



ADVENTURE TRAVEL
TRADE ASSOCIATION



ADVENTURE
360

ACCELERATING FINLAND'S SUSTAINABLE FUTURE IN ADVENTURE TOURISM

Outdoors Finland
23 May, Helsinki, Finland



@ADVENTURETWEETS
#THISISADVENTURE

FINLAND



“Finland aims to be a pioneer in the circular economy. In the future, the competitiveness of our economy and our well-being will no longer be based on overconsumption of natural resources. The world’s first national road map to a circular economy defines the steps required for a systemic change in the economy.”

ATTA - FINLAND: HISTORY

✓Finland becomes ATTA member in 2007

✓Finland - participation at ATWS 2007 in Canada

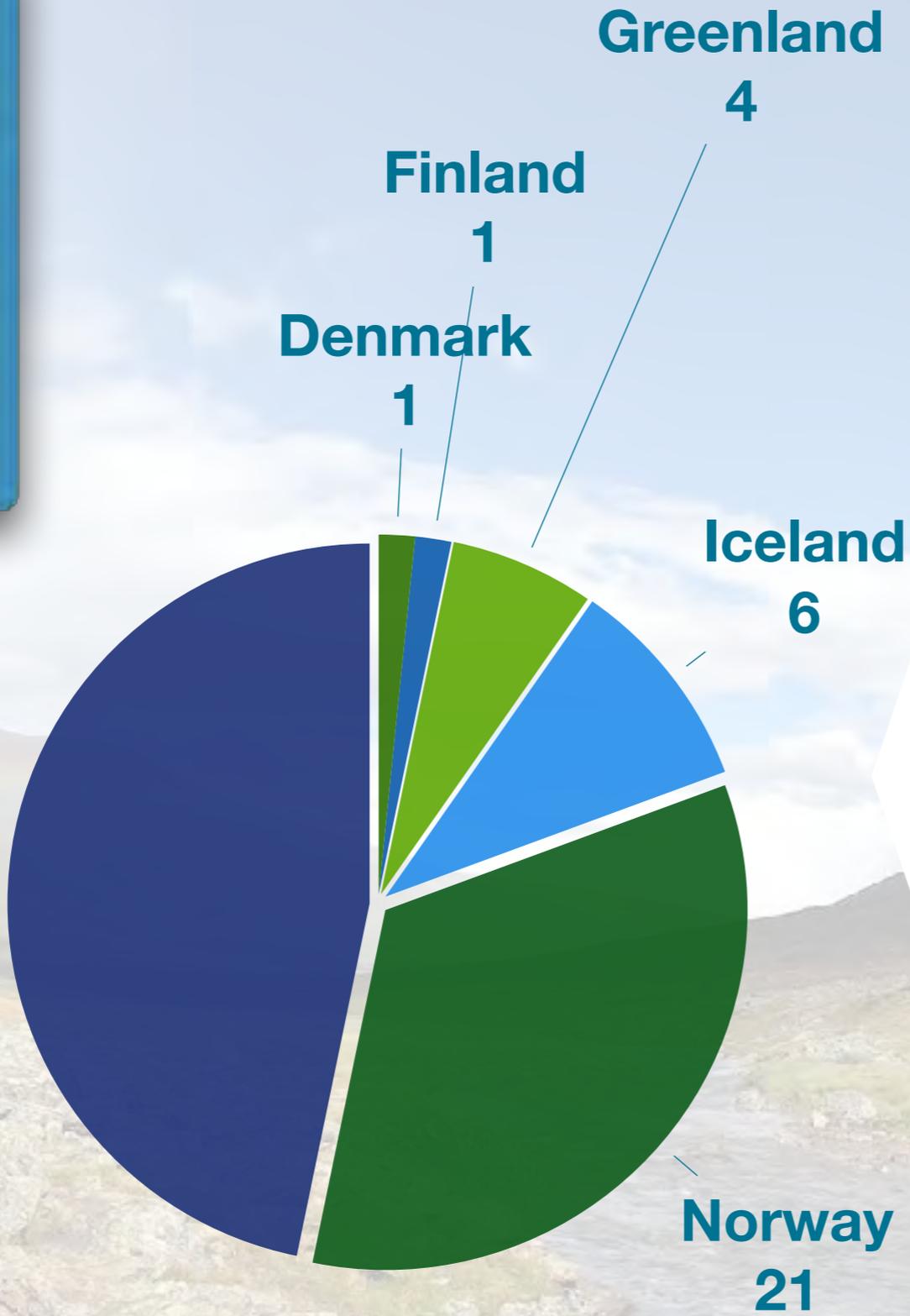
✓Finland - participation at ATWS 2008 in Brazil

✓Finland - participation at ATWS 2009 in Canada

✓AdventureConnect Finland in Kuusamo - 13 October, 2016

✓ Finland - participation at AdventureELEVATE 2018 in Banff, Alberta, Canada

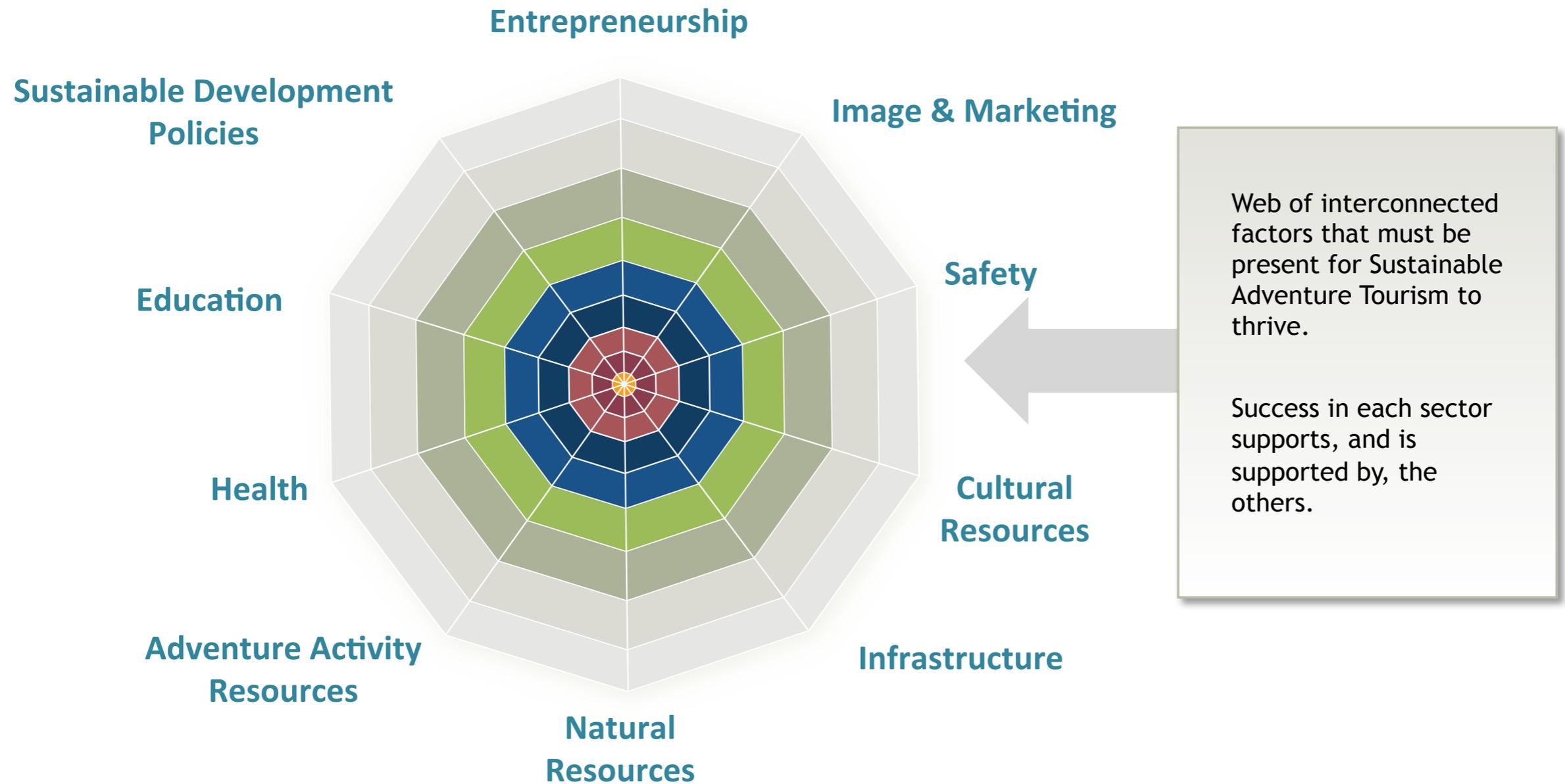
✓Finland - visibility with Destination Showcase Partnership at ATWS 2018 in Tuscany, Italy - 15-18 October, 2018



ATTA MEMBERS: NORDIC REGION

Total: 62 members

DIAGNOSTIC AND BENCHMARKING: ADVENTURE TOURISM DEVELOPMENT INDEX (ATDI)



ADVENTURE TOURISM DEVELOPMENT INDEX

Developed Countries

2016	2015	2011
Iceland	Switzerland	Switzerland
Germany	Iceland	New Zealand
New Zealand	Germany	Canada
Norway	Norway	Germany
Switzerland	New Zealand	Iceland
Canada	Austria	Norway
Australia	Canada	Finland
Finland	Finland	Austria
Austria	Sweden	Sweden
Denmark	France	Japan

A person wearing a red jacket and a black backpack stands on a large rock in the middle of a river. The river flows through a valley with steep, rocky mountains in the background. The sky is blue with some clouds. The overall scene is a beautiful mountain landscape.

