# GREENWAYS PRODUCT

# SPECIFIC METHODOLOGY FOR CREATING A TOURISM PRODUCT BASED ON GREENWAYS









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**Authors:** Rutas Pangea: Jesús Blázquez and Juan Sarrión with the collaboration of Greenways and Environment Department (FFE): Carmen Aycart Luengo, Arantxa Hernández Colorado and Fundación Vía Verde de la Sierra: Mary Jiménez.

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**Translation:** Steve Turpin

Design and layout: Arantxa Hernández (FFE) y Oana

Buda





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# SPECIFIC METHODOLOGY FOR CREATING A TOURISM PRODUCT BASED ON GREENWAYS

One of the main activities of this project is the creation of the specific methodology required and the steps to be taken to create a tourism product based on Greenways.

The objective of this report is to serve as a guide not only for public managers of the Greenways and local tourism resources but also for the private enterprises at a local or regional level which provide services to the users of these routes. The research required to achieve this goal has been carried out by *Rutas Pangea* and *Fundación de los Ferrocarriles Españoles* (Spanish Railways Foundation), the organization responsible for developing develop the Spanish Greenways Programme.

The aim of this report is for it to be delivered to the project partners and to all the public and private entities who wish to access it.

#### 1. INTRODUCTION

There are a number of facts and figures that make it interesting to continue to work towards the creation of a tourism product based on cycle tourism and hiking on European greenways. Let us take a look at some of them:

Holidays whose main purpose is the practice of some kind of sport (cycling, hiking, golf, etc.) are a coming trend, as stated in a report presented at the ITB Berlin fair in 2011. In that year, sport tourism was behind nine million trips abroad in Europe alone. Spain may have great potential in this segment, but it fails to figure among the top three favourite destinations of European sport lovers.

According to data gathered in the ITB World Travel Monitor survey, sport tourism has posted double-digit growth over the last five years in European outbound tourism markets, "even overtaking cruises", which up until then had been the segment with the strongest growth.

However, demand is by no means homogeneous. German travellers head the ranking; they alone account for 42% of the nine million trips a year made in Europe for the purpose of sport tourism. Next come the Dutch (14%). But in the other outbound markets, the combination of holiday and sport represents less than 6% of the total national demand.

The sports that are responsible for most trips abroad are hiking (38%), cycling (23%), motor sports (including aquatic motor sports, 14%); and golf (10%).



Not only has the number of trips grown, but so has the amount per person spent on those trips. The average expenditure per person on adventure activities has grown over these last three years from 445 euros per trip to 710, according to the latest survey by George Washington University's business school and the Adventure Travel Trade Association (ATTA). This outlay would be even higher if these figures included air fares and the cost of equipment and accessories that are not considered in the report.

As the survey points out, this type of leisure activity is on an upward trend, with an average annual growth rate of 65% since 2009.

ATTA President Shannon Stowell puts this increase down to "growth in the global tourism industry, a significant increase in the percentage of adventure travellers, and an increase in the average amount spent per adventure travel trip".

And to finish, here are some figures that underline the importance of this segment. Spain also holds an increasingly greater interest for foreign travellers as a destination for the practice of sports.

In fact, the number of international tourists who came to Spain to take part in sport-related activities topped the nine million mark in 2011, nearly two million more than the previous year, and accounted for 16% of the total number of visits by foreign tourists. 56.2% were men and the rest women. They generated revenues totalling 9.8 million euros, 18.4% of the total, with an average expenditure of 1,075 euros.

These figures appear in the *Anuario de Estadísticas Deportivas* (Sports Statistics Yearbook) for 2013 produced by the Ministry of Education, Culture and Sport, chapter 7 of which studies the link between sport and tourism. With these figures the report "highlights the importance of the sports sector as a driver of other sectors of great economic importance, such as tourism".

Este es el panorama actual. Un gran potencial pero que en pocas ocasiones logramos que se convierta en una realidad que nos reporte beneficios económicos a nivel local.





