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Tourism and Sport: Destination Latin America

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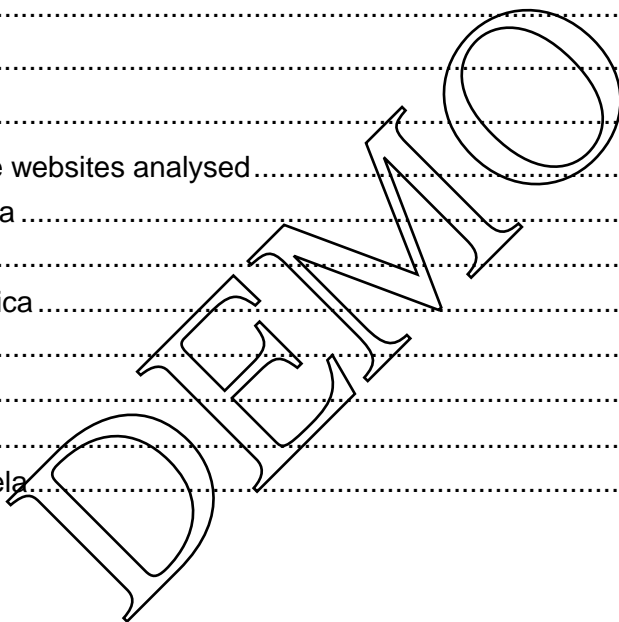
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## Introduction

“Tourism and sport are key cultural components of our time and play a significant role in the behaviour of present-day society. (...) Tourism and sport are two forces that are helping to accelerate the pace at which countries are coming closer together and the different social groups are getting to know each other and thus also drawing closer.”<sup>1</sup>

“Holidays are a time for escape, for discovering the world, other people, countries, and cultures, and a time for renewal, that is, a special time for self-discovery, for getting back in touch with oneself and with others, for trying new things, for getting back in physical condition and for playing sports.”

Why sport?

Sport is a fundamental means of recharging the batteries, while holidays today are a key time for personal development and for breaking the daily routine.

Obviously, participating in sports is much easier while on holiday.

Sport tourism is undergoing a significant boom in pace with social trends towards strengthening “taking care of yourself” and the “back to basics” vogue.

At the same time, sport tourism has also sprung up as an aid to tourism development, a solution for local development, and an economic opportunity.

Developing sport tourism and its economic potential helps producers restructure supply and identify demand”<sup>2</sup>

Following the conclusions of the First World Conference on Sport and Tourism, there is a realization that sport is becoming an essential component in the development of new destinations and in the recovery of others.

Cognizant that statistics and information on sport tourism are heavily lacking because it has only recently emerged as a separate discipline, the *World Tourism Organization* has conducted a study designed to assess the role of sport tourism and sport generally in the supply of Latin American destinations by the principal European tour operators and on the Internet.

<sup>1</sup> F. Frangialli; J.A. Samaranch, First World Conference on Sport and Tourism (Barcelona: WTO, 2001), 5.

<sup>2</sup> H. Giscard d'Estaing, First World Conference on Sport and Tourism (Barcelona: WTO, 2001), 95.

## Methodology

The present study analyses the supply of the European tour operators with the highest turnover in order to establish how sport features in products involving Latin America. To supplement this information, sports supply available on websites for the main Latin American destinations has also been analysed. This has made possible a two-pronged approach to ascertaining sport's role.

1. Compilation extracted from the brochures of tour operators for the following European countries:

- Germany
- Benelux
- Spain
- France
- Italy
- United Kingdom

At least 10 brochures for the summer 2002 and winter 2002-2003 seasons from the tour operators having the highest turnovers were used for each generating country, making a total of 72 brochures from 34 different tour operators.

2. Compilation of the information available on specialized sport tourism websites:

A total of 30 websites for destinations in Latin America supplying specific and significant sport tourism products were considered and analysed. The websites were for the following countries:

- Argentina
- Chile
- Spain
- Mexico
- Peru
- Venezuela
- Costa Rica

## Terminology employed

*N.B.: The brochures considered use different terms to designate the same concepts. The following uniform terminology has therefore been employed:*

- **SPORT TOURISM**
  - Sport tourism has been defined as tourism undertaken by persons seeking out venues where they can participate in their favourite sport. Tourism sports include winter sports, water sports, mountaineering, hunting, fishing, and all those requiring travel. Sport tourism also includes travel by tourists to attend major spectator sporting events.
- **VISITS**
  - Visits have been defined as departures, excursions, places of interest, and activities offered by a destination.
- **SPORT VISITS**
  - Sport visits have been defined as departures, excursions, places of interest, and activities offered by a destination on which sporting activity is undertaken.
- **TOURS**
  - Tours have been defined as the total number of routes and extensions offered. In all cases these involve overnight stays at more than two different venues.
- **SPORT TOURS**
  - Sport tours have been defined as the total number of tours on which sporting activity is undertaken on at least one day of the tour.
- **PHOTOGRAPHS**
  - Only photographs in the brochures for Latin American and Caribbean venues have been analysed. Photographs for other destinations have not been quantified.

## Brochures used

Brochures for the following generating tour operators have been used:

<b>SPAIN:</b>	- Iberojet - Mundicolor - Travelplan - Turavia - Viajes Soltour	<b>BENELUX:</b>	- C&N Nur Touristic Belgium - Ticket BBL Travel Touring Club - Travel Unie - TUI Belgium
<b>ITALY:</b>	- Alpitur-Francorosso - Costa Crociere - Eurotravel - Grupo Hit - Kuoni	<b>FRANCE:</b>	- Club Méditerranée - Fram - Jet Tours - Kuoni - Look Voyages - Marsans - Nouvelle Frontières
<b>GERMANY:</b>	- Neckermann C&N - Dertour - Fernreisen FTI - LTU Touristik - TUI Group	<b>UNITED KINGDOM:</b>	- Airtours - First Choice - Globus (Cosmos - Avros) - Journey Latinoamerica - Thomas Cook Group - Thomson - Virgin

## Websites considered

- [www.aguas-bravas.co.cr](http://www.aguas-bravas.co.cr)
- [www.aventurarse.com](http://www.aventurarse.com)
- [www.bikeway.com.ar](http://www.bikeway.com.ar)
- [www.bikeadventure.riviera-maya.com.mx](http://www.bikeadventure.riviera-maya.com.mx)
- [www.cabalgatas.unlugar.com](http://www.cabalgatas.unlugar.com)
- [www.cabot.cl](http://www.cabot.cl)
- [www.caminoabierto.com](http://www.caminoabierto.com)
- [www.chapelco.com.ar](http://www.chapelco.com.ar)
- [www.comarcas.com](http://www.comarcas.com)
- [www.divingcenter.com.ar](http://www.divingcenter.com.ar)
- [www.eccosports.com.mx](http://www.eccosports.com.mx)
- [www.fspatagoniavirtual.freeservers.com](http://www.fspatagoniavirtual.freeservers.com)
- [www.galapaventura.cl](http://www.galapaventura.cl)
- [www.geocities.com/hemiriver/](http://www.geocities.com/hemiriver/)
- [www.geocities.com/Yosemite/Gorge/1000](http://www.geocities.com/Yosemite/Gorge/1000)
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- [www.lasleñas.com](http://www.lasleñas.com)
- [www.maitenes.8k.com](http://www.maitenes.8k.com)
- [www.nortetrekking.com](http://www.nortetrekking.com)
- [www.piraguas.com](http://www.piraguas.com)
- [www.rioymontana.com](http://www.rioymontana.com)
- [www.selvazul.com](http://www.selvazul.com)
- [www.rioaventura.com.mx](http://www.rioaventura.com.mx)
- [www.trekkingviajes.com](http://www.trekkingviajes.com)
- [www.tuaregviatges.com](http://www.tuaregviatges.com)
- [www.yakexpediciones.cl](http://www.yakexpediciones.cl)



## 1. Current status and conclusions

The conclusions presented in this section refer only to the study carried out on Latin America, though the authors believe it is possible to extrapolate it to the supply at other destinations.

There is a need to focus on the content and meaning of the term “sport tourism”. This concept does not appear as such in supply circles. Thus, participation in a given sport is not a specific selling point, at least not in conventional channels.

In contrast, it is beginning to become more important as a complement to tourism supply.

In most cases the opportunity to take part in sports while on vacation is taken for granted, something that does not have to be addressed explicitly or individualized. This means that there are no separate prices that might be indicative of a differential value.

This aspect affords significant opportunities to those agents who decide to differentiate by offering products based on sporting activities as a selling point.

Conventional channels are highly directed at the ordinary tourist, and in consequence supply is inherently generic to cater to all tastes, both for customers with sporting interests and for customers with other hobbies.

Sporting events are very hard to find in tourism brochures. Specific offers aimed primarily at this type of supply can be expected to exist, but they are announced to the points of sale and to customers using other means, since the brochures are published only twice a year and cover only the basic packages.

On the other hand, the Internet caters more to special interests, having an understanding of what potential customers might want and being prepared to offer it clearly and specifically

The analysis of Latin American tourism supply in Europe shows that from a structured supply perspective numerous gaps exist in the sport tourism supply and demand matrix. Each box in the matrix represents a business opportunity, hence it is to be hoped that both destinations and middlemen will take an interest in coming up with specific supply in the coming years.

Tourism component →

	Top-level athletes	Second-tier athletes	Youth groups	Amateurs	Spectators	Sport tourists	Incidental sport tourists
Major events							
Minor events							
Structured stays							
Spectator tours							
Incidental stays							
Sporadic activities							
Resorts							
Attractions							

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Source: A. Díaz, First World Conference on Sport and Tourism, WTO

According to the analysis of product presentation, there is a dichotomy between nature / mountain / adventure tourism, in which sport is a component of the tourism activity, and sun & sand tourism, in which sport is complementary to the tourism activity.

Since sun & sand destinations supply is far more prevalent than supply for inland or exotic destinations, sport could become an important selling point for these two last-mentioned types of destination. For the present, use of the adjective “sport” as a selling point seems to be limited to just a few elite sectors who are able to pay or who have sporting skills. From this standpoint, sport still has to come into its own as a selling point and doubtless represents an opportunity for emerging destinations or destinations which have not yet become established.

The present study has analysed two separate focuses of tourism middlemen, namely, that of large, generalist tour operators and that of specialized tourism supply, with Europe as the source of outbound tourism and Latin America as the destination for inbound tourism. In the future it will be interesting to note the role of sport – and the forms it will take – in the plans of the large tour operators as well as how those who make sport one of their main selling points fare.

It will also be interesting to see how sport tourism supply in Latin America compares with supply at other destinations, particularly in the United States, Europe, Asia, and Australia.

In addition, while this study has analysed the status of sport as a tourism product from the standpoint of those supplying such products to the marketplace, it will also be important to ascertain the role of sport as a selling point for tourism destinations.

There is a need to stand out, to add value to the tourism experience, and to reflect that value not only in the location but also in the activities that can be carried out there. This means that both the destinations and inbound tourism agencies will have to become the main motors for the promotion and marketing of new supply. To some extent, the information compiled on the websites is indicative of certain steps in that direction.

There is a long way to go before the potentialities of sport tourism supply can be structured on the basis of existing facilities, their level of development and professional infrastructure, and their self-management capability. What today stand as the epitome of local public-oriented installations and management will have to change over into tourist-oriented endeavours.

From the perspective of sun & sand, tourism complexes are the primary infrastructures for generic, unspecialized sports supply. They in turn give rise to enterprises capable of organizing specific activities, chiefly relating to aquatic and nautical sports.

At inland venues, nature itself is the primary infrastructure. Risk, “the adrenaline rush”, is also perceived as being higher than in sun & sand activities, hence it is a given that either the activities carried out are low-risk activities (hiking) or suitable outfitting and support staff who know what they are doing must be available.

It would be interesting to determine in detail the potential of sport tourism as a selling point for tourists in the main European countries.

Finally, the authors believe that this study has succeeded in characterizing supply.

In the future it will be necessary to have a clear idea of which factors will foster and condition the development of sport tourism both from the standpoint of tourism and from the standpoint of sport and from the perspective of the destination and from the perspective of the tourism middleman.

It is to be expected that certain destinations and certain operators will start to differentiate themselves based on their ability to develop sports supply. How long it will take for this to happen, and where it will happen, will depend on certain starting conditions that will have to be identified.

The distinction between the emergence of new operators and specialist sport tourism brands or the appearance of specialized brochures by generalist tour operators is another aspect that will have to be examined in the future.

The main factor associated with the advent and upsurge of sport tourism may well be its ability to generate demand and to add value as a selling point, which will have to translate into higher prices and higher profit margins.

The possibility of becoming a mass consumption product set off from existing products that to some extent already include sport as an intrinsic product component, at least for a certain segment of the public, will also depend on the existence of suitable sports facilities and on the ability of such activities to generate income both for middlemen and destinations.

Therefore, it is necessary to examine trends in the economic component that sport tourism on the one hand demands and on the other generates for tourism destinations.

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## 2. Analysis of the brochures

### 2.1. Characteristics of sports supply

#### a. Treatment accorded to information on sport

On the whole, the European generating tour operators whose brochures have been analysed do not have specialized brochures for sports supply. Further, only a few have a separate section dealing exclusively with sport.

Sports usually appear complementary to the visits and tours, which are chiefly cultural or for nature watching.

However, it should be borne in mind that:

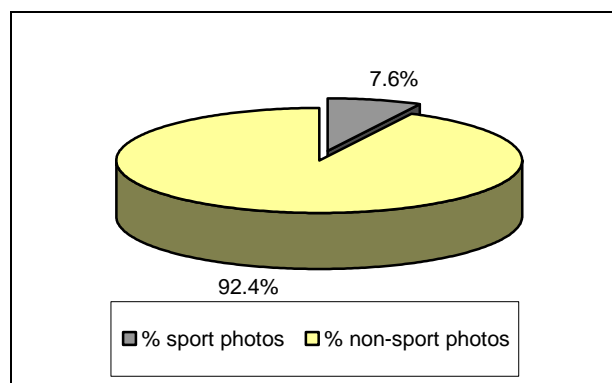
- Sport is the basis for recreation at tourism complexes, especially at sun & sand destinations, where activities are focused on aquatic and nautical sports. Virtually all the hotels considered have a broad-ranging sports supply, some using “all inclusive” packages.
- Sports supply is practically nil on cruises, although all cruise ships have fitness centres and pools.
- Only occasionally is it specified whether sporting equipment is included in the activity. This is evidence of the low importance afforded to sports in the brochures analysed.

#### b. Treatment accorded to images of sport

No special importance is attached to presenting images of sports, partly because the brochures do not specialize in sport.

However, 7.6% of the photographs analysed contain images of sports, especially in the sections dealing with tourism complexes as a means of calling attention to their recreational supply.

Photographs in the brochures

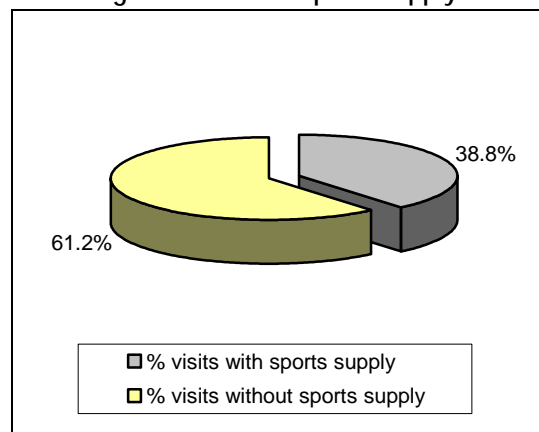


Source: tour operator brochures

**c. Importance of sports supply on visits**

38.8% of the visits in all the brochures analysed included some sort of sporting activity. This may seem like a rather high figure, but it needs to be kept in mind that not all the visits were sport visits exclusively. In many cases sport is merely complementary to the recreational supply and may be combined with other types of activities (culture, shopping, nature watching, and so on).

Percentage of visits with sports supply



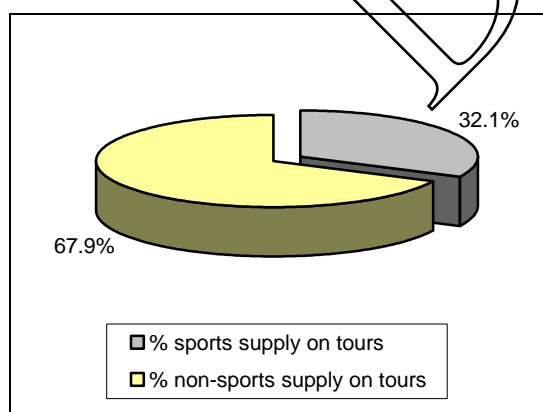
Source: tour operator brochures

**d. Importance of sports supply on tours**

The percentage of sports supply on tours, 32.1%, was somewhat lower than on visits. This was because many of the tours for the destinations analysed had an extensive cultural supply (Mayan and Inca sites, city tours, etc.) and nature supply (natural parks and reserves, etc.).

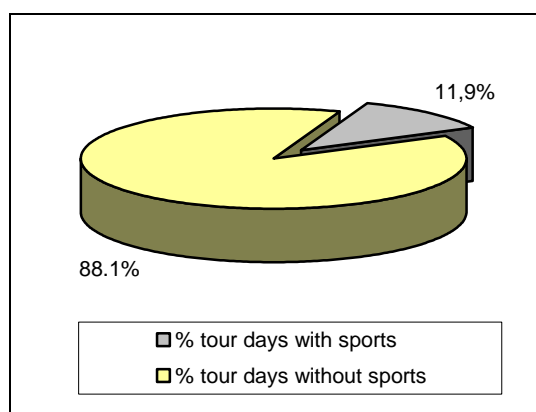
What is more, virtually none of the tours were 100% sport tours. On tours deemed to be sport tours, sports were played on only 11.9% of the days.

Percentage of tours with sports supply



Source: tour operator brochures

Percentage of tour days with sports



Source: tour operator brochures

### **e. Seasonality**

Sports supply did not display marked differences between the winter and summer seasons, in that most of the destinations were sun & sand destinations with a tropical climate all year round.

United Kingdom tour operators offered the most differences between tourism seasons (supplying Mediterranean destinations in summer and Caribbean destinations in winter).

Among the inbound tourism countries, some differences in sports supply were observed for Costa Rica, with more sports supply during the winter season. This may be because the dry season runs from December to March and is more conducive to active and adventure tourism in contact with nature, without the adverse effects of inclement weather conditions (rainy season).

### **f. Type of transport**

Since the analysis has focused on long-haul vacations from Europe to the Caribbean or South America, all trips were by regularly scheduled or charter airline. All the packages offered tourist class fares.

Transportation at the destinations was by land, except in certain isolated instances in which domestic air travel was used.

The brochures analysed did not specify the type of transport used to travel to the sport venue for the sporting activities. However, transport to this type of activity from the tourism complex generally takes the form of bus, van, or car, and different kinds of boats in the case of aquatic and nautical sports.

### **g. Type of accommodation**

Most of the hotels offered belonged to large hotel chains and were in the four or five-star categories.

Nearly all the brochures analysed contained a large supply of all-inclusive tourism complexes at which sport was the cornerstone of the recreational activities available.

There was usually a very full selection of sporting facilities with a wide range of sporting activities in the surrounding area, with a broad supply including snorkelling, sailing, kayaking, windsurfing, volleyball, tennis, fitness, golf, etc.

Sport featured less prominently in the case of the hotels en route during the tours.

The cruises had very limited sports supply. Most only had a pool and a gym.

## ***h. Price***

### Visits

Many sporting activities were not included in the overall package tour price.

The price of sport departures varied according to the type of activity, the time needed to participate in the activity, and the destination. The average price for day-long sporting activities was around US \$75. In virtually no case did the cost of sporting activity on visits exceed US \$100.

In some instances two or three-day fixed-price packages for playing or taking a beginning or more advanced course in a sport of some kind, such as golf or scuba diving, were offered.

No substantial differences were observed in the prices for the same sporting activity among the European tour operators analysed.

### Tours

The price of sporting activities on the tours was usually included in the total tour price, though in certain exceptional cases the activities were offered as an option at additional cost.

