9th World Congress on Snow and Mountain Tourism
2-4 March 2016, Sant Julià de Lòria, Andorra
GRÀCIES!

- Turisme Andorra
- UNWTO
INTRODUCTION TO THE ATTA
ATTA MISSION

Inspire, connect and empower a global travel community to deliver experiences that protect natural and cultural capital and create shared economic value.
WHAT IS THE ATTA

1. MISSION: Inspire, connect and empower a global travel community to deliver experiences that protect natural and cultural capital and create shared economic value.

2. 1,100+ MEMBERS in more than 90 countries

3. STRATEGIC DEVELOPMENT PARTNER for tourism boards and development agencies

4. International events innovator: ELEVATE, NEXT, ADVENTURE TRAVEL WORLD SUMMIT...

5. ADVENTURETRAVELNEWS 23,000+ industry professionals

6. INDUSTRY VOICE and institutional worldwide leadership and trade partner

7. RESEARCH and EDUCATION pioneer of adventure travel for the leisure tourism industry

8. Key driver for RURAL ECONOMIC DEVELOPMENT
• EVENTS & NETWORKING:
  • Single Destination/Local:
    • AdventureConnect (year-round, worldwide) + trade shows (ITB, WTM, PURE…)
    • AdventureWeek: Brazil, 6-15 April 2016
  • Regional:
    • AdventureNEXT~Balkans: Macedonia, 10-12 May 2016
    • AdventureELEVATE: Saguenay, Quebec, Canada, 6-7 June 2016
  • Global: Adventure Travel World Summit: Anchorage, Alaska, 19-22 June 2016
WHAT IS THE ATTA

1. MISSION: Inspire, connect and empower a global travel community to deliver experiences that protect natural and cultural capital and create shared economic value.

2. 1,100+ MEMBERS in more than 90 countries

3. STRATEGIC DEVELOPMENT PARTNER for tourism boards and development agencies

4. International events innovator: ELEVATE, NEXT, ADVENTURE TRAVEL WORLD SUMMIT...

5. ADVENTURETRAVELNEWS 23,000+ industry professionals

6. INDUSTRY VOICE and institutional worldwide leadership and trade partner

7. RESEARCH and EDUCATION pioneer of adventure travel for the leisure tourism industry

8. Key driver for RURAL ECONOMIC DEVELOPMENT
UNWTO Global Report on Adventure Tourism

The ATTA worked with the UNWTO on this report to help educate the global leisure tourism industry on the core values of responsible tourism.

Benefits to Economy

This contribution to the national economy of the Go-RM programme is equally impressive. This graph in particular shows that tourism is the driving force behind the economy. The export of tourism services is expected to grow from almost nothing in 1994 to a high of £3.4 billion in 2004, an increase of 40%. As a result, the growth of the industry can be seen in the chart below.

Growth in Supply of Adventure Tourism

While emerging economies are slowly outpacing developed economies for growth and spending, the UNWTO predicts that by 2020, arrivals in emerging economies will exceed those in advanced economies by 2008. This is expected to increase as emerging economies continue to grow.

Training

Destinations around the world are focusing on adventure tourism as a key niche segment, because of its economic and sustainability benefits. They are working to provide professional education for adventure travel companies to support local people in participating in the tourism economy. Chapter 3 includes more information on adventure travel training programs around the world.

Destinations Incorporating Adventure into Brand Identity

Increasingly, destinations are recognizing that travelers are seeking more authentic products. A study by Vist Rehian in 2010 noted, “The UK can also respond to increasing desire for more authentic and individual travel experiences by working with partner organizations in the business and cultural sectors to promote the DMA's unique offer.” The world's destinations are using their unique selling propositions to appeal to adventure travelers.

- Norway: capitalizations on itsrowning foods and glaciers with the slogan “Power of Nature”
- Greenland® emphasizes its ruggedness with “Greenland: The Real Thing”
- New Zealand: houts its culture, mountains, wildlife and title with “100% Pure New Zealand”