#### 2. METHODOLOGY FOR CREATING THE TOURISM PRODUCT

These new markets require tailor-made services and activities with specific quality standards, aimed at a more experienced tourist. This means that customer satisfaction is a harder goal to achieve.

Today we need to organize the tourism offer according to the requirements of the particular market in which we wish to grow.

The rules have changed, and now market penetration, promotion, price setting, and the quality and quantity of product in the market are variables that today are more than ever defined by the customer rather than the producers.

The change is seen in how we need to build our product:



The line to follow is to create a new market-oriented tourism product, meeting the needs of the potential customer. The product must be customer-oriented.

In order to meet the needs of the demand, it is essential to create authentic and exciting products that enable tourists to enjoy a memorable and innovative experience, which is what the tourist today is seeking.

In broad terms the steps to follow are common to any tourism product:

- 1. Identify and assess available resources. (Here much of the work has been done.)
  - a. Human resources involved in the design of the products.
  - b. Tourist attractions, services and equipment.
  - c. Economic and social fabric present in Greenways.
  - d. Infrastructure, mobility and accessibility.



- 2. Identify the profile of the customers.
  - a. What are they like? Country of origin, age, purchasing power.
  - b. What do they expect to find? Basic product, associated activities.
  - c. What do they value? What added value elements do they demand?
  - d. What do they need? Mobility, accommodation, food, activities, information, communication.
- 3. Specify the basic aspects of the product.
  - a. Core of the product.
  - b. Tangible product.
- 4. Add value to the proposition.
  - a. Staff, provision of services.
  - b. Social and environmental sustainability.
  - c. Accessibility of the propositions.
  - d. Predominance of local products.
  - e. Awareness of Greenways, their railway past, recovery of cultural and natural heritage.
- Marketing
  - a. Price and promotions.
  - b. Communication.
  - c. Sales channels.
    - i. This is a key element in the process; without a good distribution strategy with specialized travel wholesalers and/or retailers it will be very difficult to develop the marketing of the product.
- 6. Training of the Product Manager
  - a. This may be a key role in the local areas involved, as a driver and enabler of the creation and consolidation of cycle tourism and hiking products.
  - b. Training courses with the product manager could be organized in a more centralized and specialized manner and materials created to help replicate this training on their Greenways.
- 7. Creation of the Greenways Product Club
  - a. Definition of its objectives and structure
  - b. Implementation





#### PROPOSAL FOR STRUCTURING THE GREENWAYS PRODUCT

**TRADE NAME:** Name to be used for promotion and marketing

#### Concept

#### Basic description of the product

#### Sales pitch

Most outstanding elements of the product in question; the factors that make it attractive or different from the rest.

Outbound markets	Segment	Mode	
Geographic markets of greatest	Proposed socio-demographic	-	Guided
interest for product design, due	segmentation for each product	-	Self-guided
either to proximity or profile.			
Activities			

Activities proposed for each product; specify and develop the temporal and geographic itinerary.

#### Marketing and distribution resources

Proposal of resources for the future marketing of the product by travel agencies and tour operators. This is key element to the successful implementation of the project!

#### **Promotion al methods**

Proposal of dissemination channels for the product in question.

Season of implementation	Duration of proposal		
Months in which the product is expected to be	Minimum and maximum duration of		
consumed optimally due to matters of weather,	the proposal		
tourist flows, deseasonalization, price, etc.			

#### Possible establishments to involve

Tourist establishments and other entities that might participate in the product due to it being aligned with their focus and matters of location, style, price, etc.

- Accommodation
- Bike rental
- Hospitality
- Public transport (taxis, buses, train...)
- Guides
- Active tourism companies
- Additional excursions (museums, oil and other mills, wineries...)
- Shop selling local products: handicrafts, foodstuffs

#### Elements to take into account

- Accessibility
- Consumption of local products
- Trustworthiness of service providers
- Integration of the product within the currently existing offer





Some ideas for continuing to make progress in the design of a Greenway-based tourism:



One crucially important element is its potential as a catalyst for local development. The various kinds of cycling holidays (road, ATB, bikepacking, guided and self-guided routes) generate wealth and are ideal for forging links and sharing synergies with the hotel sector, as has already been happening at many European destinations. We need to offer added value and good services to attract and create a base demand. All cyclists like to travel and discover new places where they can practise their hobby.

