (those born between 1946-1964) are increasingly active and travel more than their predecessors, so charity tourism will experience an increase in numbers from this segment of the population.

Brief Profile of Consumers

The two largest groups are: the gap year traveller i.e. people aged 18-23, who choose to experience different cultures, usually on a round-the-world ticket; and the over 55 age groups – typically post-career - who are interested in charity tourism.

Travellers tend to be well educated, and in the ABC1 socio-economic groups. Within the UK market, almost half of all private school pupils take gap years, compared with about one in five students overall.

Main Source Markets

- United States
- Canada
- Western Europe
- Australia
- New Zealand

Main Competing Destinations

Most trips tend to be to the world's poorest countries, typically these are situated in Africa and Asia: Burkina Faso, Cambodia, Lesotho, Nepal and Tanzania are some of the most popular charity tourism destinations in recent years.

Other destinations become popular for charity tourism due to natural disasters (and sometimes man-made disasters), such as the tsunami in South and South East Asia.

Key Tour Operators

Private companies, and charity organisations that work closely with travel agents to promote their trips and arrange flights dominate the market. A leading operator is i-to-i, which is not a charity itself but does operate a charity arm, the i-to-i Foundation, to support its most needy projects.

i-to-i
United Kingdom
http://www.i-to-i.com
Woodside House, 261 Low Lane, Leeds, LS18 5NY
Tel: (+44) 0800 011 1156

Raleigh International
United Kingdom
http://www.raleigh.org.uk
Third Floor, 207 Waterloo Road, London SE1 8XD
Tel: (+44) 20 7183 1270
Fax: (+44) 207 504 8094

Idealist
United States
http://www.idealist.org
360 West 31st Street, Suite 1510, New York, NY 10001
Tel: 1 212 843 3973

Earthwatch
United States (and worldwide)
http://www.earthwatch.org
3 Clock Tower Place, Suite 100, Box 75, Maynard, MA 01754
Tel: 1 800 776 0188, (978) 461 0081

Fax: (978) 461-2332

Travelworks
Germany
http://www.travelworks.de
Travelplus Group GmbH, Münsterstrasse 111, 48155 Münster
Email: info@travelworks.de

Key Points for Marketing and Distribution

Should to be marketed primarily at gap year students, and therefore by contacting specific student travel based companies such as STA (based internationally, especially in the UK and US). Direct mail to students associations at universities & colleges can be a particularly effective means of generating interest.

Some leading tour operators are looking to increase charity tourism in their portfolios. Explore (www.explore.co.uk) is introducing a volunteering element into their holidays in 2008, and Virgin Holidays has pledged to include a responsible travel aspect in its travel agent familiarisation trips, with a view to adding such elements to future programmes.

Responsible Travel provides a directory of carefully screened holidays run by hundreds of specialist operators and accommodations.
http://www.responsibletravel.com

Travel magazines that are of particular relevance to charity tourism are:

Canada: Outpost
http://outpostmagazine.com

International: Brave New Traveller
http://www.bravenewtraveler.com

United Kingdom: Wanderlust
http://www.wanderlust.co.uk

United Kingdom: Real Travel
http://www.i-dj.co.uk/realtravel

Social Networks

Yahoo for Good
http://forgood.yahoo.com

Additional Information

General Information

Advice for international volunteers
http://www.ethicalvolunteering.org

Promoting responsible tourism

http://www.charitychallenge.com

Responsible and ethical tourism charity
http://www.tourismconcern.org.uk

Organisations/Institutions in the Caribbean

CCC: Caribbean Conservation Corporation to ensure the survival of sea turtles within the wider Caribbean basin and Atlantic.
http://cccturtle.org

CCA: Caribbean Conservation Association
http://www.ccanet.net

CULINARY (OR GASTRONOMIC) TOURISM

Definition

Gastronomic tourism refers to trips made to destinations where the local food and beverages are the main motivating factors for travel.

Estimate of Global Market Size

Culinary tourism tends to be largely a domestic tourism activity, with consumers travelling to places to eat and drink specific (usually local) produce. A domestic survey of leisure travellers in America found that 17% engaged in culinary related activities. The International Culinary Tourism Association predicts that this will grow rapidly in the coming years. According to USA Today (27 Feb 2007), 27million Americans have made culinary activities part of their travels in the last three years. In the UK, food tourism is estimated to be worth nearly $8 billion each year.

International culinary tourism is less significant than its domestic counterpart. Whilst consumers do consider food when deciding where to take a holiday, it is not usually the main consideration. The growth in popularity of ethnic cuisines like Thai, Indian, North African, Mexican and Chinese throughout the industrialised countries is attributable to a significant degree to tourism where visitors sample local foods and develop a taste for them.

Food and drink festivals constitute the sole instance where the decision to travel is taken solely on the grounds of the gastronomic experiences offered. These are becoming more prevalent, in particular in Europe. Whilst this segment is growing, at present there are estimated to be no more than one million international culinary tourists travelling each year.

Potential for Growth

Culinary tourism is a growth segment, and typically gastronomic tours are increasingly being combined with other activities such as cultural tours, cycling, walking, etc. Consequently, this is a segment that appeals to a broad range of consumers.

With consumers being increasingly aware of the benefits (economic, environmental and health related) of local produce, there is an increased desire to sample local dishes, foodstuffs and drink. This has led to the emergence of local food and drink festivals, as well as increased interest in local markets.

Growth in this niche market is expected to be strong over the next 5-10 years, although from a relatively small base, so volumes will still be small.

Brief Profile of Consumers

Gastronomic consumers tent to be couples that have above-average income, are usually professionals and are aged 30 to 50. This correlates closely to the demographics of the cultural tourist.

The International Culinary Tourism Association states that on average, food travellers spend around $1,200 per trip, with over one-third (36% or $425) of their travel budget going towards food-related activities. Those considered to be "deliberate" food travellers (i.e. where culinary activities are the key reason for the trip) tend to spend a significantly higher amount of their overall travel budget (around 50%) on food-related activities.

Main Source Markets

The main source markets tend to be in Europe and North America, in particular:

- Germany
- United Kingdom
- Benelux countries (Belgium, Netherlands, Luxembourg)
- Italy
- France
- Scandinavia
- United States

Main Competing Destinations

In Europe, the main competing destinations are:

- Spain
- France
- Italy

In Asia, they include:

- Japan
- India
- Thailand

Key Tour Operators

Global Gourmet Tours
United Kingdom
http://globalgourmettours.co.uk
12 Hockley Court, Stratford Road, Hockley Heath, West Midlands, B94 6NW
Tel: (+44) 1564 784595
Email: sales@globalgourmettours.co.uk

On the Menu
United Kingdom and Australia
http://www.holidayonthemenu.com

United Kingdom
68-70 North End Road, West Kensington, London, W14 9EP
Tel: (+44) 8708 998844
Fax: (+44) 20 7471 6414

Australia
3/690 Brunswick Street, New Farm, QLD, Australia 4005
Tel: (+61) 1300 855 684
Fax: (+61) 7 3358 0905

Cooking Vacations
United States and Italy
http://www.cooking-vacations.com

United States
304 Newbury Street, Suite 318, Boston, MA 02115
Tel: 617 247 4112
Fax: 617 247 4850

Italy
Via G. Marconi, 45-84017, Positano
Tel: (+39) 339 604 29 33

Several other more generic tour operators feature gastronomic tours, or incorporate food as a selling point in their holidays. For example, Abercrombie and Kent offer gourmet tours to Alaska, but cater specifically for the luxury market and are not associated with culinary tourism specifically.

Abercrombie & Kent
United States
http://www.abercrombiekent.com
1520 Kensington Road, Suite 212, Oak Brook, Illinois 60523-2156
Tel: 630 954 2944
Toll-Free: 800 554 7016
Fax: 630 954 3324

Key Points for Marketing and Distribution

United States: Epicurious (part of CondeNet)
http://www.epicurious.com/articlesguides/diningtravel

Food and Wine – Magazine
http://www.foodandwine.com

Readers of broadsheet newspapers fit the profile of culinary tourists well, and advertisements – and assisted editorial features - are therefore likely to be one of the most effective ways for tour operators to distribute their products.

United States: USA Today (travel section)
http://www.usatoday.com/travel

United States: New York Times (travel section)
http://travel.nytimes.com

United Kingdom: The Times (travel section)
http://travel.timesonline.co.uk/tol/life_and_style/travel

Germany: Bild
http://www.bild.t-online.de/BILD/lifestyle/reise/home/reise.html

Germany: Faz Frankfurter Allgemeine Zeitung
http://www.faz.net

Social Networks

(The) foodblogblog.com – A directory of food blogs
http://www.foodblogblog.com

seriouseats.com – A food blog community
http://www.seriouseats.com

Additional Information

General Information

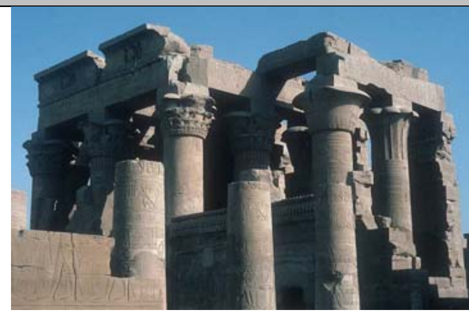
International Culinary Tourism Association
http://www.culinarytourism.org

Organisations/Institutions in the Caribbean

Caribbean Food Emporium (CFE), provides information about Caribbean food through its website and through the publication of the Caribbean food and drink magazine. The Caribbean Cuisine Consortium (CCC) is its parent company, and consists of Caribbean food and drink enthusiasts.
http://www.caribbeanfoodemporium.co.uk

CULTURAL, HERITAGE AND HISTORICAL TOURISM

Definition



Cultural, heritage and historical tourism describes all tourist trips that include cultural activities (e.g. the visiting of monuments or sites), as well as experiences and interaction with local people.

Estimate of Global Market Size

Over the last five years it is widely acknowledged that the culture, heritage and historical tourism segment has been increasing at a rate higher than the growth of tourism worldwide. It is estimated that around 20% of tourist trips worldwide incorporate some form of cultural, heritage or historical activity; consequently the size of the market can be estimated as being over 160 million trips per annum.

However, if this is refined to include only tourists that specifically go on holiday to visit a cultural, heritage of historical attraction, then the percentage share of the international tourism market is estimated as being between 5% and 8%: or 40 million to 65 million trips per annum.

Potential for Growth

Since 1972 the United Nations Educational Scientific and Cultural Organisation (UNESCO) has been compiling a list of the world's heritage sites; currently there are 851 properties that UNESCO considers as having outstanding universal value. This figure increases year on year. Of the 851 sites, 31 properties are listed as World Heritage Sites in danger. As awareness of UNESCO world heritage sites increases and their cultural importance is more fully recognised, demand to visit these sites, especially those classified as "in danger", is likely to increase the volume of cultural tourists worldwide.

It is widely accepted that the cultural, heritage and historical tourism market segment will continue to grow for the foreseeable future. This will be led by the ageing "baby boomer" generation (those born between 1946 and 1964).

The growth this market exhibits means that destinations will develop their tourism product to accommodate their cultural selling points, hence increasing the growth of this sector further.

Brief Profile of Consumers

The culture, heritage and historical tourism segment is largely made up of "empty nesters" (adults whose children have left home) and the senior age group; they predominantly fall into the 45 to 60 years age group. However, the younger age group, driven by "gap year" students (typically aged 20-29 years), are also a key demographic group.

Cultural tourists usually have a higher than average annual income and are generally well educated. They have a large amount of travel experience, are quality conscious and are sensitive to environmental and social concerns. Research shows that this segment is slightly skewed towards females, with a 55% female – 45% male split.

Main Source Markets

The key source markets for cultural tourism correspond closely to the main outbound source markets, and are considered to be:

- Germany
- United States
- United Kingdom
- Japan
- France
- Italy
- Spain
- Scandinavia

Main Competing Destinations

The key competing destinations for cultural tourism are in Europe and Asia. Most prominent among these are:

- Europe (most countries are strong in this segment)
- Asia (significantly: China, India, Thailand, Malaysia)
- South America (significantly: Mexico, Argentina, Brazil, Peru)

Key Tour Operators

Several large operators, such as Explore and Cox & Kings feature cultural tours in their brochures. However, the operators listed focus specifically on cultural tours.

