

AAMUKAHVIT ATTAN KANSSA WEBINAARI

24 April 2023





MEET TODAY'S **ATTA TEAM**



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ADVENTURE TRAVEL

TRADE ASSOCIATION™

The Adventure Travel Trade Association is a vital leadership voice and partner for the adventure travel industry around the world.

Established in 1990, The Adventure Travel Trade Association is the largest global network of adventure travel leaders who share a belief and commitment to sustainable tourism

If your clients are interested in outdoor activities, like trekking, cycling, and kayaking, or cultural experiences like cooking classes and homestays, then you should join our community of nearly 1,200 tour operators, DMCs, lodges, travel advisors, journalists, tourism boards and DMOs in more than 100 countries worldwide.

The connections and creativity of this vibrant community come together both virtually and in person to create and deliver the solutions that propel our businesses and our communities toward a responsible and profitable future.











ATTA MISSION

To EMPOWER a global travel

COMMUNITY to deliver experiences that

PROTECT natural and cultural capital
while creating shared ECONOMIC

VALUE.





COMMUNITY



The ATTA is a community of adventure travel believers. We believe travel, when done responsibly, safely and respectfully, can be a catalyst for positive change for communities, the environment, wildlife, and culture.

Joining the ATTA helps your business grow, introduces you to the best and brightest minds in the industry, and allows you to have a bigger impact by collaborating on a collective purpose.





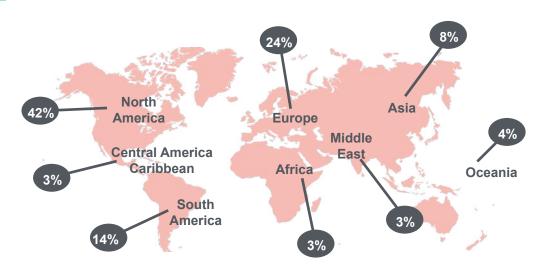
WHO OUR MEMBERS ARE

- Tour Operators, DMCs 56%
- Adventure Media 17%
- Tourism Board, DMO 8%
- Travel Advisors 7%
- Industry Partners 6%
- Accommodations 2%
- Association Partners 2%
- Gear Suppliers 1%

Learn more



WHERE OUR MEMBERS ARE



MEMBERS FROM SCANDINAVIA

- Albatros Expeditions
- This will be u
- Bering Travel
- Greenland Travel
- Adventure Apes Ltd
- Sila Greenland DMC
- Arctic Hiking and Expeditions
- Arctic Yeti
- Iceland Encounter
- Icelandic Mountain Guides
- Arctic Adventures
- FRAMTours AS
- Up Norway
- Norway Adventures AS
- Adventure Travel Norway
- Ethical Travel Portal
- Exclusive Scandinavia
- Nyrups Naturhotell and Robusta Äventyr

- Exclusive Travel Experiences AS
- Anglerman Fishing Adventures
- Äventyrsresor
- Björk Experience
- SAKURA TOURS AB
- Sjö & Havsguiderna
- Vildmark i Värmland
- EverTrek
- Green Owl Travel
- Dalslands Aktiviteter
- Catch & Relax
- Upplevelsebolaget
- Waymonde Travel
- Visit Oulu
- Visit South Greenland
- Fjord Norway
- West Sweden Tourist Board
- Traktforest Hotel

- Smalands Turism
- Visit Dalarna
- Visit Finland
- Visit Iceland
- Visit Greenland
- Innovation Norway
- Visit Sweden
- Ruka-Kuusamo Tourist Association
- Tourism In Skåne
- Air Greenland
- Bolder Technology AS
- Adventure Tech
- The Nordics
- CMD Inspired
- Tenson
- Hendrik Morkel
- Lola Akinmade Åkerström
- Kicki Lind Nanoq
- Gabriel Arthur



























































ADVEN TOURED













































OUR INDUSTRY PROFESSIONALS COMMUNITY

Our community is made up of ~30,000 individual guides, tour operators, lodges, travel advisors, tourism boards, destination marketing and management organizations, outdoor educators, gear companies and travel media who share a belief and commitment to sustainable tourism.



32,000

subscribers



45,600

followers



15,300

followers



34,000

followers



What is Adventure Travel?