We need to clearly define the core of the product; the main service that we have designed to meet the needs of a specific target public. We must be able to express it in words and images designed to

encourage purchase by appealing to customers' expectations (which obviously we need to know). To sum up, tourists do not buy products; they buy expectations that they can meet through those product and, in short, they buy experiences.

In our case it is clear that it is the Greenways that generate the driving force behind demand. We need to work as a team with all the existing small tourism offerings through the coordinated bringing together of many small magic experiences to make up a number of memorable products.

In order to ensure that all these initiatives are actually successful we need to convert our trails into tourism products and we need to design those tourism products bearing in mind a number of well-defined tourism segments, since one of the problems today is failing to reach the right customer due to having designed products aimed at some very nebulous demand profiles.

We need to highlight what makes each area different, by emphasizing the authenticity of the areas through which the Greenways run, so as to establish the bases for a unique and appealing brand.



A good way to find out how to design tourism products that meet the needs of the various types of European customers is to analyse the products offered by specialized tour operators whose products have already been on the market for some time.

While it is true that demand channelled in this way may be relatively small in some destinations, consumption patterns are representative of all customers who are interested in specific products. Furthermore, this marketing channel helps establish less irregular visitor flows which in turn helps deseasonalize destinations.







We need to produce some recommendations on segmentation of the demand and the creation of a specialized tourism product based on the analysis of the products offered in the catalogues of European tour operators' specialized in cycle-based tourism. A detailed analysis of these products will serve as a guide for the design of new Greenway-based tourism products and bring to light both their present shortcomings and their strengths.

It is necessary to assess existing local companies and any products that are already being offered in this area, while seeking to identify projects and/or initiatives with potential for becoming good opportunities for experiential tourism, which is the type of products with the greatest potential demand.

In this respect we could look into the idea of working in the future towards overcoming one of the basic problems of the special interest tourism sector which can be summed up as follows: "I don't specialize because I'd miss out on part of the market and I miss out on the market because I don't specialize". This solution would be based on interconnecting existing micro-products.

We should also stress the need to develop a digital ecosystem among all the stakeholders in the product, one which will enable the fluid, real-time communication of incidents, offers, changes to schedules, programmes, etc. which will ensure effective communication between suppliers and distributors. This could be one of the main functions of the **Greenways Product Club** 

All these proposals give rise to a number of benefits for all the players involved.

Tourism companies	Tourists	Local community
<ul> <li>More market and revenue opportunities by producing at a lower cost.</li> </ul>	<ul> <li>More consumption alternatives.</li> </ul>	<ul> <li>More and better opportunities.</li> </ul>
<ul> <li>Better market penetration with less individual effort.</li> <li>Better forecasting of seasonal</li> </ul>	More diversity in the offer at point of sale.	<ul> <li>Better awareness demand trends.</li> </ul>
demand.  • Better targeting of promotional actions.	<ul> <li>More effective purchasing.</li> </ul>	<ul> <li>Better image of the destination.</li> </ul>
<ul> <li>Improve competitiveness.</li> <li>Enhanced credibility, vital to building trust.</li> <li>Better commercial image.</li> </ul>	More confidence in the quality of the service.	<ul> <li>Increased confidence in own capabilities.</li> </ul>