### "All inclusive" hotel stays

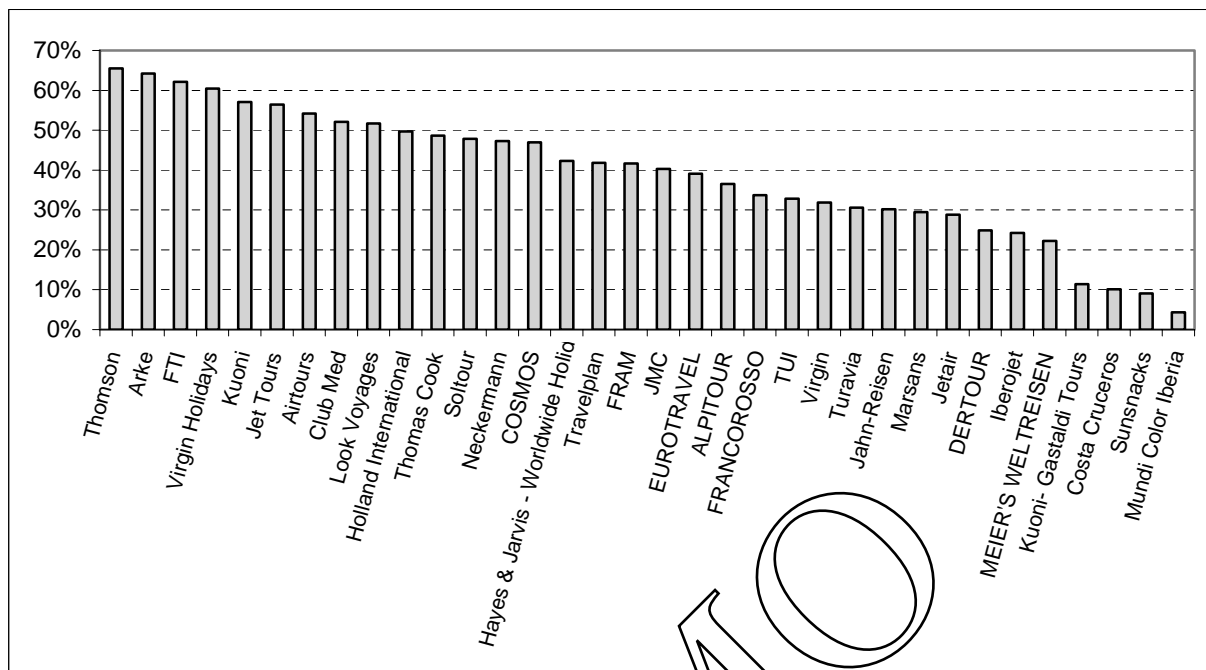
The all-inclusive tourism complexes included non-motor water sports (snorkelling, kayaking, sailing, etc.) in their supply

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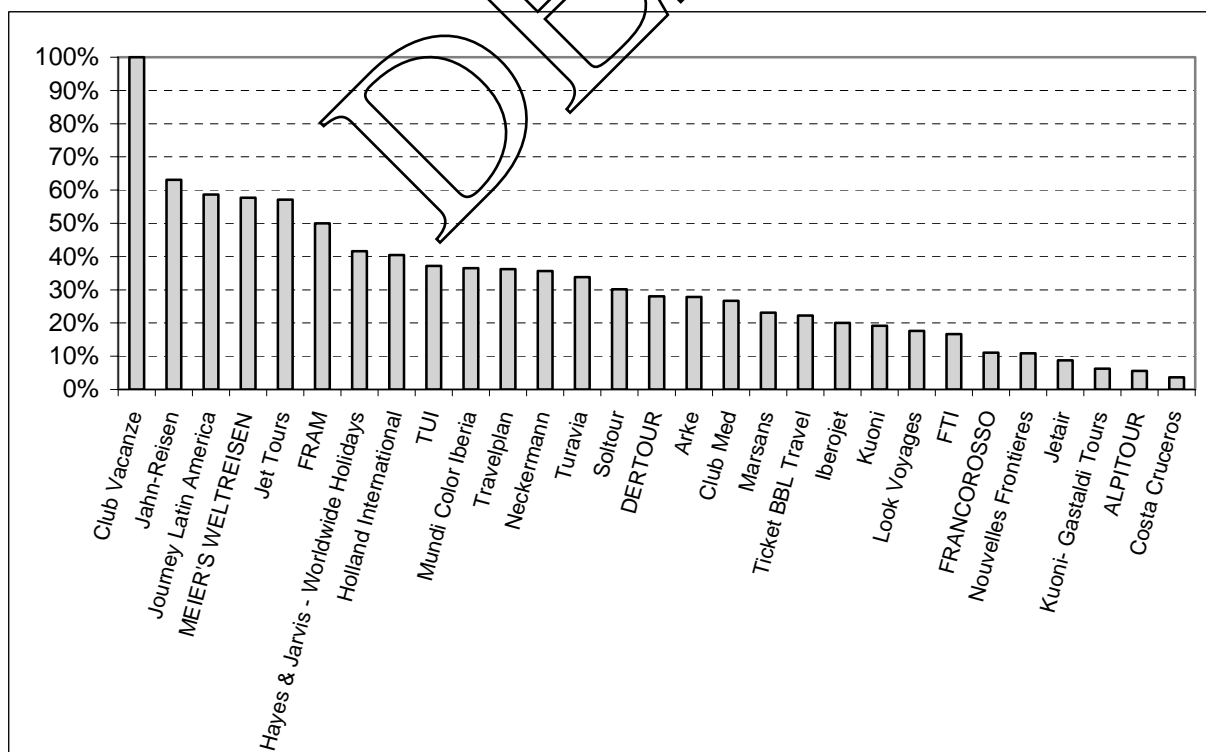
**i. Ranking of sports supply by outbound tour operator**

Percentage of sport visits by tour operator



Source: tour operator brochures

Percentage of sport tours by tour operator



Source: tour operator brochures

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**j. Ranking of sports supply on visits**

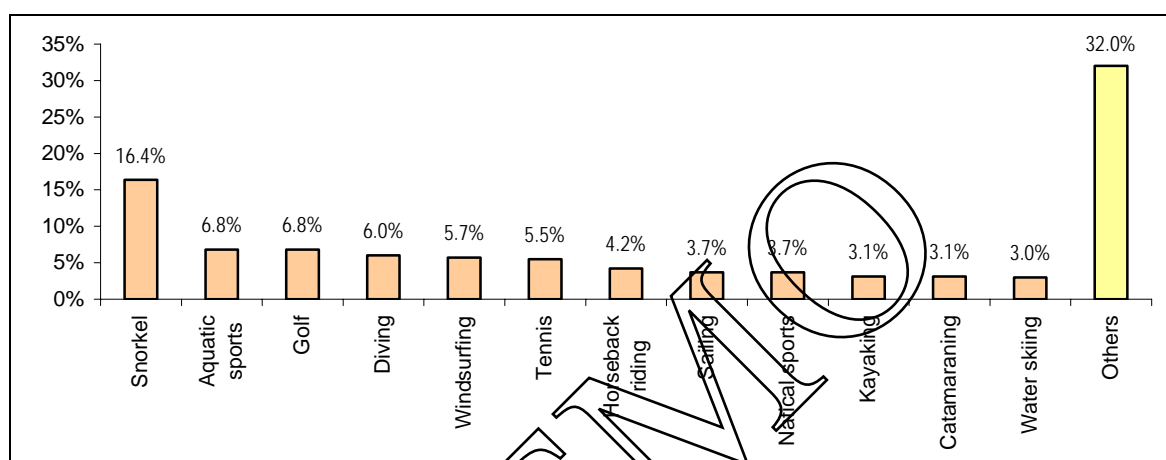
The range of sports offered on the visits was very wide.

Aquatic and nautical sports were the most widespread, particularly underwater sports, with snorkelling and diving together making up 22.4% of the total supply.

Golf was extremely important, being the third most widely offered sport, accounting for 6.8% of the sports supply on visits.

Tennis was the sixth-ranking sport at 5.5% of supply, followed by horseback riding at 4.2%.

Percentage of sports supply on visits



Source: tour operator brochures

Ranking of sports supply on visits (number of visits)

Snorkel	312	Deep-sea fishing	22	Cricket	3	Winter sports	1
Aquatic sports	130	Hiking	22	Caving	3	Cave snorkeling	1
Golf	129	Jet ski	17	Fun board	3	Skiing	1
Diving	115	Beach volleyball	17	mountainbike	3	Cross-country skiing	1
Windsurfing	109	Rowing	15	Sport fishing	3	Gymnastics	1
Tennis	104	4x4	11	Squash	3	Hobie cats	1
Horseback riding	80	Basketball	11	Waterpolo	3	Motorcycle	1
Sailing	71	Aerobics	10	Body board	2	Boating	1
Nautical sports	70	ATV	10	Boogie	2	Inline skates	1
Kayaking	60	Skydiving	9	Boogie board	2	Shore fishing	1
Catamaraning	59	Parasailing	8	Capoeira	2	Fishing	1
Water skiing	58	Quad	7	Motorized watersports	2	Catfish fishing	1
Surfing	40	Aquagym	6	Flysurf	2	Pitch& putt	1
Volleyball	39	banana boat	6	Skates	2	Skydiving	1
Fitness	34	Trekking	6	Piranha fishing	2	Speed boats	1
Fishing	31	Rock climbing	5	Zip line	2	Steps	1
Archery	31	Pedals	5	Introductory diving	1	Stretching	1
Canoe	30	Buggy	4	Baseball	1	Sand surfing	1
Cycling	28	Football	4	Boat	1	Tai-chi	1
Petanque	27	Kite surf	4	Canopy Tour	1	Shooting	1
Ping-pong	27	Rappel	4	Croquet	1	Flying trapeze	1
Rafting	23	Wakeboard	4	Collective sports	1	Yoga	1

Source: tour operator brochures

**k. Ranking of sports supply on tours**

The range of sports supply on the tours was smaller than on the visits, since certain sports (golf, tennis, etc.) require special facilities.

Sports carried out in natural settings were offered most often.

Sports typical of active tourism featured most prominently, hiking, horseback riding, and rafting together accounting for 36.3% of the total supply.

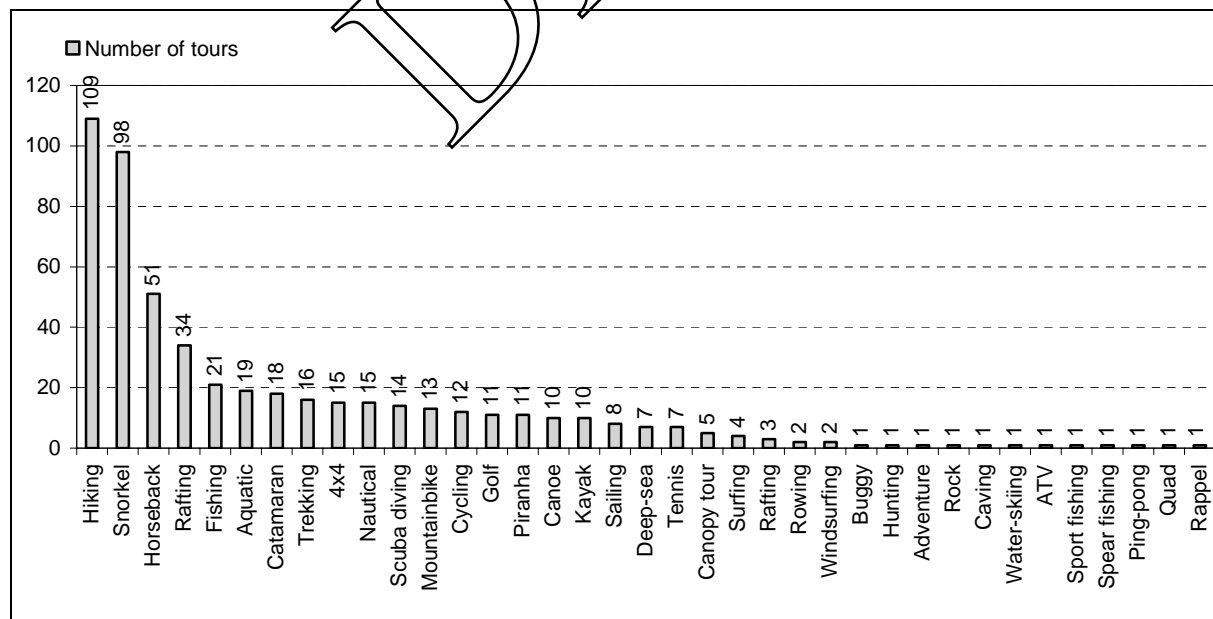
Since the destinations had attractive sea bed features, snorkelling and diving were consistently among the most frequently offered sports (20.9% of the total supply).

Breakdown of sports supply on tours

<b>Hiking</b>	<b>20.4%</b>
<b>Snorkel</b>	<b>18.3%</b>
<b>Horseback riding</b>	<b>9.5%</b>
<b>Rafting</b>	<b>6.4%</b>
<b>Fishing</b>	<b>3.9%</b>
<b>Aquatic sports</b>	<b>3.6%</b>
<b>Catamaran</b>	<b>3.4%</b>
<b>Trekking</b>	<b>3.0%</b>
<b>4x4</b>	<b>2.8%</b>
<b>Nautical sports</b>	<b>2.8%</b>
<b>Diving</b>	<b>2.6%</b>
<b>Mountainbike</b>	<b>2.4%</b>
<b>Others</b>	<b>20.9%</b>

Source: tour operator brochures

Ranking of sports - total tours



Source: tour operator brochures

### **I. Attending sporting events**

As a general rule, the tour operators analysed did not include special supply to attend sporting events.

However, the tour operators did tend to offer repeatedly destinations with the potential for important sporting events. Chief among these were:

- Cabarete in the Dominican Republic (world windsurfing championship).
- Rincón in Puerto Rico (world surfing championship)
- Paradise Island, Bahamas (international golf tournament)

The tour operators used the championships for tourism promotional purposes without regard to the dates on which the championships were held, because they were evidence of the outstanding conditions and facilities for taking part in the sport available at a given destination.

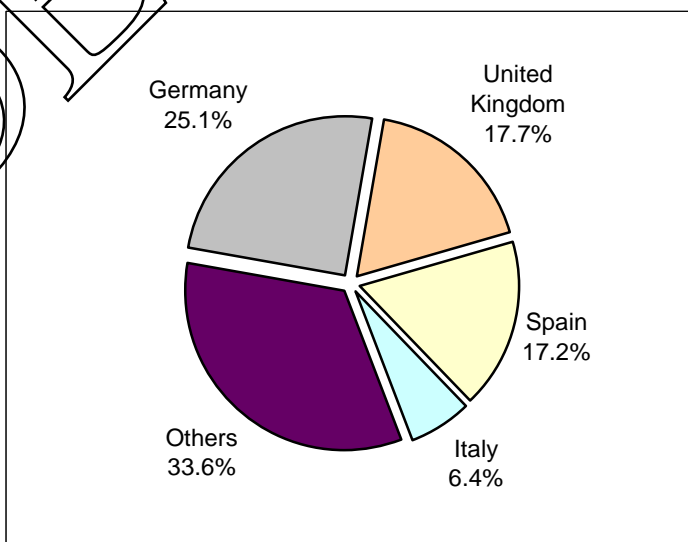
The programmes offered by the tour operators were too tight to be fit to the dates of international sporting events. Packages to attend these events were offered by specialized retailers or in special brochures issued by these same tour operators.

### **m. Breakdown of visits with sports supply by generating country**

The German tour operators made the most sports supply within the total visits with sports supply, accounting for 25.1% of the total supply. They were followed by the British at 17.7% and by the Spanish at 17.2%.

The Italians placed the least emphasis on sports among all the outbound tour operators analysed, accounting for only 6.4% of the visits with sports supply

Breakdown of total visits with sports supply by generating country



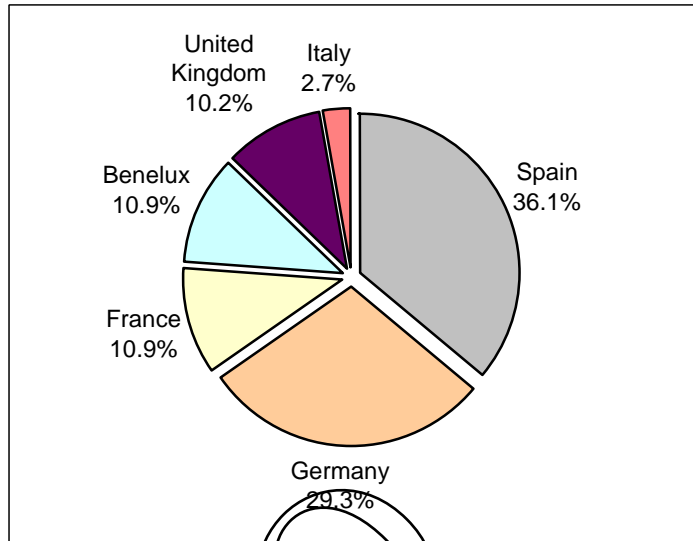
Source: tour operator brochures

**n. Breakdown of tours with sports supply by generating country**

The breakdown differs from that of the visits, with Spanish outbound tour operators accounting for 36.1% of the tours with sports supply and taking first place away from Germany.

Italian outbound tour operators accounted for only 2.7% of the total tours with sports supply

Breakdown of total tours with sports supply by generating country



Source: tour operator brochures

**o. Ranking of visits with sports supply by destination**

Sports supply by destination was concentrated principally in the Dominican Republic, Mexico, Cuba, Jamaica, Venezuela, Costa Rica, and Brazil, which together accounted for 76.7% of the sports supply.

Percentage of visits with sports supply by destination

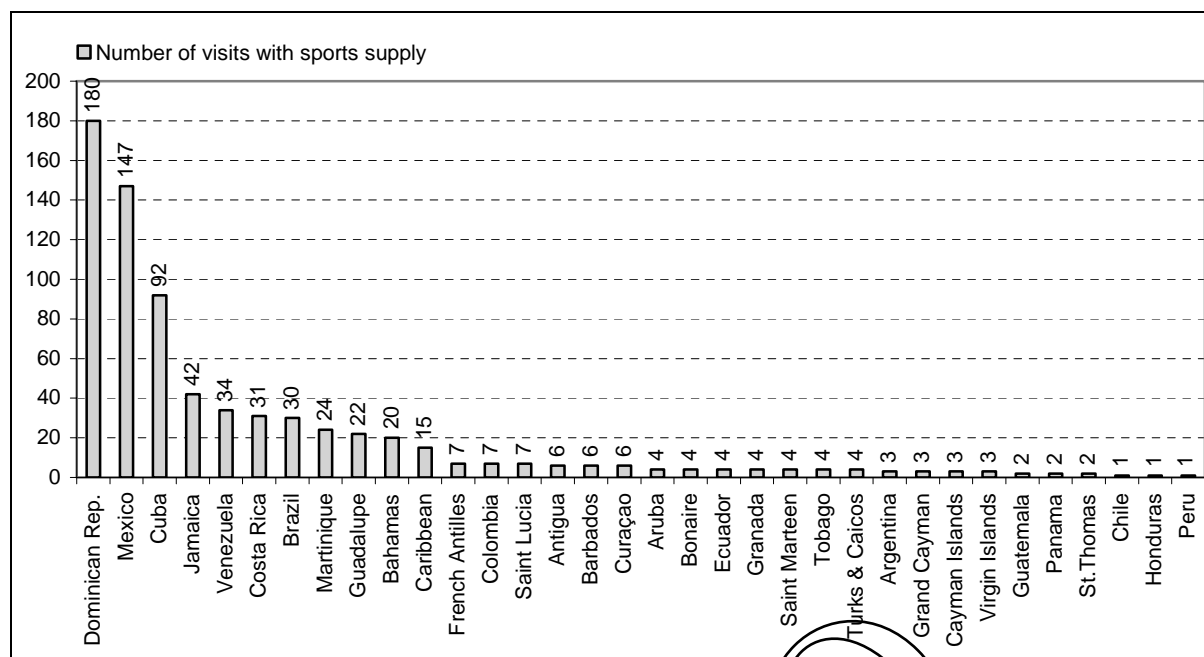
<b>Dominican Republic</b>	<b>24.8%</b>
<b>Mexico</b>	<b>20.3%</b>
<b>Cuba</b>	<b>12.7%</b>
<b>Jamaica</b>	<b>5.8%</b>
<b>Venezuela</b>	<b>4.7%</b>
<b>Costa Rica</b>	<b>4.3%</b>
<b>Brazil</b>	<b>4.1%</b>
<b>Others</b>	<b>23.3%</b>

Source: tour operator brochures

Clearly, such established destinations as the Dominican Republic, Mexico, and Cuba included sport among the many other activities offered.

Jamaica, Venezuela, Costa Rica, and Brazil have reached a certain volume of visitors and have also invested heavily in sport tourism.

Ranking of destinations having visits with sports supply

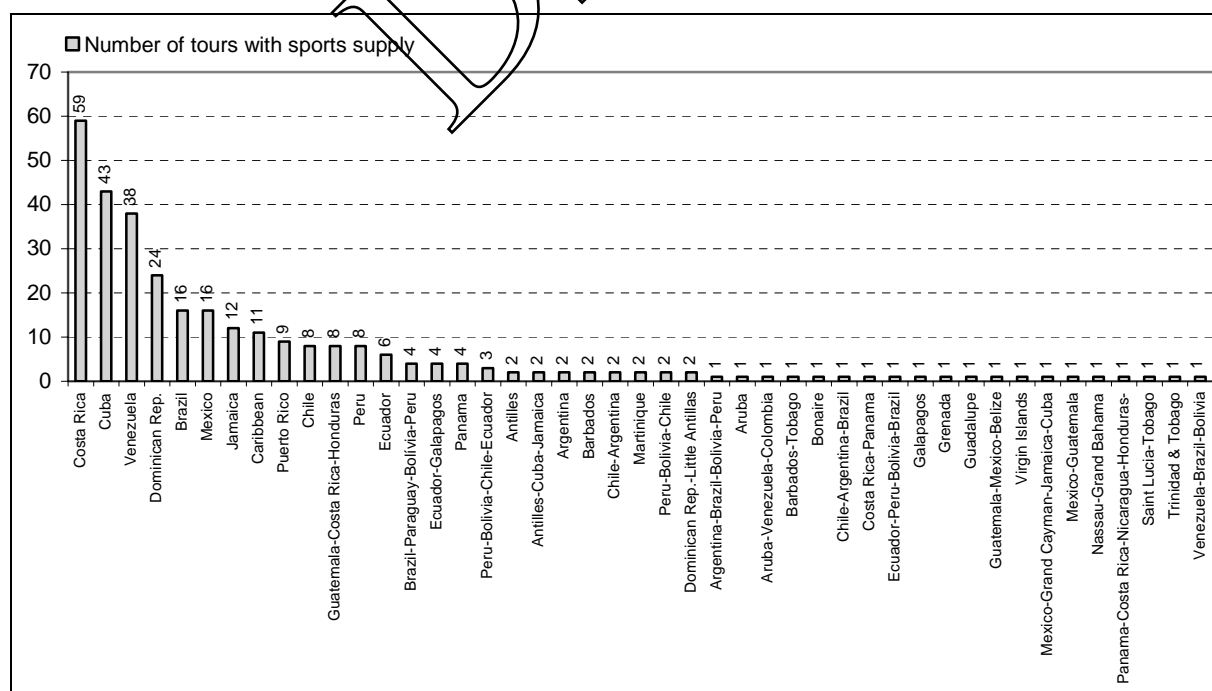


Source: tour operator brochures

**p. Breakdown of tours with sports supply by destination**

Some of the tours offered included combinations of different countries, as shown in the following tabulation. This has made it difficult to establish a ranking by destination. Still, certain countries, like Costa Rica, Cuba and Venezuela, hold down the top-ranking positions.

Ranking of destinations having tours with sports supply



Source: tour operator brochures

Costa Rica, in first place with 19% of the tours with sports supply, is establishing itself as an active tourism destination and has invested in sporting activities in its national parks. For this destination European tour operators offered considerably more tour packages than stays.

Cuba, in line with its policy of differentiating itself on the basis of new tourism strategies, has been able to avoid limiting its supply to sun & sand only and has likewise made a commitment to sport tourism.

Venezuela ranked in third place on the basis of active sports on its Amazon tours.

Percentage of tours with sports supply by destination

<b>Costa Rica</b>	<b>19.0%</b>
<b>Cuba</b>	<b>13.9%</b>
<b>Venezuela</b>	<b>12.3%</b>
<b>Dominican Republic</b>	<b>7.7%</b>
<b>Brazil</b>	<b>5.2%</b>
<b>Mexico</b>	<b>5.2%</b>
<b>Jamaica</b>	<b>3.9%</b>
<b>Others</b>	<b>32.8%</b>

Source: tour operator brochures

**q. Percentage of visits with sports supply by destination**

Most destinations (24) combined sports supply with other type supply. Chief among this group were major sport destinations such as the Dominican Republic, Mexico, and Cuba, where the sports supply and other kind of supply (culture, nature, etc.) were complementary:

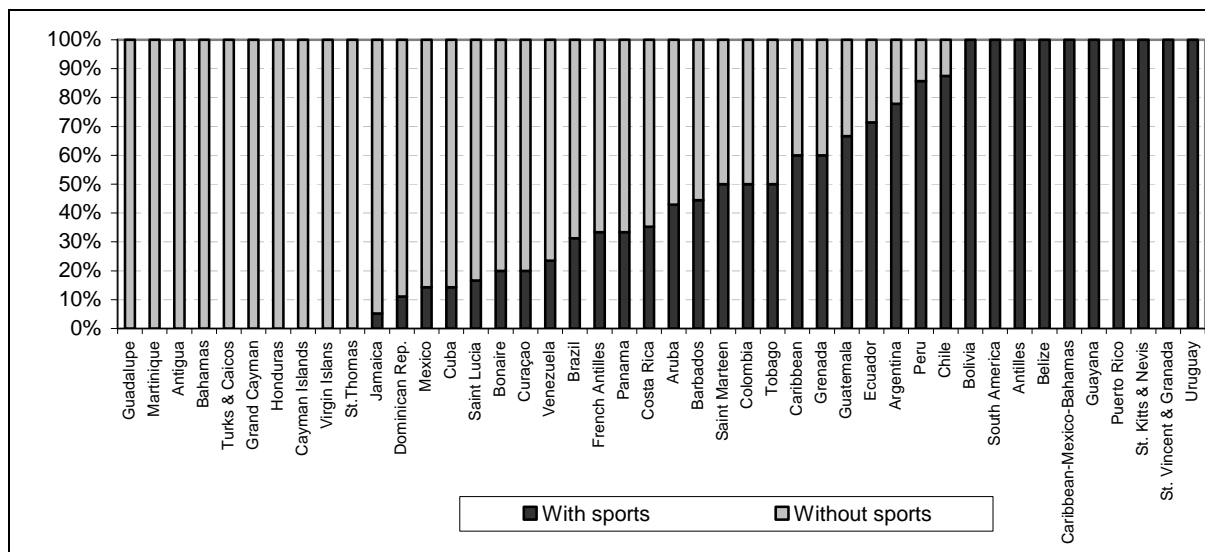
- **Dominican Republic:** 89% of products had sports supply  
11% of products had no sports supply
- **Mexico:** 86% of products had sports supply  
14% of products had no sports supply
- **Cuba:** 86% of products had sports supply  
14% of products had no sports supply

Ten destinations offered sporting activities only, namely, Guadeloupe, Martinique, Antigua, the Bahamas, Turks & Caicos, Grand Cayman, Honduras, Cayman Islands, Virgin Islands, and St Thomas. These were sun & sand destinations with an extensive range of aquatic and nautical sports.