EXAMPLES OF TRENDING ADVENTURE EXPERIENCES

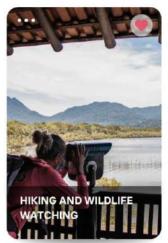
Q What type of experience are you looking for? Q ×

Popular

Rating

Recommended











MARKET IMPACTS

Generating \$10,000 USD in the local economy takes:







Overnight Package Tourists

Adventure Travelers

Mass Tourism

14%

of revenues remain in the country

1.5 24

local jobs per \$100,00 USD

Adventure Tourism

65%

of revenues remain in the country

2.6 224

local jobs per \$100,00 USD

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

Bank (2015) Strengthening Tourism Competitiveness in the OECS countries: Market Analysis





Adventure Travel Expenditures





OWNITURE TRAVE. Sources: Euromonitor's Travel & Tourism Global Economic Impact & issues 2017 // Projections based on combined date from Euromanitor's ATTA'/ 2019 Shaping the Future of Adventure and Cultural Travel Report (ATTA's IFC/World Bank Group)





ADVENTURE TRAVELER PERSONA

Karen & Mike

AGE

NATIONALITY

LIFE INCOME EDUCATION HOME Mid 50s

German | American

Living in the UK

Professionally active

Above average

Graduate degrees

Empty nesters



Personal life





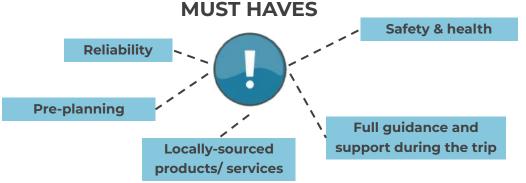




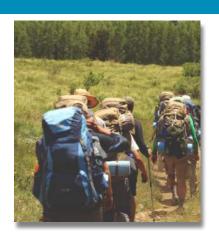
ADVENTURE TRAVELER PERSONA - TRAVEL PROFILE

Karen & Mike

- Preferred TO
- Travel = adventure, discovery, contact with nature and culture
- Travel holidays are the most precious moments of the year



IDEAL HOLIDAYS



- Combine **nature** and **culture** with heavy emphasis on **experiencing** the place and its people.
- Combine convenience and good service with raw contact with nature, pure touch with locals and sense of adventure.
- Fully pre-designed (with TO) itineraries with a small group, ideally only with friends and acquaintances (unless everyone in the group is vaccinated against COVID-19).

- Balance between being active (biking, hiking, kayaking, etc.) and connecting with local culture and people.
- Favorite things to do: visit a local market, take a local cooking class, listen to stories about local legends while hiking the area.
- Enjoy **learning** about the place and **immersion** in its living culture and people.



TYPICAL ACTIVITIES DURING HOLIDAY

- Outdoor activities of moderate difficulty (hiking, biking, kayaking, etc.) mixed with cultural experiences that reveal to them what is interesting and different about the place they are visiting.
- The ideal itinerary combines fun with rejuvenation and learning.





- When in rural setting excited to stay at small B&Bs with traditional character or do homestay in local communities.

- Passionate about food and wine, and particularly about actively exploring local cuisine and food traditions (farm visits, spice training, cooking demonstrations and classes, etc.)
- Read a lot about the history and culture, and all attractions on the itinerary but rely heavily on learning even more from local guide to deepen





DECIDING ON THE NEXT TRIP



- Consult with one of their preferred TO's (with one of which they always travel).
- Read and follow in social media specialized media for travel and active travel (Nat Geo, NYT Travel, Outdoors Magazine, Discovery Channel, Lonely Planet, etc.)
- Talking to friends and seeing their travel pictures in social media.

UPON RETURN

- Spend the days after their return uploading and sharing photos "bragging" about the cool experiences they were part of.
- Invite friends over to taste some of the wine or food they have brought back and to share moments from their travels.
- Enjoy the fact that many of their friends get inspired and later visit the same places they have been the first to go to.





FAVORITE MOMENTS FROM KAREN & MIKE'S TRAVELS - CAPTURED ON CAMERA AND SOCIAL MEDIA







QUOTES FROM KAREN & MIKE

Traveling is about seeing another part of the world that you aren't used to seeing. Getting outside of what you see day to day and seeing how another part of this huge world lives.