#### Some lines to follow:

- It is essential to consolidate the current products with the strongest potential.
- Identify the most interesting markets.
- Provide the products with enough information tools regarding their usage. Either of a
  permanent nature (signage and interpretation, generally speaking plentiful on the
  Greenways at the moment but less so off them) or distributable (specific on-site brochures,
  road books for self-guided trips, etc.)
- Flexible structuring of the offer of product in order to adapt and combine it with other products according to the demand from the various target markets and segments, while at the same time facilitating a manner of marketing better tailored to the potential customers.
- The products must by aligned with the positioning of the destination in question, thereby helping to increase market exposure.
- In some Greenways we need to leverage and enhance the connection between the coast and the interior. In Spain, for example, being traditionally a destination of sun and sand, this is a key factor. In other destinations the connection between the various tourist attractions and the adjacent greenways will be a key factor.
- We cannot place enough emphasis on the importance of making the most of our natural heritage and preserving our railway heritage as much as possible, showcasing not only stations and railway infrastructure, but also signalling equipment and other related features: water tanks, turntables, engine sheds, level crossings, height gauges, buffers, point indicators...
- Relate Greenways with industrial tourism.
- Seek synergies with agri-food products.
- Position Greenways as an accessible tourism product.
- Unify the denomination of Greenways that pass through a number of territories under different names or by sections.







#### 3. NEEDS DETECTED FOR PRESENT AND POTENTIAL CUSTOMERS

If we wish to continue making progress in terms of targeting our products to our potential customers we need to take into account their needs.

We have put together a list of some, but not all, basic needs that we should meet which might be considered as minimum requirements for establishments wishing to join the Greenways Product Club.

We have divided these needs by type of establishment:

- Accommodation.
- Hospitality.
- Support companies.
- Public transport.
- Interpretation centres, tourist information offices.

#### 3.1 Accommodation

- Distance to the route
- Possibility of a fortifying breakfast
- Safe area to store bikes
- Space for washing bikes
- Service and clothes washing available for the customers.
- Basic self-service workshop (availability of basic tools and air hose / pump)
- Sale of basic spares (inner tubes, patches, tyre levers...)
- Flexibility of coming and going times
- Bike park
- Car park
- Information on the Greenway and general information about other Greenways.
- Sustainable and environment-friendly running of the establishment

There are some initiatives along these lines such as Bed&Bike, Bikefriendly, Accueil Velo or Cyclists Welcome, which are differentiating elements and contain some interesting ideas that could be adopted.











#### 3.2 Hospitality

- Distance to the route
- Menus (special/regional gastronomy/consumption at starting point...)
- Fortifying breakfasts
- Picnic preparation
- Have an arrangement for customers who arrive outside mealtimes
- Bicycle park
- Information on the Greenway

#### 3.3 Support companies

- Baggage transport
- Bike transport
- Bike wash
- Repair shop
- Bike rental
- Sale and/or rental of spares and accessories
- Maps, route guides. Information on the Greenway and general information on Greenways
- Information on the routes available: distance, difficulty, points of interest, etc.
- Bike park

#### 3.4 Transport companies

- Baggage transport
- Vehicles adapted to carry bikes
- Stipulated and published terms and prices for the transport of bikes.
- Information on the Greenway.

#### 3.5 Information offices

- Distance to the route
- Information on the Greenway.
- Bike parks
- Published timetables and conditions
- Possibility of organizing activities for accompanying visitors who do not wish to cycle.





## Greenways Product project:

## From the **Resource** ...



## ... to the **Product**:

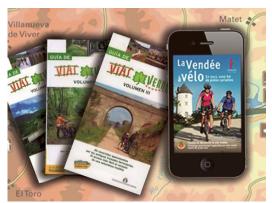






#### 4. ACCESSING NEW MARKETS

The aim of this proposal is clear; to provide the means for Greenway-related tourism companies to improve their competitiveness and reach markets to which they previously have not had access.



To increase companies' knowledge of tourism marketing, communication and intelligence required to position the product of cycle-based tourism on Greenways in an increasingly more competitive market, taking into account the new trends in consumer behaviour and the emergence and development of social marketing.

In short, to provide companies with tools and processes so that they can perfect their product

and/or create new tourism products, and design their marketing and communication plans so as to offer them to both domestic and international tour operators.

Following our methodological proposal for the creation of the tourism product, we identified the needs of those tourist profiles that are best suited to our chosen target market so as to be able to perfect the products.

Once we have optimized our products we need to place them on the market. This is the next step; we need to enhance the commercial capabilities of the companies offering Greenway experiences. To do this we need to introduce the concept of marketing strategy and planning as a structural element of these companies.