Responsible Travel
United Kingdom
http://www.responsibletravel.com
3rd Floor, Pavilion House, 6 Old Steine, Brighton BN1 1EJ
Tel: (+44) 1273 600030
Email: amelia@responsibletravel.com

Cultural Tours
United Kingdom
http://www.culturaltours.co.uk
320 Regent Street, London, W1B 3BB
Tel: (+44) 20 7636 7906
Fax: (+44) 20 7436 3053
Email: info@culturaltours.co.uk

Far Horizons
United States
http://www.farhorizons.com
PO BOX 2546, San Anseimo, CA 94979
Tel: 800 552 4575, 415 482 8400
Email: journey@farhorizons.com

Key Points for Marketing and Distribution

National newspapers, specifically the broadsheet publications – and their colour magazine supplements - that attract a more affluent, educated audience, are the most effective media for marketing and distribution. In particular these include:

United States: New York Times - travel section
http://travel.nytimes.com

United States: Washington Post - travel section
http://www.washingtonpost.com/wp-dyn/content/artsandliving/travel

United Kingdom: Times - travel section
http://travel.timesonline.co.uk/tol/life_and_style/travel

United Kingdom: Telegraph - travel section
http://www.telegraph.co.uk/travel

Germany: Faz Frankfurter Allgemeine Zeitung
http://www.faz.net

Additional Information

General Information

UNESCO World Heritage Sites
http://whc.unesco.org

International Council on Monuments and Sites
http://www.international.icomos.org

Organisations/Institutions in the Caribbean

OECS Cultural Network: promoting the cultural life of the Eastern Caribbean States, namely: Antigua and Barbuda, Dominica, Grenada, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Martinique and Guadeloupe.
http://www.oecsculture.com

CYCLING

Definition

Cycling tourism can be defined as trips to destinations where cycling is the main activity undertaken. Cycling tourists can be split into two distinct categories:

Holiday cyclists: They specifically look for holidays where there is the opportunity to cycle on more than one occasion, with a variety of interesting routes. Whilst they may not wish to cycle everyday, they consider cycling to be the main attraction or core activity.

Short-break cyclists: They tend to travel on a package tour, and cycle each day of their break. They usually travel within a group of family or friends.

Estimate of Global Market Size

Cycling is most popular amongst domestic tourists (people who take a holiday in the same country as they live). However, cycling when on holiday in another country is still a popular activity, and is predominantly undertaken through the renting of bicycles. Much smaller numbers of people actually take their own bicycles with them.

Cycling tourism tends to flourish in places of outstanding natural beauty, and where special cycle trails have been developed. Victoria on Vancouver Island is the cycling capital of Canada, which attracts 50,000 cycle tourists each year in an industry worth $12million. The Danube cycle route in Austria attracts 150,000 cyclists per year. England's *Camel Trail* attracts 300,000 cyclists per year.

Whilst there is a lack of data related to cycling tourism, largely due to the large number of independent cycling tourists. It is estimated that 50,000 people from the UK took an overseas cycling holiday in 2006, with a further 70,000 from Germany in the same year.

Globally, it is estimated that the size of the international cycling tourism market is around 1.5 million trips per annum.

Potential for Growth

New socio-economic ideals mean that cycling is increasingly appealing as a healthy activity, and a way of procuring a fitter more enjoyable lifestyle. In particular, cycling holidays are most appealing to the ABC1 socio-demographic group, especially families within this group. In the next 5-10 years, holidays taken by the ABC1 family market are expected to exhibit good growth.

Ski resorts are increasingly looking to mountain bikers to utilise their ski lifts and ski slopes in the summer, and thereby create a year-round tourism season. Morzine, in the French Alps, has been particularly successful in achieving this.

Significant growth has been reported by many overseas tour operators, with rates of between 10-30% per annum being quoted. Over the next 5-10 years cycling tourism is expected to grow by at least 10% per annum, but more in those destinations that specifically cater for this type of holiday.

Brief Profile of Consumers

Cycling tourists are predominantly aged 30-55, and tend to be in the ABC1 socio-economic groups – usually pre and post family – though, as noted, the family cycling holiday segment is also expected to continue to expand.

A survey in Canada found that 47% of cyclists had incomes of between $60,000 and $80,000, which confirms that most cycling tourists tend to be professionals with higher than average incomes. Consumers from the UK market are slightly older than those from the North American and European markets.

Surveys of cycling tourists indicate that a large proportion (around 70%) would pay extra for additional services such as luggage transfer and bike maintenance.

Main Source Markets

The main source markets for cycling holidays are:

- United States
- United Kingdom
- Canada
- France
- Germany
- Italy
- Scandinavia

Emerging Markets

- South Africa

Main Competing Destinations

The key cycling destinations tend to be in countries where cycling is widespread amongst locals. These countries usually have extensive facilities for cyclists, which tourists can also use. Typically these countries include:

- France
- United States
- Canada
- Spain
- Austria
- Italy

Key Tour Operators

Backroads
United States
http://www.backroads.com
801 Cedar St. Berkeley, CA 94710-1800
Tel: 800-GO-ACTIVE (462 2848), 510 527 1555

Duvine Adventure
United States
667 Somerville Ave, Somerville, MA 02143
Tel: (617) 776-4441
Fax: (617) 776-1660
Email: info@duvine.com

Saddle Skedaddle Biking and Cycling Holidays
United Kingdom
http://www.skedaddle.co.uk
Ouseburn Building, East Quayside, Newcastle upon Tyne, NE6 1LL
Tel: (+44) 191 265 1110
Email: info@skedaddle.co.uk

Hooked On Cycling
United Kingdom
http://www.hookedoncycling.co.uk
5, Redmill Court, East Whitburn, West Lothian, Scotland, EH47 0PA
Tel: (+44) 1501 744727
Fax: (+44) 1501 742743
Email: info@hookedoncycling.co.uk

Ruckenwind Reisen
Germany
http://www.rueckenwind.de
Am Patentbusch 14, D-26125 Oldenburg
Tel: (+49) 441 485970
Fax: (+49) 441 4859723
Email: info@rueckenwind.de

Aktiva Tours
Netherlands
http://www.aktivatours.nl
Postbus 431, 5550 AK Valkenswaard
Tel: (+31) 40 203 03 20
Fax (+31) 40 204 77 95

Key Points for Marketing and Distribution

Gordans Guide: A guide to bicycle tours
http://bicycle-tours.gordonsguide.com

Bike Magazine – United States

http://www.bikemag.com

Cycling Weekly – UK's largest publication
http://www.cyclingweekly.co.uk

The Cycle people - Offering reviews, a directory of cycling holiday destinations and cycling holiday companies – United Kingdom
http://www.thecyclepeople.com/cycling_holidays.asp

Social Networks

Squidoo – Community for all types of cyclists
http://www.squidoo.com/ebragger

Trade Fairs

Eurobike
International bicycle trade exhibition
Germany
September each year
http://www.eurobike-exhibition.de/html/en/supporting_programme/holiday_bike/holiday_bike.php

Interbike
Largest bicycle event in North America
September each year
http://www.interbike.com

Other trade fairs include, the China Cycle Show, which takes place in April, and the Moscow International Bicycle Trade Show takes place in February each year. However, these do not appear to have cycling holiday components.

Additional Information

General Information

International Bicycle Fund
http://www.ibike.org

European Cycling Federation
http://www.ecf.com

United States: Rails to trails Conservancy
http://www.railtrails.org

Worldwide Bicycle Tour Directory
http://www.bicycletour.com

Organisations/Institutions in the Caribbean

Bermuda Bicycle Association
http://www.bermudabicycle.org

DIVING

Definition

Tourist trips for which the main purpose is scuba diving. This includes diving in freshwater as well as in the sea, but excludes all types of snorkelling. Specialist equipment is required (most notably a diving cylinder and regulator), but wet (or dry) suits are also usually worn for warmth and protection.

Whilst it is not essential to have passed a diving qualification to dive, most commercial operators will only take customers who have a valid form of certificate, which shows they have reached a certain level of competence. Alternatively they provide training to attain this certificate. The four most common types of diving certificate are issued by the Professional Association of Diving Instructors (PADI) based in the US, the National Association of Underwater Instructors (NAUI) also based in the US, the British Sub-Aqua Club (BSAC) based in the UK, and the Confederation Mondiale des Activites Subaquatiques (CMAS) based in Europe.

Estimate of Global Market Size

In 2005, the number of PADI certified divers reached 14.7 million members, and this is expected to increase by 2.5% per annum to reach 16.6 million by 2010. It is estimated that PADI certified divers make up 70% of the total dive market, and therefore in 2007, the total estimated number of certified divers worldwide is 22.1 million. Of these, roughly one-third, or 7.3 million, can be classified as “active” divers. In terms of value, it is estimated that the diving market generates $8 billion annually.

In 2007 it was estimated that around 2.7 million divers took a diving holiday, thus roughly 10% of all certified divers continue to pursue the sport for leisure purposes.

On top of this volume, a large and growing number of beach resort-based tourists will take a one-off diving lesson as part of their overall holiday experience. As tourism moves away from passive holidays to active experiences, the opportunity to engage in a simple recreational dive will be increasingly attractive to resort holidaymakers.

Potential for Growth

The annual growth rate in PADI certifications has slowed in recent years. From 2000 to 2005, year-on-year growth was just 2.5% compared to an average growth of 15.1% per annum during the 1980s. However, there are certain identified areas of significant growth:

- The US, with divers’ destinations generally being split between the Caribbean and its own waters (domestic dives)

- The increasingly active over 50 year old age group.
- Budget travellers and families, although these are likely to be mainly interested in impromptu dives, whilst travelling or on holiday.
- The women and the singles market in general. As diving must always be undertaken with a “buddy” it is an ideal way to meet people.

Brief Profile of Consumers

Divers tend to be young, are predominantly male, single and travel regularly; they are also likely to be adventure seekers. They usually have a large disposable income, are aged 25-40 and are either professionals or self-employed.

In the US 75% of divers are under 50 years of age, and 75% of divers are in full time employment. The average wage of the US diver is $100,000.

Italian Market: heavily skewed towards divers that holiday in a traditional family beach resort but make a small number of dives whilst they are there.

UK Market: around 25% of active divers from the UK take an overseas dive holiday each year. This is primarily made up of people that consider the main purpose of their holiday as being for diving. There is also a significant presence of young people that organise low-cost dive holidays and divers that consider diving as a secondary purpose (partake in a few dives whilst on holiday in a beach resort).

German Market: average expenditure is considerably higher than that of the UK diver. A considerable amount of this additional spend is on a higher quality of accommodation.

Main Source Markets

The US has roughly twice as many certified divers as Europe. Only around one third of certified divers can be described as “active” divers – that is, they would be interested in diving as a holiday or leisure pursuit. There are approximately 4.2 million active divers in the US, and 2.2 million in Europe (with Italy being the most significant market, followed by Germany, France and the UK). The rest of the world (largely Australia, New Zealand and South Africa) account for the remaining 0.9 million.

	Certified Divers (m)	*Active Divers (m)*
US	12.8	4.2
Europe	6.6	2.2
Rest of World	2.7	0.9
Total	22.1	7.3

Emerging Markets

- China

Main Competing Destinations

Established holiday destinations such as the Mediterranean and Thailand are exhibiting particular growth. However, the main competitor market remains US waters, primarily Florida, secondly California and thirdly Hawaii.

Other popular locations include Australia (Great Barrier Reef), Red Sea (Sharm El Sheikh), Indian Ocean (Maldives and the Seychelles) and Southern Africa (South Africa and Mozambique).