"Our holidays allow me to expand my own limits and provides me ideas for what gives me the greatest pleasure and how I can best feel at peace in a crazy world."

What makes this type of travel so addictive is the endless opportunities to learn new skills, try new things, taste new foods, meet fascinating people, and have amazing experiences!

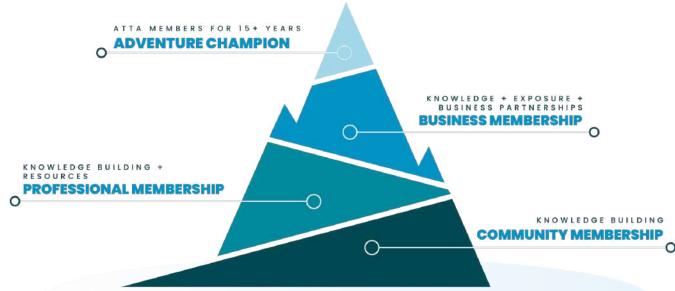
When we travel, I feel we are more alive....I learn about myself and my limits, and I keep being surprised by the wonders of the world. Every time we travel I feel we return home more enriched and with expanded life limits.

"When we travel we want to feel that we are doing good. Everyday life does not give us that many opportunities to do good so we want to experience this when we travel."

Physical and spiritual wellness is really important these days so with travelling we look to restore our sense of wellness



MEMBERSHIP LEVELS



https://www.adventuretravel.biz/membership/





Membership Types

If now is not the right time for you to join as a full Business Member, we encourage you to sign up for a free Community Membership to stay connected, or a Professional Membership for one person to access our educational resources. We know you will join when the time is right for you.

	Community Membership	Professional Membership	Business Membership
User Access	One Person	One Person	One Business / All Employees
Free Research Reports	Ø	Ø	0
Free Educational Webinars	0	0	0
Access to Pro Deals	8	Ø	0
Discounts on training courses	8	Ø	Ø
Personal Profile in online member directory	8	Ø	0
Business Profile in online member directory	8	8	Ø
Discounts on events	8	8	0
Trade exposure through Adventure Travel News	8	8	0
Consumer exposure through Adventure.Travel	8	0	0
Digital member badge	8	0	0
Price per year	FREE	\$150usd/YEAR	Starts at \$350usb / YEAR Price varies by company type





Tourism Board Membership



https://membership.adventuretravel.biz/tourism-boards





MEMBER BENEFITS



NETWORKING

With other ATTA Members across the globe through exclusive access to the HUB, a social networking website for members only.



TRADE EXPOSURE

Submit your press releases for publication on AdventureTravelNews.com and associated newsletter (circ. 26,000+ adventure travel professionals globally)



CONSUMER VISIBILITY

On Adventure.Travel (associated newsletter circ. 240,000+ subscribers)



Industry research reports, educational training, webinars on important relevant ADVENTURE TRAVEL topics, business reports, best practice quides, etc.



PUBLICITY GENERATION

The ATTA plays an active role on behalf of the adventure tourism industry to help generate publicity and to connect its members with high-value media through its Journalist Alert system. Recent coverage fueled by the ATTA includes: The New York Times, National Geographic Traveler, Outside, Men's Journal, Associated Press, BBC News, Frommer's, USA Today, The Wall Street Journal, CNN, Globe & Mail, MSNBC. com...the list is long.



DISCOUNTS, TOOLS, AND RESOURCES

Discounted advertising, marketing and PR services, pro-deals on gear for your whole staff, an online directory listing, use of the ATTA logo, and more.



To apply for FAM trips and to be hosted at certain events.



SPECIAL PRICING

On all of your staff's registrations to several travel trade events including.

- · Adventure Travel World Summit This annual gathering attracts over 700 adventure travel professionals and allows you to network with tour operators from around the world, build relationships with media, and promote your products to the industry's key players.
- AdventureELEVATE is an annual North America-based two-day intensive educational and networking conference
- AdventureNEXT helps put emerging adventure travel destinations on the adventure map, offers partners the chance to present themselves to international buyers and media, as well as local regional destinations and outfitters.
- AdventureWeek is a fully-hosted intensive FAM, in which the ATTA partners with a destination and invites outbound tour operators to meet with local operators and ground suppliers during two or three MARKETPLACES during the itinerary.