Eight destinations offered non-sporting activities only, namely, Uruguay, St. Vincent and Grenada, St. Kitts & Nevis, Puerto Rico, Guyana, Belize, the Antilles, and Bolivia.

At many of the destinations where no sporting activities were offered, the tourism complexes and hotels usually made up for the lack of visits with explicit sports supply by the tour operators..

Percentage of visits with sports supply by destination



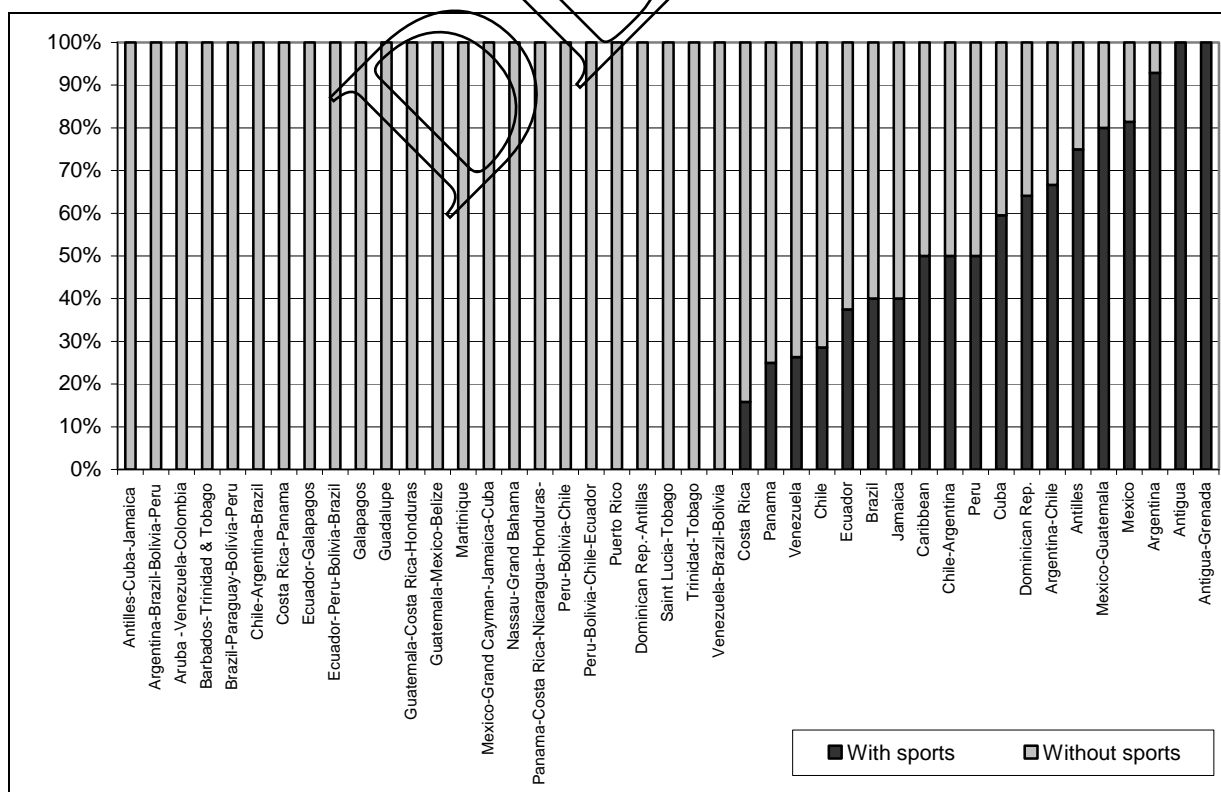
Source: tour operator brochures

r. Percentage of tours with sports supply by destination

A little over one-third of the tours had no sports supply. Since a tour passes through many venues, it is relatively common to have some sort of sports supply at one or more of them.

However, in most cases taking part in sports was optional. And as we have already seen, on those tours that have been considered sport tours the average percentage days on which sports were played came to just 11.9%.

Percentage of tours with sports supply by destination



Source: tour operator brochures



## 2.2. Characteristics of sports supply by generating country

### 2.2.1. Germany

Summer 2002 and winter 2002-2003 brochures from the following tour operators were analysed:

- Dertour
- Fernreisen- FTI
- LTU Touristik
- Neckermann C&N
- TUI

#### Importance of sports supply

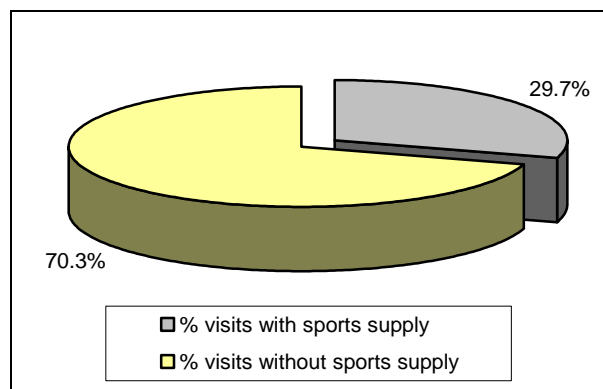
Germany was first among European tour operators in the overall ranking of total visits with sports supply, at 25.1% of the total. It ranked second for tours, at 29.3%, after Spain.

The 44.1% of tours with sports supply was significant.

In addition to accounting for 44.1% of the sports supply on tours, German outbound tour operators had the highest percentage days with sporting activity on tours

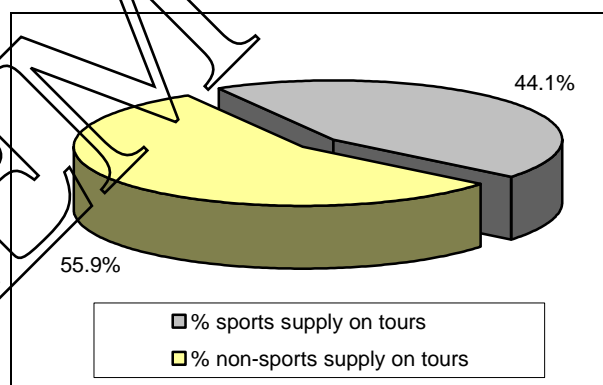
Germany, then, was one of the countries attaching the most importance to sport on tours. Even so, only a single German tour operator, Meier's Weltreisen, offered exclusively sport-oriented tours.

Percentage of visits with sports supply – Germany



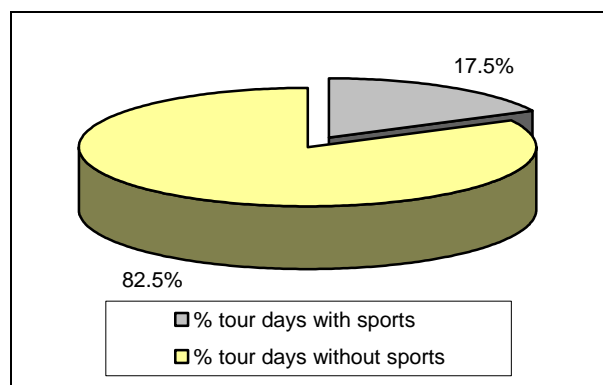
Source: tour operator brochures

Percentage of tours with sports supply – Germany



Source: tour operator brochures

Percentage days with sporting activity on tours – Germany



Source: tour operator brochures

### **Treatment of information on sport**

The tour operators considered (the five top-ranking tour operators on the basis of turnover in 1999-2000) did not have any brochure specializing in sports supply only.

None of the German tour operators' brochures contained a separate section dealing exclusively with sport, either.

- ➔ Sports were merely complementary to the supply of tourist visits and tours.
- ➔ However, Meier's Weltreisen brochure did include tours that were specifically for purposes of sport (e.g., golf courses in the Dominican Republic, Jamaica, Panama, and Costa Rica).
- ➔ TUI and Neckermann offered only cruises. Sports supply on cruises was of minor importance, except for one cruise offered by Neckermann which called at the Cayman Islands for snorkelling activity.
- ➔ On the other hand, the hotel complexes did have a broad-ranging sports supply. Chief among these were the aquatic and nautical sports supply at the large resort complexes in the Caribbean..

Very seldom was it specified whether sporting equipment was included in the sporting activity on visits and tours.

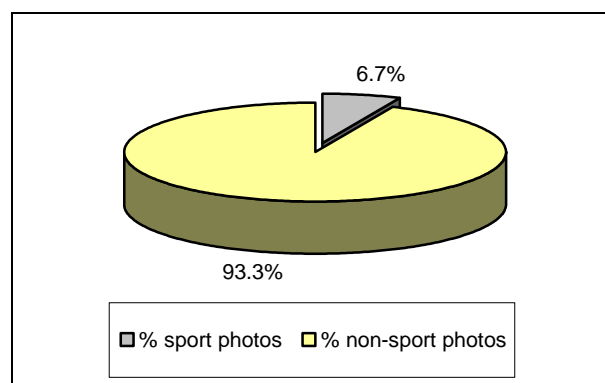
Except in FTI's brochures, there were no substantial differences between sports supply in summer and in winter:

- The brochure for summer had no tours with sports supply, while tours with sports supply did appear in the brochure for winter. Since these brochures dealt with destinations in Mexico, Cuba, and the Dominican Republic, all of which have a tropical climate, we are unable to say whether weather conditions were a factor in this difference

### **Treatment of sports images**

The German brochures placed considerable importance on the pictorial content. A total of 5,854 pictures were counted in the brochures analysed, of which only 6.7% dealt with sport. These pictures appeared particularly in connection with the sections dealing with tourism complexes.

Percentage photographs in the brochures – Germany

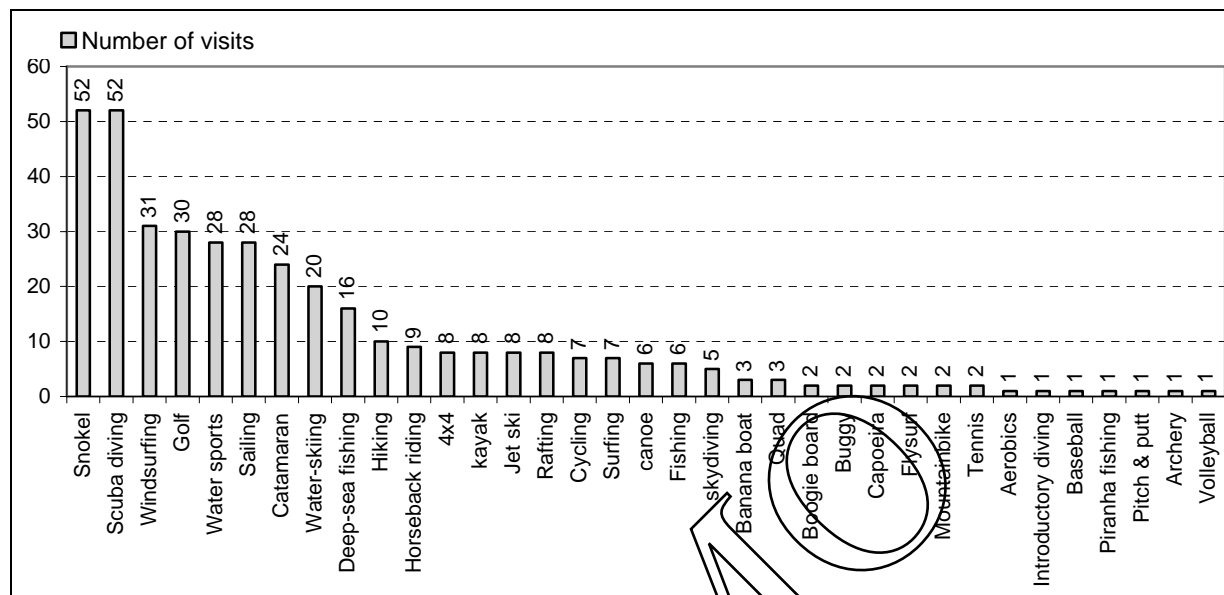


Source: tour operator brochures

### Ranking of sports supply on visits

Aquatic sports, in particular underwater sports (snorkelling and scuba diving accounting for 25.6% of all sports supply), with golf (7.4%), were the principal sports supply on visits in the German brochures.

### Ranking of sports supply on visits by tour operator – Germany



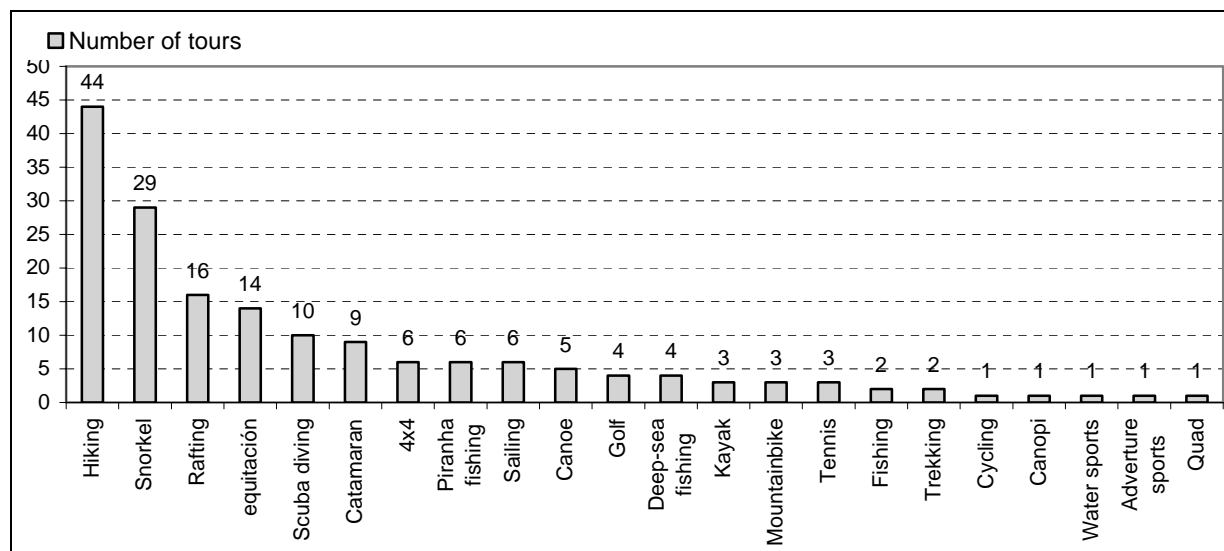
Source: tour operator brochures

### Ranking by sports supply on tours

Active tourism was again a major feature of the sports supply on the tours. Hiking, rafting, and horseback riding made up 43% of all sports supply.

Given the types of destination considered, having a wealth of coral reefs, snorkelling and diving again figured prominently, accounting for 22.7% of the total.

### Ranking of sports supply on tours by tour operator – Germany



Source: tour operator brochures

### Sporting events

There was only one offer to attend a sporting event in the German brochures:

- ➔ The FTI Summer 2002 brochure offered the option of attending baseball games at the San Pedro de Macorís University in the Dominican Republic, baseball being the national sport there.

A world windsurfing championship is held in Cabarete in the Dominican Republic, an important tourism complex for practitioners and fans of this sport.

A sailing competition is held in Santa Lucía in Venezuela, but the brochure failed to say which one it was.

### Ranking of destinations by visits with sports supply

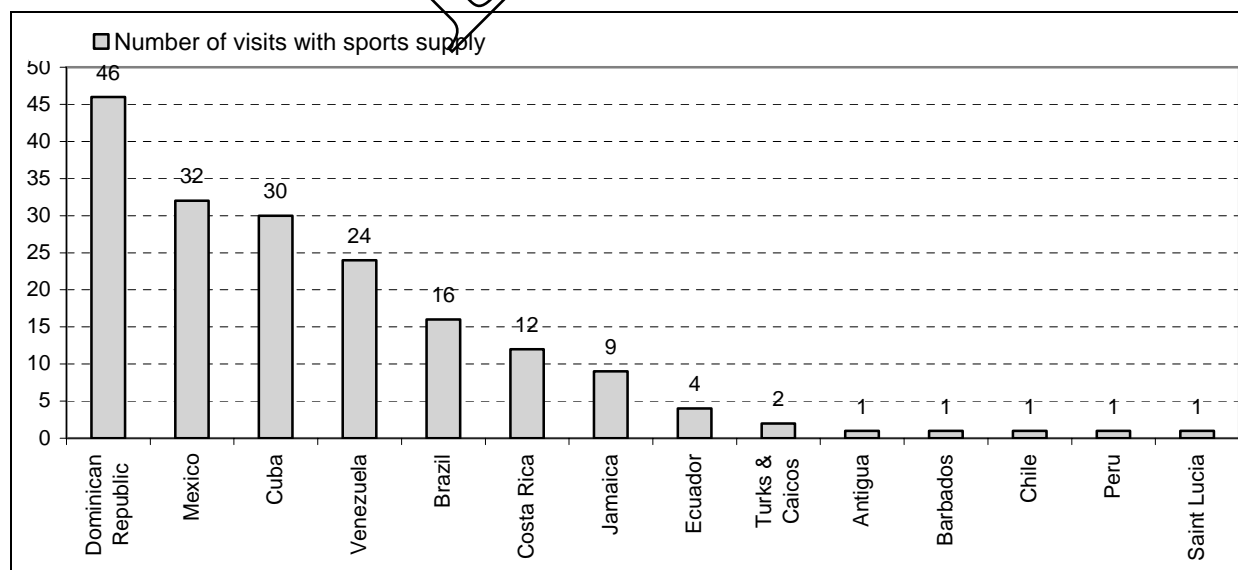
The Dominican Republic, Mexico, and Cuba accounted for 60.1% of the total visits with sports supply. These are major sun & sand destinations with large hotel complexes with sports as the cornerstone for recreational activities.

Percentage of visits with sports supply by destination – Germany

<b>Dominican Republic</b>	<b>25.6%</b>
<b>Mexico</b>	<b>17.8%</b>
<b>Cuba</b>	<b>16.7%</b>
<b>Venezuela</b>	<b>13.3%</b>
<b>Brazil</b>	<b>8.9%</b>
<b>Costa Rica</b>	<b>6.7%</b>
<b>Jamaica</b>	<b>5.0%</b>
<b>Others</b>	<b>6.0%</b>

Source: tour operator brochures

Ranking of destinations by visits with sports supply – Germany



Source: tour operator brochures

**Ranking of tours with sports supply**

The combination of active tourism and nature played a major role in Venezuela and Costa Rica, together accounting for 37.2% of the total sports supply.

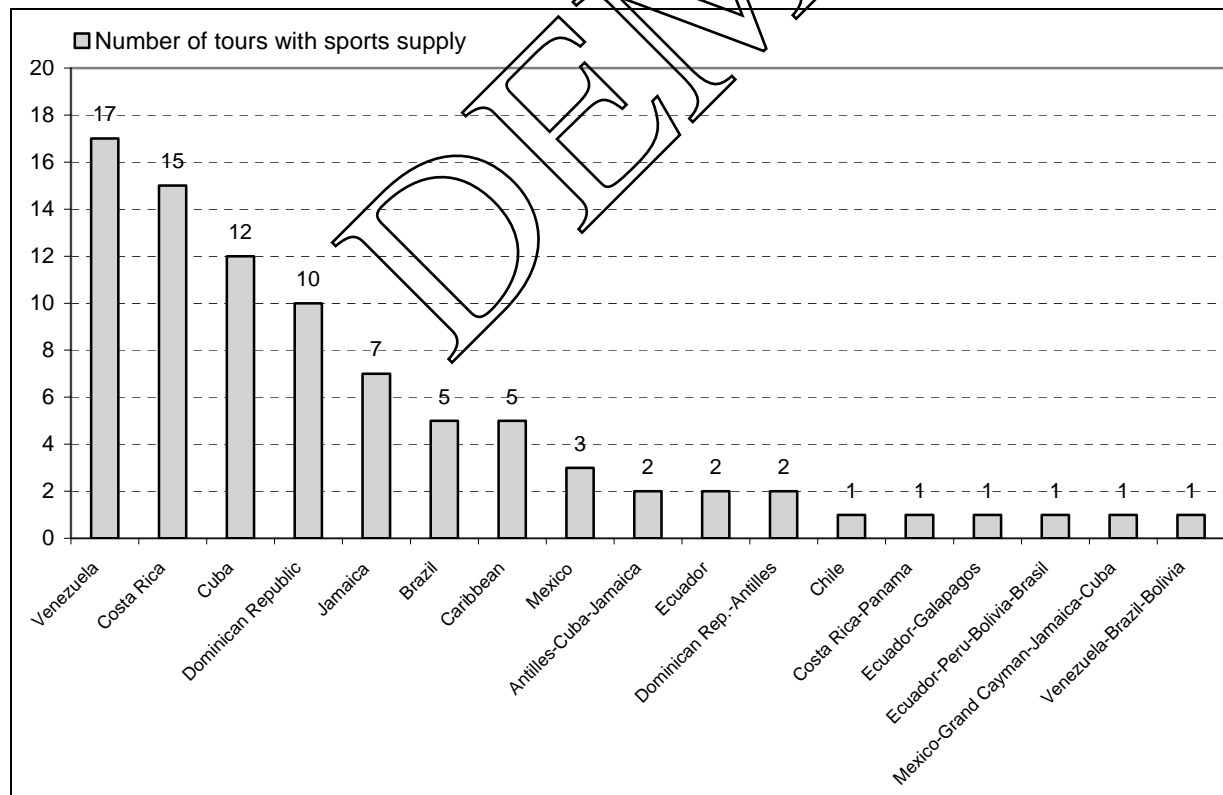
Cuba and the Dominican Republic were next at 25.6%. Aquatic sports played an important role in these two countries.