ADVENTURE TRAVEL TRENDS SNAPSHOT

APRIL 2018



ADVENTURE TRAVEL
TRADE ASSOCIATION

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ATTA | MAY 2018

ACTIVITIES

Activity trends are reported globally.

Top Trending Activities by Region

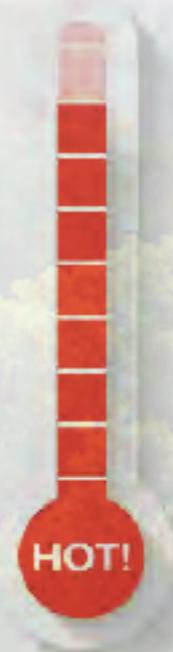
HEADQUARTERS	#1	#2	#3	#4	#5
AFRICA	SAFARI	ECO-TOURISM	HIKING	BIRDWATCHING	CULTURAL
ASIA	CULTURAL	ECOTOURISM	ENVIRONMENTALLY SUSTAINABLE	HIKING	CLIMBING
EUROPE	HIKING	CYCLING	ECO-TOURISM	CULTURAL	ENVIRONMENTALLY SUSTAINABLE
NORTH AMERICA	HIKING	CULTURAL	ECO-TOURISM	ENVIRONMENTALLY SUSTAINABLE	CULINARY
SOUTH AMERICA	ECO-TOURISM	HIKING	ENVIRONMENTALLY SUSTAINABLE	CULTURAL	CULINARY
ALL REGIONS	HIKING	CULTURAL	ECO-TOURISM	ENVIRONMENTALLY SUSTAINABLE	CULINARY

© ATTA 2018

DESTINATIONS

Hottest Trending Destinations

"Hot" destinations have high levels of client demand
"Warm" destinations are seeing an increase in client demand



Eastern Europe



Scandinavia



Southern Africa



Southeast Asia

INTRODUCTION TO THE ATTA





ATTA Team

ATTA MISSION

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

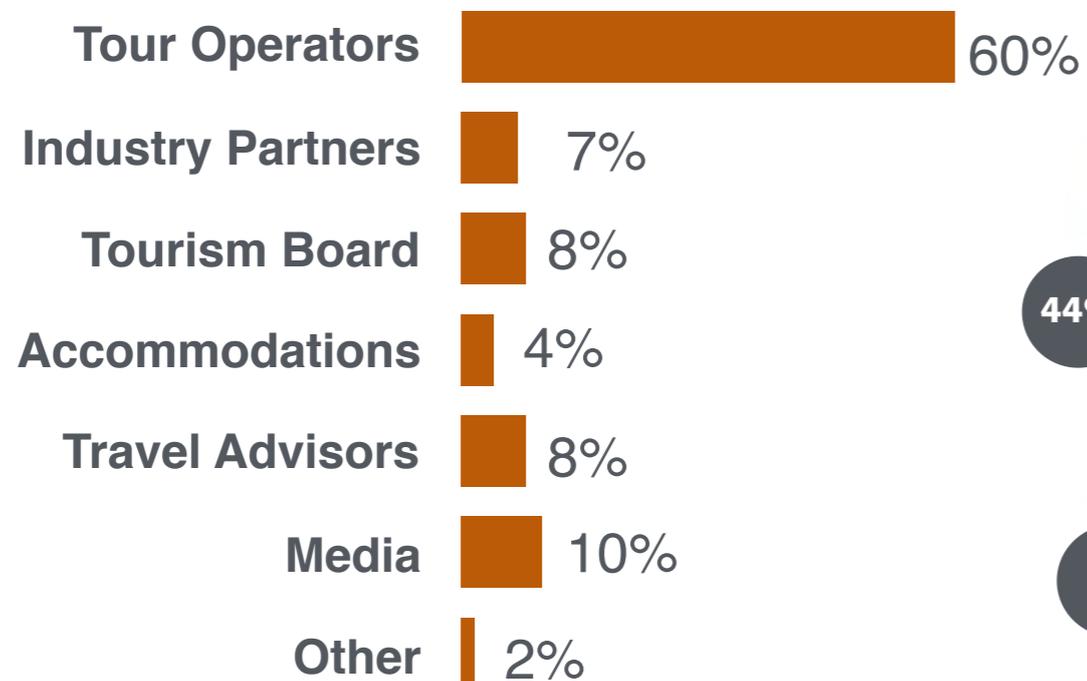


ABOUT ATTA / OUR MEMBERS

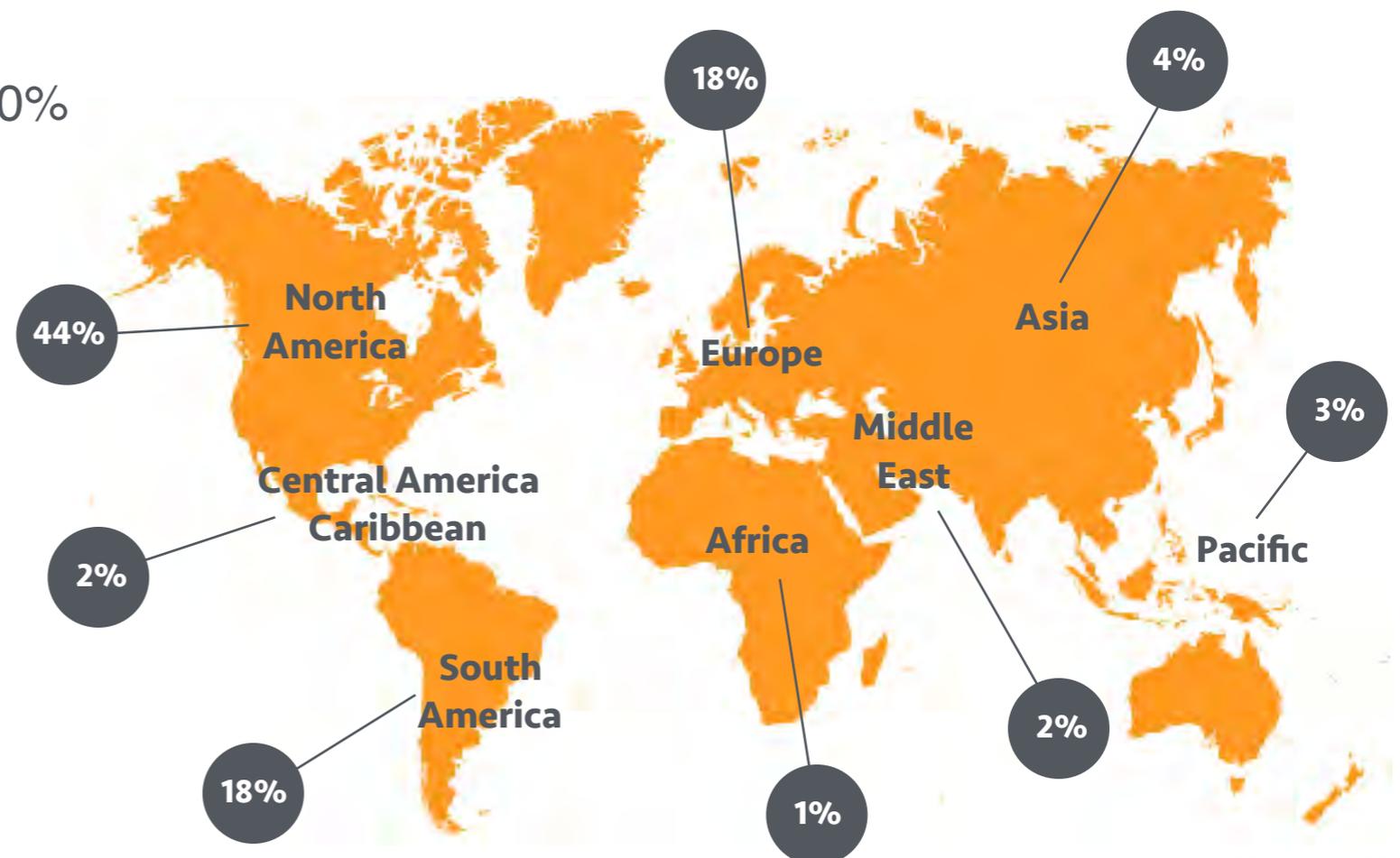
Established in 1990, the Adventure Travel Trade Association (ATTA) serves over 1300 members in 100+ countries worldwide.