Key Tour Operators

Caradonna Dive Adventures
United States
http://www.caradonna.com
U.S. & Canadian Reservations, 2101 W. State Road 434, Suite 221, Longwood, FL 32779
Tel: 800 328 2288, 407 774 9000, 407 682 6000
Email: sales@caradonna.com

Dressel Divers
Spain
http://www.dresseldivers.com
Cronista Almela y Vives 9, B-2 46010, Valencia
Tel: (+34) 963 561 496
Fax: (+34) 963 557 510

Regaldive
United Kingdom
http://www.regal-diving.co.uk
58 Lancaster Way, Ely, CB6 3NW.
Tel: (+44) 1353 659 999
Fax: (+44) 1353 666 128
Email: info@regal-diving.co.uk

Diversion Dive Travel
Australia
http://www.diversionoz.com
PO Box 191, Redlynch, Cairns, Queensland, 4870
Tel: (+61) 740 390 200
Fax: (+61) 740 390 300
Email: info@DiversionOz.com

Reef and Rainforest (Dive and Adventure Travel)
United States
http://www.reefrainforest.com
400 Harbour Drive, Suite D, Sausalito, CA 94965
Tel: 1 800 794 9767, 415 289 1760

Key Points for Marketing and Distribution

As is common with many niche markets, diving holidays are not advertised widely in the general media but are targeted at media known to have a high level of diver readership/viewership; as well as through diving clubs.

Germany: Divers Travel Guide
http://www.divers-travel-guide.com

United Kingdom: Dive Magazine
http://www.divemagazine.co.uk

United Kingdom and Europe: Divernet
http://www.divernet.com

Official publication of PADI: Sport Diver
http://www.sportdiver.com

United States: Undercurrent
http://www.undercurrent.org

United States: Scuba Diving
http://www.scubadiving.com

United Kingdom and Australia: Scuba Herald
http://www.scubaherald.com

Social Networks

DiveBuddy.com – Social network for scuba divers
http://www.divebuddy.com

Dive Area – Diving community worldwide
http://www.divearea.com

Trade Fairs

China Dive Expo
China
China's only dedicated international trade conference and consumer dive event
September
http://www.chinadiveexpo.com

DEMA Show
United States
Only international trade fair for diving, action water sports and adventure travel industries.
October
http://www.demashow.com

London International Dive Show and NEC Dive Show
United Kingdom
March / November

http://www.diveshows.co.uk

Many other dive shows take place worldwide that seem to be equally as important; consider the following links:
http://www.scubayellowpages.com/calendar/events.htm
http://www.diveindustry.net/shows.htm

Additional Information

Guide to dive sites around the world
http://www.divespots.com

Professional Association of Diving Instructors (PADI) website
http://www.padi.com

Scuba Diving Directory
http://www.scubayellowpages.com

Industry Standards

The four most common types of diving certification are essential in acquiring consumer confidence: PADI, NAUI, BSAC and CMAS. Resorts have to be diving certified; this is particularly the case with first time divers and families.

Organisations/Institutions in the Caribbean

Association of Tobago Scuba Diving Operators
http://www.tobagoscubadiving.com

Grenada Scuba Diving Association
http://www.grenadascubadivingassociation.com

Dominica Watersports Association
http://www.dominicawatersports.com

Dive Cayman
http://www.divecayman.ky

EXTREME SPORTS

Definition

Extreme or adrenaline sports are defined as activities where there is a high degree of risk to the participant. Participants in these sports need a certain skill-set, although under the guidance of an experienced instructor it is not uncommon for novices to participate in extreme sports.

There is no defined list of sports that make up the extreme sports market segment, although they include bungee jumping, paragliding, kiteboarding, land yachting, hang-gliding, caving, white-water rafting and coasteering.

Estimate of Global Market Size

The extreme sports market segment is difficult to measure due to it having no clearly defined boundaries. It is however assumed that this market segment accounts for around 5% of the adventure travel market as a whole. This equates to approximately 500,000 trips per annum.

Most extreme sports are undertaken on a whim rather than part of an extreme spots holiday. Since 2000, some tour operators have been reporting growth rates of around 20%.

Potential for Growth

The extreme sports market segment has been exhibiting rapid growth in popularity over the last decade, though it still has a relatively small participant level. Extreme sports are likely to display increased popularity trends for the foreseeable future.

The extreme sports market is volatile: consumers are extremely influenced by what is considered to be "in" or fashionable. As a direct result, extreme sports activities and destinations can go in and out of favour very quickly. It is a very innovative market that is constantly looking for new ways to evolve. In consequence, it even involves non-extreme sports in extreme conditions, such as scuba diving in the Arctic.

Good growth rates can also be expected from the ever-increasing number of "gap year students", who tend to travel for around 6-12 months before or after university. Extreme sports are particularly popular with this market, which has expanded by 100% over the last five years.

The over 55-age group is another market with growth potential. Some specialist over-55 operators are starting to include extreme activities in their programmes, such as white-water rafting, bungee and parachuting.

EXTREME SPORTS

Definition

Extreme or adrenaline sports are defined as activities where there is a high degree of risk to the participant. Participants in these sports need a certain skill-set, although under the guidance of an experienced instructor it is not uncommon for novices to participate in extreme sports.

There is no defined list of sports that make up the extreme sports market segment, although they include bungee jumping, paragliding, kiteboarding, land yachting, hang-gliding, caving, white-water rafting and coasteering.

Estimate of Global Market Size

The extreme sports market segment is difficult to measure due to it having no clearly defined boundaries. It is however assumed that this market segment accounts for around 5% of the adventure travel market as a whole. This equates to approximately 500,000 trips per annum.

Most extreme sports are undertaken on a whim rather than part of an extreme spots holiday. Since 2000, some tour operators have been reporting growth rates of around 20%.

Potential for Growth

The extreme sports market segment has been exhibiting rapid growth in popularity over the last decade, though it still has a relatively small participant level. Extreme sports are likely to display increased popularity trends for the foreseeable future.

The extreme sports market is volatile: consumers are extremely influenced by what is considered to be "in" or fashionable. As a direct result, extreme sports activities and destinations can go in and out of favour very quickly. It is a very innovative market that is constantly looking for new ways to evolve. In consequence, it even involves non-extreme sports in extreme conditions, such as scuba diving in the Arctic.

Good growth rates can also be expected from the ever-increasing number of "gap year students", who tend to travel for around 6-12 months before or after university. Extreme sports are particularly popular with this market, which has expanded by 100% over the last five years.

The over 55-age group is another market with growth potential. Some specialist over-55 operators are starting to include extreme activities in their programmes, such as white-water rafting, bungee and parachuting.

Brief Profile of Consumers

The main age group for extreme sports enthusiasts is 20-35 years, with a predominance of males. In the last five years the level of interest shown by gap year students has grown significantly, and this trend is set to continue.

Main Source Markets

The main source markets for extreme sports are:

- United States
- United Kingdom
- Germany
- Italy
- Scandinavia
- Australia
- New Zealand
- Canada

Emerging Markets

- Brazil
- Croatia
- Czech Republic
- Hungary
- Poland

Main Competing Destinations

Whilst it is possible to participate in extreme sports in almost any country in the world, certain destinations are building up a reputation for this market segment. These include:

- Australia
- New Zealand
- United States
- Canada
- France
- Norway
- Switzerland
- United Kingdom

Key Tour Operators

There are very few tour operators that exist solely to cater for the extreme sports market. The majority of participants are likely to book through the more broad ranging adventure travel specialists that include extreme sports in their programmes. These include:

Explore!
United Kingdom
http://www.explore.co.uk
Nelson House, 55 Victoria Road, Farnborough, Hampshire, GU14 7PA
Tel: (+44) 870 333 4001
Fax: (+44) 1252 391110
Email: res@explore.co.uk

Gap Adventures
Worldwide
http://www.gapadventures.com
19 Charlotte Street, Toronto, Ontario, M5V 2H5
Tel: 1 800 708 7761
Fax: 416 260 1888

Adventure Sport Holidays
http://www.adventuresportsholidays.com
Booking agent for adventure holidays

Adventure Sports Online
http://www.adventuresportsonline.com
Booking agent for adventure holidays

Key Points for Marketing and Distribution

Due to the evolving status of this segment, specialist publications are emerging continually, and provide excellent opportunities for marketing and distribution to the enthusiast. However, the more general participant can be targeted through publications that are circulated and read amongst student communities.

United States: Kiteboarding Magazine
http://www.kiteboardingmag.com

United Kingdom: British Parachute Association
http://www.skydivemag.com

Social Networks

May Contain Nuts – Extreme sports social network
http://www.maycontainnuts.com

X3M People – Social adventure network.
http://x3mpeople.com

Trade Fairs

DEMA Show
Las Vegas, United States
Only international trade fair for diving, action water sports and adventure travel industries
October
http://www.demashow.com

Additional Information *Adventure Sports Directory* http://www.adrenalinepages.com *Adventure Travel Trade Association* http://www.adventuretravel.biz

FESTIVALS

Definition

Festival and music tourism is defined as travel for the main purpose of attending cultural and/or music festivals.

Religious pilgrimages and sporting events are excluded from the definition.

Estimate of Global Market Size

Some of the main international cultural and music events are listed below.

- The largest beer festival in Europe – the Oktoberfest - held in Munich, Germany, attracted 6.2 million visitors in 2006, of which an estimated 15% (or 920,000 people) were from abroad.
- Brazil is arguably the premier carnival destination worldwide. Rio Carnival attracts 500,000 foreign visitors annually. It takes place during the height of summer and lasts for four days.
- The Salvador de Bahia carnival is the largest street party in the world and attracts crowds of up to two million people throughout its weeklong duration.
- Notting Hill Carnival (London, UK) is one of the largest street parties in Europe and attracts around one million people each year.
- The San Francisco Pride Parade attracts over one million people throughout the week. The parade that culminates Pride Week attracts over 500,000 people.
- It is estimated that 50,000 foreign tourists are attracted to the annual carnival in Trinidad and Tobago.

Overall, an estimated 10 million people travel internationally each year for the main purpose of watching or participating in a music or cultural festival.

Potential for Growth

Interest in cultural events in other countries is on the increase, and experiencing festivals is perceived by tourists as one of the most authentic ways of immersing themselves in local culture. Consequently there is considerable interest in the "global festival calendar".

An identifiable trend of having children later in life means that more couples have the time and money to participate in festivals. However, festivals are also becoming more “family friendly” thereby opening themselves up to a wider audience e.g. the Bestival on the Isle of Wight, UK, which attracts 30,000 participants, a large number of whom are families. This is one of the key trends that is driving the popularity of this segment.

Overall, growth in this segment is expected to remain very strong, attaining growth rates in excess of 10% per annum.

Brief Profile of Consumers

Due to the diversity of festivals worldwide, both in theme and content, as well as location, it is difficult to generalise about consumer profile. However, broadly speaking, the pre-family and post-family groups represent the key consumer groups for music and festival tourism. The 18-35 age group is the predominant age group for music festivals, whilst the 45-65 age group is most significant for cultural festivals.

Main Source Markets

The main source markets for music and festival tourism largely correspond to the key outbound source markets. Most significantly these are:

- United States
- United Kingdom
- Germany
- Italy
- France
- Scandinavia
- Japan

Main Competing Destinations

The following countries are the main destinations on the international festival calendar:

- Brazil
- United Kingdom
- United States
- Trinidad and Tobago
- Germany
- Spain

Key Tour Operators

There is considerable independent travel for festivals, although many tour operators include ad-hoc festival trips in their brochures (usually if they already serve the country the festival is in). There are few tour operators specialising exclusively in music and/or festival tourism.

Infinity Tours
United Kingdom
Specialising in carnival trips to Brazil
http://www.infinity-tours.com
PO Box 258, Harrow, Middlesex, UK, HA3 0ZP
Phone: (+44) 871 2882064
Fax: (+44) 20 89099904
Email: info@infinity-tours.com

Key Points for Marketing and Distribution

Marketing and distribution of music and festival tours tends to be predominantly undertaken through the regional and national press, and the websites of the festival organisers. Some of the key publications in the main source markets are:

United States: USA Today - travel section
http://www.usatoday.com/travel

United States: New York Times - travel section
http://travel.nytimes.com

United Kingdom: NME – Music magazine that also gives info on music festivals
http://www.nme.com

United Kingdom: The Sun – travel section
http://www.thesun.co.uk/sol/homepage/travel

United Kingdom: Telegraph - travel section
http://www.telegraph.co.uk/travel

Germany: Bild
http://www.bild.t-online.de/BILD/lifestyle/reise/home/reise.html

Germany: Faz Frankfurter Allgemeine Zeitung
http://www.faz.net

Additional Information

What's On When – Lists upcoming events worldwide
http://www.whatsonwhen.com

Festivals.com – lists festivals worldwide, although it has a specialist US element
http://www.festivals.com

International Festival and Events Association
http://www.ifea.com

FISHING

Definition

Fishing (or angling) is the process of catching fish for recreational purposes. Fishing can take place in the sea (saltwater fishing) or in lakes, rivers etc (freshwater fishing). Consequently, fishing tourism refers to trips taken for the main purpose of catching fish.