To this end it is necessary to develop skills to ensure that the destinations and the business sector concentrate their resources on optimal business opportunities.

The first steps should be to make approaches at a relatively local level, contacting retailers and/or wholesalers that may be interested in the offer. This will be easier in cases where there is a major city near the Greenway where these packages can be marketed. Although the outreach to retailers dedicated to travel in general will be particularly limited due to a lack of specialization and segmentation.

Naturally it will be necessary to talk to those responsible for the promotion of tourism in each area so they can include all the available range of packaged products in their promotion plan, with the backing of Greenways' brand image.

The next step is to enter into commercial contact with bigger operators. To do this it is necessary to know the travel agencies and European tour operators specialized in nature tourism/sustainable tourism, their distribution channels and their function. This information is essential to any successful business opportunity.



This requires a continuous effort towards improving the quality of the services and seeking new marketing channels through such vehicles as product clubs, business associations, brands and seals of quality, etc.



If we wish to market through these operators we need to know what they are looking for and to establish a relationship of trust, something which requires dedication and effort. An effort which in turn requires staff and resources dedicated to ensuring that these new customers understand the attributes of our product and know that the companies offering it are trustworthy; in other words, they are good partners.

Another strategy that must certainly be adopted is the use of direct marketing, by attending fairs and other events, but the simplest channel continues to be that of marketing through travel agencies already established in our target countries who know what their customers want.

There are tourism fairs that can provide good opportunities, although it can be hard for small operators to attend such fairs. Not only because of the direct costs but also due to their lacking the commercial structure to be able to properly manage the choice of fairs, prepare the right material, set agendas, and then follow up on the contacts made.



A tourism fair does not just last the days that a company is present at it; there are months of work before each event and then all the work involved in sending off the requested proposals and following up contacts so that they are not lost.

Within the framework of this project we are building a database of European, Canadian and US tour operators specialized in cycle tourism which will provide an excellent springboard for making new commercial contacts available to any Greenway-related companies that may be interested.

There are some basic steps to follow and some issues to resolve concerning the staff themselves, their time availability and skills, the companies' websites, their usability and optimization for search engines and the contents they offer, and the companies' marketing and communication plans.



These are the elements required to enter new markets effectively with a view to enhancing the visibility of the companies involved.



Another important aspect is the need to fully meet the legal terms and conditions required by the tourism markets in which companies wish to operate. Once the geographic market has been determined, companies must consult the legal requirements on the chosen operators' websites and ensure their compliance with them. This is a crucial point which is a mark of professionalism, one that helps create the climate of mutual trust mentioned earlier. This will also significantly facilitate matters when it comes to negotiating with operators. There are major differences between the markets of different countries in terms of legal framework and commercial culture.

The same is applicable to the matter of insurance. If we are targeting international markets, we must be aware of the insurance coverage customarily required of those operating in those markets. Additional coverage may be provided but it as well to know what the customers of any outbound tourism country demands.

This is especially important when the product includes several different activities and requires knowledge of the insurance policies of the collaborating companies, of the subcontracted staff, and of certain resources that may be visited.



#### 5. THE GREENWAYS PRODUCT CLUB

A Product Club is a management and planning tool whereby a group of companies and organizations agree to work in conjunction, in an organized manner, with the aim of developing new products and increasing the value of existing products for a specific market segment, always taking into account customer-orientation and the importance of meeting those customers' needs.



In short, a tool that helps improve the quality

of the tourism product and which lends specialization and differentiation to member destinations and establishments while integrating the offer of accommodation, hospitality, leisure, trade, equipment for public use, handicrafts, and other services.

In Spain, for example, there are a number of product clubs operating which could provide a model for our club, with some aspects that could be included:

The product club *Rutas del Vino de España* and the *Club de Reservas de la Biosfera* promoted by the Secretariat General for Tourism; or the *Club de Turismo Familiar*, promoted by the Autonomous Communities of Catalonia and Valencia. Another very interesting club is the *Asociación Española de Estaciones Náuticas* which plays an important role in the business sector.