Members predominantly include tour operators, tourism boards, specialty agents and accommodations with a vested interest in the sustainable development of adventure tourism.

WHO OUR MEMBERS ARE



WHERE ARE OUR MEMBERS



OUR EVENTS / OUR REACH

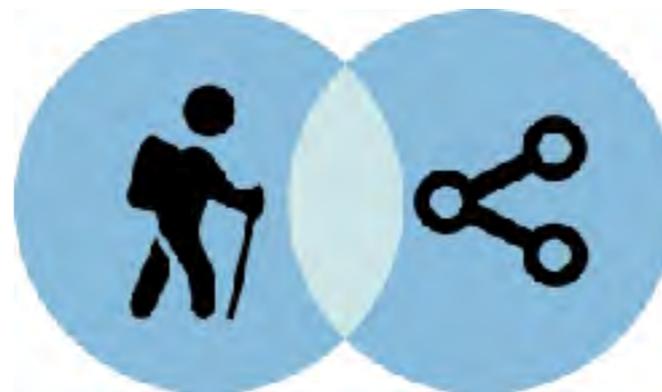
The ATTA excels in professional learning, networking and partnering services. We host events and offer services to address the needs of our community, such as:

- Adventure Travel World Summit
- AdventureELEVATE
- AdventureNEXT
- AdventureWeeks
- AdventureEDU
- Research
- Consumer Marketing Promotions
- Co-op Marketing
- AdventureTravelNews
- AdventureConnect

And, of course, ATTA Membership.

With expertise in research, education, adventure travel industry news and promotion, members of the ATTA receive competitive opportunities that help establish them as leaders in adventure tourism.

4,000,000
adventure travel consumers
reached per year by ATTA
Member Tour Operators



22,000
adventure travel professionals
through newsletters, events,
publicity and web

ATTA MEMBERSHIP

MEMBERSHIP OVERVIEW

Our primary goal is to **help your business grow and give you access** to a global adventure travel community. **Connect** with a variety of businesses that will help you succeed from media, destinations and tour operators to suppliers, accommodations and specialty travel advisors. By becoming a member you can promote your products/services; secure new customers; **tap into industry knowledge** and research; and gain access to a global business community that values growing the adventure travel market responsibly.





ATTA MEMBERSHIP BENEFITS

Adventure Travel World Summit

Priority Access & Discounts

Adventure Travel News

Press Releases & News

Marketplace Events & FAM Tours

Exclusive Access & Invitation

The HUB

Online Community
of Members

Research Reports

Industry Trends,
Financials & Insights

Consumer Exposure

More than 200k
Subscribed Travelers

ATTA'S VALUES STATEMENT

ATTA's Values Statement was formed through a collaborative process between the ATTA team, advisory board, members and input from the UNWTO.

In signing, ATTA members state that they too will strive and move toward these values (in brief):

1 TOURISM ETHICS

- The ATTA affirms and agrees with the UNWTO's Global Code of Ethics for Tourism

2

PROTECTION OF CHILDREN

- The ATTA believes in the protection of children from harmful effects of tourism and is a signatory of TheCode.org

3 RESPONSIBILITY

- The ATTA believes in the universal standards put forth by the Global Sustainable Tourism Council (GSTC), and that tourism businesses and destinations should adopt the criteria.

4

COMMUNITY PRINCIPLES

- As established by the ATTA
- and its active Members.

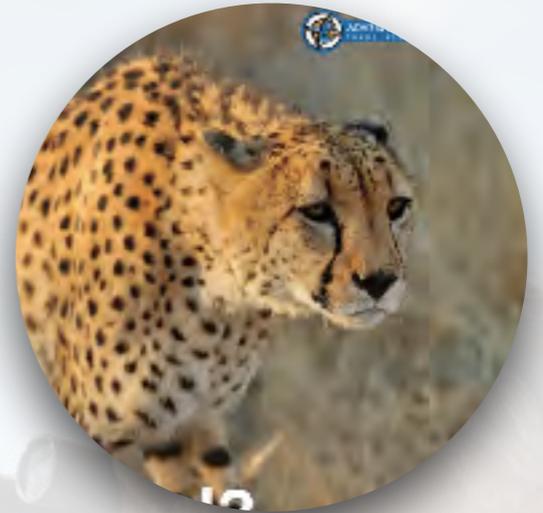
ATTA INTENSIFYING FOCUS...



WOMEN'S LEADERSHIP IN TRAVEL



INDIGENOUS TOURISM



WILDLIFE TRAFFICKING

2018 ATTA INITIATIVES UNDER WAY...



WOMEN'S LEADERSHIP



YOUTH LEADERS



CLIMATE ACTION



ELIMINATING SINGLE-USE PLASTIC WATER BOTTLES

THE ATTA ECOSYSTEM

Membership &
Industry Leadership



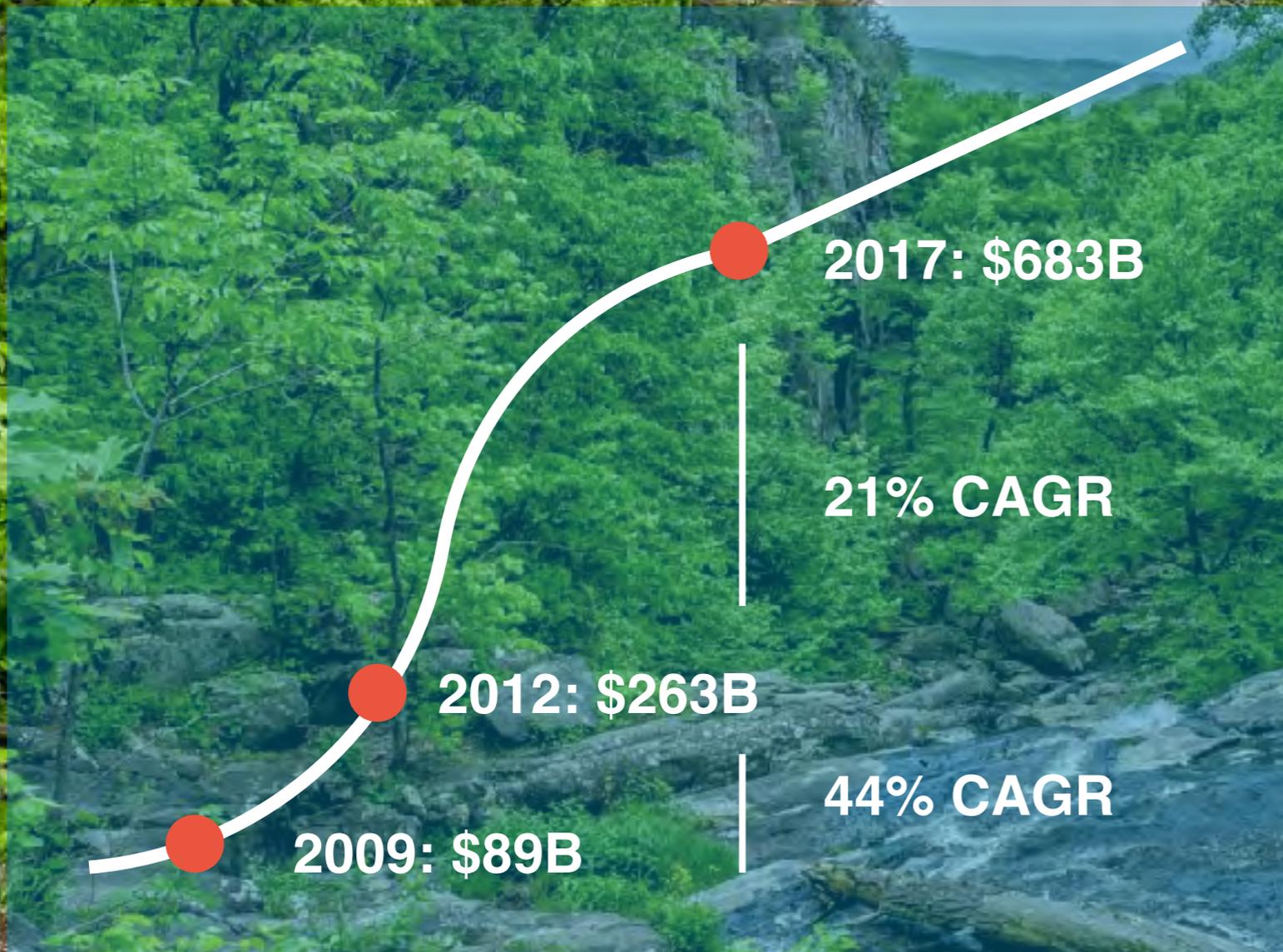
Events & Business
Services

Global
Conservation

ADVENTURE TRAVEL



INTERNATIONAL ADVENTURE TRAVEL MARKET SIZE



- Projections Based on ATTA Consumer Research From 2009 and Repeated in 2012
- Survey Research Did Not Include Asian Outbound Markets, Does Not Include Domestic Adventure Travel

