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Ministry of Economics

Republic of Latvia

Cycling Tourism in Latvia

The contribution of Ministry of Economics of the Republic of Latvia and future development.

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Tourism policy development: Structure

- ❑ Tourism Policy: Entrepreneurship Competitiveness Department - Tourism Division
- ❑ Implementation of the Tourism Policy: Latvian Tourism Development Agency (LTDA)
- ❑ Latvian Tourism Advisory Council – consulting on Tourism Policy development
- ❑ LTDA Advisory Council – decides about the implementation of Tourism Policy (Ministry of Foreign Affairs, LIVE RIGA, professional and regional tourism associations, representatives from marketing/promotion sector)



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Policy framework

- ❑ Latvian Tourism marketing strategy 2010-2015 (16.03.2010.);
- ❑ Latvian Tourism Marketing External Communication Strategy 2011-2013;
- ❑ LTDA Action Plan for year 2012;
- ❑ Tripartite Cooperation Council Working plan 2012 (Ministry of Economics, Foreign Affairs, LTDA, Investment and Development Agency of Latvia (LIAA), Latvian Chamber of Commerce and Industry (LCCI), Employers' Confederation of Latvia (LDDK);
- ❑ Ministry of Economics Working Plan 2012



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Overview of tourism in 2011

- Tourism sector remain an important source of revenue in Latvia that constitutes almost 20% share of all service export and has broadly positive impact on economic growth and employment.
- After a downturn in tourism (2009-2010) due to deterioration of global economic conditions in 2008-2009, in 2011 Latvian tourism sector has showed it's possibility to recover in a short term.



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Overview of tourism in 2011

State budget for the program

“Implementation of tourism policy”

- Year 2007 – 1,968 million EUR
- Year 2008 – 1,976 million EUR
- Year 2009 – 0,990 million EUR
- Year 2010 – 0,528 million EUR
- Year 2011 – 0,528 million EUR + ERDF
- Year 2012 – 0,517 million EUR + ERDF



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Overview of tourism in 2011

International cooperation

- Participation in EU institutions
 - European Commission Tourism Sustainability Group
 - European Commission Tourism Advisory Council
- Membership in International Organisations
 - UNWTO – the legal procedure of withdrawal is going on (!)
 - European Travel Commission



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Non-resident travellers in Latvia

	2008	2009	2010	2011	%
Number of border crossings, thsd	5 496	4 727	5 042	5 538	+9.8
Total expenditure, mln EUR	573.7	489.6	475.1	539.98	+13.7
Average length of trip, visitor nights	1.4	1.3	1.2	1.3	-
Average daily expenditure per traveller, EUR	72.6	79.7	76.8	75.4	-2

1 EUR = 0,702804 LVL

Data source: Central Statistical Bureau of Latvia



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TOP 10 source countries

Country	2010	2011	Increase, %
Total	1373,3	1493,2	+8,7
Russian Federation	189,3	270,5	+42,9
Lithuania	181,6	191,9	+5,7
Sweden	157,4	151,3	-3,8
Germany	108,6	116,4	+7,2
Estonia	129,8	102,1	-21,3
Finland	109,5	95,4	-12,9
Norway	79,3	94,3	+18,9
United Kingdom	48,1	61,1	+27,0
Poland	36,9	39,0	+5,7
Denmark	34,4	29,5	-14,2



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Data source: Central Statistical Bureau of Latvia
Overnight travellers by country of residence

Number of visitors in hotels and other accommodation establishments

	1st quarter	2nd quarter	3rd quarter	4th quarter
2009	191585	295411	411050	215852
2010	191045	319977	532441	268075
2011	247099	416023	594344	327530
Change, %	+29	+30	+12	+22



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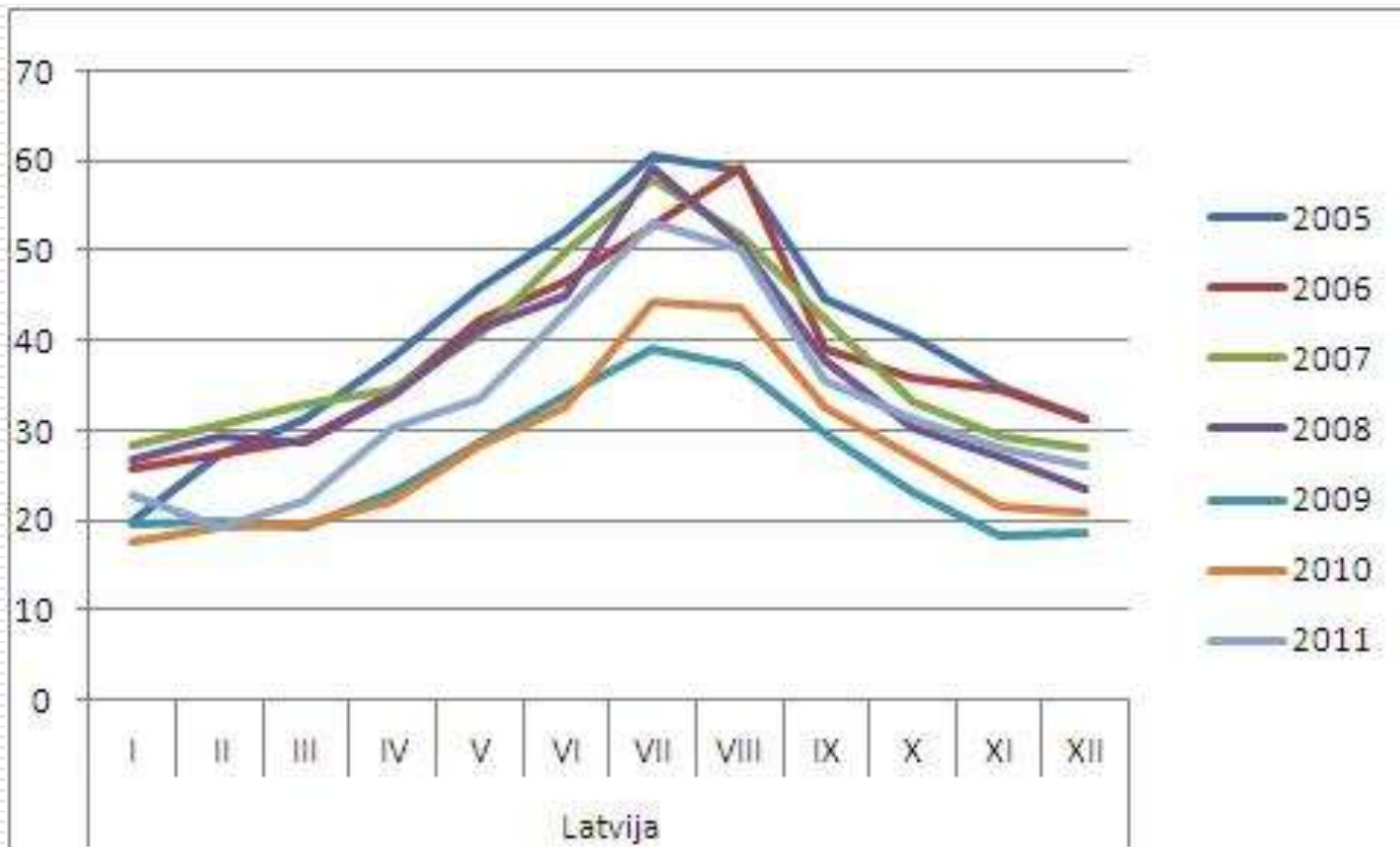