Meanwhile *Rusticae* or *Casonas Asturianas* are private accommodation product clubs, membership of which confers a seal of approval to differentiate them from their competitors.

The general objectives of product clubs tend to be very similar:

- To diversify products and services.
- To enhance the quality of the products and services of member establishments.
- To build up business networks among the member producers of tourism services and activities.
- To improve the products offered by tailoring them to the needs of the customers.
- To define the promotion strategies and plans to meet the needs of each product depending on their market situations.
- To raise awareness of the segments that constitute differentiating elements within the overall tourism offer, so as to channel demand while optimizing promotional actions.
- To generate synergies between the various public authorities and the companies private companies of a specific sector, segment or geographic area.





The development of a tourism product club must pass through a series of stages:

- 1. Selection of Club members. They must be related to the product around which the club is structured.
- 2. Design of the business model, defining the club's mission and aims, the core product, membership criteria, and how it is to be implanted and monitored. Definition of promotion and marketing strategies.
- 3. Definition of the management model, legal status of the club, management structure, internal rules of procedure, funding, etc.
- 4. Implementation of the club. In this stage it is necessary to test and evaluate the business model defined in previous stages and make the necessary adjustments.

As of that moment the club should begin to offer tourism products aimed at the previously targeted segments, penetrating markets through the various promotional actions chosen using the marketing resources mentioned previously.

In short, we should begin to use tourism intelligence to know how satisfied tourists are and how they behave as consumers.



The Product Club must involve all tourism and service establishments that wish to become members. But only if they meet the requirements previously established by the club. We need to convey the idea that all the stakeholders involved share the same interest, the same goals, and that their participation in the Product Club will enable everyone to work together towards the achievement of measurable benefits.

Below we list a number of actions that potential Greenways Product Club might carry out. Many of them have already been outlined earlier in the document since they relate to the general methodology of the design of the tourism product:

- With regard to existing products, analyse their alignment with the established objectives and adjust them accordingly.
- Determine whether there are other cultural, natural and historical elements that we can use to shape our Greenway-based products.
- Define the Greenways tourism product and the elements comprising it.
- Identify the stakeholders involved in the creation process.
- Identify the specific demand for the product.





- Define the attributes of the product.
- Establish the requirements of the providers of each service. Establish the club membership requirements. The various companies or entities must meet certain requirements of a legal nature and others related to the appropriateness of the services to the customers' needs. Some requirements will be mandatory and others will be optional but recommended.
- Select the entrepreneurs to form the membership of the club. Participation is voluntary but involves the acquisition of a number of commitments and a willingness to make economic contributions to the club.
- Produce a procedures manual for the club, stipulate admission requirements, and propose the management structure.
- Set up the club, deliver training for the members and establish an attendance system for those taking part.
- After a research process, decide on the specific needs of each market.
- Design the marketing strategy for the different products.
- Seek public collaboration for the promotion of the offer.
- Keep the members informed of the results on a regular basis.

Once the club is up and running we need to disseminate it and associate its brand with the Greenways.

One of the tasks that needs to be carried out is to present the product to a number of national and international travel wholesalers that market products specializing in cycle tourism and hiking.

To achieve this dissemination the club should attend to tourism fairs and organize some workshops for these companies to attend. (As Annex II we include a calendar of tourism fairs with some notes on those most important for the sector.)

Some events with the specialized media and tour operators could also be organized to raise awareness of the potential of the Product Club.

In short, the Greenways of Europe represent a major resource with an enormous potential for becoming a truly appealing, sustainable, competitive, thematic and transnational tourism product. The stakeholders involved, both public and private, have the opportunity to work together to position these infrastructures and their associated businesses in the tourism market with an identity of their own.



This document aims to help establish the methodological bases so that what today is a latent need recognized by tourism stakeholders and driven by demand, may in the medium term become a tangible reality in Europe.