ADVENTURE TRAVEL (IN DEVELOPMENT CONTEXT)

Adventure travel is:

- ✓ a viable option for **regeneration/adaptation of places** to new socio-economic realities (resource depletion, climate change or decline of competitiveness), and/or
- ✓ a **complementary alternative for rural development** and existing economic activities (additive option)

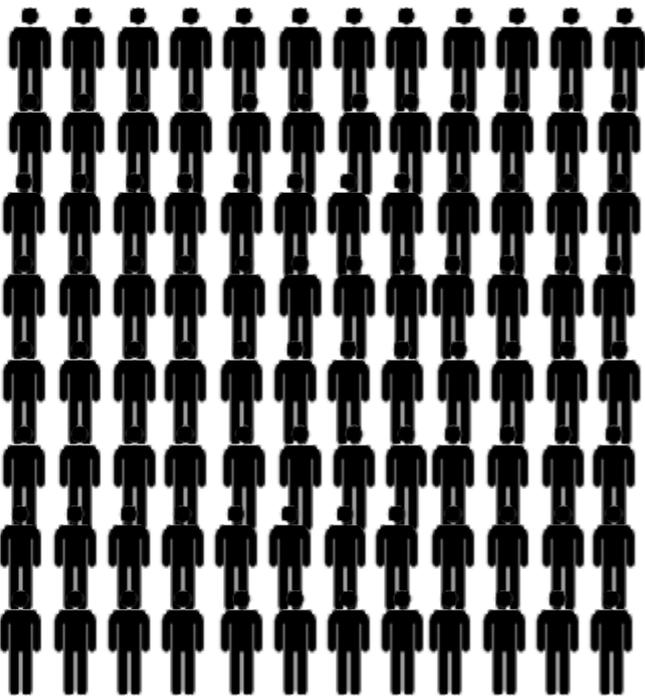
ADVENTURE TRAVEL (IN DEVELOPMENT CONTEXT)

Strategic economic development benefits:

- ✓ economically viable market model for sustainable management of natural resources
- ✓ creates incentives for transition from destructive/ extractive environmental activities
- ✓ creates economic opportunities for local communities, especially for women and youth
- ✓ facilitates public-private partnership
- ✓ tends to be **THE** "connective tissue" between diverse industry sectors

MARKET IMPACTS

GENERATING US\$10,000 IN THE LOCAL ECONOMY TAKES:*



Cruise tourists



Overnight package tourists



Adventure travelers

*based on World Bank (2015) Strengthening Tourism Competitiveness in the OECS countries: Market Analysis

MASS TOURISM
14%

of revenues remain in the country



local jobs per \$100, 000 USD

ADVENTURE

65%

of revenues remain in the country



local jobs per \$100, 000 USD



*based on USAID (2017) research study comparing mass tourism with adventure tourism in Jordan

ADVENTURE TRAVEL

Adventure tourism incorporates and promotes the values of the tourism that we want - a tourism that respects cultural and natural assets, and protects the most vulnerable

Taleb Rifai
former UNWTO Secretary General

Adventure Travel defined:

- ✓ connects **people with nature** (for mutual rejuvenation)
- ✓ weaves **culture and lifestyle** in the nature-based experience
- ✓ nature - traveler relationship based on respect and **natural attitude of protecting** and managing footprint (both for travelers and suppliers)

ADVENTURE TRAVEL ACTIVITIES

COMMON ACTIVITIES OFFERED BY ADVENTURE TRAVEL OPERATORS

SOFT ADVENTURE

trekking
hiking
kayaking
canoeing
scuba diving
camping
going on safari
horseback riding
cycling
wildlife watching
participating in cultural events
culinary experiences
sailing
etc.

HARD ADVENTURE

mountain climbing
mountain biking
paragliding
skydiving
caving
heli-skiing
kite surfing
skiing
snowboarding
sand boarding
rappelling/abseiling
hand gliding
rock climbing
surfing
etc.

SPECIALIZED

birdwatching
educational trips
cultural immersion trips
exploratory expeditions
research expeditions
“voluntourism”
yoga retreats
mindfulness programs
reflection retreats
etc.