SUSTAINABILITY & CLIMATE TOOLS

Through our climate programs we enable individuals and businesses to immediately take action in support of natural and technological innovations for climate.

Our tools and resources can help you advance climate understanding and spur action within your organization and beyond.

SUSTAINABLE TRAVEL RESEARCH, CONTENT & COURSES



NEUTRAL TOGETHER: CONVENTIONAL CARBON OFFSETTING

FREE ACCESS TO TRAVELIFE* TRAINING & TOOLS

TOMORROW'S AIR: CARBON REMOVAL WITH PERMANENT STORAGE

*Travelife provides <u>education</u> to become certified in sustainability





CONSUMER ACCESS

Find travelers looking for your adventure travel products through the ATTA's and ATTA's media partners consumer channels.

Consumer Access Opportunities Include:

- Your listing & content on Adventure.Travel
- Inclusion in consumer campaigns
- Advertising emails, social media, online







FREQUENT QUESTIONS ANSWERED

- → The benefits of Business Membership are available for your whole team
- → Membership is for 12 months from the time you join and will renew each year
- → The price is tiered based on your annual revenue
- → See answers to more frequently asked questions here.
- → Price starts at \$350 USD per year

JOIN ATTA





JOIN THE ATTA COMMUNITY









ATTA SOLUTIONS

曲 **B2B Marketing** Advisory Research **B2C Marketing** Education Signature Events Market Activation

Climate

UN SDG Alignment

















SIGNATURE EVENTS





Signature Events

ATTA events help the adventure travel industry forge quality connections. Event hosts and partners gain opportunities to speak directly with decision-makers leading tour and media companies, and to share inspiring messages that can shape the future of sustainable tourism.

Get in Touch



What We Do

The ATTA community is an odventurous mix of 30,000 tour buyers and suppliers, destinations, media, and industry bronds from all ever the world, and our events bring together leaders from every continent. We can help you timb the right platform—and the right world—to reach your target outbound tour operators, buyers, media, and travel advisors.

LAUNCH

EARN

FORGE

new products to the right audience

quality media attention in specific markets

connections with boutique travel brands

FACILITATE

SHOWCASE

high-value gatherings of travel trade members

adventurous and emerging destinations in an inspiring

EDUCATION

Education

Bring valuable training programs to your community led by experienced practitioners who teach from their own experiences. Custom AdventureEDU programs are led by professionals within the adventure travel community and not only help elevate your suppliers' offerings and business sawry, but help foster community among like-minded companies that should be working together. At previous AdventureEDU programs, we've worked with tourism boards to bring together high-quality groups of suppliers in pursuit of a common goel and facilitated community development beyond expectations.

Get in Touch



What We Do

ATTA's approach includes a multi-format obtains a wider range of sector-relevant content including safety and risk management, advertures update training-represented content including safety and risk management, advertures update training-represented and service designs, product development, and must make the content observery more effective, we use a customized combination of educational formats. This provise methodology enhances audience performance and supports

AbvertureEDU is ATTA's trends on learning program, with a rebust portrolo or fraining subcors to help your destination thinke and become more competitive, whether you've still are early tage of goodwith the adverture trevel residency by our are already a global ladder. These taking or grammary are designed to improve destinations' market readness and help suppliers and emterpreneurs position themselves for success the individual concess that the

From self-paced online courses to custom, in-person training events to help your best suppliers improve and attract more high-quality visitors, we can help you identify areas where training can take your destination to the next level and then execute a plan to get there.

Our educators are best-in-class practitioners: adventure travel company owners, expert guides, and DMCs whose experience informs best practices worklede.

Some of the current online self-paced courses:





SALES FUNNELS & HIGH-CONVERTING WEBSITES

DEVELOPING SELF-GUIDED TOURS



Safety & Risk Management



EDUCATION

Grounded on current industry trends and best practices, ATTA's online courses are adapted to the specific needs of of our community to activate their true market potential.