**Percentage tours with sports supply by destination - Germany**

<b>Venezuela</b>	<b>19.8%</b>
<b>Costa Rica</b>	<b>17.4%</b>
<b>Cuba</b>	<b>14.0%</b>
<b>Dominican Republic</b>	<b>11.6%</b>
<b>Jamaica</b>	<b>8.1%</b>
<b>Brazil</b>	<b>5.8%</b>
<b>Caribbean</b>	<b>5.8%</b>
<b>Otherso</b>	<b>17.5%</b>

Source: tour operator brochures

**Ranking of destinations by tours with sports supply - Germany**



Source: tour operator brochures

### 2.2.2. Benelux

Summer 2002 and winter 2002-2003 brochures from the following tour operators were analysed:

- C&N – Nur Touristic Belgium
- Ticket BBL Travel – Touring Club
- Travel Unie
- TUI Belgium

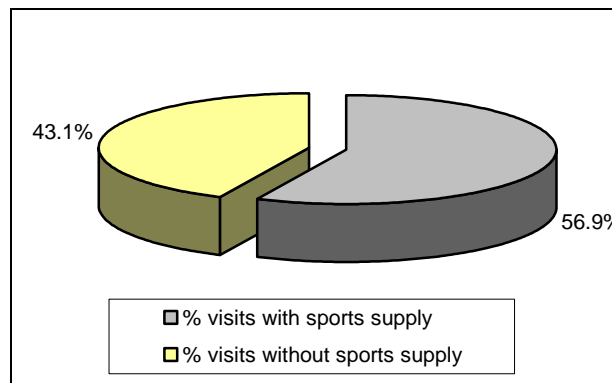
#### Importance of sports supply

Benelux was the third-ranked European generating country in terms of the total visits with sports supply, at 17.3% of the total analysed, and the fourth-ranked country in terms of the total tours with sports supply, at 10.9% of the total analysed.

56.9% of the total visits had sports supply.

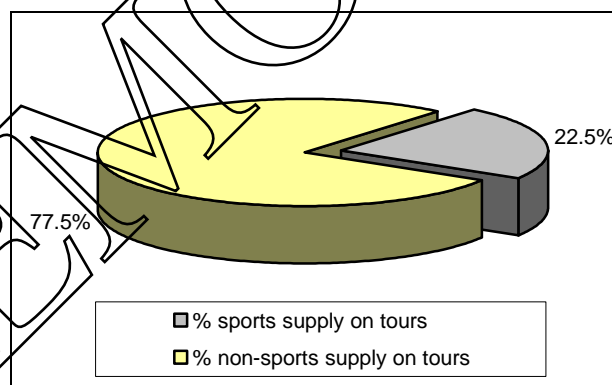
Only 22.5% of the total tours in the Benelux brochures had sports supply, with sporting activities on barely 7.6% of the days on tour.

Percentage of visits with sports supply – Benelux



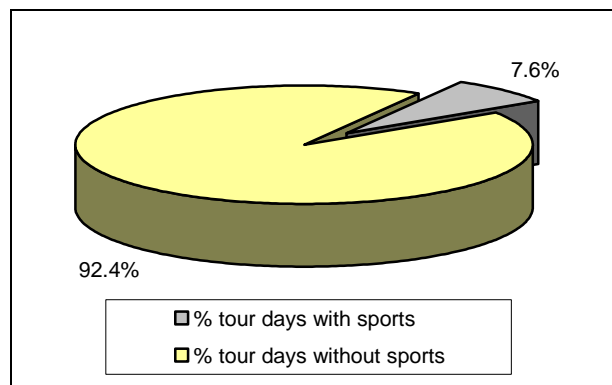
Source: tour operator brochures

Percentage of tours with sports supply – Benelux



Source: tour operator brochures

Percentage days with sporting activity on tours – Benelux



Source: tour operator brochures

### ***Treatment of information on sport***

None of the Belgian and Dutch brochures (the top-ranked brochures for the Benelux in terms of turnover in 1999) analysed specialized in sports supply.

The brochures of the tour operators Neckermann, Arke, Holland International Caribbean, and Sunsnacks did have a separate section dealing exclusively with sports supply for each of the destinations considered. In all the remaining brochures sports supply were a supplementary activity on visits and tours.

- ➔ The hotels offered had a comprehensive range of sports supply.
  - The Dominican Republic in the Sunsnacks brochure is a case in point. There were no tours, supply basically comprising stays at “all inclusive” hotel complexes at which a whole gamut of sporting activities, especially aquatic sports, was available.
  - On the whole, tourism complexes in the Caribbean region had large hotels where sport was the foundation for recreational supply.
- ➔ Only Arke and Jetair offered Caribbean cruises. Sports supply was basically restricted to snorkelling at stops at Cozumel and Roatan.
  - The cruise ship “European Vision” in the “Jetair Air Holidays” brochure is a stand-out, supplying miniature golf, a golf simulator, climbing gym, and tennis, basketball, and volleyball courts among its facilities.

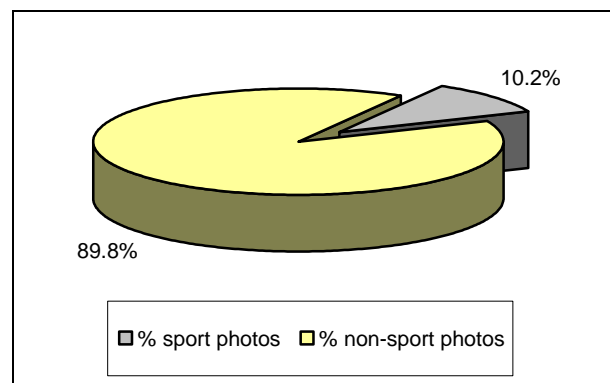
Sporting equipment was sometimes included in the sporting activities on visits and tours.

There were no appreciable differences between the summer and winter brochures. In this respect, the tour operator Arke focused more on the Caribbean in summer while Holland International did the same in winter.

### ***Treatment of sports images***

The Benelux brochures placed the most emphasis on sports images, with pictures of sporting activities making up 10.2% of the total pictures included. Pictures of sports appeared mainly when promoting tourism complexes.

Percentage photographs in the brochures – Benelux



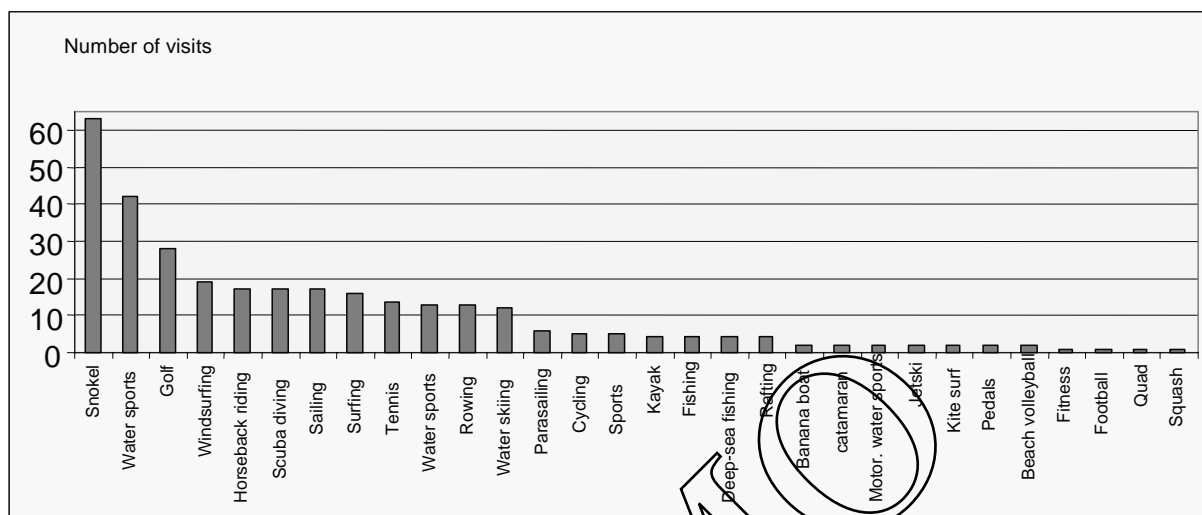
Source: tour operator brochures

### Ranking of sports supply on visits

Aquatic sports (snorkelling, windsurfing, diving, sailing, and surfing) predominated in the sports supply on visits, accounting for 54.2% of the total supply.

Golf at 8.9%, horseback riding at 5.3%, and tennis at 4.4% also figured prominently.

#### Ranking of sports supply on visits by tour operator – Benelux

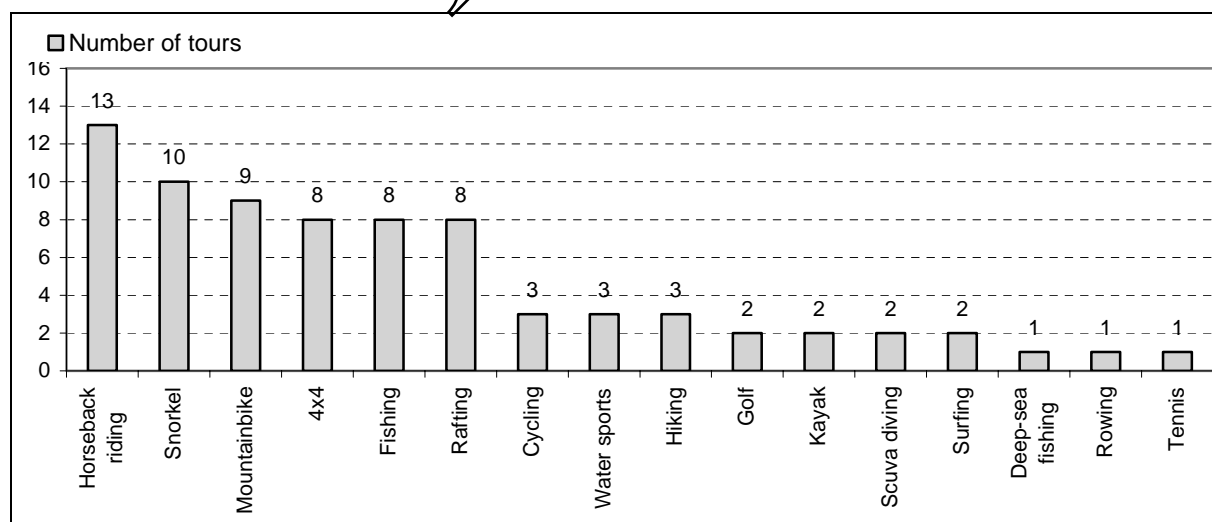


Source: tour operator brochures

### Ranking of sports supply on tours

Horseback riding, mountain biking, ATV and rafting were active sports and adventure activities which together made up 49.9% of the sports supply on the tours. The explanation is that sports supply on tours was chiefly based on active outdoor sports in natural settings. Fishing ranked fourth, at 10.5% of the total.

#### Ranking of sports supply on tours by tour operator – Benelux



Source: tour operator brochures



### Sporting events

There were no specific offers to attend sporting events in the Benelux brochures.

In any case, Cabarete in the Dominican Republic, where an annual international windsurfing championship is held, was a stand-out and offers a large number of windsurfing schools.

### Ranking of destinations by visits with sports supply

The sports supply on visits tended to be concentrated in the sun & sand destinations in the Caribbean region.

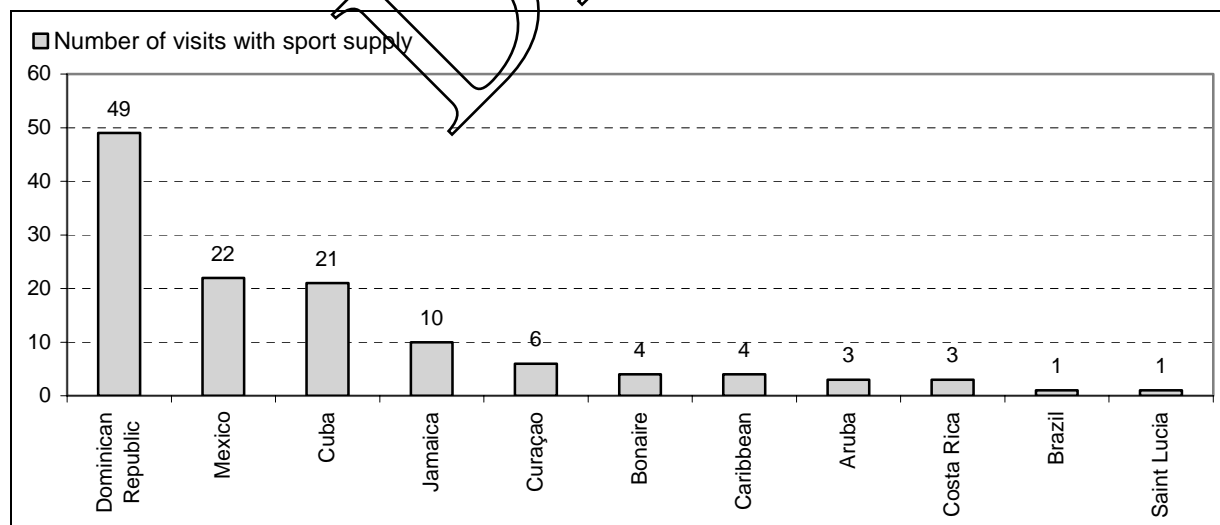
The sports supply was primarily aquatic and nautical sports, golf, horseback riding, and tennis, in keeping with the Caribbean destinations, where recreational supply at the tourism complexes was based on sport.

Percentage of visits with sports supply by destination – Benelux

<b>Dominican Republic</b>	<b>39.5%</b>
<b>Mexico</b>	<b>17.7%</b>
<b>Cuba</b>	<b>16.9%</b>
<b>Jamaica</b>	<b>8.1%</b>
<b>Curacao</b>	<b>4.8%</b>
<b>Bonaire</b>	<b>3.2%</b>
<b>Others</b>	<b>9.8%</b>

Source: tour operator brochures

Ranking of destinations by visits with sports supply – Benelux



Source: tour operator brochures

### Ranking of destinations by tours with sports supply

The Caribbean destinations, e.g., the Dominican Republic, Cuba, and Jamaica accounted for 57.1% of the sports supply on the tours.

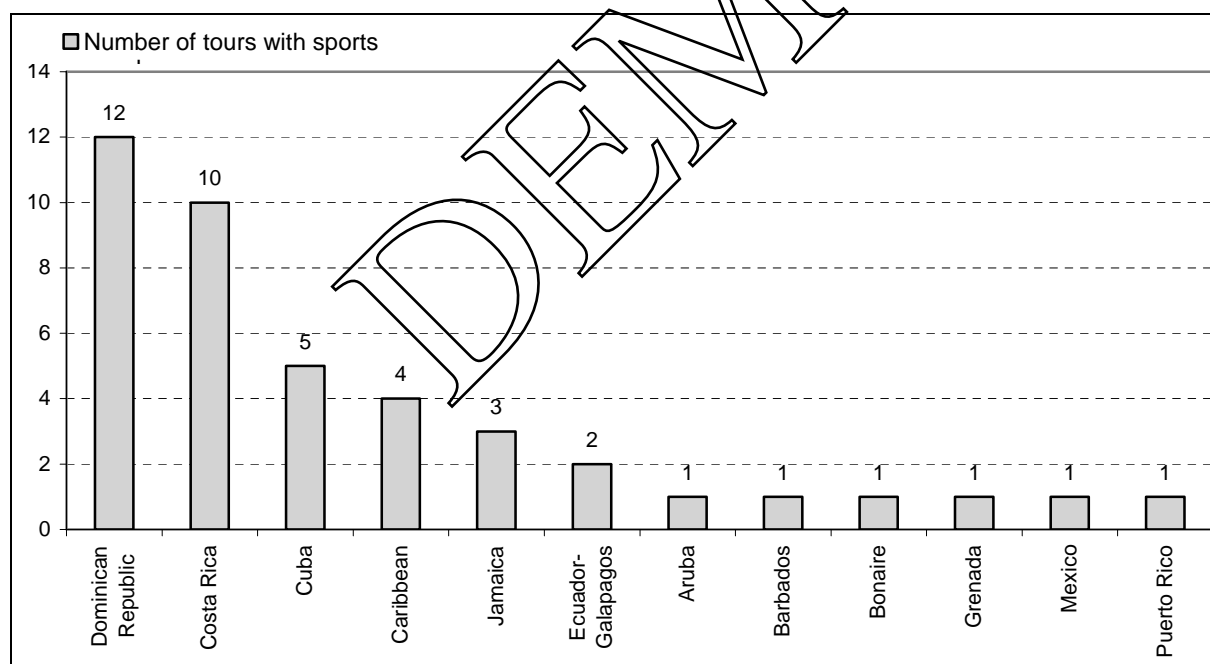
Second place at 23.8% went to Costa Rica, where all sorts of active sports were available at the country's many national parks.

Percentage of tours with sports supply by destination – Benelux

<b>Dominican Republic</b>	<b>28.6%</b>
<b>Costa Rica</b>	<b>23.8%</b>
<b>Cuba</b>	<b>11.9%</b>
<b>Caribbean</b>	<b>9.5%</b>
<b>Jamaica</b>	<b>7.1%</b>
<b>Ecuador-Galapagos</b>	<b>4.8%</b>
<b>Others</b>	<b>14.3%</b>

Source: tour operator brochures

Ranking of destinations by tours with sports supply – Benelux



Source: tour operator brochures

### 2.2.3. Spain

Summer 2002 and winter 2002-2003 brochures from the following Spanish tour operators were analysed:

- Iberojet
- Mundicolor
- Travelplan
- Turavia
- Viajes Soltour

#### Importance of sports supply

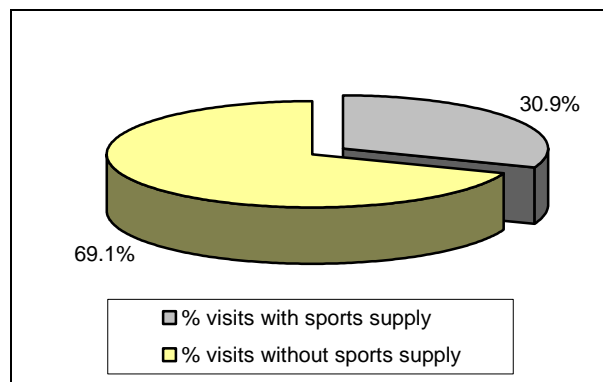
The Spanish tour operators' brochures ranked fourth among European tour operators having the most visits with sports supply, accounting for 17.1% of the total sports supply. For tours they ranked first, at 36.1%.

Visits with sports supply made up 30.9% of the total visits offered in Spanish brochures, while tours having sports supply made up 33% of the total tours offered by Spanish tour operators.

Even though Spain ranked first among European tour operators in terms of tours with sports supply, it needs to be borne in mind that the proportion of days on which sport was played on the tours amounted to only 15.8%.

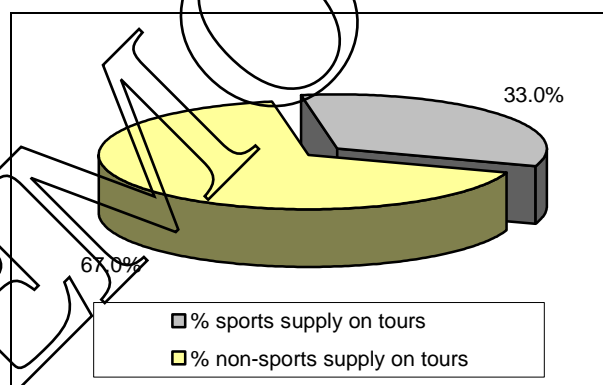
Thus, the importance of sport on the tours offered by the Spanish tour operators has to be put in perspective. Sport was merely complementary to the other recreational supply on the tours.

Percentage of visits with sports supply – Spain



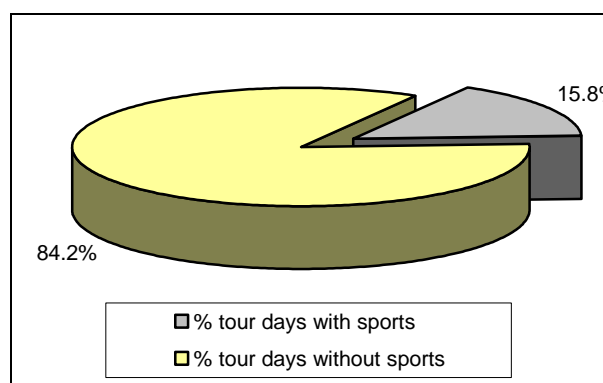
Source: tour operator brochures

Percentage of tours with sports supply – Spain



Source: tour operator brochures

Percentage days with sporting activity on tours – Spain



Source: tour operator brochures

### Treatment of information on sport

None of the tour operators considered (the top five in turnover for 2001) had a specialized brochure for sports supply.

None of the brochures of the Spanish tour operators had a separate section dealing only with sport, either.

- ➔ Sport was merely complementary to the visits and tours offered.
  - Certain brochures did offer exclusive sport departures, for instance, Iberojet's "Paseo en Quad" ("ATV excursion") and "Snorkel Aventuras" ("snorkelling adventure").
- ➔ The sports supply on cruises was practically nil, though all the ships have fitness centres and pools.
- ➔ On the other hand, the hotel complexes had an extensive sports supply, with the following attributes:
  - Sport is the cornerstone of their recreational supply.
  - It is usually part of an "all inclusive" package.
  - Aquatic and nautical sports predominate, especially at sun & sand destinations in the Caribbean and Latin America.
  - Since clients stay at the hotel complex for all or part of their holiday, recreation is associated with leisure time sport or just lying in the sun ("dolce far niente").

The brochures did not usually indicate whether sporting equipment was included in sporting activity on the visits and tours.

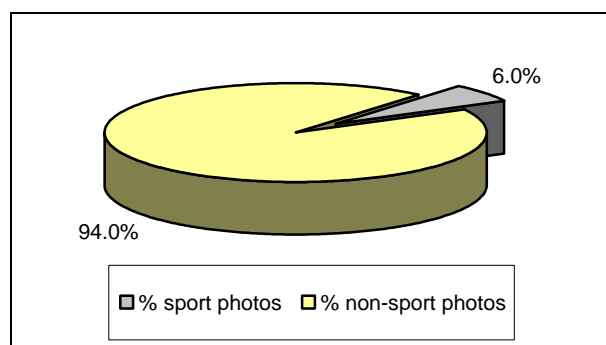
Since the main the destinations have a tropical climate (e.g., the Caribbean), there were no major differences between the winter and summer sports supply, except in the case of Costa Rica:

- The Turavia brochure for Costa Rica did have greater sports supply for the winter season. This may be because the dry season runs from December to March and is more conducive to active tourism and to adventure tourism in contact with nature, without the adverse effects of inclement weather conditions (rainy season).

### Treatment of sports images

There were no sections dealing specifically with sport, but 6.0% of the total pictures in the Spanish brochures were sports pictures.