MOTIVATION FOR ADVENTURE TRAVEL



Transformation



Expanded Worldview



Learning



Nature & Discovery



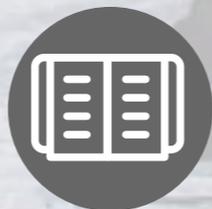
Mental Health



Fun & Thrills



Connections



Meaningful Stories

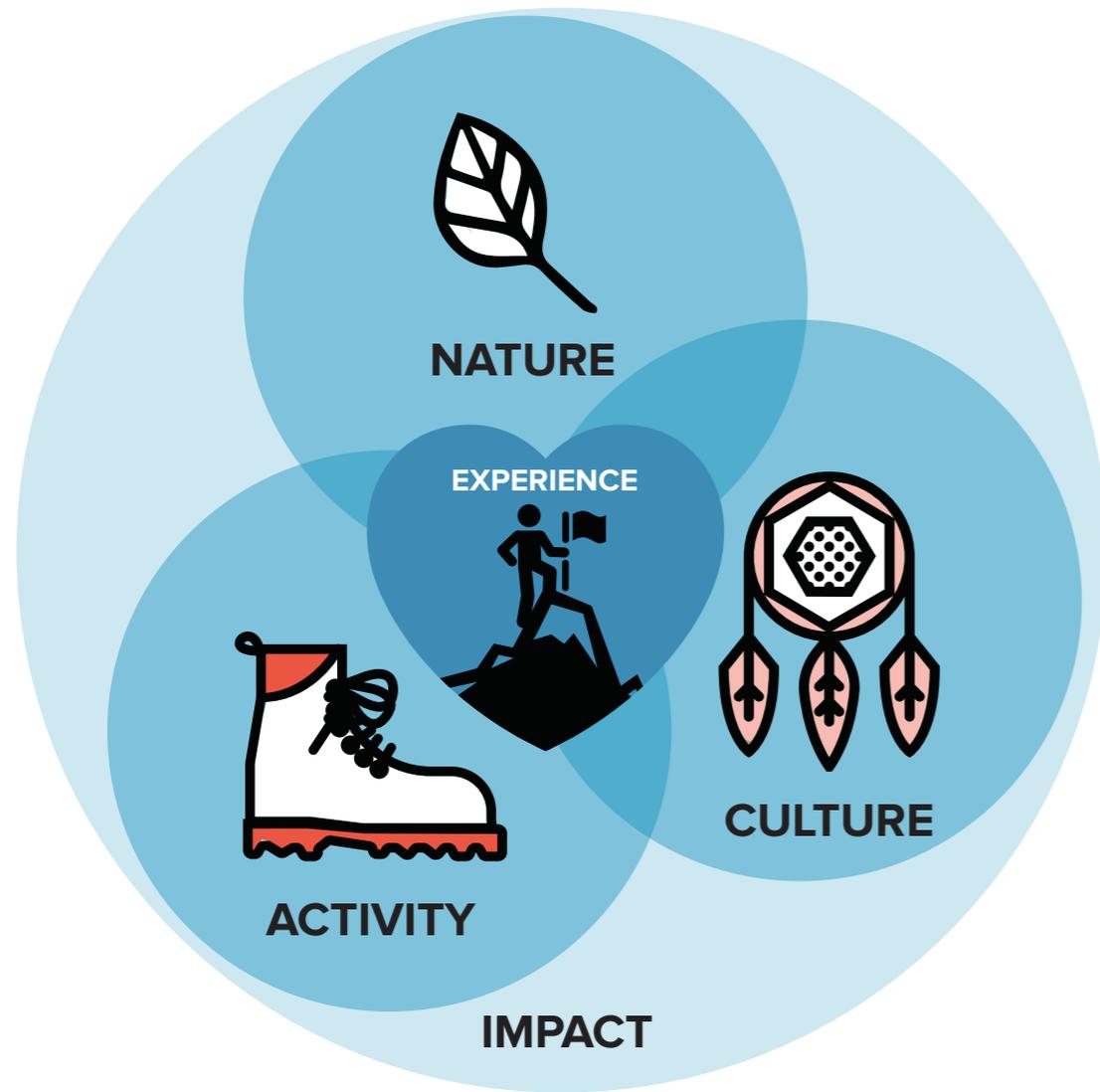


Physical Health

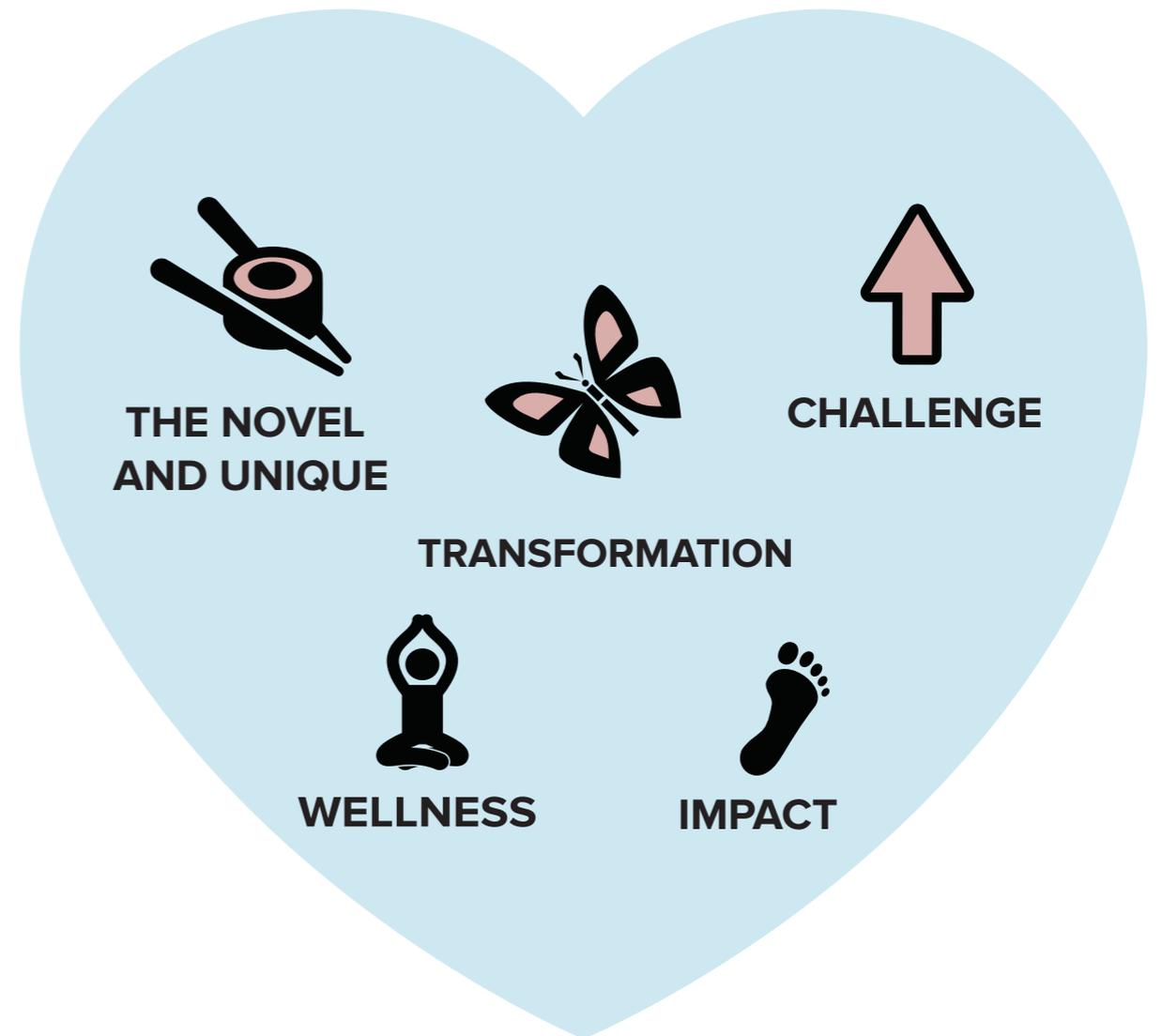


Unique Experience

ADVENTURE TRAVEL DEFINED



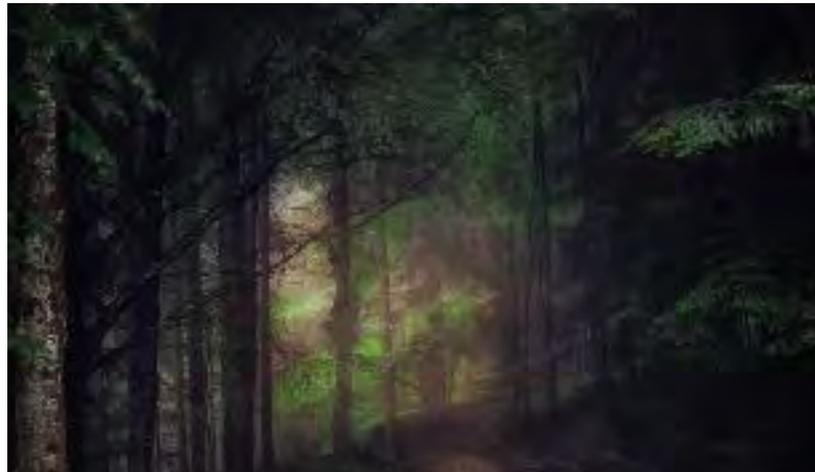
Essential Elements



Traveler Experience

ADVENTURE TRAVEL ACTIVITIES

EXAMPLES OF POPULAR ADVENTURE TRAVEL ITINERARIES



NATURE WALK WITH NATURE PHOTOGRAPHY



HIKING AND WILDLIFE WATCHING



EXPLORING LIFE IN RURAL AREAS BY BIKE



FARM TOURS AND LEARNING ABOUT FARMING TRADITIONS



CULINARY CLASSES AND TRADITIONAL FOOD TASTINGS



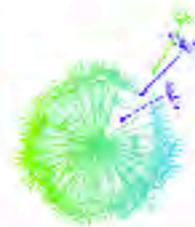
SOME GENERAL TRENDS TO KEEP IN MIND

INTERNATIONAL TOURIST ARRIVALS 2016

(million)



WORLD: 1,235 MILLION



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



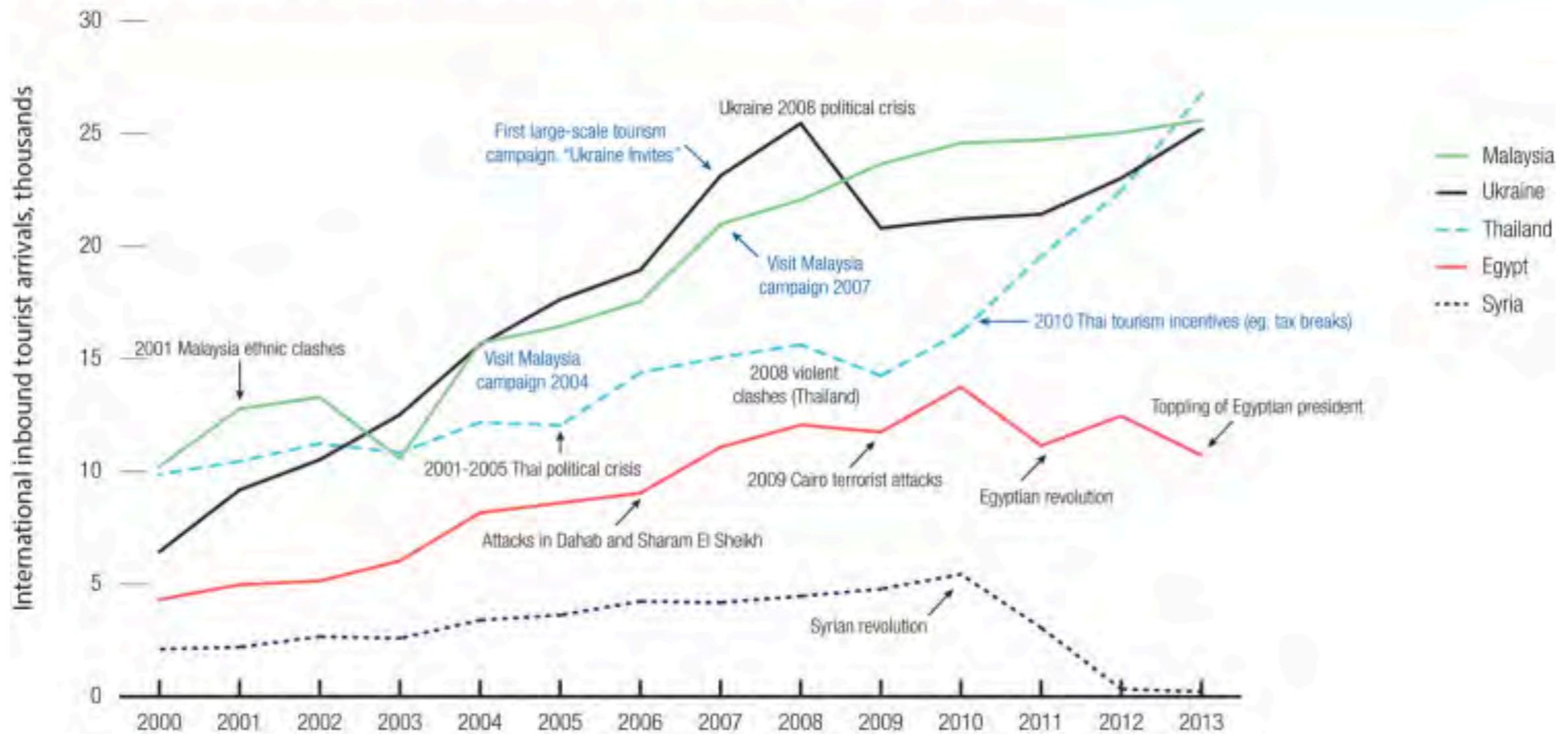
DEVELOPMENTS INFLUENCING GLOBAL TRAVEL: GEOPOLITICS

