



Nourish Transformation

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Nourish Transformation

- **Nourish:**

- To supply with what is necessary for life, health, and growth
- To cherish, foster, keep alive, etc.
- To strengthen, build up, or promote

- **Transform:**

- To change in form, appearance, or structure; metamorphose
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Adventure Travel... Why it matters... It is:

- Resilient when other sectors flux... and rebounds faster
- Bigger than most people realize- so it has real impact US\$89B
- Transformative and turns customers into passionate evangelists and advocates
- A driver of economic development where it's often needed most, the life system for the non-urban areas, propping up multiple industries
- Innovative - the majority of adventure travel businesses are entrepreneurial, innovative ideas and products often emerge from this segment- this is where trends start
- Inspirational- aspects of adventure travel – nature, challenging activities and cultural exchange that create desire in a traveler to visit a place
- Focused on nature, activity and culture, it focuses on triple bottom line of people, planet and profit

About the ATTA

- 650+ members representing 70+ countries - comprised of tour operators, destinations, agents, accommodations, journalists, service providers
- ATTA leadership activity worldwide: GSTC, World Travel Market, ITB, WTTC, National Geographic Geotourism Summit, Sustainable Communities Guild, etc.
- ATTA's online community, The HUB: more than 1,200 online – networking, best practices sharing, business getting done, upcoming events, etc.
- AdventureTravelNews.com – ATTA's online trade journal serving more than 25,000+ tourism professionals
- Adventure.Travel – ATTA's consumer portal to adventure travel
- Research Initiatives (trade and consumer, ATTA & partners)
- Partners – Destinations, Associations, Gear + Service Brands, Outdoor Retailer, etc.
- ATTA Regional Meetings (North America & Europe)
- Education & Professional Development – 2010 ATTA Tune In Webinar series for Members released, library grows in The HUB
- 2011 Adventure Travel World Summit – Chiapas, Mexico, October 17-20...the 2010 ATWS in Aviemore sold out at 600 delegates representing 54 nations

What is Adventure Travel?



- Today's adventure traveler seeks experiences beyond high-adrenaline sports
- Remember: "adventure" is a subjective notion
- Adventure provides a mix of activities that enable authentic, un-manufactured experiences

Defining Adventure Tourism & Sector

Players

- Increasingly recognized for attracting environmentally and culturally aware consumers and for its focus on responsible and sustainable development, adventure tourism is a model inherently designed to create economic opportunities for local people in rural and remote communities worldwide.
 - “Sustainability” = cost of entry
- “Hard” vs. “Soft” adventure – dispel the myth
- Micro → Large enterprise
- Public, Private, NGOs, Academia, Media and others
- Holistic thinking → Entire supply chain

2010

■ Adventure Tourism Market Report

■ Resmark Systems – Social Media Study in Adventure Tourism

■ Adventure Industry Research Roundup

■ ATTA Industry Snap Shots

■ PhoCusWright Inc - *In-Destination Events, Attractions & Activities*



Trends to Monitor

- Changing distribution of age cohorts, ethnic groups, sexes, religions, and sexual orientation
- Emergence of the global middle class (e.g., China and India)
- Source markets are rapidly growing and diversifying
- Distinctions made between adventure tourism and the mass travel industry in terms of products and services are blurring
- Migration of traditional leisure and luxury travelers toward the “adventure” travel spectrum
- Increasing importance of “sustainable tourism” – concurrent corporate and consumer attention to and pressure to pursue unabated
- Agri-, rural, community-based, indigenous, culinary and arts/crafts tourism
- Increasing importance of culture and climate/environment
- Pricing pressures – importance of *value*

Trends to Monitor...