ATTA Members save 40% on all courses









Click here for more courses



MARKET ACTIVATION



AdventureFAM



AdventureWeek



AdventureNEXT

Market Activation

Our range of customizable market activation programs enables destinations to immerse globally-recognized journalists, outbound tour operators, and travel advisers into unforgettable timeraries. Buyers and media who have participated in programs like AdventureWeek and AdventureNEXT have included host destinations on "world's best" lists and created high-yield timeraries attracting travelers who bring more value to destinations by spending more with local businesses than with international hotels and vendors. On average, more than two-thirds of the money spent by adventure travelers while on vacation stays in the local community where they spent it.

Get in Touch



What We Do

If you are seeking ways to expose your destination to new, adventure-focused buyers or gain more bodion in specific markets, give us a call. We can help you find the right program, coate attention-grabbing timeraries, and invote the right buyers and media. We also activate our Stonyfelling town to capture competing narratives that attract travelers eager to explore innovative destination.

INTRODUCE

INCREASE

FORGE

SUPPORT

destinations to rapy markets

a destination's adventure travel profile

lasting partnerships with buyers and

new product innovation and education

IMPROVE

CREATE

ADVISE

the supply chain's capacity and professionalism to meet market expectations world class storytelling marketing content

on best in class adventure business sustainability practices

RESEARCH

Research

Research is one of the most important contributions we make to our community and the broader travel industry. Our research team partners with destinations and brands to sponsor trendspotting, industry-leading, and media-worthy reports on issues, and we're also available for custom research projects to help you meet your poets.

Get in Touch



What We Do

Our adept researchers conduct everything from large-scale surveys to custom, boulique fact-finding projects to help our partners understand their clientele and succeed at scale.

IDENTIFY

CREATE

UNDERSTAND

gaps in the market

goels to take your organization to the next level

and analyze your target audience

CLARIFY

INCREASE

where your destination stands on a global scale

brand awareness with a researched-backed approach



Frequent Travelers, Climate and What To Do: Travelers Share Their Thoughts



<u>Creating, Communicating,</u> <u>and Connecting: Technology</u> <u>in Adventure Travel</u>



The Influence & Impact of Women in Adventure Travel



Adventure Travel
Trade Perceptions of
Chile

ADVENTURECONNECTS

AdventureConnects are free networking events hosted in destinations or at trade shows where the adventure travel community gathers. They can range from casual networking, to group outings, to structured educational roundtables. You can find us annually at these shows:

- → ITB Berlin
- → ITB Asia, Singapore
- → World Travel Mart London
- → World Travel Mart Latin America
- → FITUR

See here Upcoming AdventureConnects







TRADE CONNECTIONS

Gain access to adventure travel industry professionals from more than 100 countries through the ATTA membership and ATTA community.

Connect with:

 Inbound and outbound tour operators, DMCs, tourism boards, travel advisors, gear suppliers, service & technology providers, and travel writers

Connect through:

- AdventureWeeks & FAMs with ATTA partners
- AdventureConnect free networking events
- One-on-one meetings at ATTA signature events









UPCOMING EVENTS

Business Members receive discounted member pricing on tickets. Buyers will also have opportunities to be hosted at events.

Events May Include:

- Pre or Post Multi Day Adventures
- Day of Adventure
- One-on-One Pre-Scheduled Meetings
- Opportunities to pitch your stories to media
- Inspiring Keynote Speakers
- Educational Workshops & Roundtables
- Opportunities to connect and network with peers and media.