GLOBAL GEOPOLITICAL DYNAMICS

- Changing global patterns of travel
- New risks and sources of fear
- Continuing buzz around new (non-European) destinations

DEVELOPMENTS INFLUENCING GLOBAL TRAVEL: GEOPOLITICS

Figure 1: Number of international inbound tourists in selected countries, 2000–2013

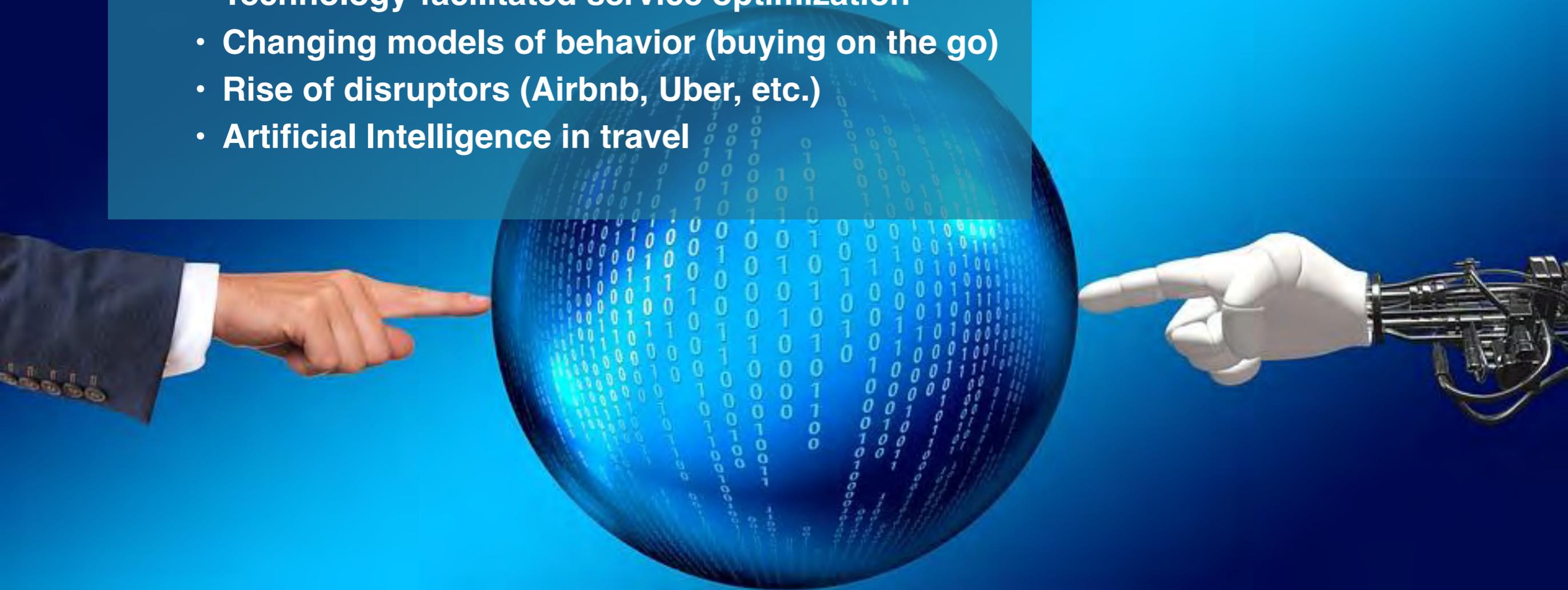


Source: The Economist Intelligence Unit, Euromonitor.

TRENDS INFLUENCING GLOBAL TRAVEL

ADVANCE OF TECHNOLOGY

- Technology-facilitated service optimization
- Changing models of behavior (buying on the go)
- Rise of disruptors (Airbnb, Uber, etc.)
- Artificial Intelligence in travel



TRENDS INFLUENCING GLOBAL TRAVEL

IMPROVED TRANSPORTATION INFRASTRUCTURE & TECHNOLOGY

- New airports, new railroads, new roads
- Smart cars, self-driving cars
- Scientific breakthroughs in speed of travel

TRENDS INFLUENCING GLOBAL TRAVEL

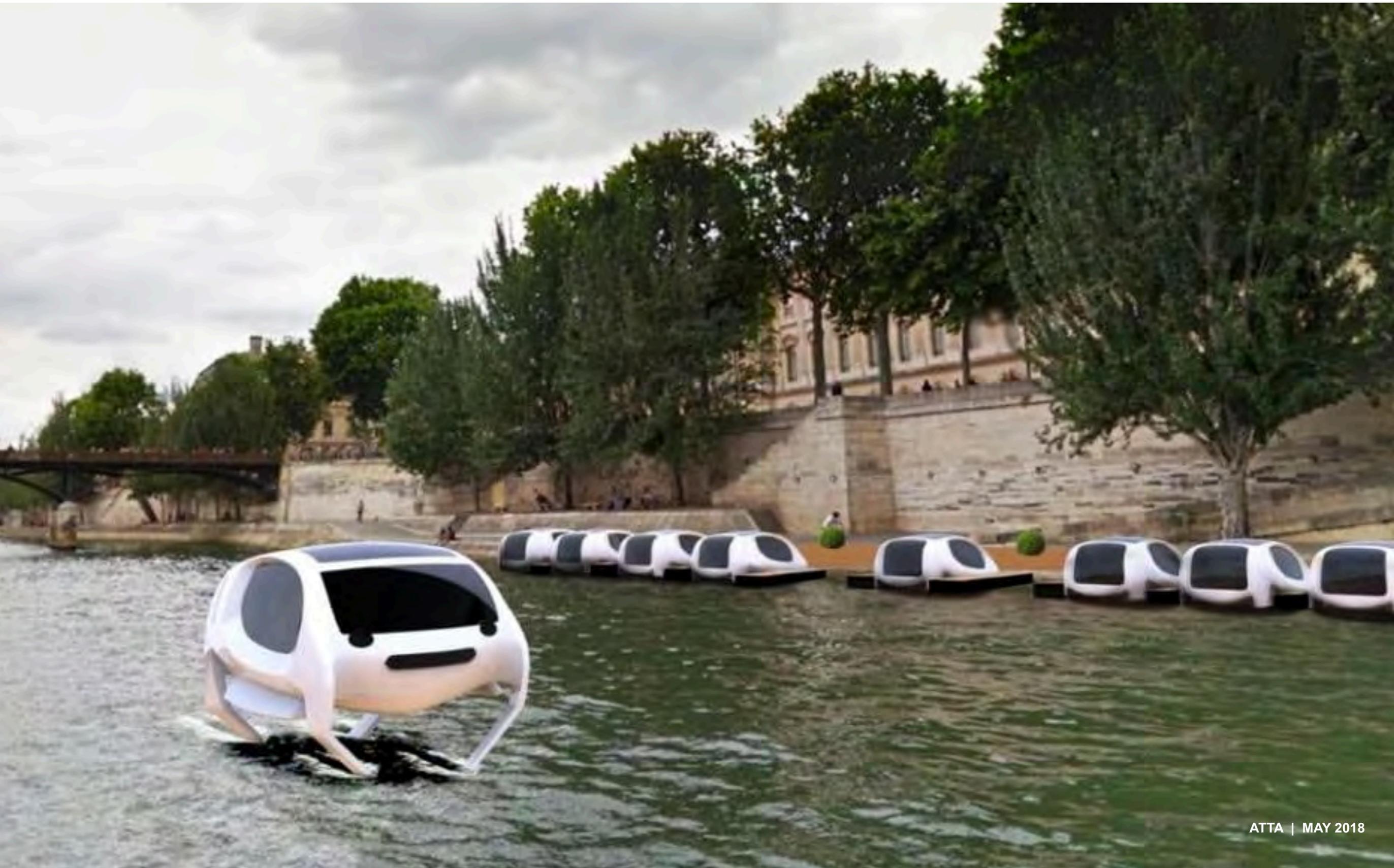
SUSTAINABILITY AND CLIMATE CHANGE AWARENESS

- On the global society's to do list
- Shared responsibility of all
- Changing demand

#DRIVERLESS #NOTRAFFIC #SKY-IS-THE-LIMIT



#NOEMISSIONTRANSPORT #NOTRAFFIC



**#ELECTROPLANES #NOEMISSIONS
#LIMITFOOTPRINT**



COURTESY: EASYJET

TRENDS INFLUENCING GLOBAL TRAVEL

MODERN LIFESTYLE AND HUMAN VALUES

- Personal growth & wellness
- Mid-career shifts & lifelong journey
- New concept of “luxury”



TRENDS INFLUENCING GLOBAL TRAVEL

CHANGING TRAVELER BEHAVIOR

- Status seeking, exclusivity and personalization
- Wellness, mindfulness, transformation
- Back-to-nature
- Independence and silence

#WELLNESS #HUMANCENTERED #CAREFORTHETRAVELER



VITALITY IN MOVEMENT

Earn our Swiss chocolate with a variety of fitness options both indoors and out.