Saltwater Fishing: there are three main components to saltwater fishing: fishing from the shore (piers/jetties, beach etc), inshore fishing (roughly within 5km of the shore) and deep-sea fishing. Common species of saltwater fish sought after on fishing tourism trips are: tuna, swordfish, marlin, tarpon, bonefish and eels.

Freshwater Fishing: also known as course fishing. Freshwater fishing is limited to lakes, ponds, rivers, canals, etc, and the species of freshwater fish vary greatly. Common species of freshwater fish sought after on fishing tourism trips are: carp, pike, barbell, perch, trout, eels and salmon.

Estimate of Global Market Size

It is possible to estimate the level of interest in fishing from various national surveys, which show the number of participants and the proportion of the population these people represent.

Country	*Participants (m)*	*Proportion of Population*
United States	34.1	20%
United Kingdom	5.9	12%
Canada	3.6	12%
Australia	3.4	20%
France	7.4	12%

As fishing is most popular within the countries listed above, it can be assumed that they constitute the majority (80%) of the world's anglers. Therefore there are approximately 68 million anglers worldwide, of which an estimated 5%, or 3.4 million travel abroad on holiday with the main purpose being to fish. In addition to these, there are an estimated additional 3 million tourists who participate in some kind of fishing during their trip.

Potential for Growth

Potential growth or decline is particularly hard to determine with regard to fishing tourism. Participation levels in fishing have been falling throughout Europe and North America. This change is slight, however it is a clearly identified trend. This does not necessarily translate to fishing as a holiday activity, and indeed there are positive indicators with respect to this, and it is predicted that fishing tourism will grow over the next five years.

One of these positive indicators is the increase in popularity of big game fishing in destinations such as Kenya and Mexico. Not only is it on the increase, but the types of people that choose to do it are quite often non-anglers (people that do not fish at home).

The tour operator sector shows signs of being very healthy. This market is full of small specialist operators that focus on specific types of fish, fishing or destination. Since fishing has so many different sub-sections, it offers many niche market opportunities, a characteristic that makes it very appealing for new fishing specialist operators.

Brief Profile of Consumers

- United States: 20% of Americans aged 16 or over participate in fishing to some extent – this equates to roughly 34.1 million. 83% of these anglers specialise in course fishing, compared to 27% who prefer saltwater fishing; thus 10% have participated in both freshwater and saltwater fishing. Saltwater anglers tend to travel further afield to fish than their freshwater counterparts. Males outnumber females by 3 to 1. The majority of anglers are 25-54 years old.

- United Kingdom: 75% of all anglers are male, a high proportion being aged 15-24.

- Australia: 68% of all anglers are male, with a high proportion being aged 30-44.

Main Source Markets

The main source markets are in North America and Europe, although the UK and France are the two key European markets.

- United States
- Canada
- United Kingdom
- France
- Australia

Emerging Markets

- **China**

Main Competing Destinations

Africa
- Kenya
- South Africa

Asia

- Australia
- New Zealand
- India

Americas

- United States
- Canada
- Mexico

Europe

- UK (England and Scotland)
- Ireland
- France
- Norway
- Denmark

Key Tour Operators

Mad River Outfitters
United States
http://www.madriveroutfitters.com
813 Bethel Rd, Columbus, Ohio 43214
Tel: (614) 451 0363
Fax: (614) 451 0709
Email: admin@madriveroutfitters.com

Frontiers International Travel
United States
http://www.frontierstravel.com
P.O. Box 959, Wexford, PA 15090-0959
Tel: 724 935 1577, Toll Free: 1-800-245-1950
Fax: 724-935-5388
Email: info@frontierstravel.com

World Sport Fishing
United Kingdom
http://www.worldsportfishing.com
Tythe House, Staploe Road, Wyboston, Bedfordshire, MK44 3AT
Tel: (+44) 1480 403293
Fax: (+44) 1480 403292
Email: richard@worldsportfishing.com

Angling Direct Holidays
United Kingdom
http://www.anglingdirectholidays.com
The Homestead, Thurgarten Road, Aldborough, Norfolk, NR11 7NY
Telephone: +44 (0) 1603 407596, Fax: +44 (0) 1603 406004
Email: Info@anglingdirectholidays.com

Key Points for Marketing and Distribution

In recent years the popularity of fishing programmes on television has increased significantly, in particular Sky TV programmes on the Discovery Home and Leisure channel (notably *Tight Lines, Hooked, and Fishing Road Trip USA*). Other key marketing and distribution media include: *Fish and Game - Online version* *http://www.fishandgame.com* *Sport Fishing – Saltwater fishing* http://www.sportfishingmag.com *American Angler – Fly Fishing Magazine* http://www.americanangler.com/ *Worldwide Anglers Magazine* http://www.worldwideanglermag.com ***Social Networks*** Angling Masters – World's largest online fishing community http://www.anglingmasters.com Switchfly.com – Social networking site for fly fishing enthusiasts http://www.switchfly.com ***Trade Fairs*** ISE Sports shows, specialising in fishing United States http://www.sportsexpos.com
Additional Information *Fish Online: information about fishing and fishing issues* http://www.fishonline.org *International Game Fish Association* http://www.igfa.org ***Organisations/Institutions in the Caribbean*** Caribbean Regional Fisheries Mechanism (CRFM) http://www.caricom-fisheries.com

GOLF

Definition

Golf tourism is the term used to describe trips undertaken by persons for which the main purpose is to play golf. Golf may also be pursued as a secondary activity (for example, someone on a beach holiday playing a round during their vacation). This type of activity is more difficult to measure, and whilst it can be important for the golf courses themselves it has little significance for tour operators.

Estimate of Global Market Size

The global golf tourism market is worth over $17 billion, according to the International Association of Golfing Tour Operators (IAGTO).

56 million people play golf worldwide: 26.7 million in the United States, 5 million in Canada, 5.5 million in continental Europe, 14 million in Japan, and 3.8 million in the United Kingdom. Of this 56 million, between 5% and 10% travel overseas each year for the main purpose being to play golf – therefore making the international size of the golf tourism market between 2.8 million and 5.6 million.

The leading market in terms of golf as a sport is the United States - it is thought to contribute over $60 billion to the economy. Europe (aside from the UK) is not a mature golf market; it is still mainly pursued by the elite few (worth $20 billion). The UK, Japan, and Australia all have mature golfing markets.

Potential for Growth

The mature golfing markets of North America, UK, Japan and Australia have seen stagnation in the number of dedicated golfers in recent years. It appears that membership has reached saturation level; a major contributor to this seems to be the amount of time the sport consumes (average round of golf is around 4 hours). There is a growing trend whereby people would rather participate in activities that take a shorter amount of time.

In these markets, the main potential for growth lies with the aging population, which is growing in size in most developed countries. These consumers are becoming increasingly active and as they are likely to be either “empty nesters” (parents whose children have left home) or retired, they tend to have more time than their younger counterparts.

The rapidly growing golf markets in Asia, the Middle East and Mexico will contribute to the growth of the golf sector worldwide. However, it is not expected that these countries/regions will contribute to the growth of golf tourism in the short term, as there will be a delay between actively taking the sport up and travelling to participate in the playing of it. However, in the long term (in 5-10 years) growth will be notable.

In continental Europe the participation rates in golf are low but are increasing steadily (French participation rates are increasing between 5-8% per year). This is the market that demonstrates the most growth potential in terms of golfing holidays. The proliferation of the low-cost airline sector in Europe has had a significant impact on the growth of golfing holidays in Europe, in particular from the UK, but increasingly from other countries too.

Brief Profile of Consumers

Consumers are predominantly male, with the majority being middle aged (40-55) or retired (55+). Professional and managerial groups dominate the sector. Golf tourists are likely to be members of golf clubs at home.

- United States: Golf participants are generally affluent, they have a higher than average annual income with two-thirds of American golfers earning over $50,000. 65% of golfers are over 40 years of age and 80% are male.

- United Kingdom: Golfers are predominantly (78%) male. 62% are aged between 35-60 and 42% are from the AB socio-economic grouping.

- Canada: Predominantly male with an average age of 48 years. The Canadian consumer tends to combine golfing with business trips. They are likely to be well educated with a graduate or undergraduate degree. The Greater Toronto Area is the key generating area.

- France: 65% are male, although 70% of golfing tourists will travel with their partner or spouse.

Main Source Markets:

The main source markets for golf tourism are:

- United States
- United Kingdom
- Japan
- Canada
- Australia

Emerging Markets

- Taiwan
- Malaysia
- China
- Thailand

Main Competing Destinations

The United States, United Kingdom / Ireland, Japan, Australia, and Scandinavia are established destinations.

Thailand, Malaysia, Singapore, and Taiwan are all relatively new, growing destinations.

Emerging golf destinations are Korea and China that will, albeit from small numbers, exhibit significant growth over the next five years:

- Korea: currently has 200 golf courses; this is expected to double to 400 by 2016.

- China: currently has a growth rate of 40% per annum in terms of golfing facilities. At present there are 311 golf courses and this is expected to double over the next 10 years.

Key Tour Operators

Golf Holidays
United States
http://www.golfholidays-online.com
16885 West Bernardo Drive, Suite 350, San Diego, CA 92127
Tel: 888 465 3499, 858 451 8190

Golfbreaks.com
United Kingdom
http://www.golfbreaks.com
2 Windsor Dials, Arthur Road, Windsor, SL4 1RS
Tel: (+44) 800 279 7988

4Golf.com
http://www.4golf.com
75 King Street, South Shields, Tyne & Wear, NE33 1DP
Tel: (+44) 191 497 4516

The INTA Group consists of 4golf.com and a number of subsidiary companies including Bill Goff Holidays, Teetimesanywhere.com, Longshot Golf and Jack High Holidays. This group is the UK's largest golf travel specialist, with over 25 years travel experience.

Direct Golf Holidays
Spain
http://www.directgolfholidays.com
Avenida de Mijas 2, Edificio J Serrano Portal 1 3-C, Mijas Costa 29649 Malaga.
Tel: (+34) 656 561 530
Email: info@directgolfholidays.com

Key Points for Marketing and Distribution

There are a plethora of golf magazines that serve the sector, including:

Travel Golf.com
http://www.travelgolf.com

Travel and Leisure Golf
http://www.travelandleisure.com/tlgolf

Golf Today
http://www.golftoday.co.uk

Broadsheet newspapers, in particular the New York Times (in the US) and Times and Daily Telegraph (in the UK) are alternative options for marketing and distribution. These tend to be read by professionals in the AB socio-economic group.

United States: USA Today - travel section
http://www.usatoday.com/travel

United States: New York Times - travel section
http://travel.nytimes.com

United Kingdom: The Times - travel section
http://travel.timesonline.co.uk/to/life_and_style/travel

United Kingdom: Telegraph - travel section
http://www.telegraph.co.uk/travel

Germany: Faz Frankfurter Allgemeine Zeitung
http://www.faz.net

Direct promotions targeted at golf clubs and their members can also be effective.

Social Networks

The Golf Space
http://www.thegolfspace.com

19thHole.com – Social network for golfers
http://www.19thhole.com

IGolf.to – Socail networking portal to meet other golfers.
http://www.igolf.to

Trade Fairs

National Golf Expo
United States
February
http://www.paragonexpo.com/213.html

The Vancouver Golf & Travel Show
Canada
February
http://www.vancouvergolfshow.com

Additional Information

General Information

PGA of America
http://www.pga.com

International Association of Golf Tour Operators
http://www.iagto.com

Organisations/Institutions in the Caribbean

Caribbean Golf Association (CGA)
http://cgagolfnet.com

Further regional sub-organisations also exist, such as the TTGA (Trinidad and Tobago Golf Association)
http://www.trinidadandtobagogolfassociation.com

HEALTH, WELLNESS AND SPA

Definition

Health and wellness tourism refers to trips that are taken by tourists with the principal purpose being to improve their health and/or wellbeing. Typically this includes one or more of the following: physical fitness programmes, spa visits, medical treatment, health farms, beauty treatment, and many different alternative therapies derived from different cultures.