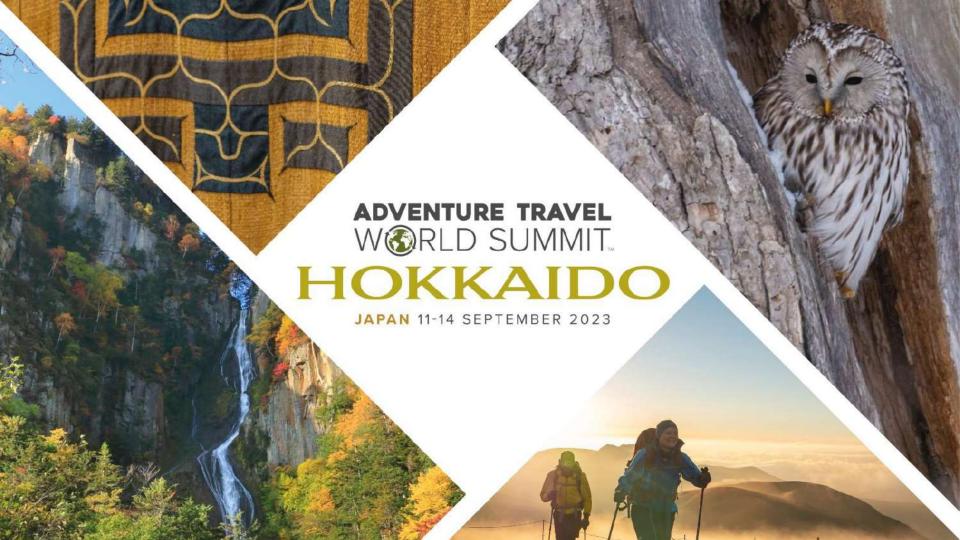












Event Theme

調和 - Harmony

In Japan, **Chōwa** or **Harmony** is most often used to describe the collective spirit that connects people together. While the word has layers of meaning, as a cultural concept, 調和 (chōwa) is a reminder to look beyond our individuality. It asks us to place higher value on our community as a whole. As we gather the global adventure travel community in Hokkaido, the home of the Ainu people, we look forward to learning how this concept of harmony can teach us to create a sustainable ecosystem of nature, communities, and economies worldwide.

In looking to the future of adventure travel, we ask ourselves what will be possible when our individual intentions pursue a shared vision.



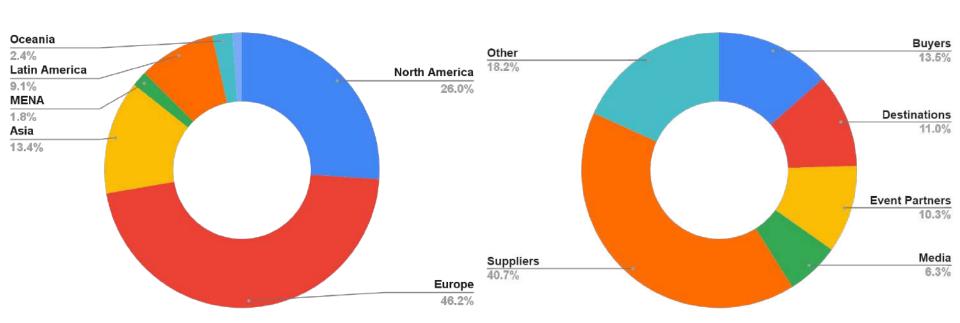


ATWS 2023 Dates:

- ✓ Sunday 10 September Recommended Arrival
- ✓ Monday 11 September Day of Adventure
- ✓ Tuesday 12 September Keynotes, Breakout Sessions, Networking, Opening Reception
- ✓ Wednesday 13 September Marketplace & Networking, Breakout Sessions
- ✓ Thursday 14 September Keynotes, MediaConnect, Breakout Sessions & Networking



Who attended ATWS 2022?



718 delegates



Marketplace 13 Sep

Relationships Matter



What is it?

B2B meetings

Pre-scheduled

Matched

Who is it for?

"Suppliers" = Inbound providers, accommodations, destinations

"Buyers" = Outbound providers + travel advisors

How do I schedule meetings outside of Marketplace?





In the ATWS Networking App



MediaConnect - 14 Sep

- **OPEN TO ALL**
- **✓** NO PRE-SCHEDULED APPOINTMENTS
- **✓** ONE-ON-ONE MEETINGS

BEFORE The Summit

- PREPARE (do your research)
- MAKE YOUR LIST

DURING MediaConnect

- LOCATE THEIR TABLE (name signs)
- MEET (for 6 minutes)

REGISTER







Hokkaido, Japan 11-14 September

https://events.adventuretravel.biz/summit/hokkaido-2023





HOW ACTIVE TRAVELERS ARE CHANGING?

THE POST-COVID TRAVELERS...