VITALITY IN CUISINE

Enjoy healthy food throughout the day that fits your lifestyle.



VITALITY IN MEETINGS

Learn to love meetings with specially tailored breaks featuring fresh food and drinks.



VITALITY GUIDE

Delve deeper into your destination with our Vitality Guides.

**#WELLNESS #MINDFULNESS
#HUMANCENTERED**



DEVELOPMENTS INFLUENCING GLOBAL TRAVEL: GLOBAL MIDDLE CLASS

EXPANDING MIDDLE CLASS GLOBALLY

- Expanding middle class across continents
- New source markets
- New leading source markets in tourism



DEVELOPMENTS INFLUENCING GLOBAL TRAVEL: GLOBAL MIDDLE CLASS



© World Tourism Organization (UNWTO) 2015



DEVELOPMENTS INFLUENCING GLOBAL TRAVEL: THE NEW GROWING SEGMENT

The New 60's

- A growing new segment
- “Nyppies” (Not Yet Past It) or “Owls” (Older, Working Less, Still earning)
- New needs, new market opportunities

SPECIAL REPORT

Don't call us silver

Pensioners are an underrated and underserved market

From adventure travel to dating websites, older consumers display resolutely young tastes



Alamy Stock Photo

FACTORS INFLUENCING GLOBAL TRAVEL



RISE OF MILLENNIAL TRAVELLER

- New lifestyle and life goals (money poor, time rich)
- Blending the everyday with leisure
- Focused on the experience, adventurous by spirit

Understanding the MILLENNIAL TRAVELER

Hipmunk is built by a bunch of Millennials. We know what we like, but we wanted to know what others our age crave when it comes to travel. Hence, we created a survey and an infographic.

The Millennial

18-34 years old

Key Traits:

- Expect technology to work
- Very social
- Love their phones
- Crave adventure
- Like sharing ideas
- Passionate about values



Hipmunk Employees

32

Average age of Hipmunk employee

75%

of Hipmunk employees are millennials

The Experience Junkie

These experience junkies like big cities and don't mind roughing it if it means an extra day of play

Plan to travel more in 2015



63%

See their travel style as urban



75%

Earn travel points from a credit card



55%

MILLENNIAL MINDSET

3RD ANNUAL TRAVEL HABITS STUDY

Millennials use Hipmunk. Designed and built by a staff of 37% Millennials, for the first year it's also our largest user base. We asked you to help us understand the generational gap in how people travel.

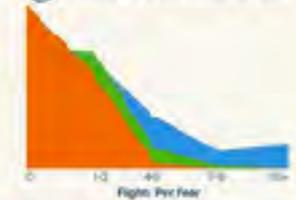


Always On The Go

Will you take more business trips in 2015 vs 2014?



How many flights will you take this year?



Travel Hackers

Do you consider yourself a travel hacker who can work the system to get deals?



Do you plan to book off a Budget list Ambassador in 2015?



Do you prefer staying in vacation rentals?



Do you use credit cards to earn food points or flight miles?



Mix Pleasure with Business

Would you extend a business trip into a leisure trip?



Constantly Connected

What is the most important in-flight amenity when you travel for leisure?



Would you take a leisure trip without gadget?



Get Traveling

From the internet's (and others) #1 Hipmunk, named for helping you travel in 2014, we're not stopping.

hipmunk

DEVELOPMENTS INFLUENCING GLOBAL TRAVEL: OVER TOURISM



THE TWO SIDES OF TOURISM GROWTH

- Continuous growth of international arrivals
- New technology and distribution tools accelerating growth
- High number of popular places struggling with overtourism
- Rise of instances of #TouristsGoHome movements

A top-down view of a desk with a magnifying glass over a newspaper, a coffee cup, and a pen. The magnifying glass is positioned over a newspaper page with the word 'Uturu' visible. The coffee cup is in the upper right, and a pen is in the lower left. The background is a blurred desk surface.

SOME MORE SPECIFIC TRENDS TO CONSIDER

#CREATIVESUSTAINABILITY
#SHAREDRESPONSIBILITY



SOUVENIRS

FROM
(ULEBRA)

#TRAVEL-WITH-IMPACT #MAKING-A-DIFFERENCE



Interested in hosting a social impact experience?

If you're a volunteer, employee, or board member of a registered nonprofit, you can create an experience that brings people closer to your work and encourages them to become advocates for your cause.

[Get Started](#)

[Learn more >](#)

Start your journey.

Get to know the volunteers and activists who are closest to the causes. Share their stories and inspire others to get involved, too.

GET IT ON
 Google Play

Available on the
 App Store



#ENTREPRENEURSHIP-WITH-IMPACT

#GOOD-COMPANIES



#CREATIVITY-AND-IMPACT

#EXTREME-AWARENESS-RAISING



**#STATUSSEEKING #EXCLUSIVITY
#PERSONALIZED**



**#SELFGUIDED #SILENTTRAVELER
#TECHNOLOGY**



#BACK-TO-NATURE
#DIGITALDETOX



#INSTANT-AND-ANYWHERE #SERVICEOPTIMIZATION



#BUYONTHEGO #NEWBUYERJOURNEY



#DISRUPTIONALLAROUND

#SLEEPINGWITHVIEW



#AR-ENHANCED-EXPERIENCE #TECH-IN-TRAVEL



#RADICALESCAPE **#TRANSFORMATIVE**
#THE-NEW-LUXURY



ADVENTURE TRAVEL TRENDS IN 2018

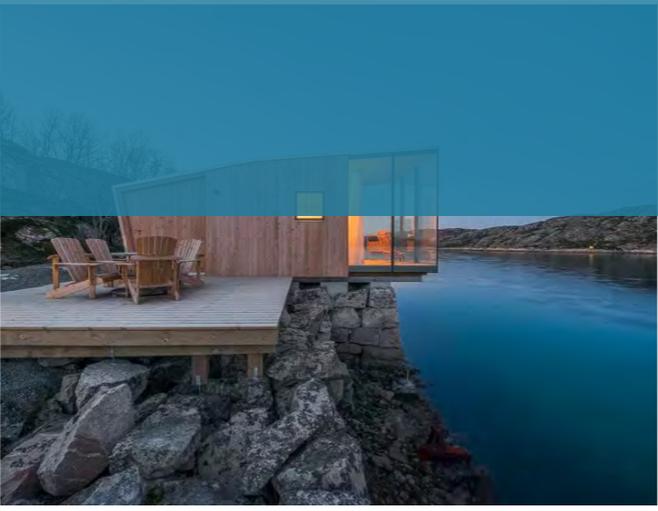


This report examines trends in adventure tourism in five sections:

- “The Big Picture” provides a macro view of the intersection between global politics and its effect on adventure tourism.
- The section on the virtual future examines upcoming trends in technology and specifically how tech tools can be used to market and sell adventure tourism products.
- “Traveler Trends” looks at the demand side of the adventure industry.
- “Product Trends” examines the supply side of the adventure industry.
- The section on destination trends identifies key issues facing adventure destinations as they seek to grow sustainably in 2018.



IN SUMMARY...




Interested in hosting a social impact experience?

If you're a volunteer, employee, or board member of a registered nonprofit, you can create an experience that brings people closer to your work and encourages them to become advocates for your cause.

[Get Started](#) [Learn more](#)



TRENDS: KEY TAKEAWAYS

We operate in a **dynamic and fast-changing industry** and we share it with some of the **biggest disruptors** of our times