Percentage photographs in the brochures – Spain

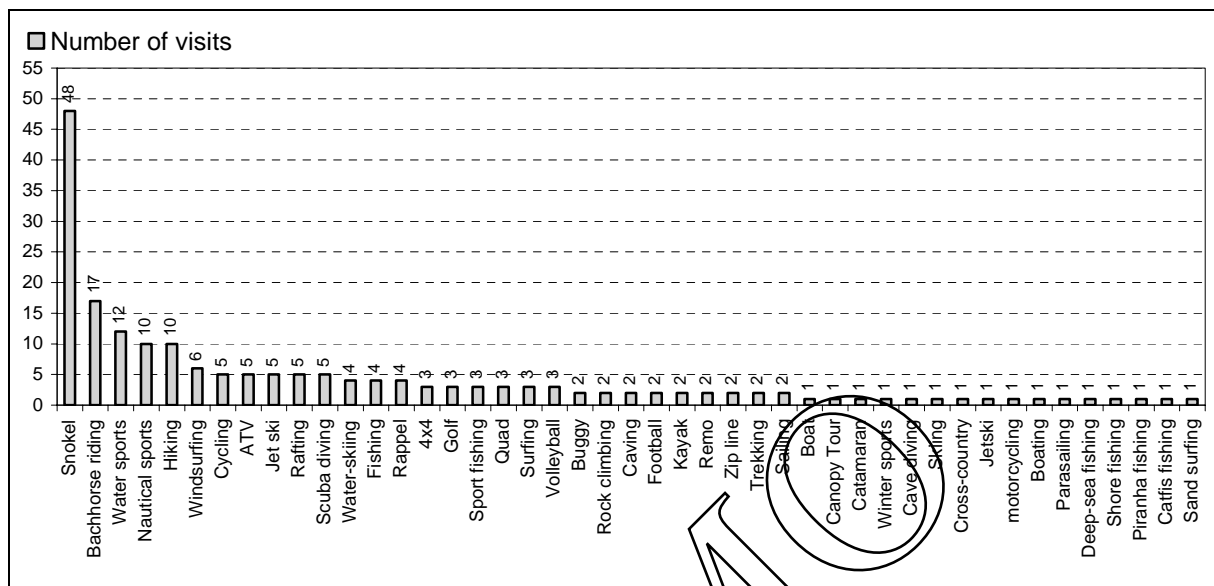


Source: tour operator brochures

### Ranking of sports supply on visits

Snorkelling was the most frequent sports supply, accounting for 24.9% of the total. It was followed by horseback riding at 8.8%, aquatic sports at 6.2%, and nautical sports and hiking at 5.2% each.

### Ranking of sports supply on visits by tour operator – Spain



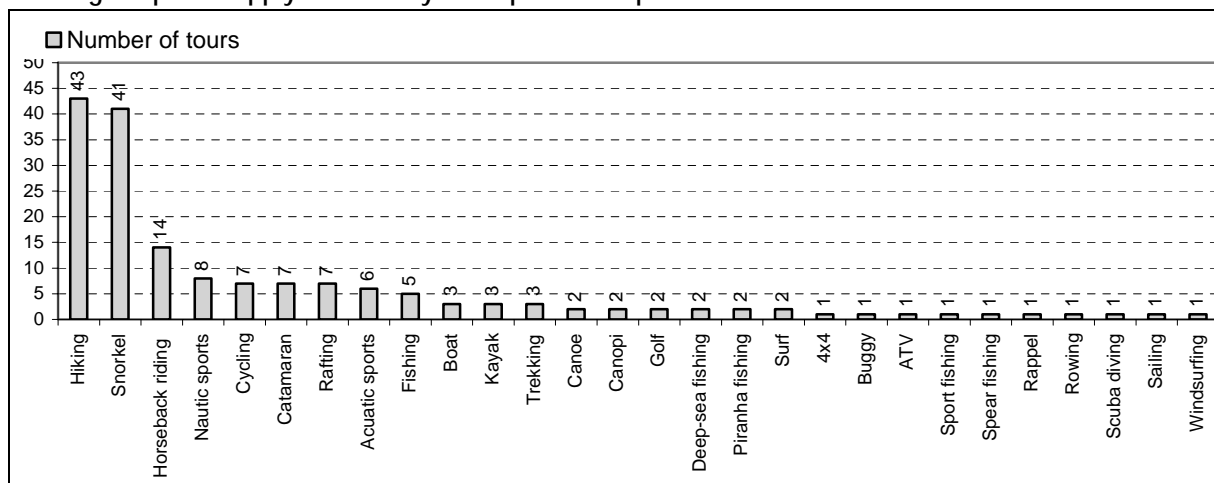
Source: tour operator brochures

### Ranking of sports supply on tours

There was less variety in the sports supply on the tours, focusing more on active tourism, particularly hiking at 25.3% of the total sports supply on the tours, horseback riding at 8.2%, cycling and rafting at 4.1% each, and such other sports supply as kayaking, trekking, etc.

At the sun & sand destinations, snorkelling at 24.1% and aquatic sports at 4.7% were again important.

### Ranking of sports supply on tours by tour operator – Spain



Fuente: Catálogos tour operador

### Ranking of destinations by visits with sports supply

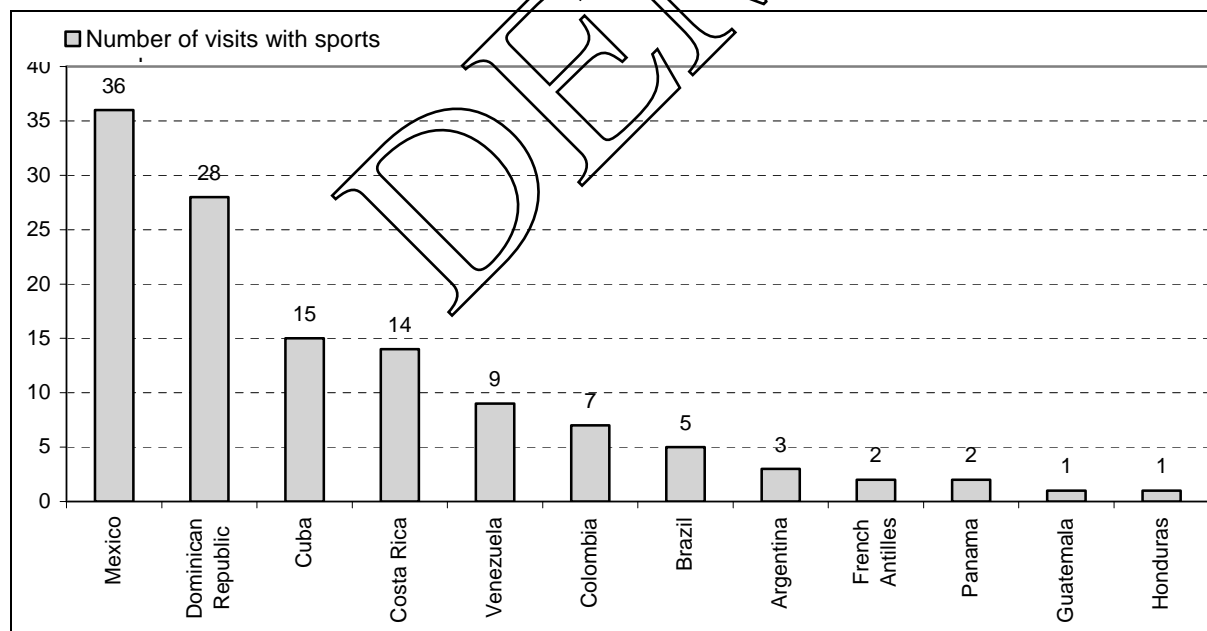
Mexico was the destination with the most sports supply at 29.3% of the total destinations with visits having sports supply, followed by the Dominican Republic at 22.8% of the total, Cuba at 12.2%, and Costa Rica at 11.4%. Taken together, these countries accounted for 65.7% of the total visits with sports supply.

Percentage of visits with sports supply by destination – Spain

<b>Mexico</b>	<b>29.3%</b>
<b>Dominican Republic</b>	<b>22.8%</b>
<b>Cuba</b>	<b>12.2%</b>
<b>Costa Rica</b>	<b>11.4%</b>
<b>Venezuela</b>	<b>7.3%</b>
<b>Colombia</b>	<b>5.7%</b>
<b>Brazil</b>	<b>4.1%</b>
<b>Others</b>	<b>7.2%</b>

Source: tour operator brochures

Ranking of destinations by visits with sports supply – Spain



Source: tour operator brochures

### Ranking of destinations by tours with sports supply

Costa Rica was the destination with the most tours having sports supply, accounting for 27.4% of the total. This was because Costa Rica is establishing itself as a destination for active tourism and nature activities, supplying such sports as hiking, rafting, fishing, and, in particular, canopy tours. This sport was only offered in Costa Rica and consists of hanging from the treetops and crossing using Tyrolese riggings and zipwires.

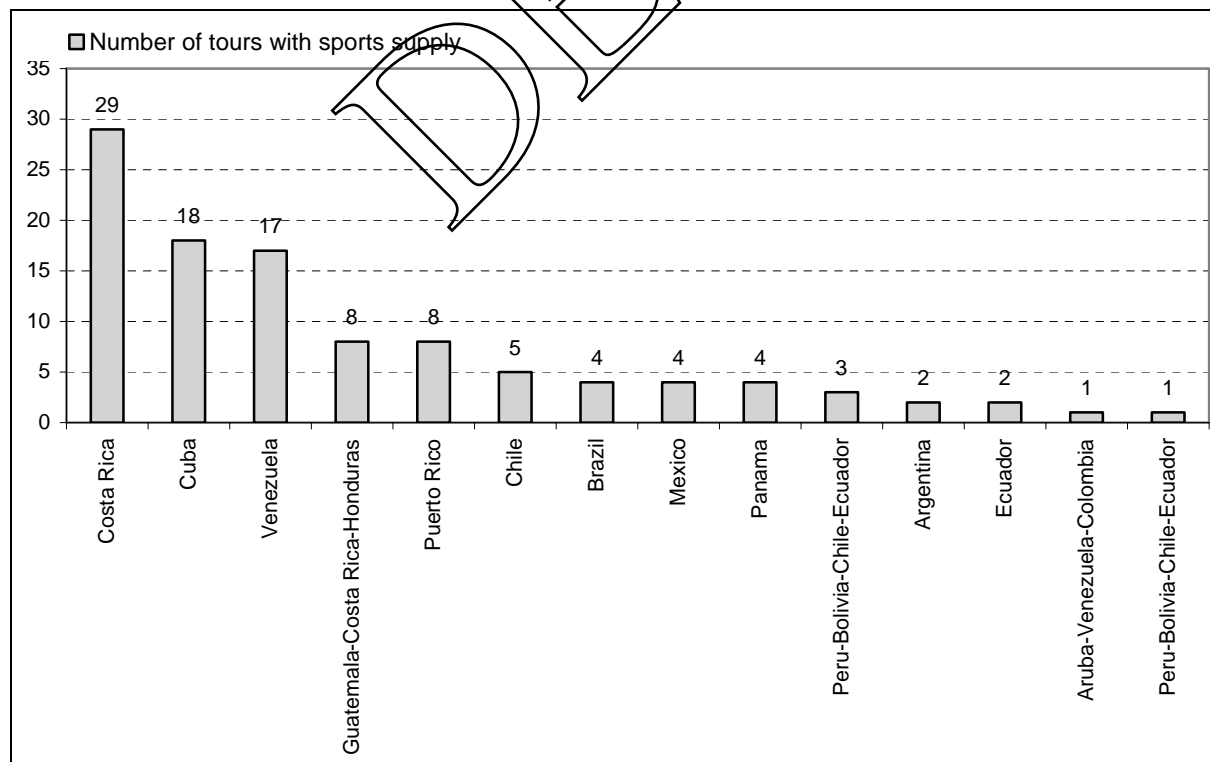
Cuba, at 17% of the total, is successfully establishing itself as a sport tourism destination under the policy of diversification of its tourism supply.

Percentage of tours with sports supply by destination – Spain

<b>Costa Rica</b>	<b>27.4%</b>
<b>Cuba</b>	<b>17.0%</b>
<b>Venezuela</b>	<b>8.0%</b>
<b>Guatemala - Costa Rica - Honduras</b>	<b>8.0%</b>
<b>Puerto Rico</b>	<b>5.0%</b>
<b>Chile</b>	<b>4.0%</b>
<b>Brazil</b>	<b>4.0%</b>
<b>Mexico</b>	<b>4.0%</b>
<b>Others</b>	<b>22.6%</b>

Source: tour operator brochures

Ranking of tours with sports supply – Spain



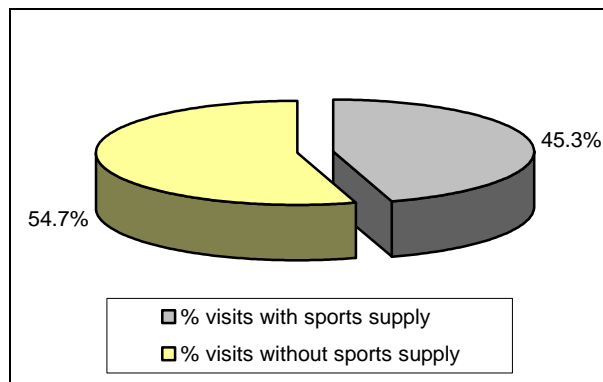
Source: tour operator brochures

### 2.2.4. France

Summer 2002 and winter 2002-2003 brochures from the following tour operators were analysed:

- Club Méditerranée
- Fram
- Jet Tours
- Kuoni
- Look Voyages
- Marsans
- Nouvelle Frontières

Percentage of visits with sports supply – France



Source: tour operator brochures

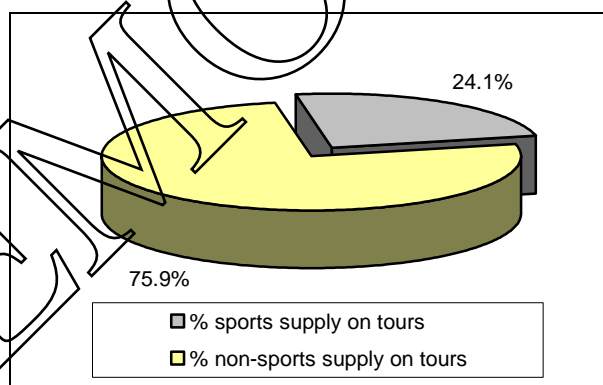
#### Importance of sports supply

The brochures published by the French tour operators were ranked in fifth place for visits, with visits having sports supply accounting for 16.4% of the total visits offered by European tour operators. For tours they were ranked third, at 10.9%.

The percentage sports supply in the French tour operators' brochures was 45.3% for visits and 24.1% for tours.

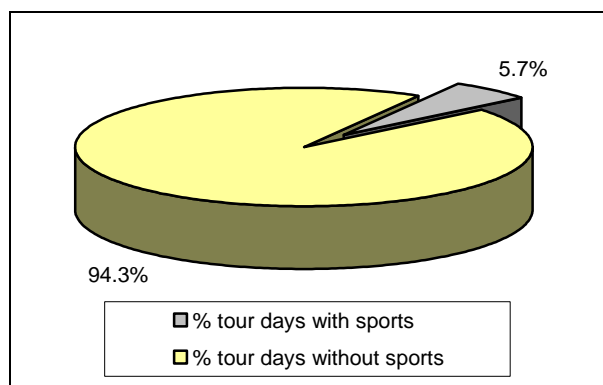
France was the next to last country in terms of the percentage of tour days on which sports were played, at 5.7% of the total.

Percentage of tours with sports supply – France



Source: tour operator brochures

Percentage days with sporting activity on tours – France



Source: tour operator brochures



**Treatment of information on sport**

None of the top six tour operators ranked by turnover in 2001 had a brochure that dealt specifically with sports supply.

- However, Club Med had a broad-ranging sports supply, since its products are based on tourism complexes with special family recreation and sport programmes.

The French brochures also did not have a special section dealing exclusively with sports supply.

- ➔ Sport figured by way of a complement to supply in the form of visits and tours.
- ➔ There was virtually no sports supply in the case of cruises.
- ➔ On the other hand, hotel complexes ordinarily did have facilities for sports.

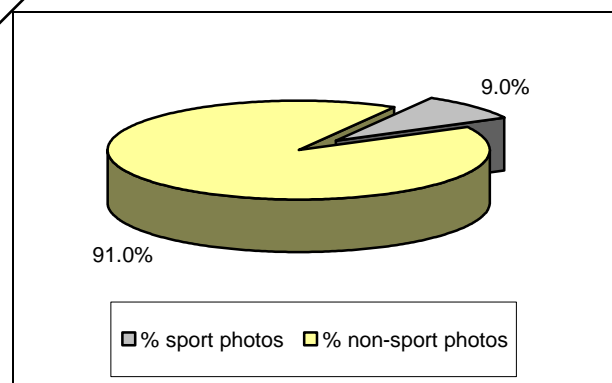
Normally visits and tours did not specify whether sporting equipment was included in the sporting activities.

In the brochures analysed, there were no appreciable differences in the sports supply in the winter season compared with that in the summer season. The same held true for the sports supply on cruises.

**Treatment of sports images**

There were no sections dealing specifically with sport, but pictures of sporting activity made up 9% of the total photographs appearing in the French brochures.

Percentage photographs in the brochures – France

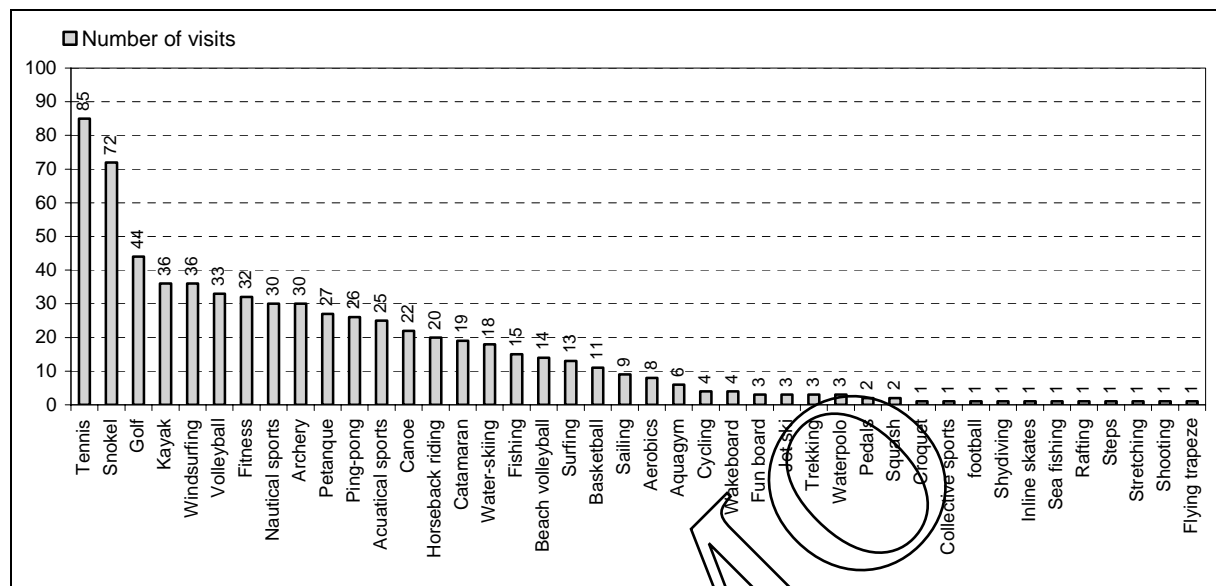


Source: tour operator brochures

### Ranking of sports supply on visits

France was the only country to have tennis as the principal sports supply on visits, accounting for 12.7% of the total sports supply. This is no doubt because of France's strong tennis tradition. Golf ranked third.

### Ranking of sports supply on visits by tour operator – France



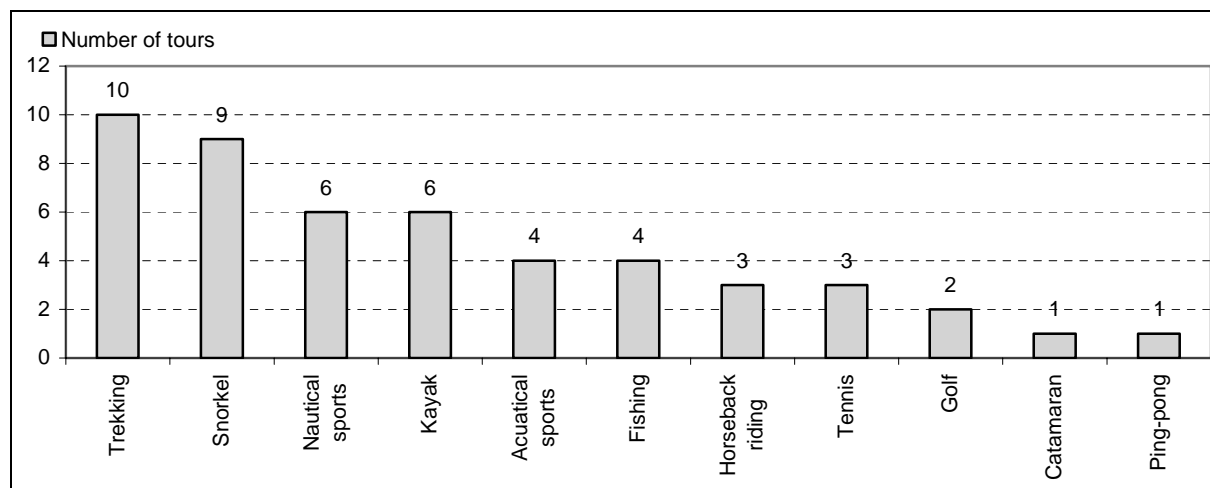
Source: tour operator brochures

### Ranking of sports supply on tours

Except for trekking, aquatic sports were the principal sports supply on the tours. Snorkelling, nautical sports, paddling, and aquatic sports together made up 51% of the total sports supply.

Unlike the case for the visits, sports supply principally involved aquatic sports.

### Ranking of sports supply on tours by tour operator– France



Source: tour operator brochures

**Sporting events**

Sporting events did not figure prominently for any of the Caribbean and Latin American destinations in any of the French brochures.

**Ranking of destinations by visits with sports supply**

Because of their historical ties, Martinique and Guadeloupe accounted for a large proportion of the French tour supply in the region. It therefore comes as no surprise that they should hold down the top rankings, accounting for 38.9% of the sports supply.

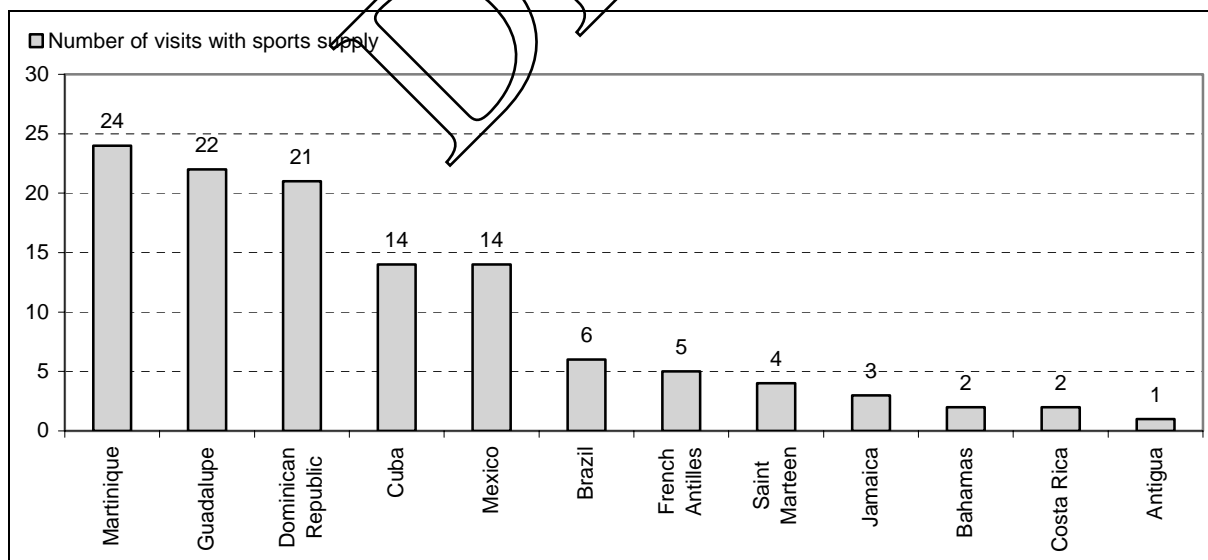
The Dominican Republic, Cuba, and Mexico together contributed 41.6% of the total sports supply.