The health and wellness market can be seen as a continuum reflecting different sub-segments' requirements and interests. At one extreme – the "soft" end – are general wellness consumers who look for high quality facilities, a healthy eating menu, the opportunities for gentle walks in pristine natural settings, and the availability of gym facilities. In the centre of the continuum are those looking for the traditional spa facilities, facial and other treatments, and the practice/performance of treatments based on the healing properties of the waters, muds etc. At the "hard" end are those seeking cosmetic beautification, including surgery.

Estimate of Global Market Size

This segment of the tourism sector is rapidly growing in significance. However, there is scant information available on its size or value. It is known that the UK overseas spa/holistic tourism market is worth $50 million, and the overseas medical tourism market is worth $120 million. Also, according to the European Travel Monitor health holidays account for 15% of the total European international holiday market. It is assumed that this refers to trips on which some element of health tourism is included rather than it being the main purpose of visit.

Based on available research, the global market size of health, wellness and spa tourism is estimated at 5 million trips annually, whereby it represented the main purpose of the trip. It is acknowledged that participation in this sector during trips for other purposes is considerably greater.

Potential for Growth

Growth rates within this market are significant, and it is likely that the health and wellness market will continue to exhibit substantial growth rates for many years to come. As the population in the main tourist generating markets ages, and the search for "eternal youth" continues to grow, so the demand for health and wellness trips will increase.

Another driving factor behind the predicted growth trends is the changing attitude towards physical fitness and general wellbeing. It is now a recognised that a fit lifestyle leads to a better standard of life. In Germany, new laws enable employees to take up to six weeks leave in a year, if required, for health/wellbeing reasons.

Brief Profile of Consumers

Health and wellness tourism is a market generally driven by women and middle aged empty nesters (adults whose children have left home). These consumers tend to be well-educated, affluent professionals.

However, over the last five years there has been a definite trend that shows health and wellness holidays are appealing to a younger audience. The 20-24 year old age group are increasingly showing an interest in this segment.

The age group represented by 50-65 year olds remains the one with the greatest potential. In particular these consumers look for conventional medical healthcare methods, they tend to stay longer (as they have more time) and their treatments generally take longer.

Main Source Markets

This segment is driven by consumers from the United States and Europe, though Asian demand is also increasing strongly prompting many of the high quality resort hotels in the region to develop spa and wellness facilities.

Main Competing Destinations

Whilst health, wellbeing and spa tourism is developed in a large number of destinations, the following have developed a specific niche, largely due to natural resources (such as hot springs):

- Austria
- Hungary
- Japan
- Thailand

Key Tour Operators

The health, wellness and spa market overlaps considerably with luxury operators that offer spa options in their hotels. However, some of the key operators include:

Erna Low Body & Soul
United Kingdom
http://www.bodyandsoulholidays.com
9 Reece Mews, London SW7 3HE
Tel: (+44) 207 594 0290

Essential Escapes
United Kingdom
http://www.essentialescapes.com
85-87 Bayham Street, London, NW1 0AG
Tel: (+44) 207 284 3344
Fax: (+44) 207 284 3348
Email: sales@essentialescapes.com

Spa Quest
United States
http://www.spa-quest.com
381 Park Avenue South Suite 1201, New York NY 10016
Tel: 212-251-0877, Toll Free: 800-SPA-QUEST (800-772-7837)

Thalassoline
France
http://www.thalasso-line.com
Thalassoline New-Eve SA, 14, avenue du Général de Gaulle, 32600 L'Isle Jourdain
Tel: (+33) 5 620 777 40

Key Points for Marketing and Distribution

International Booking Agent: SpaFinder
http://www.spafinder.com

International: Spa World Magazine
http://www.spaworld.tv

United States: Health and Wellness Magazine
http://www.healthandwellnessclub.com

United States: Health Magazine
http://www.health.com/health

Trade Shows

Spa & Wellness
Hungary
November
http://www.biztradeshows.com/trade-events/spa-wellness-hungary.html

Spa and Resort Expo
United States
February
http://www.spaandresortexpo.com

Additional Information

General Information

ISPA - International Spa Association
http://www.experienceispa.com

Industry Standards

IMPAC – The 'gold standard' for the industry
http://www.impacsurvey.org

Branding has a large effect on consumers, and hotels that have a trusted brand name for quality are likely to benefit from increased confidence in spa facilities by

consumers. Other accreditations, such as the Conde Nast Traveller Gold Standard is likely to attract consumers
http://www.forimmediaterelease.net/pm/701.html
http://fitnessbusinesspro.com/mag/fitness_brand_news_big/

Organisations/Institutions in the Caribbean

Caribbean Health Tourism
http://www.caribbeanhealthtourism.com

Caribbean Spa and Wellness Association
http://www.hotelmotel.com/hotelmotel/article/articleDetail.jsp?id=380135

HOMESTAYS

Definition

Homestay is a traditional practice in many industrialised countries, especially in North America, Australasia and Britain. It is comparable to bed and breakfasts, but even less formal. A homestay property is a non-commercialized, private residence that accommodates paying guest(s) who enjoy staying in the comfort and security of a family home. These guests often reside in the family home for an extended period of time, usually months rather than days. It is a safe, affordable means of housing popular amongst international students, interns, travelling professionals and adult visitors from other countries, who are looking to experience and learn about local lifestyle and culture.

Homestay is not specifically a niche tourism segment, but rather a type of accommodation that is used by tourists when staying at a destination and pursuing other purposes of visit.

Estimate of Global Market Size

It is almost impossible to measure the market size of homestays; however as many as 500,000 international tourists each year are estimated to have used a homestay.

Potential for Growth

Tourists are becoming increasingly adventurous and well travelled. Consequently their search for unique cultural experiences will also increase, and they will seek out new forms of accommodation. Therefore growth rates are expected to be strong, albeit from a relatively small base.

The popularity of homestay will also be boosted by the so-called “gap year” student. Whilst hostel and guesthouse accommodation has proven popular with young travellers due to their desire to interact fully with local families, the same interests are likely to drive the homestay market.

Most tourist boards now offer a homestay option. In particular this has spread outside of the traditional tourism destinations in Europe and North America, to other areas such as Africa, where some countries further segment this market by offering stays with indigenous tribes. Such schemes will raise the profile of homestay tourism.

Brief Profile of Consumers

Homestay consumers are similar in profile to cultural tourists. They predominantly fall into the 45-55 year old age group, and are most likely to be empty nesters (adults whose children have left home).

These consumers have considerable travel experience, are less likely to be quality conscious, and are more sensitive to environmental and social concerns. In addition to these consumers, the younger age group, driven by the 'gap year' student, is also a key demographic group.

Main Source Markets

The main source markets will be the key outbound tourist generating countries. In particular:

- Germany
- United States
- United Kingdom
- Japan
- China
- Italy
- Spain
- Scandinavia
- France

Main Competing Destinations

The destinations where homestays are currently most established include:

- United States
- Japan
- United Kingdom
- Canada
- China
- Australia

Key Tour Operators

Responsible Travel
United Kingdom
http://www.responsibletravel.com
3rd Floor, Pavilion House, 6 Old Steine, Brighton BN1 1EJ
Tel: (+44) 1273 600030

Gohomestay
International
http://www.gohomestay.com
Email: info@gohomestay.com

Lets Homestay
New Zealand
Specialising in farmhouse homestays in New Zealand
http://www.farmstay.co.nz
P.O.Box 3129, Greerton, Tauranga
Tel: (+64) 7 543 3220

Key Points for Marketing and Distribution

The key places for marketing and distributing homestays are websites and the national media in key destinations. In particular:

United States: New York Times - travel section
http://travel.nytimes.com

United States: Washington Post - travel section
http://www.washingtonpost.com/wp-dyn/content/artsandliving/travel

United States: Wall Street Journal travel section
http://online.wsj.com/personal_journal/travel

United Kingdom: Times - travel section
http://travel.timesonline.co.uk/tol/life_and_style/travel

United Kingdom: Telegraph - travel section
http://www.telegraph.co.uk/travel

Germany: Faz Frankfurter Allgemeine Zeitung
http://www.faz.net

Germany: Financial Times Deutschland – travel section
http://www.ftd.de/lifestyle/reise

Additional Information

International homestay agency
http://www.homestayagency.com

International directory of homestays
http://www.homestayweb.com

China Homestay
http://www.chinahomestay.org

Homestay 101 online magazine - blog
http://homestayemagazine.blogspot.com

MICE

Definition

MICE is an acronym for the Meetings, Incentives, Conventions and Exhibitions tourism segment.

This is therefore a business-oriented segment, involving obligatory (or non-discretionary) travel. The Incentives part of MICE is the odd one out – though it is related to business, as it is usually provided to employees or dealers/distributors as a reward, it tends to be leisure based.

Estimate of Global Market Size

Various sources report that the MICE market is worth around $30 billion a year worldwide. Some countries rely heavily on the MICE segment – 30% of Singapore's tourism revenue is from MICE, and Malaysia is specifically targeting the MICE market, running schemes such as the Meet and Experience campaign.

Worldwide, at least 50 million trips are taken each year for MICE purposes.

Potential for Growth

The MICE segment is exhibiting encouraging growth potential, with Russia, India and China likely to drive the market. In 2006, Brazil made the International Congress and Conference Association top ten for meetings organised in that country, and was the first from the so called BRIC (Brazil, Russia, India, China – countries with rapidly growing economies) countries to do so.

Companies tend to choose meeting locations based upon their core business values and relative expensiveness. They do not stray too far from their headquarters. The incentives market is slightly more diverse with firms liable to send employees to more exotic long haul destinations. An increasing recognition that motivational programmes are important for staff retention means that the incentives market will increase in the coming years.

Whilst the MICE market is expected to continue to exhibit moderate growth, it is dependent upon the prevailing economic circumstances. A confident market will lead to more meetings and incentives whilst a nervous market is liable to have the opposite effect.

Brief Profile of Consumers

Varies considerably – although is slightly skewed towards the 30-45 age group, and around 65% male.

Main Source Markets

The main source markets are the main industrial countries in Europe and North America. However, there is significant growth from emerging markets such as Brazil, Russia, India and China.

- United States
- Germany
- United Kingdom
- France
- Italy
- Spain
- Scandinavia

Emerging Markets

- Brazil
- Russia
- India
- China

Main Competing Destinations

Destinations for MICE tourists are Influenced by safety and security. However, there is also a desire to find new destinations, although they need to be deemed politically safe to travel to.

Some of the most popular MICE destinations include:

- Vienna, Austria
- Paris, France
- Singapore
- Barcelona, Spain
- Berlin, Germany
- New York, United States

For the incentives segment, however, upmarket resort locations in areas such as Asia and the Indian Ocean are popular.

Key Tour Operators

World Incentives
United States

http://www.worldincentives.com
Two Chestnut Place - Suite 320, Worcester, MA 01609
Email: info@worldincentives.com

Maritz Incentives
United States
http://www.maritzincentives.com
1400 South Highway Drive, St. Louis, Missouri 63099

Capital Incentives
United Kingdom
http://www.capital-incentives.co.uk
Carlton House, Sandpiper Court, Chester Business Park, Chester, CH4 9QE
Tel: (+44) 1244 625 331
Email: enquires@capital-incentives.co.uk

World Events
United Kingdom and United States
http://www.worldevents.com
Summit House, Woodland Park, Cleckheaton, West Yorkshire, BD19 6BW
Tel: (+44) 1274 854 100
Fax: (+44) 1274 854 110

Key Points for Marketing and Distribution

Websites are important - a survey found that 50% of meetings/incentives planners consulted a website for a source of information. 20% of meetings and incentives planners in the United States consulted national tourism organisations for information.