- Expansion of the number and types of destinations, many offering more structured and higher quality of tourism products, and the intensifying competition among them
- Increasing adoption of new technologies, social networking tools, channels to access news, information, products, services & resources (e.g., iPads, mobile apps, etc.)
- Social media fueling communities, leading to group buying power
- Rapidly urbanizing world, while emergence of “return to the farm” is striking
- Rise of the independent traveler (aka, “Do it yourself” traveler), concurrent with growth in travelers who seek increased value and support as they’re in “trial mode” for new adventures

Changing Traveler Lifestyle and Values

- Placing increasing importance of “green” products and services
- ”Enlightenment”...more mature and informed views emerging on sustainability, climate change, environmentalism...
- Increasing demand for immediacy & customization
- Changing global personal and household consumption spending patterns + economic uncertainty the norm, reducing credit, saving for “experiences” vs. material possession
- Drastically altered/ing media consumption habits
- Increasing personal/family/political emphasis on health, wellness and recreation – all while time starved
- Shifting more toward global travel and “adventure” (physical, cultural, environment) options for holidays
- Emphasis on taking control, responsibility, self-reliance, thinking small and sustainable, etc.

Transition Period...From Field Reports

- Tight marketing budgets (tight government budgets!!)
- Intensifying competition
- Tough to find the right partners
- Need to access research, validate approaches, consider new strategies
- Need more and better connections to new markets
- Need more brand awareness at consumer level
- Need to improve quality, training, professionalism
- Media market is upended, now what?
- Need resources, new ideas

Seize the Moment – Growth Opportunities

- Build off of your renewed confidence and the 2010 Adventure Travel World Summit momentum
- Break the mold – now is the time to innovate...while tending to sound foundations
- Threatened species = the fiefdom & bureaucracy, “us vs. them” mindset
- Avoid getting stuck in the weeds
- “No Fear” – let go of, yet respect, conventional wisdom
- Leverage the element of surprise here in Scotland
- Holistic Thinking – Engage the entire supply chain
- Long term vision and branding for Scotland

Ubuntu: Generosity, Partnership, Co- Opetition

- As an industry, we need to:
 - Professionalize
 - Establish industry best practices and ethical standards across our operations, across continents
 - Be generous, creative, collaborative, and diverse
 - Be able to respond to changes quickly and efficiently
 - Think of ourselves as a key part of a global community of businesses proactively working to solve local economic-development issues
- Your network keeps you safe – collaborate or perish

Synergy & Success in Partnerships

- Power in numbers
- “Co-opetition” as the new norm
- Consider all businesses and travelers (consumers) as prospect partners
- Holistic thinking – again, consider the ENTIRE supply chain, the moment the traveler steps off the plane to the moment their return flight home lifts off
- Tourism Boards and DMOs provide needed and necessary international influence, marketing power, etc. – help them help you
- Trade Association involvement to learn, partner & grow – do not gripe from the sidelines, be present to influence
- Exchange programs – to pilot new programs, product concepts, resources, more consistent year-round revenue, etc...

Suggested Next Steps...Scotland

- BUSINESS AS UNUSUAL – To build a stronger presence for Scotland and to create increased growth and revenue, adventure travel providers and tourism board representatives here will want to consider:
 - Developing, maintaining and refreshing adventure travel products and services within the broader context of overall economic development strategy for the region
 - Increasing its ability to reach out directly to consumers AND partnering with businesses (tour operators, agents/agencies, distribution services, etc.) to sell the Scotland experience
 - Rethink the range of audiences you're trying to reach
 - Initiate and maintain conversations and develop loyalty with existing as well as new adventure-travel consumers
 - Combine activities (physical, cultural, environmental) for a variety of ability levels and/or elements of adventure

Suggested Next Steps...Scotland

- When framing marketing campaigns and product positioning... connecting adventure travel with “health and wellness” may provide some consumers with a better reason to consider adventure tourism
- Social media, mobile technology and other means of customer outreach and ongoing communication by starting with a specific profile/target audience and then to determine what kind of relationship you want to build with those targeted individuals, based on what they are ready for and how and when they wish to receive it
- Continuing to innovate, provide higher levels of services, and operate businesses professionally to maintain competitive position
- Whether your company/organization is large or small, being present - one-to-one relationship building with tourism boards, associations, trade shows, etc., to build the network, evolve concepts, etc.
- Scotland has historical tourism strength, continues to offers unique product...time to transition its image and expand, deepen...

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The ATTA's Web Properties



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