Percentage of visits with sports supply by destination - France

<b>Martinique</b>	<b>20.3%</b>
<b>Guadeloupe</b>	<b>18.6%</b>
<b>Dominican Republic</b>	<b>17.8%</b>
<b>Cuba</b>	<b>11.9%</b>
<b>Mexico</b>	<b>11.9%</b>
<b>Brazil</b>	<b>5.1%</b>
<b>French Antilles</b>	<b>4.2%</b>
<b>Others</b>	<b>10.2%</b>

Source: tour operator brochures

Ranking of destinations by visits with sports supply - France



Source: tour operator brochures

### Ranking of destinations by tours with sports supply

Brazil and Cuba each accounted for 15.6% of the tours having sports supply.

Because there were very few tours with sports supply, Peru was able to take third place in the ranking. Hiking at Cuzco was an important activity at this destination.

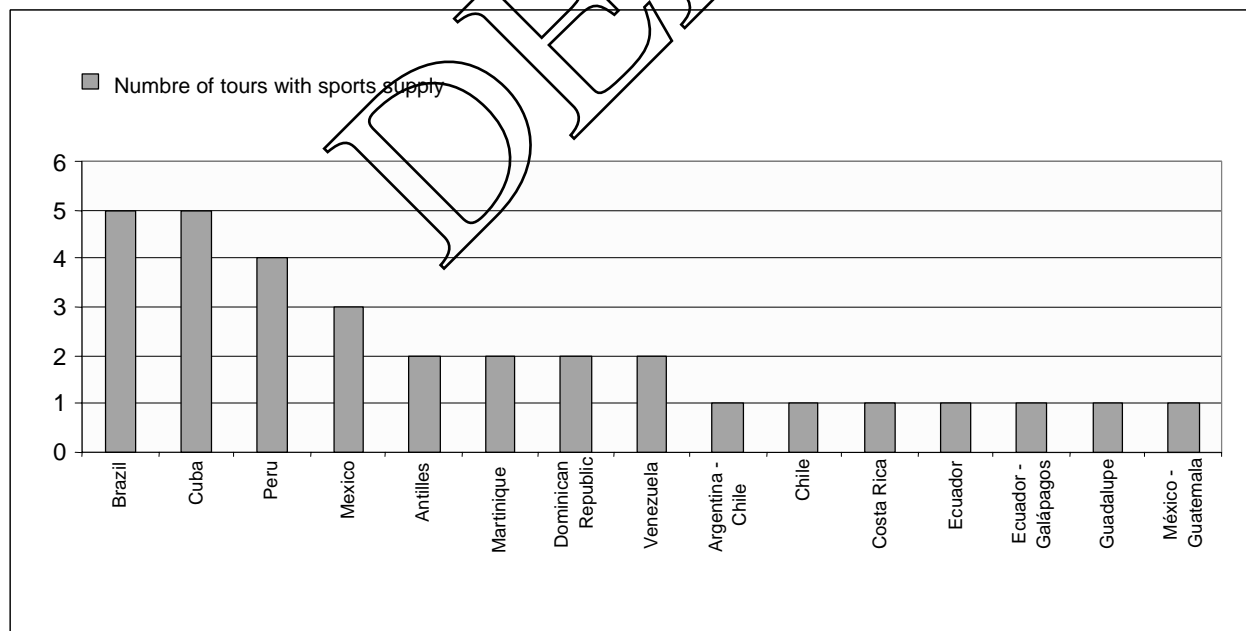
It should also be taken into account that sports supply on tours in the French brochures was quite limited, with sporting activity being engaged in on only 5.7% of tour days.

Percentage of tours with sports supply by destination – France

<b>Brazil</b>	<b>15.6%</b>
<b>Cuba</b>	<b>15.6%</b>
<b>Peru</b>	<b>12.5%</b>
<b>Mexico</b>	<b>9.4%</b>
<b>Antilles</b>	<b>6.3%</b>
<b>Martinique</b>	<b>6.3%</b>
<b>Dominican Republic</b>	<b>6.3%</b>
<b>Venezuela</b>	<b>6.3%</b>
<b>Others</b>	<b>21.7%</b>

Source: tour operator brochures

Ranking of destinations by tours with sports supply – France



Source: tour operator brochures

### 2.2.5. Italy

Summer 2002 and winter 2002-2003 brochures from the following Italian tour operators were analysed:

- Alpitur-Francorosso
- Costa Crociere
- Eurotravel
- Hit Group
- Kuoni

#### Importance of sports supply

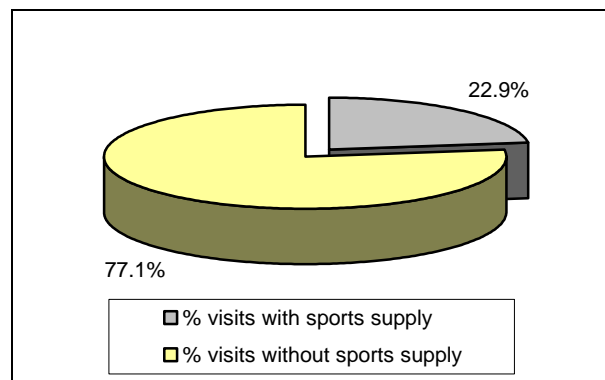
Italy was ranked last among the European countries in terms of sports supply both for visits, at 6.4% of the total sports supply by the European tour operators considered, and for tours, at 2.7%.

There was very little sports supply in the Italian brochures, particularly for the tours, at 7.1%. This may be ascribable to the very large supply of cruises in the Italian brochures, since these place very little emphasis on sport.

Not only was Italy ranked last in terms of sports supply, it also had the lowest percentage days on which sport was played on the tours, at 3.5% of the total.

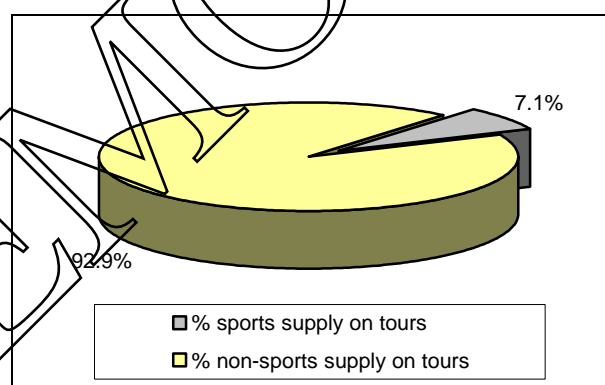
Of the generating countries analysed, Italy attached the least importance to sport. Nevertheless, it is to be kept in mind that the hotels did offer a broad range of sporting activities.

Percentage of visits with sports supply – Italy



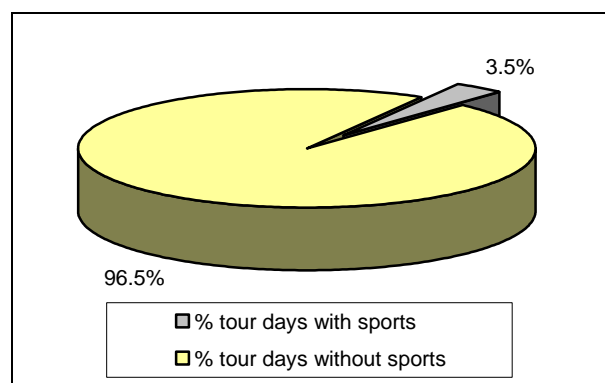
Source: tour operator brochures

Percentage of tours with sports supply – Italy



Source: tour operator brochures

Percentage days with sporting activity on tours – Italy



Source: tour operator brochures

### **Treatment of information on sport**

None of the tour operators considered (the top six ranked according to turnover in 1998) had a specialized sports supply brochure, although Eurotravel had a Health & Beauty brochure which:

- ➔ Did not offer visits or tours but did feature a high level of sports supply at the hotels in relation to the primary reason for travel, health and beauty.

The Italian brochures likewise did not have a separate section dealing with sports supply, which was included as a complementary activity on visits and tours.

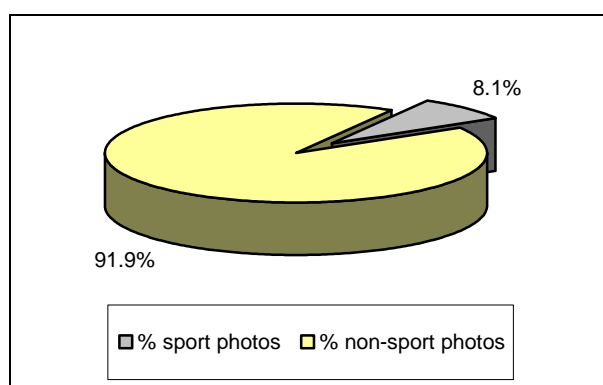
- ➔ It should be noted that the tours offered by the Italian tour operators were mainly cultural, with little sports supply.
- ➔ Costa Cruceros was the third-ranked Italian tour operator, and such other tour operators as Kuoni also offered cruises. The sports supply on the cruises was negligible.
- ➔ The largest sports supply were to be found at destinations like remote Caribbean islands (e.g., Saint Thomas). These destinations did not generally offer visits or tours, but this did not have any adverse effect on the sports supply, which was fully covered by the tourism complexes

The brochures did not usually specify whether sporting equipment was included in the sports supply on the visits and tours.

### **Treatment of sports images**

There were no sections dealing specifically with sport, but pictures of sports accounted for 8.1% of the total photographs in the Italian brochures.

Percentage photographs in the brochures – Italy



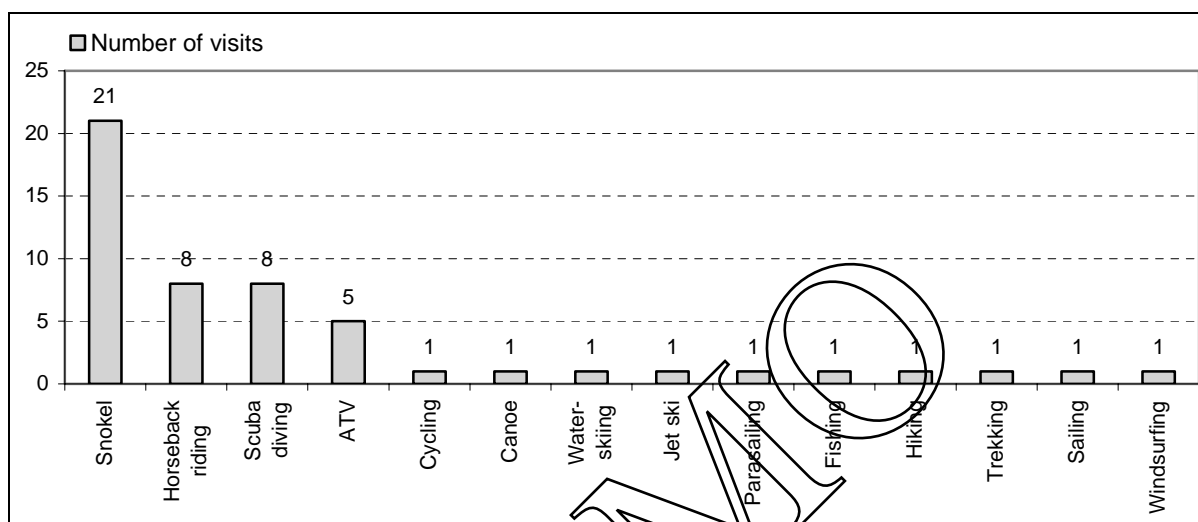
Source: tour operator brochures

### Ranking of sports supply on visits

Chief among the scant sports supply was snorkelling at 40.4% of the total sports supply on visits, followed by horseback riding and scuba diving at 15.4%.

- ➔ Snorkelling is only to be expected to be the prime sports supply, since the destinations considered offered the opportunity to visit some of the world's most beautiful coral reefs.

### Ranking of sports supply on visits by Italian tour operator



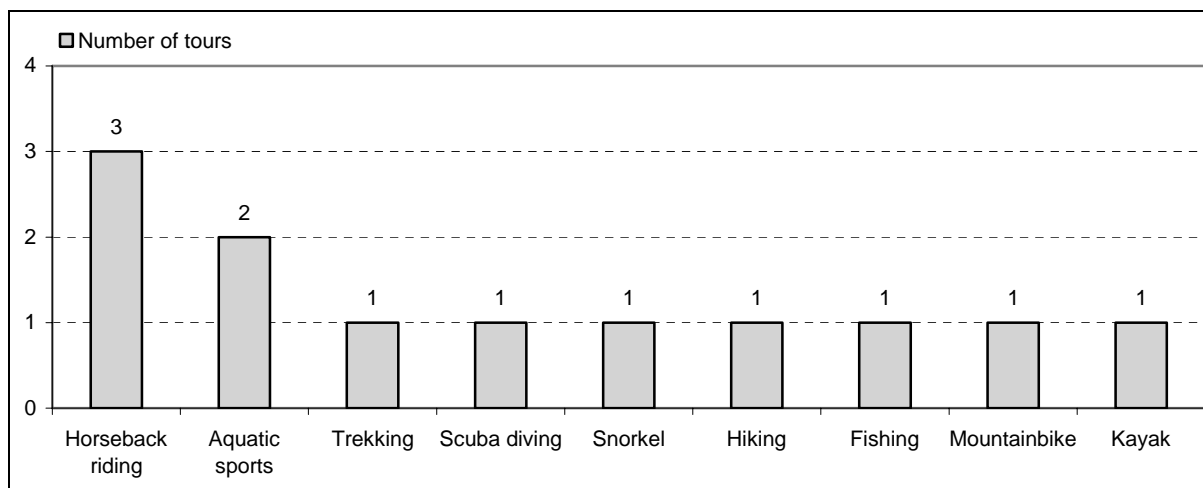
Source: tour operator brochures

### Ranking of sports supply on tours

Sports supply in the Italian brochures was extremely low, with sport only being referred to on 12 tours.

Horseback riding was the main sporting activity on both visits and tours.

### Ranking of sports supply on tours by Italian tour operator



Source: tour operator brochures

### Sporting events

The Italian brochures did not contain any opportunities to attend sporting events.

### Ranking of destinations by visits with sports supply

The Dominican Republic, Mexico, and the Caribbean accounted for 83.1% of the total sports supply on visits, all at sun & sand destinations.

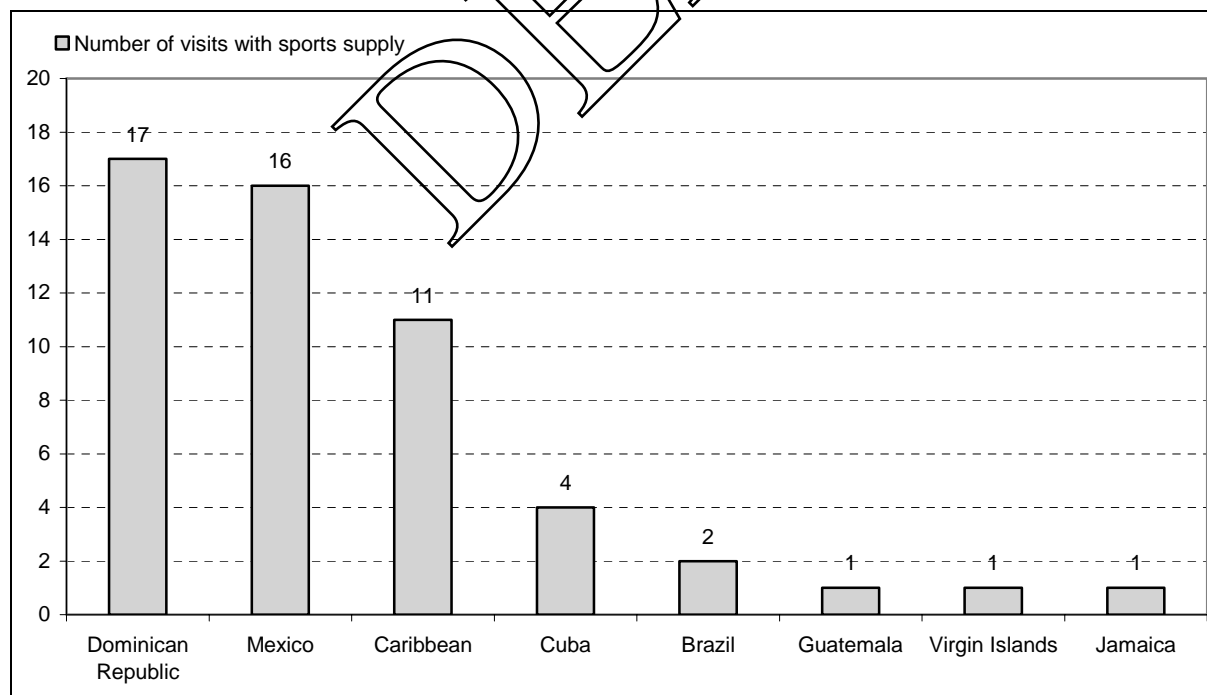
Since snorkelling was the most frequently available sport, the sports supply was consistent with the type of tourism carried out at these destinations

Percentage of visits with sports supply by destination - Italy

<b>Dominican Republic</b>	<b>32.1%</b>
<b>Mexico</b>	<b>30.2%</b>
<b>Caribbean</b>	<b>20.8%</b>
<b>Cuba</b>	<b>7.5%</b>
<b>Brazil</b>	<b>3.8%</b>
<b>Others</b>	<b>5.6%</b>

Source: tour operator brochures

Ranking of destinations by visits with sports supply - Italy



Source: tour operator brochures



**Ranking of destinations by tours with sports supply**

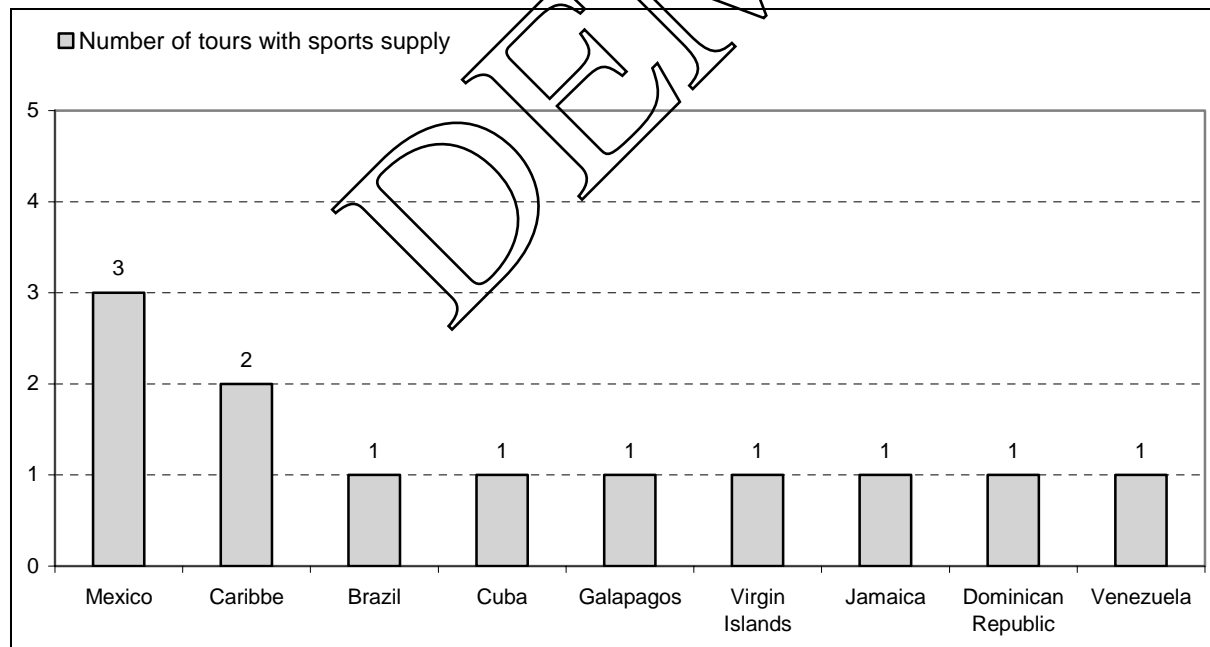
There were very few tours with sports supply. Sporting activity was available on only 12 of the tours offered. The sports supply was, however, evenly distributed among the destinations.

Percentage of tours with sports supply by destination – Italy

<b>Mexico</b>	<b>25.0%</b>
<b>Caribbean</b>	<b>16.7%</b>
<b>Brazil</b>	<b>8.3%</b>
<b>Cuba</b>	<b>8.3%</b>
<b>Galapagos Islands</b>	<b>8.3%</b>
<b>Virgin Islands</b>	<b>8.3%</b>
<b>Jamaica</b>	<b>8.3%</b>
<b>Dominican Republic</b>	<b>8.3%</b>
<b>Venezuela</b>	<b>8.3%</b>

Source: tour operator brochures

Ranking of destinations by tours with sports supply – Italy



Source: tour operator brochures

## 2.2.6. United Kingdom

Summer 2002 and winter 2002-2003 brochures from the following tour operators were analysed:

- Airtours
- First Choice
- Globus (Cosmos - Avros)
- Journey Latin America
- Thomas Cook Group
- Thomson
- Virgin

### Importance of sports supply

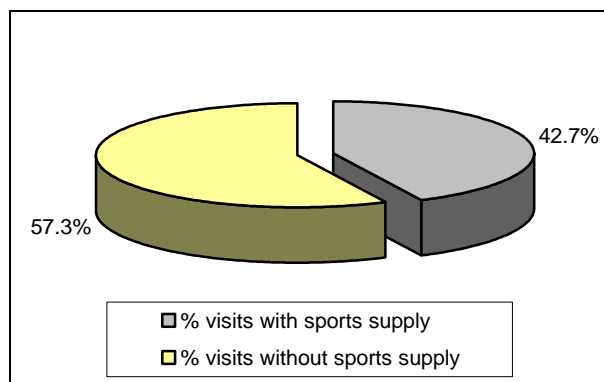
The United Kingdom ranked second among the countries in terms of sports supply for visits at 17.7% of the total and next to last in terms of sports supply for tours at 10.2%.

In the United Kingdom, sports were offered on 42.7% of the total visits and on 33.2% of the tours.

Sport was accorded much more importance on the visits than on the tours in the United Kingdom

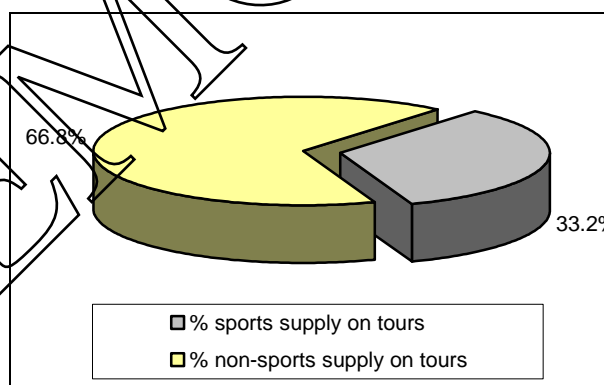
Even so, the percentage days on which sports were engaged in on the tours was not so low compared with the other countries.