Industry specific MICE magazines aimed at companies that participate in the MICE industry include:

United States: Incentive Magazine
http://www.incentivemag.com

United States: Corporate Meetings Magazine
http://meetingsnet.com/corporatemeetingsincentives

United Kingdom: Incentive Travel and Corporate Meetings Magazine
http://www.incentivetravel.co.uk

Germany: TW Tagungs-Wirtschaft (circulation around 22,500 – bilingual)
www.tw-media.com

Germany: Event Partner (circulation around 20,000)
www.event-partner.de

Trade Shows

CONFEX
United Kingdom
February
Event organisers and companies that supply venues, destination and event support

IMEX Germany April The worldwide exhibition for incentive travel, meetings and events http://www.imex-frankfurt.com AIME Australia February Asia Pacific incentives and meetings expo http://www.aime.com.au CIBTM China July China incentives, business travel and meetings exhibition http://www.cibtm.travel/en/index.jsp
Additional Information *ICCA – International Congress and Convention Association* www.iccaworld.com *CIC - Convention Industry Council* http://www.conventionindustry.org *IACVB – Destination Marketing Association* http://www.iacvb.org *International Association of Exhibitions and Events* http://www.iaem.org *Meeting Professionals International* http://www.mpiweb.org *Incentives Travel Industry Online* http://www.incentive-travel.org.uk

SAILING

Definition

Sailing tourism refers to any holiday where the main purpose of the trip is to sail or learn how to sail. Sailing tourism has two broad categories, which are defined by the type of boat used: a yacht (which is also used as overnight accommodation) or a dinghy (a smaller boat without berths – therefore overnight accommodation is on land).

Yacht sailing holidays tend to be either *bareboat charters*, where the boat is hired – without crew - and can be sailed to any chosen destination, or *flotilla*, where all boats in the flotilla follow a pre-planned route. Dinghy sailing holidays are most likely to be combined with a sailing course.

Estimate of Global Market Size

As with most niche markets, there are scant data available regarding the sailing tourism sector. However, it is estimated that around 10 million sailing holidays are taken each year. An estimated 2.5 million trips are taken by residents of the United States, with an additional 1 million by residents of the United Kingdom.

Potential for Growth

Sailing holidays have been exhibiting significant growth over the past 10 years. This growth shows no signs of abating, with an increase in the desire for more active holidays.

There is also increasing interest in sailing as a short-break, and as a multi-centre trip (which combines sailing and some other land-based activity).

Groupe Beneteau (the leading sailboat builder) is planning for long-term growth. In the short term, growth trends are likely to be boosted by China's rapid economic expansion, which will be further intensified by the Beijing Olympics in 2008.

Brief Profile of Consumers

Sailing holidays are available to a wide range of consumers. Little or no experience is needed, although to participate on a yachting holiday a minimum qualification is required. For dinghy sailing, no qualifications are required at all.

However, sailors tend to be from higher socio-economic groups and are skewed towards males rather than females. Dinghy sailing appeals to the younger age groups with the 16-34 group dominating this market, whilst yacht charter consumers tend to be aged 55 and over.

Flotilla holidays are growing in popularity, and families with teenage children are driving this market. This group will exhibit strong growth over the next 10 years, as will the increasingly active 55+ age group.

Main Source Markets

The main source markets for sailing are:

- United States
- United Kingdom
- France
- Germany
- Italy
- Scandinavia
- New Zealand
- Australia

The major sailing source market is the US, followed by European countries.

Emerging Markets

- Russia
- China
- Japan

Main Competing Destinations

The principal competing destinations for the sailing market are:

- The Mediterranean (primarily Greece)
- Australia
- Seychelles
- Hawaii
- United Kingdom
- Turkey
- Maldives
- Thailand
- Vietnam (rapidly emerging destination)

Key Tour Operators

First Choice owns the two biggest sailing companies in the US and the UK: Moorings (in the US) and Sunsail (in the UK). Moorings and Sunsail combined have the largest fleet of yachts in the world with around 1,000 yachts each (most with 4 to 8 berths). Both operators offer bareboat and flotilla options to their clients.

Sunsail
United Kingdom

http://www.sunsail.co.uk
The Port House, Port Solent, Portsmouth, Hampshire, PO6 4TH
Tel: 020 9222 2300
E-mail: yachting@sunsail.com

Moorings
United States
http://www.moorings.com
19345 US Highway 19 N#4, Clearwater, FL, 33764-3147
Tel: 888 952 8420, 727 535 1446.

Sailing Holidays
United Kingdom
http://www.sailingholidays.com
105 Mount Pleasant Road , London NW10 3EH.
Tel: 020 8459 8787

Neilsen
United Kingdom
http://www.neilson.co.uk
Locksview, Brighton Marina, Brighton, BN2 5HA
Tel: (+44) 870 333 3356
Fax: (+44) 870 909 9089

Mark Warner
United Kingdom
http://www.markwarner.co.uk
20 Kensington Church Street, London, W8 4EP
Tel: (+44) 871 703 3887

Yacht Hire & Charter
Australia
http://www.yachthireandcharter.com
2 / 1 Balmoral Street (P.O. Box 1518) Frankston, Victoria, 3199
Tel: within Australia (+61) 3 8781 1155
Fax: (+61) 3 8781 1159
Email: enquiry@yachthireandcharter.com

Key Points for Marketing and Distribution

Key forums for marketing and distribution include yachting magazines (although many of these focus purely on equipment). National broadsheet newspapers in the key source markets offer other good opportunities due to the close demographic match between their readership and the sailing consumer. Direct promotions with yacht/sailing clubs in main source markets can also be effective.

United States: Yachting Magazine
http://www.yachtingmagazine.com

United States: Sailing Magazine
http://www.sailingmagazine.net

United States: Soundings
http://www.soundingspub.com

United Kingdom: Yachting World
http://www.ybw.com

United Kingdom: Times - travel section
http://travel.timesonline.co.uk/tol/life_and_style/travel

United Kingdom: Telegraph - travel section
http://www.telegraph.co.uk/travel

United States: New York Times - travel section
http://travel.nytimes.com

United States: Washington Post - travel section
http://www.washingtonpost.com/wp-dyn/content/artsandliving/travel

United States: Wall Street Journal - travel section
http://online.wsj.com/personal_journal/travel

Germany: Faz Frankfurter Allgemeine Zeitung
http://www.faz.net

Social Networks

Sailing Networks
http://www.sailingnetworks.com

AllSailors.com
http://www.allsailors.com

Trade Fairs

For an extensive list of boat shows see the following link:
http://www.nmma.org/calendar/boatshows.aspx

Additional Information

General Information

National governing body of Sailing in the United States
http://www.ussailing.org

Sailing publication: Information about sailing
http://www.worldwidesailing.net

United Kingdom: Royal Yachting Association
http://www.rya.org.uk

American Sailing Association
http://www.asa.com

Sailing Blogs: Sailing forum
http://www.sailblogs.com/member_list.php

International Sailing Federation
http://www.sailing.org

Organisations/Institutions in the Caribbean

Caribbean Sailing Association (CSA)
http://www.caribbean-sailing.com

SET JETTING

Definition

Set jetting or film tourism is defined as tourist travel to a destination because of its appearance in a film (or films).

It is being driven by the globalisation of the entertainment industry, has been attributed to raising the awareness of previously unheard of tourist destinations, and regenerating waning interest in others.

Estimate of Global Market Size

Research into film tourism has indicated that eight out of ten people have their interest stimulated in a destination from its presence in a film. Two out of ten people will actually travel to the location of their favourite film.

From 2000-2005, New Zealand saw growth rates of 50% from UK tourists after the *Lord of the Rings* trilogy. Three months after *Lost in Translation* and *The Last Samurai* were released in cinemas, UK arrivals to Japan increased by 28%. After the Oscar winning film *Sideways,* California wine country reported an increase in trade of 30%, wineries featured on the *Sideways* map reported 42% growth. In general it is estimated that set jetters increase tourism in film location areas by 30% to 60%, depending on the popularity of the film.

Whilst there are considerable statistics that support the positive impact of the film industry on tourism, there are no hard statistics about the number of people who travel specifically to a film location (as opposed to visiting a site of a film shoot as an "add-on" whilst visiting other attractions nearby). However, it is estimated that specific international trips to film destinations exceed 250,000 each year.

Potential for Growth

Set jetting is still in its infancy. However, as the entertainment industry becomes more far reaching and international travel increases, the demand for set-jetting destinations will rise.

In particular, growth will be driven by the tourist boards that are increasingly promoting destinations that have been included in films. There is clear evidence that those countries that have promoted film tourism have benefited considerably.

Brief Profile of Consumers

Film tourists tend to be young, and reflect the predominant age groups of cinemagoers. There is also a strong family bias, with young children visiting (with their parents) scenes they know from feature films (or even television programmes).

Main Source Markets

The main source markets are those in which consumption of films and television is the greatest, notably:

- United States
- Western Europe (in particular the United Kingdom)
- Japan

Main Competing Destinations

Set jetting destinations tend to change depending on where recent popular films have been shot. However, some destinations are perennial favourites due to their spectacular locations, the economic benefits granted by the relevant authorities in order to encourage the film industry. For example, in New York there are on average 40 films being shot at any one time, while the countries of Eastern Europe benefit from low labour costs. The top destinations include:

- United States
- New Zealand
- United Kingdom
- Bahamas
- Hawaii

Key Tour Operators

Lord Of The Rings
New Zealand
http://www.hobbitontours.com
Rings Scenic Tours Ltd, 101 Arawa Street, PO BOX 366, Matamata
Tel: (+64) 7888 9913

Free Wheeling
New Zealand
http://www.freewheelingnz.com
PO Box 22-631, Otahuhu, Auckland, New Zealand
Tel: (+64) 9276 5905

Key Points for Marketing and Distribution

Film tourism can be generated without too much marketing effort. However targeting campaigns often maximise its potential. Most commonly national or local tourist boards develop marketing and promotional campaigns to highlight film locations.

VisitBritain has produced *movie maps* that chart the settings of well-known films that have been shot in the UK (most notably James Bond, Harry Potter and even Bollywood films). The marketing campaign for *The Davinci Code* was the largest film tourism promotion to date.

The US demonstrates the most advanced form of film tourism marketing, with established dedicated film offices in each state. The US Department of Commerce partnered with the Travel Industry Association of America launched a $15million campaign in 2004 entitled "*You've seen the movie now visit the set*" aimed at utilising the set jetting market by targeting key overseas visitors.
Additional Information *Set Jetting* http://gosetjetting.com *Article on Set Jetting: Forbes Traveller* http://www.forbestraveler.com/celebrity/famous-movie-locations-story.html

SOFT ADVENTURE

Definition

Soft adventure is the term used to describe the type of adventure tourism that requires little or no experience and is low risk (as opposed to hard tourism which requires greater levels of skill and incorporates more of significant risk).

Soft adventure tourists may also use mechanised transport (cars, motorbikes, etc) and comfortable accommodation. Soft adventure activities are often based upon their hard adventure equivalents, although they occur at a less physically demanding level. Examples include horse riding, snorkelling, canoeing/kayaking and walking in areas of outstanding natural beauty.

Estimate of Global Market Size

The international adventure travel market is currently estimated at 9 million tourists per year, or just over 1% of all international tourist arrivals.

Potential for Growth

The family soft adventure market is growing considerably, and this is expected to be a trend that will continue for at least the next 10 years. It is largely being driven by consumers who have experienced adventure tourism pre-family, and are now keen to take more adventure trips with their families.

“Baby boomers” (those people born between 1946 and 1964), are generally a more active generation than any of their predecessors. They also have more income and free time as they reach retirement. This trend will also increase the participation rate in soft adventure tourism.

Many tour operators specialising in soft adventure holidays are reporting annual growth rates of between 15%-20%. However, the average growth rate for the segment as a whole is expected to remain at about 10% per annum over the next decade.

Brief Profile of Consumers

Typically, soft adventure tourists are in their 40s, are affluent and well educated. Women are just as predisposed to participate in soft adventure activities as men.

It is expected that the soft tourism market will be led by the 40-60 year olds by 2015.

Main Source Markets

The main source markets for soft adventure are:

- United States
- Germany
- United Kingdom
- France
- Italy
- Scandinavia

Main Competing Destinations

It is almost impossible to provide a list of destinations that can be most closely linked with the adventure tourism sector. Every country in the world has potential for adventure tourism, and it is how the tourist interacts with the environment that identifies whether adventure tourism is taking place. However, some countries are more closely associated with adventure tourism than others, and these tend to be the ones with large areas of wilderness, forest, mountains or desert. Rivers also attract adventure tourism seekers, as do destinations that are virtually untouched by tourism, such as Bhutan or North Korea.