### **ANNEXES**



#### ANNEXE I - SAMPLE FACT FILE OF A GREENWAY-BASED TOURISM PRODUCT

Name of the offer						
What does this offer include?	Description of the offer					
<ol> <li>One night's accommodation for*</li> <li>Route by bike along the Green hours for people.</li> <li>Lunch in restaurant for two pe (alcoholic beverages not included).</li> <li>Two hour guided tour of the central commodation for the central commodation.</li> </ol>	Here is to be included a "touristic" style description of the offer, which will appeal to the customer. (Where is it situated? What, in broad terms, does it consist of? Where does the appeal of the offer lie? Does it last a day? A weekend etc?)					
Coordinating company of the of	Marketing channel.					
Name of the company: Phone no.: Email address:	☐ Travel agent ☐ Flash sale ☐ Specialized portals ☐ Gift box ☐ Other:					
Prices						
Activity	Price Tariff (VAT incl.)	Activity	Price Tariff (VAT incl.)	Activity		
TOTAL						
Other conditions						
(minimum / maximum number of conditions, insurance included, wh to take, minimum and maximum a	Duration and timing of the offer.	- All year: Yes / No - From: Until:				

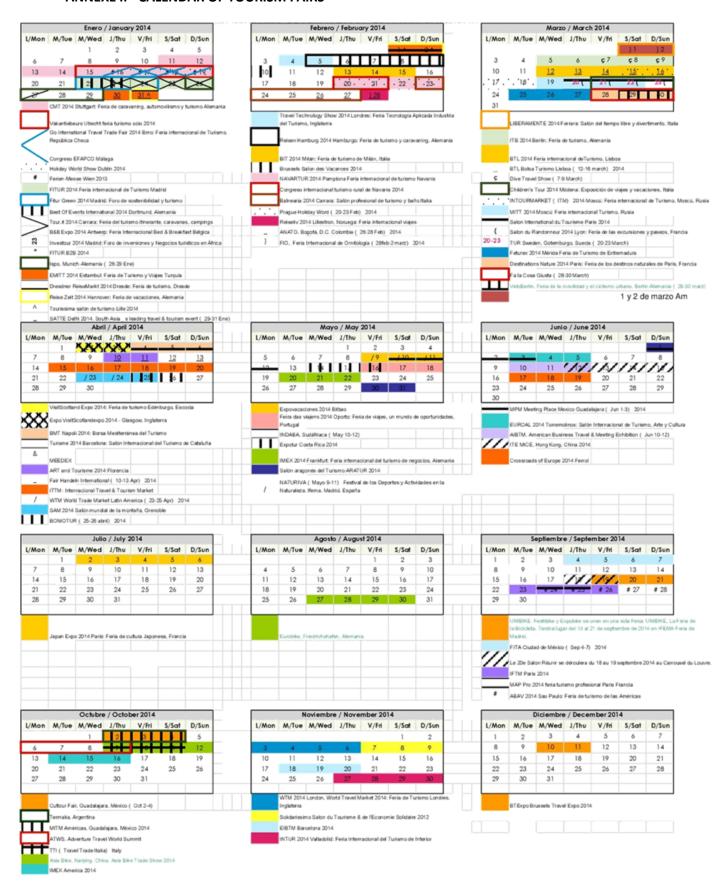
Hay que incluir una o más fotos que caractericen la actividad y estén libres de derechos.

\* Hay que incluir una subficha de alojamientos





#### **ANNEXE II - CALENDAR OF TOURISM FAIRS**







# GREENWAYS PRODUCT



#### **Project coordinator:**

Fundación de los Ferrocarriles Españoles (Spanish Railways Foundation)

www.viasverdes.com/
http://www.viasverdes.com/greenwaysproduct/

#### **Project partners:**

European Greenways Association www.aevv-egwa.org
Rogaland County Council (Norway). www.rogfk.no
University of Central Lancashire. Institute of Transport & Tourism.
(United Kingdom) www.uclan.ac.uk
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Associação Portuguesa de Corredores Verdes (Portugal). www.apcverdes.org

Vidzeme Tourism Association (Latvia) www.vidzeme.com Fundación Vía Verde de la Sierra (Spain)

www.fundacionviaverdedelasierra.com

Madrid Regional Transport Consortium (Spain). www.ctm-madrid.es/ SMEs / PYMEs:

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