Percentage of visits with sports supply  
United Kingdom



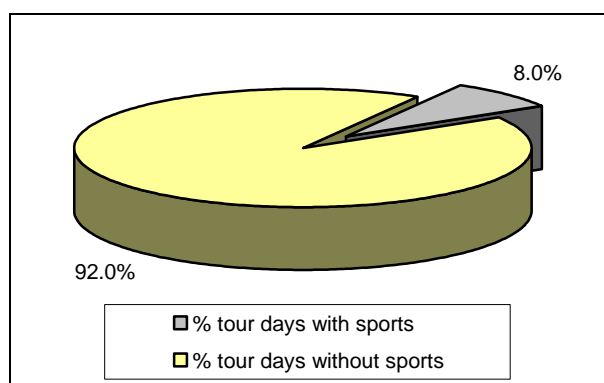
Source: tour operator brochures

Percentage of tours with sports supply  
United Kingdom



Source: tour operator brochures

Percentage days with sporting activity on tours  
United Kingdom



Source: tour operator brochures

**Treatment of information on sport**

Of the brochures analysed, Journey Travel America was the only United Kingdom tour operator specializing in Latin America that included sport as a part of the travel experience.

The tour operators did not include a separate section with sports supply for each of the destinations. The characteristics are described below.

The importance of sports supply centred on the interest of the hotel complexes in including sporting activities as a recreational complement to sun & sand tourism in the Caribbean. Aquatic and nautical sports were particularly significant.

The Virgin Florida & Caribbean brochure included cruises. The cruises did not offer visits with sporting activities. They only included fitness and pool services on board.

As a general rule, the sports supply was merely complementary to the other activities offered on visits and tours.

Sporting activity usually did not include sporting equipment.

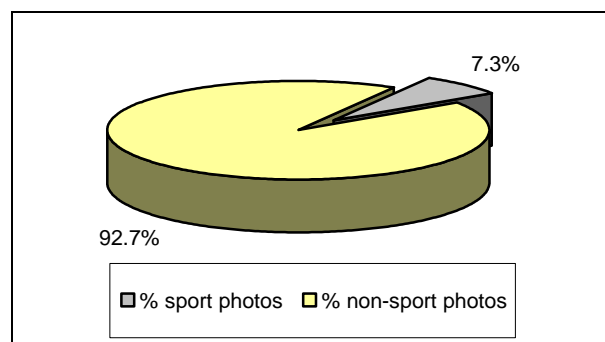
There were large differences between tourism seasons for the following tour operators:

- **THOMSON:** The absence of Caribbean and Latin American destinations in the winter season as opposed to the summer season was surprising. In winter these destinations were replaced by destinations in the Mediterranean.
- **AIRTOURS:** There were no Caribbean or Latin American destinations in their brochures for the summer season. Instead, other destinations are featured, like the Mediterranean. In contrast, these destinations are featured in winter. This may be ascribable to the lack of pronounced seasons in the Caribbean and Latin American region, which enjoys a tropical climate all year round.
- **THOMAS COOK Summer Sun:** No Caribbean or Latin American destinations were offered in summer. Rather, the competing destinations were in the Mediterranean, like Spain, Italy, Greece, Portugal, Tunisia, Malta, Egypt, Turkey, and Cyprus. This makes sense, because the Mediterranean climate is hot in the summertime and nearby supply tends to be less expensive.
- **FIRST CHOICE:** Surprisingly, there were no Caribbean or Latin American destinations in the brochures for either the summer or the winter seasons. Instead, the tourism supply focused on other countries, for instance, the Mediterranean.

**Treatment of sports images**

There were no sections dealing exclusively with sport, but 7.3% of the photographs in the United Kingdom brochures depicted sport.

Percentage pictures in the brochures – United Kingdom



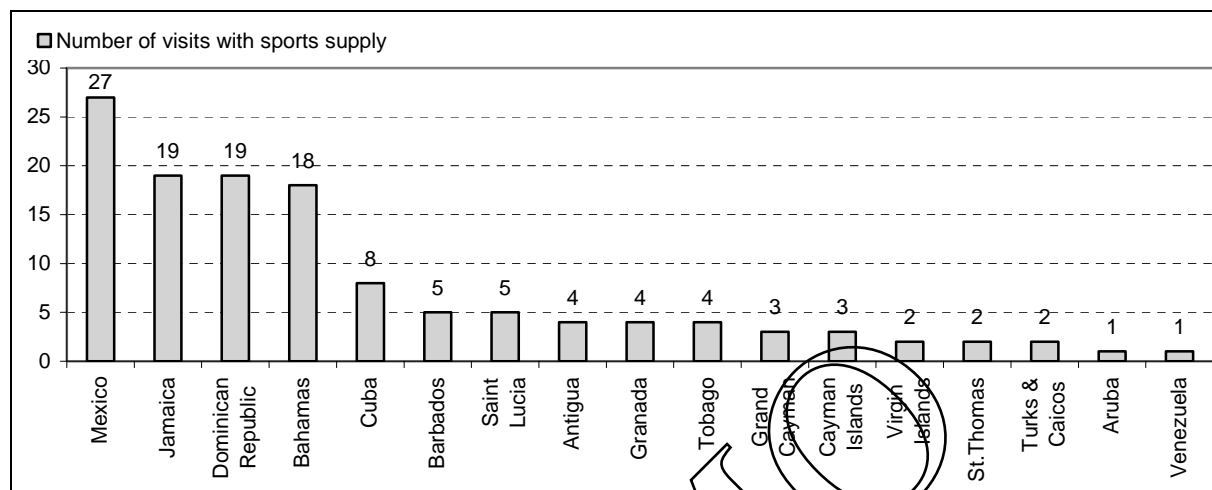
Source: tour operator brochures

### Ranking of sports supply on visits

Aquatic and nautical sports were the main sports supply on the visits. Together the top eight sports made up 66.3% of the supply.

Golf and horseback riding were the only two non-aquatic sports in the ten top-ranked sports.

#### Ranking of sports supply on visits by United Kingdom tour operator



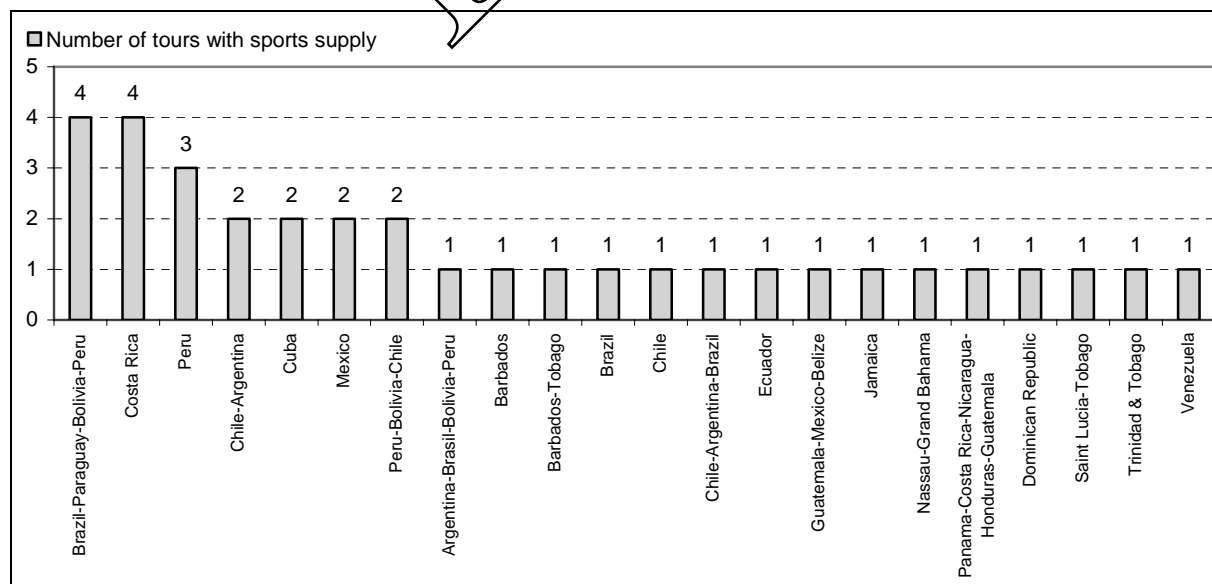
Source: tour operator brochures

### Ranking of sports supply on tours

Active sports like hiking, horseback riding, and canoeing made up 44.6% of the sports supply.

Snorkelling and aquatic sports were also important, accounting for 19.7% of the supply..

#### Ranking of sports supply on tours by United Kingdom tour operator



Source: tour operator brochures

### Sporting events

Visits to attend sporting events at the destinations were clearly absent from the United Kingdom brochures.

The Virgin Florida & Caribbean brochure offered Paradise Island, in the Bahamas, where an international golf tournament of worldwide standing is held.

- There are two tourism complexes and golf clubs on Grand Bahama: Lucaya Beach & Golf Resort and The Royal Oasis Golf & Casino Resort.

### Ranking of destinations by visits with sports supply

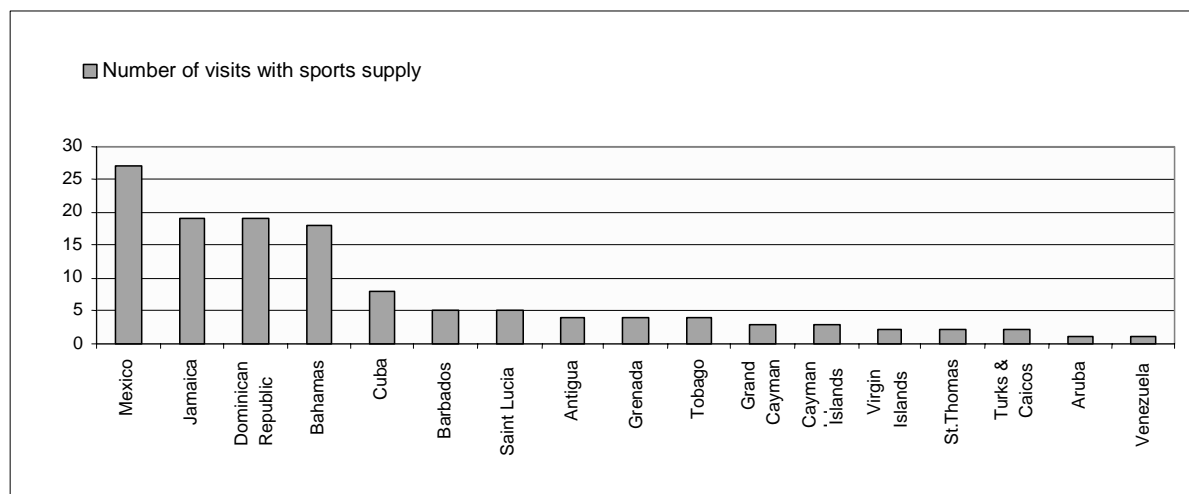
Mexico, Jamaica, the Dominican Republic, the Bahamas, and Cuba accounted for 71.8% of the visits with sports supply. The sports supply consisted mainly of aquatic sports, nautical sports, golf, and horseback riding, which was in keeping with the destinations considered..

Percentage of visits with sports supply by destination – United Kingdom

<b>Mexico</b>	<b>21.3%</b>
<b>Jamaica</b>	<b>15.0%</b>
<b>Dominican Republic</b>	<b>15.0%</b>
<b>Bahamas</b>	<b>14.2%</b>
<b>Cuba</b>	<b>6.3%</b>
<b>Barbados</b>	<b>3.9%</b>
<b>Saint Lucia</b>	<b>3.9%</b>
<b>Others</b>	<b>20.4%</b>

Source: tour operator brochures

### Ranking of destinations by visits with sports supply – United Kingdom



Source: tour operator brochures

### Ranking of destinations by tours with sports supply

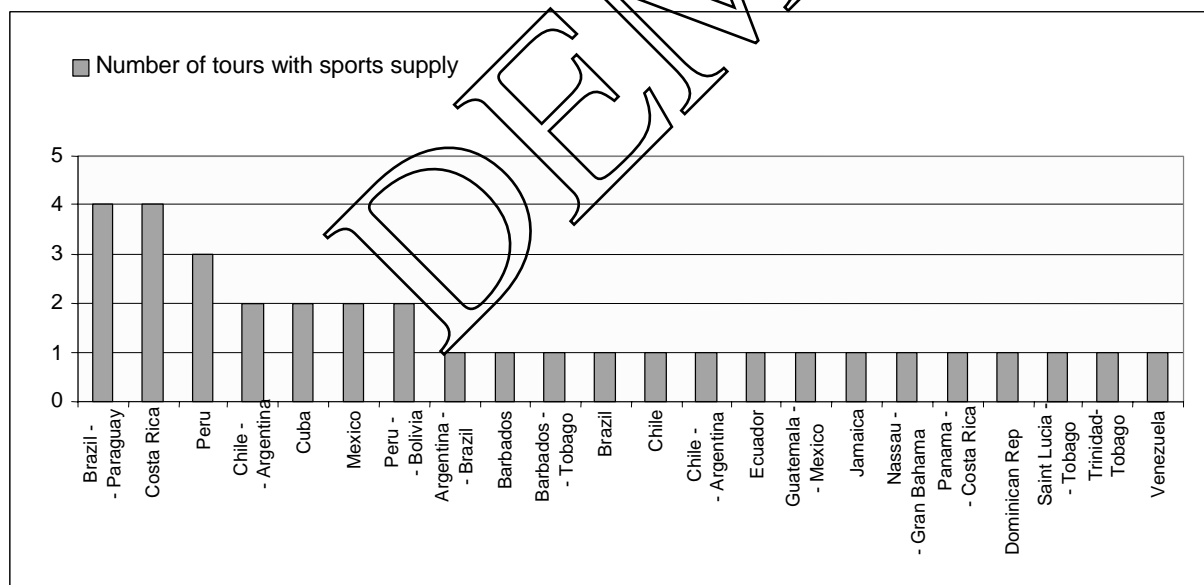
There was very little sports supply on the tours, and it was widely scattered among the brochures put out by the United Kingdom tour operators analysed.

Percentage of tours with sports supply by destination United Kingdom

<b>Brazil-Paraguay-Bolivia-Peru</b>	<b>11.8%</b>
<b>Costa Rica</b>	<b>11.8%</b>
<b>Peru</b>	<b>8.8%</b>
<b>Chile-Argentina</b>	<b>5.9%</b>
<b>Cuba</b>	<b>5.9%</b>
<b>Mexico</b>	<b>5.9%</b>
<b>Peru-Bolivia-Chile</b>	<b>5.9%</b>
<b>Others</b>	<b>44.0%</b>

Source: tour operator brochures

### Clasificación de Destinations con oferta deportiva en circuitos - Reino Unido



Source: tour operator brochures

### 3. Sports Supply by Destination

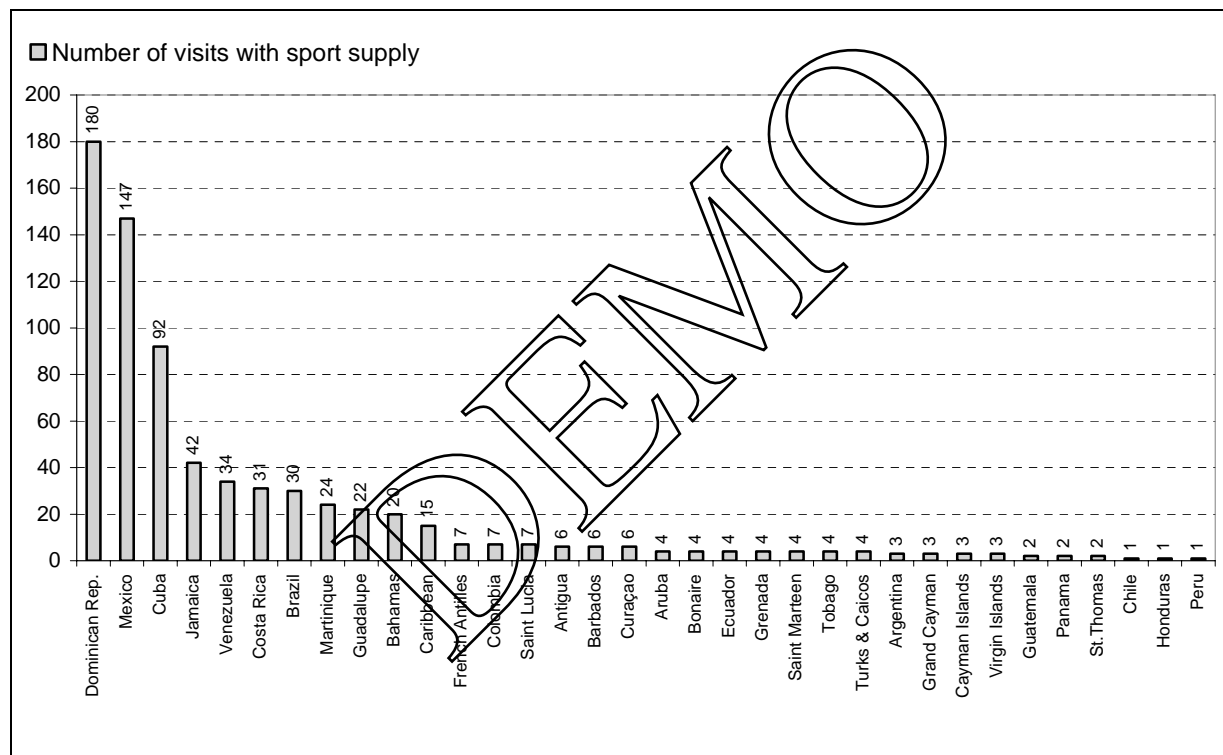
#### 3.1. Quantitative Analysis

##### 3.1.1. Ranking of destinations by visits with sports supply

Visits with sports supply were concentrated primarily in the Dominican Republic (24.8%), Mexico (20.3%), Cuba (12.7%), Jamaica (5.8%), Venezuela (4.7%), Costa Rica (4.3%), and Brazil (4.1%), which together accounted for 76.7% of the total.

The rest of the visits with sports supply (23.3%) were spread among 28 destinations.

Ranking of destinations by visits with sports supply

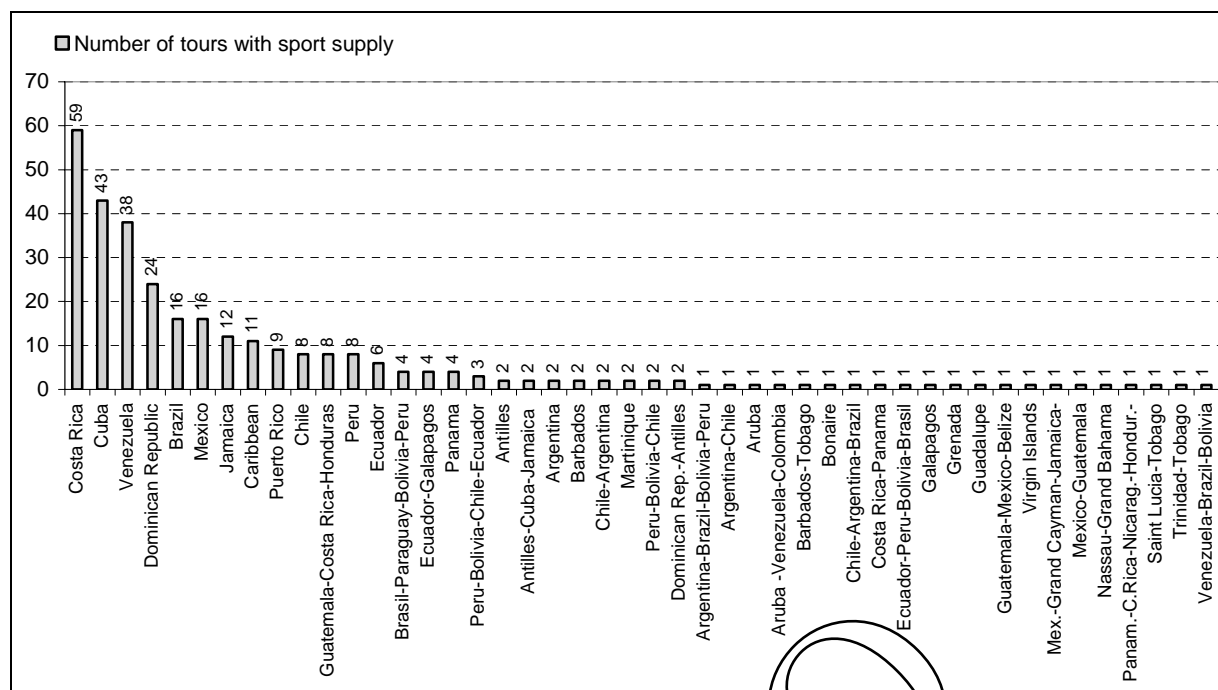


Source: tour operator brochures

##### 3.1.2. Ranking of destinations by tours with sports supply

Tours with sports supply were to be found mainly in Costa Rica (19.0%), Cuba (13.9%), Venezuela (12.3%), the Dominican Republic (7.7%), Brazil (5.2%), Mexico (5.2%), and Jamaica (3.9%), which together accounted for 67.2% of the total tours with sports supply.

### Ranking of destinations by tours with sports supply



Source: tour operator brochures

### 3.1.3. Principal sport destinations

The destinations having the most visits and tours with sports supply were analysed in greater detail because of their involvement with sport.

<u>Visits</u>	<u>Sports supply</u>
1. Dominican Republic:	24.8%
2. Mexico:	20.3%
3. Cuba:	12.7%
4. Jamaica:	5.8%

Together these countries accounted for 63.6% of the total visits with sports supply.

<u>Tours</u>	<u>Sports supply</u>
1. Costa Rica:	19.0%
2. Cuba:	13.9%
3. Venezuela:	12.3%
4. Dominican Republic:	7.7%
5. Brazil:	5.2%
6. Mexico:	5.2%

Together these countries accounted for 63.3% of the total tours with sports supply.

The following destinations held considerable interest for sport but have not been analysed in details:

- Rincón in Puerto Rico (world surfing championships)
- Paradise Island in the Bahamas (international golf tournament)



## 3.2. Qualitative aspects

### 3.2.1. Brazil

Brazil is a country with extensive natural areas in which to engage in all types of sports and a deeply rooted sporting tradition. Even so, it is not a destination offered by most of the tour operators analysed, which may have influenced its low percentage of the total sports supply for both visits (4.1%) and tours (5.2%).

The sports supply in Brazil in the brochures analysed was concentrated in the tourism complexes along the coast, such as Angra dos Reis, Búzios, Salvador de Bahía, Praia do Forte, Ilhéus, and Villa Boa Vida, supplying the following sports in order of importance: Snorkelling, kayaking, sailing, windsurfing, water skiing.

In the Amazon region sport revolved around adventure tourism:

- Rafting, tours on horseback, hiking, canoeing, hunting, and fishing for piranhas.
- These sorts of sports are available in the regions around Pantanal, Manaus, and Iguazu.

Capoeira, the country's national sport, was available in Salvador de Bahía.

### 3.2.2. Costa Rica

Costa Rica stood out as a destination in which three-fourths of the territory is preserved as a natural reserve and thus offers the perfect combination for nature tourism and outdoor sports.

The major supply included adventure sports in natural settings, such as:

- Canopy tours, rafting, horseback riding, hiking, quads, and mountain biking.
- Canopy tours were found to be available only in Costa Rica. These involve Tyrolean crossings from tree-top to tree-top in a harness suspended from a cable

The remainder of the sports supply was located at tourism complexes along the coast, where aquatic sports were particularly prevalent (Scuba diving, snorkelling, sailing, windsurfing, water skiing, jet skiing, and fishing).