The following destinations are considered to have had considerable appeal to the soft adventure market over the last decade:

- United States
- Canada
- Mexico
- Nepal
- Peru
- New Zealand

Key Tour Operators

Geographical Expeditions
United States
http://www.geoex.com
1008 General Kennedy Avenue, PO Box 29902, San Francisco, CA 94129-0902
Tel: 415 922 0448
Toll Free: 800 777 8183
Fax: 415 346 5535
Email: info@geoex.com

Lindblad Expeditions
United States
http://www.expeditions.com
96 Morton Street, 9th Floor, New York, New York 10014
Tel: 1 800 EXPEDITION (1 800 397 3348)

Wikinger Reisen

German
http://www.wikinger-reisen.de
Kölner Str. 20, 58135 Hagen
Tel: (+49) 23 31 90 48 04
Fax: (+49) 23 31 90 48 91
Email: individuell@wikinger.de

Exodus
United Kingdom
http://www.exodus.co.uk
Grange Mills, Weir Road, London SW12 0NE
Tel: (+44) 845 863 9600

Terres d'Adventure
France
http://www.terdav.com/terdav
30 rue Saint Augustin, 75002 Paris
Email: info@terdav.com

Key Points for Marketing and Distribution

Due to the diversity of the adventure tourism market, most publications tend to be focussed rather than broad (i.e. they focus on one particular activity rather than a range of activities). Consequently, there are few obvious adventure publications. However, national newspapers offer good opportunities.

United Kingdom: The Sun – travel section
http://www.thesun.co.uk/sol/homepage/travel

United Kingdom: Daily Telegraph - travel Section
http://www.telegraph.co.uk/travel

United Kingdom: Wanderlust
http://www.wanderlust.co.uk

United States: New York Times - travel Section
http://travel.nytimes.com

United States: USA Today – travel section
http://www.usatoday.com/travel

United States: Adventure Sports Online Directory
www.adventuresports.com

Germany: Bild
http://www.bild.t-online.de/BILD/lifestyle/reise/home/reise.html

Germany: Faz Frankfurter Allgemeine Zeitung
http://www.faz.net

Social Networks

X3M People – Social adventure network
http://x3mpeople.com

Trade Fairs

DEMA Show
United States
Only international trade fair for diving, action water sports and adventure travel industries.
October
http://www.demashow.com

The Outdoor Adventure and Travel show
Canada
http://www.outdooradventureshow.ca/vancouver

Adventure Sports Fair
Brazil
The largest adventure sports event of Latin America
September
http://www.adventurefair.com.br/english

Adventures In Travel Expo
United States (has 4 shows in New York, Chicago, Long Beach and Washington)
The leading active and adventure travel events in the US
Jan/Feb/Mar
http://www.adventureexpo.com

Additional Information

General Information

Adventure Sports Directory
http://www.adrenalinepages.com

Adventure Travel Trade Association
http://www.adventuretravel.biz

Industry Standards

Adventure Travel Trade Association (ATTA)
ATTA works to promote the adventure travel market
http://www.adventuretravel.biz

SPORTS TOURISM

Definition

Sports tourism refers to international trips specifically taken to watch sporting events.

Common examples include international events such as world cups (soccer, rugby, cricket, etc), the Olympics and Formula 1 Grand Prix, regional events (such as the soccer European Champions League), and individual (non-team) participant sports such as tennis, golf and horse racing.

Estimate of Global Market Size

The most popular global sporting events are the soccer FIFA World Cup and the Olympics, followed by the European Football Championships. However other popular sporting events also attract a large number of international visitors. These include the Rugby Union World Cup and Formula 1 Grand Prix.

- The FIFA Football World Cup held in France in 1998 attracted 900,000 international football fans and generated $12.3 billion.

- It is estimated that the 2000 Olympics in Sydney generated 111,000 additional international arrivals to Australia specifically travelling for sports tourism.

- Euro 2004 (the European Football Championships) attracted 500,000 sports tourists to Portugal, generating $320 million for the Portuguese economy.

- The Monaco Grand Prix (which alongside the Indy 500 and Le Mans is one of the most famous motor racing fixtures of the year) attracts 200,000 visitors over its four-day duration.

- The 2007 Cricket World Cup staged in the Caribbean was thought to have generated an additional 100,000 visitors who travelled specifically for the tournament.

Whilst the number of sports tourists fluctuates on an annual basis depending on the events taking place (it is greatest during FIFA World Cup and Olympics years), on average an estimated 12 million international trips are made for the main purpose of watching a sporting event.

SPORTS TOURISM

Definition

Sports tourism refers to international trips specifically taken to watch sporting events.

Common examples include international events such as world cups (soccer, rugby, cricket, etc), the Olympics and Formula 1 Grand Prix, regional events (such as the soccer European Champions League), and individual (non-team) participant sports such as tennis, golf and horse racing.

Estimate of Global Market Size

The most popular global sporting events are the soccer FIFA World Cup and the Olympics, followed by the European Football Championships. However other popular sporting events also attract a large number of international visitors. These include the Rugby Union World Cup and Formula 1 Grand Prix.

- The FIFA Football World Cup held in France in 1998 attracted 900,000 international football fans and generated $12.3 billion.
- It is estimated that the 2000 Olympics in Sydney generated 111,000 additional international arrivals to Australia specifically travelling for sports tourism.
- Euro 2004 (the European Football Championships) attracted 500,000 sports tourists to Portugal, generating $320 million for the Portuguese economy.
- The Monaco Grand Prix (which alongside the Indy 500 and Le Mans is one of the most famous motor racing fixtures of the year) attracts 200,000 visitors over its four-day duration.
- The 2007 Cricket World Cup staged in the Caribbean was thought to have generated an additional 100,000 visitors who travelled specifically for the tournament.

Whilst the number of sports tourists fluctuates on an annual basis depending on the events taking place (it is greatest during FIFA World Cup and Olympics years), on average an estimated 12 million international trips are made for the main purpose of watching a sporting event.

Potential for Growth

Increased media exposure of sporting events over the last decade has raised the profile of many sports, and although TV coverage is better than at any time in the past, an increasing number of sports fans want to experience live events.

The media also has the ability to make national and international icons of sporting stars, thereby generating greater demand, as fans want to see their sporting idols "in the flesh".

Sporting events themselves are being made increasingly appealing to attend, with greater levels of comfort, and other events – such as festivals - being created around them (such as horse racing weekends, boating regattas, etc).

Low-cost regional airlines (and more affordable long haul flights), are also driving demand for sporting events as flights become more convenient, more regular, and of course more affordable.

Overall, the sports tourism niche market is expected to grow annually at around 6% for the next five years.

Brief Profile of Consumers

Sports tourists are more easily profiled according to the sports they follow. However, in general terms the bulk of the market tends to be young - between 18 and 34 years, and in the C1 and C2 (middle) socio-economic groups. This would also be the typical profile of a sports tourist following soccer matches.

Rugby and cricket followers tend to be slightly older and with greater disposable income. Horse racing has a broad range of followers with no clear demographic structure. Followers of athletics tend to be young, low spenders, whilst those following the Formula 1 Grand Prix circuit tend to be skewed towards males in their 40s with above average disposable income.

Main Source Markets

The main source markets for sports tourism are those that are most interested in the main international sports. These include:

- United Kingdom
- United States
- Germany
- Italy
- Spain
- Scandinavia
- Australia
- South Africa

Main Competing Destinations

The main competing destinations tend to vary depending on where the large events, such as the FIFA World Cup and Olympics are held. However, those holding key annual tournaments of global sporting interest include:

- United States
- United Kingdom
- France
- Australia
- Spain

For specific sports, such as golf, motor racing, or yachting, this list of competing destinations would vary considerably.

Key Tour Operators

There are a large number of sports tour operators. However most of them operate at a very local level, principally serving a specific soccer club for example. However, there are a few that operate as international sports tour operators offering a wide range of sporting events in different countries. It is not uncommon, in particular for the much sought-after events, to find tour operators offering flights and accommodation but without tickets.

Sports Tours International
United Kingdom
http://www.sportstoursinternational.co.uk
91 Walkden Road, Walkden, Manchester, M28 7BQ
Tel: 0161 703 8161
Fax: 0161 703 8547

Premiere Sports Travel
United States
http://www.sportstravel.com
201 Shannon Oaks Circle, Suite 205, Cary, North Carolina 27511
Tel: 800 924 9993, 919 481 9511
Fax: 919 4811337

Key Points for Marketing and Distribution

Magazine specialising in the sports related travel and events industry
http://www.sportstravelmagazine.com

National newspapers, both broadsheet and tabloid depending on the type of sports tour being marketed, are likely to be the most effective way for tour operators to distribute their products, as well as directly through sporting associations and clubs.

United States: USA Today (travel section)
http://www.usatoday.com/travel

United States: New York Times (travel section) http://travel.nytimes.com *United Kingdom: The Times (travel section)* http://travel.timesonline.co.uk/tol/life_and_style/travel *Germany: Faz Frankfurter Allgemeine Zeitung* http://www.faz.net
Additional Information *Information, media and business-to-business marketing services* http://www.sportbusiness.com

TREKKING

Definition

Trekking refers to travel by foot through remote destinations that are, in most cases, inaccessible and unknown to the visitor. This type of holiday is mainly taken in mountainous regions, although this is not a requirement.

Estimate of Global Market Size

Due to varying definitions of trekking (and the lack of a clear definition dividing walkers and trekkers), there are no readily available statistics regarding market size.

However, it is possible to estimate the global market size of the trekking industry by interpreting various arrival figures for the main trekking destinations. Consequently it is estimated that holidays for which the main purpose is trekking number around 5 million each year.

However, it is a much bigger segment than this, as many tourists take a one or two day trek as an add-on to a holiday that would be mainly classified as being for another purpose of visit. Therefore, in terms of general participation is can be considered as a potentially large market segment.

Potential for Growth

Trekking is a rapidly expanding segment, with increasingly active travellers looking for challenges that do not necessarily require specialist equipment or a guide, although still offer a considerable physical challenge and a sense of achievement at the end.

Growth rates of between 10%-15% are being experienced in many trekking destinations, and those that actively market themselves can expect to achieve rates that exceed this for the foreseeable future. However, environmental issues, such as damage to paths and surrounding areas, are likely to be the main constraining factors to its growth.

Brief Profile of Consumers

Trekkers are generally affluent and well educated. They have high disposable income and are mainly from the 30 to 60 year old age group.

The gap year market also attracts significant numbers of trekkers, however it contributes less economic benefit than the 30-60 age group. The gap year trekker participates in the activity as one of a whole range of activities undertaken in the destination, making it difficult to quantify the size of the market segment.

Main Source Markets

The main source markets for trekking are those with considerable interest in outdoor activities, in particular:

- United States
- Canada
- Germany
- Italy
- United Kingdom
- Scandinavia

Emerging Markets

- Japan

Main Competing Destinations

Trekking is an activity that is being developed in most destinations, in particular through areas of outstanding scenery. However, the premier trekking destinations are generally considered to be:

- Everest Base Camp, Nepal
- Annapurna, Nepal
- Kilimanjaro, Tanzania
- Inca Trial, Peru
- The Alps, Europe (primarily France)

Key Tour Operators

Wilderness Travel
United States
http://www.wildernesstravel.com
1102 Ninth Street, Berkeley, CA 94710
Tel: 1 800 368 2794, 510 558 2488
Fax: 510 558 2489.