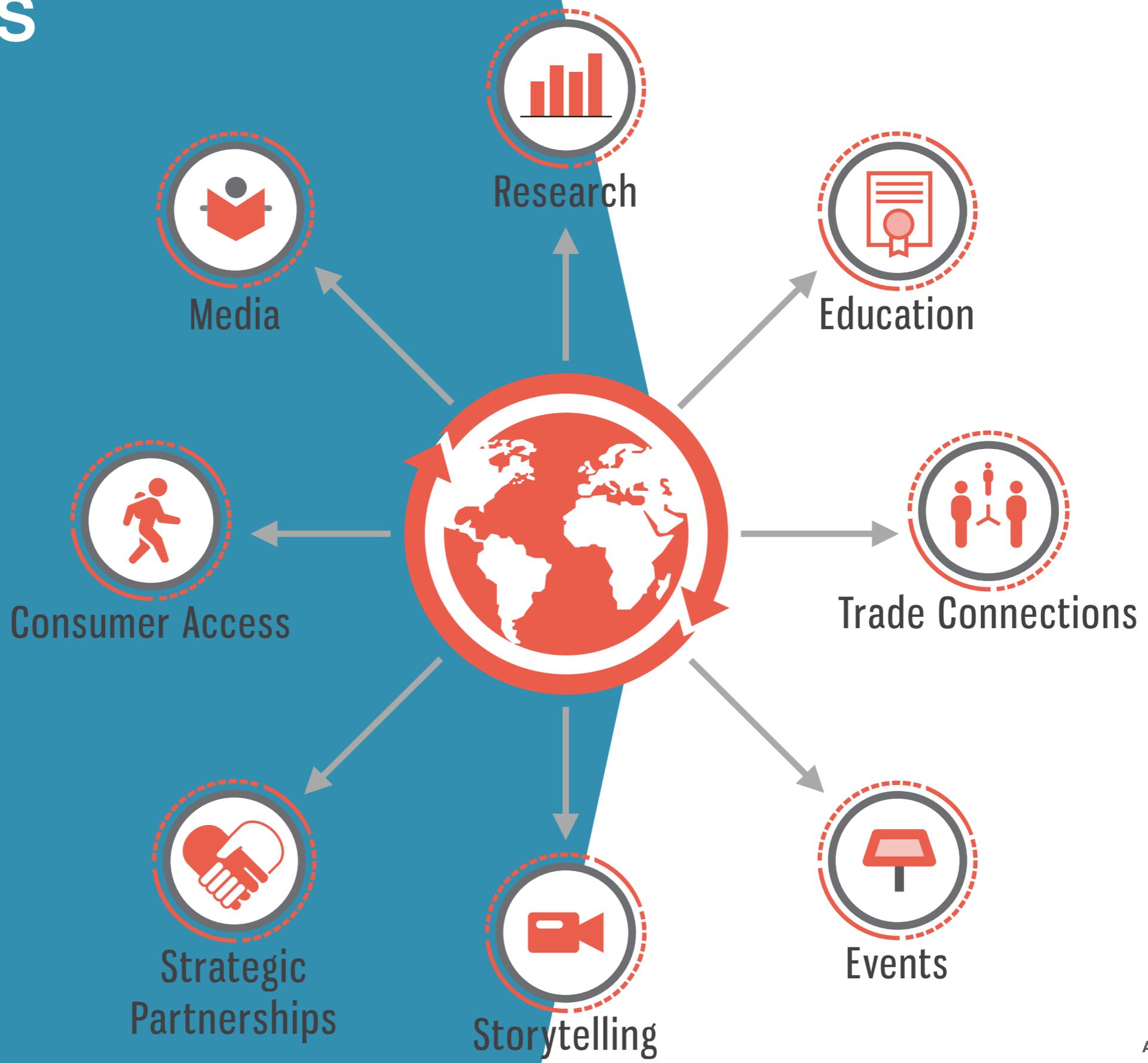
Fast change is everywhere in our industry so **innovation** is the only **path to market success**

Creative innovation is an opportunity for **competitive advantage** and **leadership** in the sector, especially in areas such as **experiential travel and sustainability**



ATTA'S APPROACH

PORTFOLIO OF ENABLING SERVICES



ATTA'S WORKING PRINCIPLES

- ✓ long term engagement and legacy mindset
- ✓ enabling of destinations based on wholistic ecosystem approach
- ✓ connecting to markets and using market rationale

LONG TERM ENGAGEMENT



ROADMAP FOR DESTINATION DEVELOPMENT

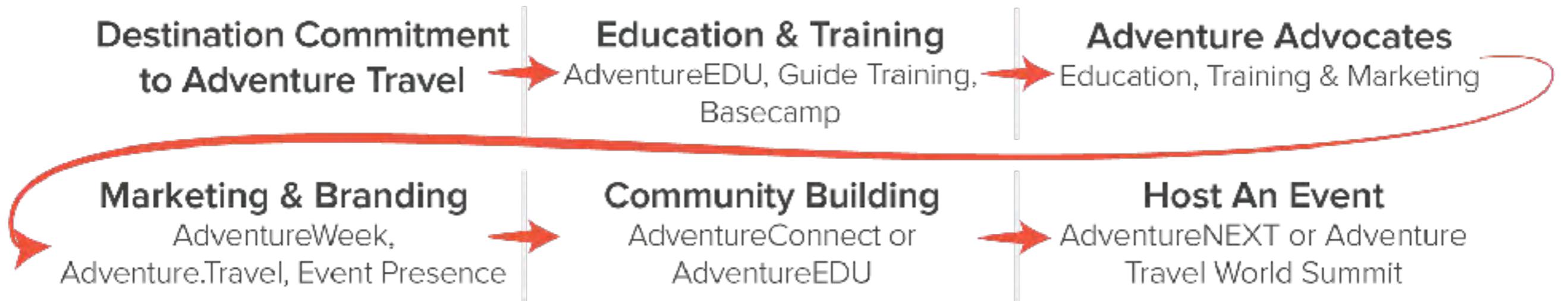


Photo Credit: © ATTA / Has

KEY TAKEAWAYS

- ⦿ Adventure travel = **sustainable tourism** balancing economic, environmental and social dynamics
- ⦿ ATTA - strategic and **long-term partner** (and facilitator) that seeks to enable destinations and make them better **prepared for global industry** competition
- ⦿ Importance of taking a **wholistic approach** to growth that considers all elements of the **ecosystem**
- ⦿ Essential importance of **visible results** and **gradual market success** (demonstrable along the process)
- ⦿ Ongoing stakeholder involvement and **public-private partnership**

FINLAND



“Finland aims to be a pioneer in the circular economy. In the future, the competitiveness of our economy and our well-being will no longer be based on overconsumption of natural resources. The world’s first national road map to a circular economy defines the steps required for a systemic change in the economy.”

WHAT NORDIC DESTINATIONS SHARE IN COMMON

- High ranking in the Adventure Tourism Development Index
- Environmentally and culturally diverse & sensitive destinations
- Solid economy & stable government
- Progressive & highly educated workforce

- Generally safe & secure destination
- Creativity & Resourcefulness
- Propensity toward sustainability & engagement with nature
- Solid infrastructure
- Innovative drive
- "Grand" visions for the future...need only operationalize

DIFFERENTIATION



INNOVATION



PHOTO CREDIT NELLY VOLKOVICH
ATTA | MAY 2018



EXPERIENCES

PHOTO CREDITS HENRIK TRYGG
ATTA | MAY 2018

A group of people is walking away from the camera through a dense forest. The scene is bathed in warm, golden light from the sun, which is visible as a bright flare on the left side of the frame. The trees and foliage are out of focus, creating a bokeh effect. A solid blue rectangular overlay covers the bottom portion of the image, containing white text.

SIGNATURE & THEME ROUTES

PHOTO CREDIT GUNNAR CREUTZ
ATTA | MAY 2018

ACCESSIBILITY



COMMUNITY BUILDING WITH AN ECO-SYSTEM FRAMEWORK



TRAJECTORY FOR DESTINATION DEVELOPMENT

Strategic development will result in high-visibility exposure to the international community – to tour operators, travel media and travelers.



WHAT IS ABOUT TO ARRIVE IN YOUR BACK YARD?





ATWS OVERVIEW

Every year, representatives from the adventure travel industry come together to make connections, get inspired and enjoy a decidedly adventurous destination anywhere in the world. More than just a conference, the Summit is a global gathering of an industry that works hard and plays hard, offering deep-dive educational content, big name keynote speakers and endless networking opportunities.

- **Businesses from 55+ countries**
- **Connect with 40+ media and 100-125 buyers**
- **Education for your businesses**
- **Branding + exposure**
- **Pre-event adventures**



800
DELEGATES

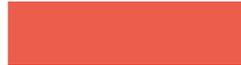


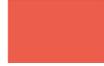
4-5
DAYS

Delegate Estimates by Industry

Tour Operators + Accommodations
 **50%**

Industry Partners
 **20%**

Tourism Boards + Destinations
 **19%**

Adventure Travel International Media
 **8%**

Travel Advisors
 **3%**

[Learn More](#)

ADVENTURE TRAVEL WORLD SUMMIT



TOSCANA

MONTECATINI, TERME, ITALY OCTOBER 15-18, 2018



SCAN ME!



Register now at www.adventuretravel.biz/atws2018

ADVENTURE TRAVEL WORLD SUMMIT

SWEDEN // 2019

16
SEP

Sweden 2019



Save the date! The Adventure Travel World Summit heads to Sweden in 2019.

📅 Sep 16-20, 2019

📍 Gothenburg, Sweden

Finland's Potential Role in the 2018 & 2019 ATWS

- **2018 Adventure Travel World Summit (ATWS):**
 - **Participate as registered delegates (sell out likely in June 2018)**
 - **Serve as potential 2018 ATWS partner**
- **2019 ATWS:**
 - **Participate as registered delegates**
 - **Serve as potential 2019 ATWS official partner, Marketplace, Destination Showcase, etc.**
 - **Serve as potential Post-Summit Adventure (PSA) provider for the 2019 ATWS**

Kiitos! I THANK YOU



ADVENTURE TRAVEL
TRADE ASSOCIATION

PHOTO CREDIT © UNSPLASH.COM
ATTA | MAY 2018