Sports supply was available in conjunction with:

- Natural areas of interest for ecotourism and sightseeing with opportunity for active sport (adventure tourism):
  - El Arenal, Rincón de la Vieja National Park, Tortuguero National Park, Monteverde, Muelle, Río Sarapiquí, Río Pacuare, Río Reventazón, San Carlos, Guanacaste, Gandoca, Manuel Antonio, Tapantí and Palo Verde National Parks.
- Sun & sand tourism areas with a broad spectrum of sports supply, particularly aquatic and nautical sports:
  - Limón, Playa Tambor, Playa Conchal, Tamarindo

### **3.2.3. Cuba**

Aquatic sports supply was a basic complement at the large tourism complexes offering “all-inclusive” packages. The aquatic sports offered most frequently were:

- Snorkelling, sailing, catamaraning, diving, windsurfing, water skiing, jet skiing, kayaking, fishing

The sports supply, especially aquatic sports, was particularly noteworthy at the following sun & sand destinations:

- Cayo Largo, Cayo Coco, Varadero, Holguín, Guardalavaca, Cayo Lewis, Cayo Blanco, Playa Pesquero, Playa Esmeralda

Varadero is the country’s largest planned tourism complex, and the hotels there offered a wide selection of sports.

Other standouts include horseback riding in the areas around La Laguna and Cayo Saetia and hiking in the areas around Santiago and in the Sierra Madre.

### **3.2.4. Jamaica**

There were two main approaches to sports supply in this country:

- Sun & sand tourism, where sport is a basic complement at all-inclusive hotel complexes, which offer:
  - Snorkelling, windsurfing, and diving
- Inland tourism, where the sports supply matches the region’s natural resources, the main sports being:
  - Rafting, climbing, and hiking

Negril was the foremost resort complex concentrating tourism and hotel activities, with aquatic sports as a complementary activity at the hub.

Ocho Rios was another resort centre supplying aquatic sports.

Active and adventure tourism were concentrated in the areas around:

- Port Antonio, Montego Bay, Black River, Rio Grande, Dunn’s River Falls

### **3.2.5. Mexico**

The sports supply was concentrated at the large hotel complexes along the Caribbean and Pacific shores, mainly aquatic and underwater sports like:

- Snorkelling, diving, catamaraning, windsurfing, water skiing, sailing, kayaking, and deep-sea fishing.

There was also golf at Playa del Carmen and Puerto Vallarta.

The main destinations for under aquatic sports (snorkelling and diving) were:

- Cozumel, the world’s second largest barrier reef.

- Xel-ha bioserve, an established underwater biodiversity reserve and resort.
- Isla Mujeres.
- Punta Allen.

The following sun & sand resorts offered a wide range of sports:

- Cancún
- Playa del Carmen
- Riviera Maya

Additionally, Cobá offered such adventure sports as abseiling, Tyrolean climbing, motorcycling, ATV, and paddling.

On the other hand, the tours were chiefly cultural (such archeological sites as Tulum and Chetumal and large cities like the capital, Mexico City.)

### **3.2.6. Dominican Republic**

Sun & sand tourism is still the country's primary approach to tourism.

The significance of sport centres on all-inclusive packages at the hotel complexes.

All the tourism complexes offered a range of sporting activities, especially such aquatic and nautical sports as:

- Windsurfing, canoeing, kayaking, snorkelling, sailing, and surfing.

The beaches at Cabarete are a destination specially selected by windsurfing enthusiasts. An international windsurfing championship is held annually.

Tourism resorts where the sports supply was concentrated in the Dominican Republic include:

- Punta Cana, Playa Dorada, Playa Bávaro, Sosua, Samaná, Luperón, Catalina & Saona, Bayahibe, Juan Dolio, and Playa Cofresi.

Active tourism (rafting, tours on horseback, ATV) featured in the vicinity of Jarabacoa and Cascada Limón, the starting point for departures.

Sports supply played only a small role on the tours.

### **3.2.7. Venezuela**

Aquatic sports supply was concentrated at the large hotel complexes along Venezuela's Caribbean shore. These included, in order of importance:

- Snorkelling, diving, windsurfing, water skiing, sailing, kayaking, and deep-sea fishing.

A broad gamut of sports, particularly aquatic and underwater sports, were available at the large tourism resorts, principally:

- Isla Margarita

- Los Roques Archipelago National Park
- Porlamar

The Orinoco River and the surrounding region (Angel Falls) were other important areas for hiking and fishing for piranhas.

The sports supply on the tours was basically that of active tourism, unlike the visits, on which sport revolved around the tourism complexes along the coast, where sport formed the basis for their recreational supply.

DEMO

## 4. Website analysis

### 4.1. Introduction

The objective of this analysis was to ascertain sport tourism supply available to European consumers on the Internet.

The analysis took in 30 websites that offered travel or stays with an emphasis on sport in Latin America. An attempt was made to include as many countries and as many sports as possible.

Since the Internet knows no borders, the search was not restricted to any specific countries. All supply on the web is available to everyone everywhere.

The Internet is without question the tool used most often by sport enthusiasts to find specialized supply. As has been shown repeatedly in the course of this study, the sports supply by the large tour operators is not specialized. Therefore, people interested in sport seeking the best conditions, facilities, and so on find the Internet to be a search platform better suited to their needs. Thanks to the Internet, they can contact professionals in their chosen sport and people with first-hand knowledge of the destinations.

### 4.2. Current status

#### *Internet supply*

- Internet supply is extremely broad. All sports are on the web, though not all are handled by tour operators.
- Most of the websites visited offered quite detailed information.
- On-line bookings could be made on most of the websites visited.
- Argentina, Mexico, and Chile were the countries with the most supply on the web.

#### *Types of companies*

- Most of the companies were small or medium-size enterprises
- They operate in a relatively local context
- They are highly focused on certain sports

#### *Nature and sport*

- Most of the sports supply is related to natural settings
- Nature is another of the selling points
- The sports supply depends on climatic conditions – some sports are not available at certain times of year.
- In some cases sport is used to deseasonalize tourism flows at the destination..

## Portals

- There are various portals and link sites for sport tourism supply which serve to showcase companies
- For example:
- [www.turismoaventura.com](http://www.turismoaventura.com): one of the top link sites encompassing a large portion of the supply in Latin America.
- The information on these portals tends to be arranged by sport.

## 4.3. Features of the websites analysed

### 4.3.1. ARGENTINA

#### Aventurarse.com

- **Address:** [www.aventurarse.com](http://www.aventurarse.com)
- **Destinations:** Supply throughout Argentina
- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 100%
  - Aventurarse is a portal supplying sport tourism over a large part of Latin America.
- **Sports offered:**

Adventure sports are the sports most frequently offered, in order of importance: climbing, cycling, rafting, trekking, diving, and hang-gliding.

  - Hiking is another major supply option.
  - In all cases sporting equipment is available for an additional charge..
- **Information structure:**
  - Information is accessed by sport by clicking on the sport of interest, which calls up a list with supply in the different countries.
- **Destinations:**
  - Sierra de la Culata National Park (Venezuela)
  - Machu Picchu (Peru)
  - Torres del Paine National Park (Chile)
  - Nahuel Huapi National Park (Argentina)
  - Cordillera Blanca (Peru)
  - Tierra del Fuego National Park (Argentina)
  - El Chaltén (Argentina)
  - Patagonia (Argentina)
  - Cordillera Real (Bolivia)

- Cotopaxi National Park (Ecuador)
- Cordillera Mendocina (Argentina)
- Tikal (Guatemala)
- Sierra Nevada National Park (Venezuela)
- Andes (Argentina)
- Iguazu (Argentina)
- Several different sports from among those listed are offered at nearly all destinations..

### Grupo Sierra

- **Address:** www.gruposierra.com
- **Destinations:** Tandil (Argentina)
- **Basic features:**
  - Percentage pictures of sport: 36.8%
  - Percentage of visits with sports supply: 65.2%
  - Grupo Sierra is an association of tourism enterprises whose aim is to generate a market for the Tandil region.
  - There is a comprehensive sport and nature supply.
- **Sports offered:**
  - Mountain sports are the chief supply, in order of importance: horseback riding, big and small game hunting, cycle tours, motorcycling (quads).
  - Other important sports are walking, hiking, golf, and ultralight flying.
  - Other sports like climbing, spelunking, and trekking are also offered.
  - Sporting equipment can be provided in all cases for an additional charge.
  - Tandil is a nature tourism destination, making sport the perfect complement for this type of supply, hence sport enjoys moderate to high standing on the website..
- **Information structure:**
  - The information is accessed in two ways, either by sport or by holiday duration (short, long, medium).

### **Chapelco Ski & Summer Resort**

- **Address:** [www.chapelco.com.ar](http://www.chapelco.com.ar)
- **Destinations:** Neuquén (Argentina).
- **Basic features:**
  - Percentage pictures of sport: 50%
  - Percentage of visits with sports supply: 75%
  - A ski resort that also offers summer activities.
- **Sports offered:**
  - Winter sports are the cornerstone of its programme.
  - Horseback riding is also offered in the summertime.
  - Ski schools are also available
- **Information structure:**
  - The different supply can be accessed from the home page under the headings Summer and Winter.

### **Comarcas**

- **Address:** [www.comarcas.com](http://www.comarcas.com)
- **Destinations:**
  - Central America
  - Caribbean
  - Argentina
- **Basic features:**
  - Percentage pictures of sport: 80%
  - Percentage of visits with sports supply: 100%
  - A tour operator specializing in diving and in addition to its programmes it offers individual stays
- **Sports offered:**
  - Diving is the only sport offered.
- **Information structure:**
  - Arranged by destination.



### Norte Trekking Expediciones

- **Address:** [www.nortetrekking.com](http://www.nortetrekking.com)
- **Destinations:**
  - Andean region (Argentina, Peru, Bolivia, and Chile)
- **Basic features:**
  - Percentage pictures of sport: 70%
  - Percentage of visits with sports supply: 30%
  - A small, virtually family-run tour operator that offers nature and sports programmes. It offers basic programmes that can be altered; tailor-made programmes are also available..
- **Sports offered:**
  - Horseback riding, rafting, and trekking.
  - Tailor-made programmes can include other sports (except hunting and fishing)
- **Information structure:**
  - The information is arranged by route and by sport.

### Camino Abierto Expediciones

- **Address:** [www.caminoabierto.com](http://www.caminoabierto.com)
- **Destinations:** Patagonia
- **Basic features:**
  - Percentage pictures of sport: 30%
  - Percentage of visits with sports supply: 50%
  - An Argentine tour operator specializing in adventure tourism and ecotourism. The importance of sport is relative, adventure tourism and ecotourism being the main selling points.
- **Sports offered:**
  - Trekking
  - Rafting
  - Mountain biking
- **Information structure:**
  - The information is arranged both by destination and by sport

### Marco Polo Expediciones

- **Address:** <http://www.geocities.com/Yosemite/Gorge/1000/>
- **Destinations:** Argentina
- **Basic features:**
  - Percentage pictures of sport: 30%
  - Percentage of visits with sports supply: 80%
  - An Argentine tour operator specializing in sport and adventure tourism. It also has company-oriented programmes.
- **Sports offered:**
  - Trekking
  - Horseback riding
  - Mountain biking
  - Climbing
- **Information structure:**
  - The information is arranged by sport.

### Grupo Huellas

- **Address:** <http://www.grupohuellas.com>
- **Destinations:** Argentina
- **Basic features:**
  - Percentage pictures of sport: 30%
  - Percentage of visits with sports supply: 80%
  - An Argentine tour operator specializing in sports for customers with a certain skill level. It also offers recreational programmes.
- **Sports offered:**
  - Trekking
  - Horseback riding
  - Rafting
  - Climbing
- **Information structure:**
  - The information is arranged by destination

### Fishing and adventure tourism

- **Address:** <http://www.interserver.com.ar/host/tronador/>
- **Destinations:** Argentina
- **Basic features:**
  - Percentage pictures of sport: 60%

- Percentage of visits with sports supply: 80%
- An enterprise dealing in fishing and nature sports.
- **Sports offered:**
  - Fishing
  - Horseback riding
  - Trekking
  - Different fishing activities are this tour operator's primary sports supply.
- **Information structure:**
  - The information is arranged by activity and by time of year.

### Bike Way

- **Address:** <http://www.bikeway.com.ar/>
- **Destinations:** Argentina
- **Basic features:**
  - Percentage pictures of sport: 80%
  - Percentage of visits with sports supply: 100%
  - An enterprise dealing in bicycle tourism, supplying pre-arranged programmes and also organizing customized routes.
- **Sports offered:**
  - Mountain biking
  - This enterprise deals only in cycling and does not offer any other sports.
- **Information structure:**
  - The information is arranged by route

### Diving Center

- **Address:** <http://www.divingcenter.com.ar>
- **Destinations:** Argentina
- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 100%
  - This is a diving centre that offers packages that include classes and stays.

- **Sports offered:**
  - Submarinismo
  - Trekking
  - Es una empresa dedicada básicamente al submarinismo que completa su oferta con trekking.
- **Information structure:**
  - The information is arranged by route

### Las Leñas

- **Address:** <http://www.lasleñas.com>
- **Destinations:** Argentina
- **Basic features:**
  - Percentage pictures of sport: 30%
  - Percentage of visits with sports supply: 60%
  - A ski resort that offers other, complementary sporting activities.
- **Sports offered:**
  - Skiing
  - Football
  - Tennis
  - Paddle tennis
  - Basketball
  - Skiing is definitely the principal sport, the other sports being complementary and helping to deseasonalize the destination
- **Information structure:**
  - The information is arranged by activity and by time of year.

### Patagonia Virtual

- **Address:** <http://fspatagoniavirtual.freeservers.com/>
- **Destinations:** Argentina
- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 100%
  - Packages combining different sports are offered according to the customer's choice at this virtual sport travel agent.
- **Sports offered:**
  - Rafting
  - Trekking
  - Skiing

- Hang-gliding
- Climbing
- Horseback riding
- Golf
- Mountain biking
- Diving
- One of the broadest-ranging sports supply analysed.

- **Information structure:**
  - The information is arranged by activity

### La Nelly

- **Address:** <http://www.cabalgatas.unlugar.com/>
- **Destinations:** Argentina
- **Basic features:**
  - Percentage pictures of sport: 80%
  - Percentage of visits with sports supply: 100%
  - Travel given over to horseback riding is offered.
- **Sports offered:**
  - Horseback riding
- **Information structure:**
  - The information is arranged by duration of the activity

## 4.3.2. CHILE

### Galopaventura

- **Address:** [www.galopaventura.cl](http://www.galopaventura.cl)
- **Destinations:** Andean mountains outside Santiago de Chile..
- **Basic features:**
  - Percentage pictures of sport: 66%
  - Percentage of visits with sports supply: 100%
  - Galopaventura offers a variety of routes through the Andean mountains.
- **Sports offered:**
  - Horseback riding.
  - Supply centres on a single sport.
  - Sporting equipment is furnished in all cases
- **Information structure:**
  - The website shows six routes lasting different lengths of time and of differing degrees of difficulty by way of example but makes it quite clear that the company usually arranges customized trips for its clients.

### Yak Expediciones

- **Address:** [www.yakexpediciones.cl](http://www.yakexpediciones.cl)
- **Destinations:** Southern Chile.
- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 100%
  - Yak Expediciones organizes a variety of activities revolving around kayaking, both ocean and river journeys and both from a fixed base and departures lasting several days.
- **Sports offered:**
  - All forms of kayaking.
  - Also trekking as a secondary supply option
  - Supply focuses primarily on kayaking.
  - Sporting equipment is furnished in all cases.
  - Beginning and more advanced courses are available for participants
- **Information structure:**
  - The different departures offered are accessed by a series of tabs.

### Riviera Maya Bike Adventure

- **Address:** [www.bikeadventure.riviera-maya.com.mx](http://www.bikeadventure.riviera-maya.com.mx)
- **Destinations:** Yucatan.
- **Basic features:**
  - Percentage pictures of sport: 44%
  - Percentage of visits with sports supply: 100%
  - This tour operator offers mountain bike tours along the Riviera Maya.
- **Sports offered:**
  - Mountain biking is the basic sport option.
  - To a lesser extent snorkelling and diving supply is also available.
- **Information structure:**
  - The home page provides access to the different routes, offering a day by day programme description. All the hotels offered, terms, bookings, etc. are also described.

### **Cabot Programs & Tours**

- **Address:** [www.cabot.cl](http://www.cabot.cl)
- **Destinations:** Chilean Patagonia, Aisén, San Rafael glacier.
- **Basic features:**
  - Percentage pictures of sport: 32%
  - Percentage of visits with sports supply: 50%
  - A tour operator specializing in nature and sports supply in Chile.
- **Sports offered:**
  - Fishing, horseback riding, rafting, and trekking are the sports offered.
  - The necessary sporting equipment is offered.
  - These sports are to a large extent dependent on the elements.
- **Information structure:**
  - The different programmes, accommodation, transport, etc. are accessed from the home page. The sports supply available and the conditions is described under each programme.

### **4.3.3. COSTA RICA**

#### **Aguas Bravas**

- **Address:** [www.aguas-bravas.co.cr](http://www.aguas-bravas.co.cr)
- **Destinations:** Chilean Patagonia, Aisén, San Rafael glacier.
- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 100%
  - A tour operator specializing in sport around San José in Costa Rica.
- **Sports offered:**
  - Rafting is the main sport supply.
  - This sport is supplemented by cycling, horseback riding, and climbing.
  - The necessary sporting equipment is provided
- **Information structure:**
  - The different tours and packages offered are accessed from the home page.

### **Maitenes expediciones**

- **Address:** <http://www.maitenes.8k.com>
- **Destinations:** Chilean Andes
- **Basic features:**
  - Percentage pictures of sport: 80%
  - Percentage of visits with sports supply: 60%
  - A Chilean tour operator specializing in sport for customers with a certain skill level, operating exclusively in the region of the Chilean Andes
- **Sports offered:**
  - Trekking
  - Mountain biking
- **Information structure:**
  - The information is arranged by destination

### **4.3.4. ESPAÑA**

#### **Tuareg Viatges**

- **Address:** [www.tuaregviatges.com](http://www.tuaregviatges.com)
- **Destinations:**
  - Peru
  - Brazil
  - Argentina
  - Venezuela
- **Basic features:**
  - Percentage pictures of sport: 20%
  - Percentage of visits with sports supply: 33%
  - A Spanish tour operator specializing in adventure travel and unusual destinations. The adventure component outweighs the sport component in this case. Much individual travel supply is available.
- **Sports offered:**
  - Trekking and rafting are the only sports offered in Latin America.
- **Information structure:**
  - The information is arranged by destination.

#### **Trekking y Aventura**

- **Address:** [www.trekkingviajes.com](http://www.trekkingviajes.com)



- **Destinations:**
  - Patagonia
  - Iguazu
  - Andes (Peru)
  - Venezuela
  
- **Basic features:**
  - Percentage pictures of sport: 0%
  - Percentage of visits with sports supply: 36.4%
  - A tour operator supplying adventure travel and sport.
  
- **Sports offered:**
  - Trekking is the primary sport supply.
  - Such other sports as mountain biking and climbing are available
  
- **Information structure:**
  - After an introduction a brochure is accessed. The information is arranged by destination. Different tours are offered for each destination, and the sports available at each destination are described.

#### 4.3.5. MÉXICO

##### Centro de Kayak K360°

- **Address:** [www.kayak360mexico.com](http://www.kayak360mexico.com)
  
- **Destinations:** Jalcomulco Veracruz (Mexico).
  
- **Basic features:**
  - Percentage pictures of sport: 87%
  - Percentage of visits with sports supply: 100%
  - Centro de Kayak K360° is a kayaking complex.
  
- **Sports offered:**
  - All forms of kayaking.
  - A single sport is offered.
  - Sporting equipment is furnished in all cases.
  - Beginning and more advanced courses are also offered
  
- **Information structure:**
  - Following an introduction explaining the complex's philosophy and facilities, the rates are listed.

##### Piraguas

- **Address:** [www.piraguas.com](http://www.piraguas.com)
  
- **Destinations:** Oaxaca Mexico

- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 100%
  - A tour operator specializing in river sports in the state of Oaxaca in Mexico
- **Sports offered:**
  - River sports, i.e., rafting, canyoneering, and kayaking, are the basic supply in this tour operator's programmes.
  - The sports supply is supplemented by trekking and mountain biking
- **Information structure:**
  - The information is arranged by route and by sport

### River and mountain expeditions

- **Address:** [www.rioymontana.com](http://www.rioymontana.com)
- **Destinations:** Mexico and Peru
- **Basic features:**
  - Percentage pictures of sport: 83%
  - Percentage of visits with sports supply: 72%
  - A Mexican tour operator specializing in sport for customers with moderate to high skill levels.
- **Sports offered:**
  - The sports offered are rafting, trekking, mountaineering, and mountain biking, often with several of these sports being offered on a single tour.
- **Information structure:**
  - The information is arranged by sport

### Ecco Sports

- **Address:** <http://www.eccosports.com.mx>
- **Destinations:** Mexico
- **Basic features:**
  - Percentage pictures of sport: 60%
  - Percentage of visits with sports supply: 60%
  - A Mexican tour operator specializing in adventure and active tourism and sport..
- **Sports offered:**
  - Trekking
  - Mountain biking

- Rafting
- Abseiling
- Kayaking

- **Information structure:**
  - The information is arranged by destination and type of trip

### Río Aventura

- **Address:** <http://www.rioaventura.com.mx>
- **Destinations:** Mexico
- **Basic features:**
  - Percentage pictures of sport: 90%
  - Percentage of visits with sports supply: 50%
  - A Mexican tour operator specializing in adventure and active tourism and sport. All sporting activities are carried out around a base complex.
- **Sports offered:**
  - Horseback riding
  - Mountain biking
  - Rafting
  - Abseiling
- **Information structure:**
  - The information is arranged by activity and by sport.

### Selva Azul

- **Address:** <http://www.selvazul.com>
- **Destinations:** Mexico
- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 100%
  - Packages combining different sports and tours lasting different lengths of time are offered.
- **Sports offered:**
  - Rafting
  - Trekking
  - Abseiling
- **Information structure:**
  - The information is arranged by activity

### 4.3.6. PERÚ

#### Hemi River Rafting Co.

- **Address:** [www.geocities.com/hemiriver/](http://www.geocities.com/hemiriver/)
- **Destinations:** Lunahuaná (Cañete-Peru)
- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 100%
  - A tour operator supplying rafting activities.
- **Sports offered:**
  - Rafting is the main option supplied and indeed the only sport.
  - Sporting equipment is provided
- **Information structure:**
  - Different services, e.g., courses, stays, are listed with an explanation of the terms, conditions and surroundings.

### 4.3.7. VENEZUELA

#### Hori Sub

- **Address:** [www.lrs.com.ve/horisub/](http://www.lrs.com.ve/horisub/)
- **Destinations:** Mochima National Park
- **Basic features:**
  - Percentage pictures of sport: 100%
  - Percentage of visits with sports supply: 86%
  - HoriSub is a tourism complex specializing in diving in Mochima National Park..
- **Sports offered:**
  - Diving is the only sport offered on the website.
  - Sporting equipment is provided
- **Information structure:**
  - Information on prices, location, and accommodation is listed.