Trek America
United Kingdom/United States
http://www.trekamerica.co.uk
Grange Mills, Weir Road, London, SW12 0NE
Tel UK: (+44) 845 330 6095
Tel US: 1 800 TREKUSA

Trekking.net
http://www.trekking.net
Germany
Trekking.net, Caputh, Spitzbubenweg 34, 14548 Schwielowsee
Tel: (+49) 30 20 61 64 88 8
Fax: (+49) 30 20 61 64 88 9

Key Points for Marketing and Distribution

Many of the adventure specialists choose to advertise in industry specific publications, in particular:

United States: Backpacker Magazine
http://www.backpacker.com

United States: Leading active lifestyle and adventure travel magazine
http://outside.away.com

United Kingdom: Wanderlust
http://www.wanderlust.co.uk

Trade Fairs

DEMA Show
United States
Only international trade fair for diving, action water sports and adventure travel industries
October
http://www.demashow.com

The Outdoor Adventure and Travel show
Canada
http://www.outdooradventureshow.ca/vancouver

Adventure Sports Fair
Brazil
The largest adventure sports event of Latin America
September
http://www.adventurefair.com.br/english

Adventures In Travel Expo
United States (has 4 shows in New York, Chicago, Long Beach and Washington)
The leading active and adventure travel events in the US
Jan/Feb/Mar
http://www.adventureexpo.com

Additional Information

United States: American Hiking Society
http://www.americanhiking.org

Industry Standards

No universal standard, although ecotourism is key in establishing trekking routes that give back to the local community. In Nepal they have a Porter's Progress Programme that aims to improve the rights of porters

WEDDINGS AND HONEYMOONS

Definition

The weddings and honeymoons tourism market refers to international trips that are taken by tourists to either get married or celebrate their wedding.

Estimate of Global Market Size

Whilst global data on the industry does not exist, the US honeymoon market is reported as being worth an estimated $13.7 billion in 2007.

UK citizens took 45,000 weddings taken abroad in 2005, and whilst a survey of UK couples showed that the majority prefer a domestic wedding, nearly all stated that they wanted to honeymoon abroad. On average, UK consumers spend $12,000 on a wedding abroad, and $6,000 on a honeymoon.

Overall, the global market size for weddings and honeymoons is estimated at being between 3 and 6 million trips per annum.

Potential for Growth

Growth of this niche segment in the next five years is expected to be good. However, there are certain elements of the wedding and honeymoon market that will experience particular growth.

Second marriages, and those marrying later in life (the 35-45 age group), will generate demand for weddings and honeymoon tourism. The number of remarriages is increasing, and is set to continue. Hence the number of second honeymoons will also increase.

The gay/lesbian market has significant potential. Generally they have above average annual income and have a disposition to travel that makes them a particularly strong demographic group for honeymoons.

Due to strenuous work demands, particularly in the US where holiday time tends to be used at certain times of the year, there is an ever-increasing trend of newlyweds taking a honeymoon that suits their employer, thus foregoing the traditional holiday immediately after the wedding. Consequently there is more inclination to travel further and for longer when the honeymoon is taken.

Overall, it is expected that this market will increase by 75% over the period to 2012 (around 12% per annum), compared to 10% per annum growth over the period 2002-2007.

Brief Profile of Consumers

The average age of wedding and honeymoon tourists is increasing, largely due to the general trend of later marriages and more second marriages.

Main Source Markets

The main source markets are those most predisposed to marrying abroad, and have sufficient wealth to holiday abroad after a domestic wedding. Typically these are:

- United States
- United Kingdom
- Germany
- Italy
- France
- Scandinavia

Main Competing Destinations

Destinations that have marketed and promoted themselves strongly as wedding and honeymoon destinations include:

- Hawaii
- Caribbean (several countries)
- Mexico
- Sri Lanka
- Maldives
- Mauritius
- Cyprus
- Italy

Key Tour Operators

Most large tour operators understand the value of having a honeymoon and wedding section within their tourism business. All large tour operators offer a "romantic holiday" (or similarly named section) that is likely to attract honeymooners.

Liberty Travel
United States (3rd largest travel agency in the US)
http://www.libertytravelhoneymoons.com
Tel: 1 877 824 3333

Best at Honeymoons
United Kingdom
http://www.bestathoneymoons.co.uk
Worldwide House, 10-12 Berners Mews, London W1T 3AP
Tel: (+44) 870 709 3000
Email: enquiries@bestattravel.co.uk

Travelocity
International
http://www.travelocity.com
Has a honeymoon section on the website.

Key Points for Marketing and Distribution

United States: Conde Nast - Brides, Modern Bride, Elegant Bride. Modern bride publishes an annual list of the 50 best holiday destinations compiled through a travel agent survey. Conde Nast also publishes an annual publication entitled Bride's Honeymoons and Weddings Away, which reaches an estimated 300,000 readers and concentrates solely on weddings and honeymoons.
http://www.brides.com

United States: The Knot – Online planning portal and bi-annual magazine
http://www.theknot.com

United States: Bridal Guide - contains a separate guide devoted to honeymoons and travel
http://www.bridalguide.com

United Kingdom: You and Your Wedding
http://www.youandyourwedding.co.uk

Social Networks

Weddings.info
http://my.weddings.info

Bridal Fever
http://www.bridalfever.com

Trade Fairs

IWED
Qatar
Middle East's leading wedding and bridal show
May
http://www.qatar-expo.com/exhibitions/iwed/index.php

A Comprehensive list of US Bridal / Marriage fairs can be found at:
http://www.bridesclub.com/bridal-shows

United Kingdom Wedding Shows
A set of shows all organised by UK Wedding Shows.
Jan-Sep (6 Shows)
http://www.theukweddingshows.co.uk

Additional Information

General Information

Wedding Great – Online Wedding Directory and Bridal information http://www.weddinggreat.com/honeymoons.html

Best Wedding Sites News Blog - Wedding blog site
http://bestweddingnews.blogspot.com

Organisations/Institutions in the Caribbean

Caribbean Wedding Association (CWA)
http://www.caribbeanweddingassociation.com

WILDLIFE TOURISM

Definition

Wildlife tourism can be broadly defined as trips to destinations with the main purpose of visit being to observe the local fauna. This therefore implies that wildlife tourism includes other niche markets such as bird watching and the exploration of marine life (such as whale watching).

As bird watching has grown to be a significant niche market in its own right, the definition of wildlife tourism has been restricted to trips to destinations with the main purpose of visit being to observe local fauna, excluding birdlife.

Estimate of Global Market Size

The global market size of wildlife tourism is estimated as being 12 million trips each year. Africa accounts for around one half of all these trips, with South Africa, Kenya, Tanzania and Botswana being the top destinations.

Some destinations rely heavily on wildlife tourism, but could survive without it (wildlife tourism contributes roughly $500 million to the Kenyan economy, or 14% of GDP). On the other hand, places such as the Galapagos islands rely almost exclusively on wildlife tourists (wildlife tourism contributes £60 million to the local economy).

Other destinations are enjoying increased influxes of visitors due to strong interest in certain mammals. For example there has been considerable growth in whale watching at Kaikoura in New Zealand and Puerto Piraminde in Argentinean Patagonia.

Potential for Growth

Interest in wildlife is growing considerably, in particular as its exposure in the international media increases. As with bird watching, the National Geographic channel and other renowned television channels have generated increased interest amongst consumers.

There is still considerable potential for growth within this market, and it is expected to expand by between 8% and 10% per annum over the next decade. The age group that will most influence this growth will be the increasingly wealthy, healthy, and active 55+ age group.

WILDLIFE TOURISM

Definition

Wildlife tourism can be broadly defined as trips to destinations with the main purpose of visit being to observe the local fauna. This therefore implies that wildlife tourism includes other niche markets such as bird watching and the exploration of marine life (such as whale watching).

As bird watching has grown to be a significant niche market in its own right, the definition of wildlife tourism has been restricted to trips to destinations with the main purpose of visit being to observe local fauna, excluding birdlife.

Estimate of Global Market Size

The global market size of wildlife tourism is estimated as being 12 million trips each year. Africa accounts for around one half of all these trips, with South Africa, Kenya, Tanzania and Botswana being the top destinations.

Some destinations rely heavily on wildlife tourism, but could survive without it (wildlife tourism contributes roughly $500 million to the Kenyan economy, or 14% of GDP). On the other hand, places such as the Galapagos islands rely almost exclusively on wildlife tourists (wildlife tourism contributes £60 million to the local economy).

Other destinations are enjoying increased influxes of visitors due to strong interest in certain mammals. For example there has been considerable growth in whale watching at Kaikoura in New Zealand and Puerto Piraminde in Argentinean Patagonia.

Potential for Growth

Interest in wildlife is growing considerably, in particular as its exposure in the international media increases. As with bird watching, the National Geographic channel and other renowned television channels have generated increased interest amongst consumers.

There is still considerable potential for growth within this market, and it is expected to expand by between 8% and 10% per annum over the next decade. The age group that will most influence this growth will be the increasingly wealthy, healthy, and active 55+ age group.

Brief Profile of Consumers

Wildlife tourists are some of the most diverse of any niche market. They range from the experienced specialists who like to seek "virgin" places that remain relatively undiscovered, to the inexperienced tourist travelling on a package to one of Africa's well-known game reserves.

Across this spectrum, consumers vary considerably in age, gender, and socio-economic grouping. Package tourists vary from budget travellers through to those staying in small exclusive lodges or tented camps. However, specialists tend to be independent travellers, who are likely to stay in basic accommodation, and are generally very flexible with their travel arrangements.

Whilst the luxury-end of the package market tends to be the most demanding in terms of infrastructure and services, they also generate the greatest income. These consumers tend to be in the third-age group (50-65 years), often including the early retired.

Main Source Markets

The main source markets for wildlife tourism are:

- United States
- Europe (UK, Germany and Netherlands being the top 3 markets)
- Canada
- Australia

Main Competing Destinations

Africa is the market leader and accounts for around one half of all wildlife tourism trips worldwide. The traditional wildlife destinations of South Africa, Kenya, Botswana and Tanzania receive the greatest volume of visitors.

However, there are a number of emerging wildlife destinations which demonstrate the desire of consumers to seek out new destinations, in particular these are:

- Antarctica (whales, penguins and seals)
- Bolivia (New World's largest concentration of large animals such as the Giant River Otter and Jaguar)
- Finland (particularly Hiidenportti National Park for bears, wolves and lynx)

Key Tour Operators

Sita World Tours
United States
http://www.sitatours.com
SITA Building,16250 Ventura Blvd., Suite 300, Encino, CA 91436
Tel: 818 990 9530 / Toll Free 800 421 5643
Email: sitatours@sitatours.com

Abercrombie & Kent
United States
http://www.abercrombiekent.com
1520 Kensington Road, Suite 212, Oak Brook, Illinois 60523-2156
Tel: 630 954 2944, Toll Free: 800 554 7016
Fax: 630 954 3324

Wildland Adventures
United States
http://www.wildland.com
3516 NE 155th St, Seattle, WA 98155-7412
Tel: 206 365 0686, Toll Free: 800 345 4453
Fax: 206 363 6615.

Wildlife Worldwide
United Kingdom
http://www.wildlifeworldwide.com
Sutton Manor Farm, Bishop's Sutton, Alresford, Hampshire, SO24 0AA
Tel: (+44) 845 130 6982

Naturetrek
United Kingdom
http://www.naturetrek.co.uk
Tel: (+44) 1962 733051

Marco Polo
Germany
http://www.marco-polo-reisen.com
Postfach 50 06 09, D - 80976 München
Tel: (+49) 89 15 00 19 0
Fax: (+49) 089 15 00 19 18

Key Points for Marketing and Distribution

As with most niche markets, the Internet has become a significant channel for marketing and distribution. However, due to a close match with the readership of broadsheet newspapers and travel supplements, these are widely used for marketing wildlife trips.

The Internet has obviously accelerated the growth of location-based operators. However as the mainstream visitor represents the majority and highest spending of wildlife tourists the Sunday supplements are likely to be the most effective way of attracting them.

United States: USA Today – Travel Section
http://www.usatoday.com

United States: New York Times – Travel Section
http://travel.nytimes.com

United Kingdom: *The Times – Travel Section*
http://travel.timesonline.co.uk/tol/life_and_style/travel

Germany: Faz Frankfurter Allgemeine Zeitung
http://www.faz.net

BBC Wildlife Magazine: Worlds best selling natural history/environmental magazine
http://www.bbcwildlifemagazine.com

Additional Information

National Wildlife Federation of the United States
http://www.nwf.org

Earthwatch Institute
http://www.earthwatch.org

World Wildlife Fund – tourism section
http://www.wwf.org.uk/researcher/issues/Tourism/index.asp