Photo by Joana Sousa
THIS IS ADVENTURE

Physical Activity

Cultural Exchange

Interaction with the Environment
<table>
<thead>
<tr>
<th>HARD ADVENTURE</th>
<th>SOFT ADVENTURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANYTHING ROPED</td>
<td>MINIMAL TRAINING</td>
</tr>
<tr>
<td>Caving, climbing</td>
<td>Hiking, Horseback Riding</td>
</tr>
<tr>
<td>HIGHLY TECHNICAL</td>
<td>CULTURAL</td>
</tr>
<tr>
<td>Heli-skiing, kite surfing, paragliding</td>
<td>Archaeological Expeditions</td>
</tr>
<tr>
<td>LONG-DISTANCE</td>
<td>ENVIRONMENTAL</td>
</tr>
<tr>
<td>Trekking, backpacking</td>
<td>Birdwatching, Safaris, Research Expeditions</td>
</tr>
</tbody>
</table>
ADVENTURE BUSINESS TRENDS:
ACTIVITIES
GLOBAL MARKET VALUE

The adventure travel market is worth $263 billion.
[ECONOMIC IMPACT]

66%

ESTIMATED ADVENTURE TRAVEL TRIP COST REMAINING IN THE REGION
• New world order: disruption throughout tourism supply chain
• Diminishing resources, climate change, etc.
• Population displacement, rural exodus
• Serious evolution in traveler demands, customer experiences
• (re)Emergence of “craft” products and services…local, local, local
• Product development/innovation (authentic vs. manufactured)
• Eco-system + cross-sector strategies the new norm
• Consumers have an insatiable appetite for anything organic, local, Fair Trade, sustainable, responsible, etc.

• Transformative experiences are in high demand – travelers are seeking richer, more fulfilling experiences – “beyond the bucket list”
• Customization (and immediate access) of travel experiences are growing – demand for ultimate flexibility, exclusivity

• Emergence of newly invented events, activities, experiential and learning opportunities, etc.

• Boomers aging; new generations are simply traveling differently
Trends

- Multi-generational travel is on the rise
- Luxury leaning towards adventure, Adventure leaning towards luxury
- Mainstream tourism is embracing “adventure”
- Adventure is becoming softer (adventure by day, luxury by night)
ORIGINAL SURVEY RESEARCH OF US ADVENTURE TRAVELLERS
• Online survey
• 1700 travelers, age 18 and older
• 11 U.S. geographical areas:
  - Boston
  - New York
  - Washington, D.C.
  - Denver
  - Miami
  - Chicago
  - Austin
  - San Francisco
  - Los Angeles
  - Phoenix
  - Seattle
ADVENTURE TRAVELER PERSONAS

**GRAZER**
- Novice
- Sampling activities/ bucket list driven
- Moderate risk

**ADVENTURER**
- Intermediate
- Repeat activities/ building skills
- Moderate risk

**ENTHUSIAST**
- Experienced
- Seeks out the best places for favorite activities
- Highest risk, mitigated by their skill
A younger professional (equally male or female), living with a friends in a major city area. Aged 18 to 40, HHI $75k.

Takes some risks when on vacation and seeks maximum thrill.

Wants to accomplish something and share his accomplishments with friends and family.
PERSONAS DEFINED

[ Key Characteristics of the Adventurer ]

DEMOGRAPHIC

Probably a middle-aged female (53%), most likely with children, although, probably from previous marriage as 51% are unmarried.

College level education (53%), working or stay-at-home mom in a major city area. Aged 18 to 40, HHI $75k.

RISK

Enjoys risk and thrill but manages these by acquiring proficiency in the activity undertaken.

PERSONAL VALUES

Values family and security first, and also wants to accomplish something.
PERSONAS DEFINED

[ Key Characteristics of the Enthusiast ]

DEMOGRAPHIC

More likely a male (54%)
Boomer (41 – 70)
College educated
High earner - HHI $81k

RISK

An expert in the activity undertaken. Always strive for a new challenge, but with measured risk. Like to push his physical limits (48%)

PERSONAL VALUES

Early adopter and an opinion leader. He values accomplishment not because a personal risky challenge he sets for himself, but because of the level of expertise and the risk control he has achieved over the years.
VALUE CREATION

empty
WHAT’S MISSING?

✓ destinations with a soul community
✓ community building & ecosystem mindset
✓ telling a story
The ATTA’s Adventure Community Builder program helps develop strong relationships and cohesion amongst diverse stakeholders in a destination. Key benefits include

- Jointly better understand the needs, concerns and priorities for all invited partners
- Bring key players together to align on priorities and focus for advancing the adventure travel economy
- Establish short and long-term objectives for cross-agency partnership
- Establish a structure and plan to keep things moving forward
GRÀCIES!

Chris Doyle
cdoyle@adventuretravel.biz
twitter: @ATTADoyle