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Bed occupancy rate in Latvia, %



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Latvian resident travellers

	2008	2009	2010	2011	%
Number of border crossings, thsd	3 524	3 058	3 090	3 257	+5.4
Total expenditure, mln EUR	832.5	581.1	523.9	572.85	+9.3
Average length of trip, visitor nights	4.0	4.7	4.9	3.8	-
Average daily expenditure per traveller, EUR	59.8	41.3	34.2	45.5	+33

1 EUR = 0,702804 LVL

Data source: Central Statistical Bureau of Latvia



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Share of Tourism Tourism balance

Share of Tourism in total gross value added (TSA)

Year	%
2007	4,1
2008	4,2
2009	3,1

Tourism balance

	2008	2009	2010	2011
EUR, million	- 258,8	- 91,5	- 48,8	- 32,95

Although there are positive trends, the indicators of tourism balance of payments are still negative – expenses of Latvian residents abroad are exceeding the expenses of foreign travellers



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Latvian Tourism marketing strategy 2010-2015

VISION

Latvia – recognized in its target markets as an attractive tourism destination for individual tourists, it provides true, sincere hospitality and high quality, innovative, authentic and sustainable tourism products with high added value in the relevant target segments, created by people with knowledge and professionalism.



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Latvian Tourism marketing strategy 2010-2015

Target markets:

- High priority (Lithuania, Estonia, Finland, Sweden, Russia, Germany)
- Priority (Norway, Denmark, UK, Italy, Spain, the Netherlands)
- Secondary (Other European countries)
- Perspective (USA, Japan, India, China)

Domestic activities:

- Development of tourism products with high export potential
- Growth of hospitality and quality level



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Tourism products

- ❑ **Culture** (architecture, museums, non-material cultural heritage, festivals, cultural activities, cultural centres, gastronomic tourism, etc.)
- ❑ **Nature** (variety of nature territories, biological diversity, nature objects, nature monuments, human made nature related objects, etc.)
- ❑ **Products with high added value** (medicine, health, business tourism, sport tourism, etc.)



Latvian Tourism Brand



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Logo of tourism brand



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Tourism Brand

Our promise to a visitor to Latvia

That Latvia is a place, where having arrived, you have the opportunity to change the tempo of your life, to relish unhurried leisure experiences, thereby savour new experiences, allowing you to aspire to harmony and reveal your true inner values.



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Activities in cycling tourism



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Research “Development of EiroVelo routes in Latvia”

- ❑ Developed in 2007
- ❑ Research goal – to analyse the EuroVelo route possibilities in Latvia and make recommendations for concrete cycle routes.
- ❑ As a result recommended EuroVelo routes Nr.10 and 11 were put on the map



Research “Development of EiroVelo routes in Latvia”



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ERDF for Cycling infrastructure

- ❑ Development of Velotourism product of national importance
- ❑ Total ERDF – 6 119 485.95 EUR
- ❑ 7 projects were financed (Liepāja, Garkalne, Sigulda, Rīga, Tukums, Dobeles un Ventspils)



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Other activities

- Work with the route signs



- Support for EuroVelo 13 “Iron Curtain Trail” development in Latvia



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Other activities

- ❑ Marketing of cycling tourism in Latvia, national tourism web-portal:
<http://www.latvia.travel/en/bike>
- ❑ It is possible to:
 - ❑ Get to know the offer in Latvia – cities, one-day or multi-day cycling routes;
 - ❑ Maps of the routes (for Downloading):
 - Cycling map;
 - Tourism route map “Day trips in and around Riga”;
 - Tour de LatEst Cycling route



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Other activities

- LTDA was a partner in the project “Go cycling through Vidzeme and Southern Estonia”:
 - Marketing of the cycling route;
 - Mass media visits;
 - Information materials.



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