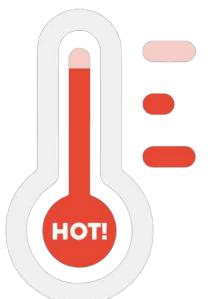
... are different as markets reopened. They want to be on the road but have different needs and characteristics such as:

- 1. Expecting **technology & virtual solutions**
- 2. Perceiving **hygiene as non-negotiable**
- 3. Seeking to be away from crowds
- 4. Eager to be **outdoors** and **physically active**





"HOT" TRENDING HIGH-DEMAND TRIPS





1. Custom Itineraries



6. Remote Destinations/Trails



2. Greener/Sustainable/ Low Impact Itineraries



7. Wellness and Mindfulness Itineraries



3. Slow Travel Itineraries



8. Diversity-Equity-Inclusion/Cultural Heritage Tours



4. Domestic/Regional Travel



9. Electric Bike Itineraries



5. Expert or Specialist-Guided Trips



10. Family/Multi-Generation

Q13: What is your organization's perception of the following itinerary trends based on consumer demand and bookings throughout 2021?

Base: All respondents excluding those left blank (n=163)





"HOT" TRENDING MOTIVATIONS FOR ADVENTURE TRAVEL

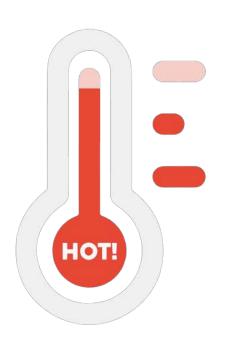


Q40: What is your organization's perception of the following consumer motivations, based on consumer demand and bookings in 2021 and going into 2022?

Base: All respondents excluding those left blank (n=156) **Source:** 2022 Adventure Tour Operator Snapshot Survey

ADVENTURE TRAVE TRADE ASSOCIATION

"HOT" TRENDING ADVENTURE ACTIVITIES





1. Cycling (electric bikes)



6. Cultural



2. Hiking/Trekking/Walking



7. Cycling (mountain/non-paved surface)



3. Safaris/wildlife viewing



8. Photography (wildlife/nature)



4. Culinary/Gastronomy



9. Cycling (road/paved surface)



5. Wellness-focused activities



10. Snowshoeing

Q41: What is your organization's perception of adventure travel activity trends, based on consumer demand and bookings in 2021 and going into 2022? **Base:** All respondents excluding those left blank (n=152)





TOP TRENDING ACTIVITIES BY REGION

Company Headquarters	#1	#2	#3	#4	#5
North America	Cycling (Electric bikes)	Safaris/Wildlife Viewing	Hiking/Trekking/Walk ing	Cycling (Road/Paved Surface)	Kayaking/sea/ whitewater
Central America / Caribbean	Culinary	Photography (Wildlife/Nature)	Safaris/Wildlife Viewing	Cultural	Wellness-Focused Activities
South America	Hiking/Trekking /Walking	Culinary	Cycling (Electric bikes)	Safaris/Wildlife Viewing	Wellness-Focused Activities
Africa	Archeological	Survival Training	Rafting	Cultural	Hiking/Trekking/ Walking
Europe	Cycling (Electric Bikes)	Culinary	Hiking/Trekking /Walking	Cycling (Mountain/ Non-Paved Surface)	Snowshoeing
Asia	Cultural	Hiking/Trekking /Walking	Cycling (Electric bikes)	Rafting	Fishing

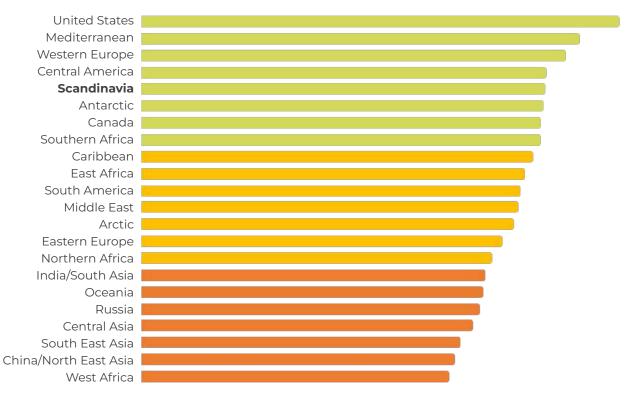
^{*}Regions not containing sufficient sample size (Pacific & Middle East) are excluded from this chart.

Q41: What is your organization's perception of adventure travel activity trends, based on consumer demand and bookings in 2021 and going into 2022?

Base: All respondents excluding those left blank (n=152)



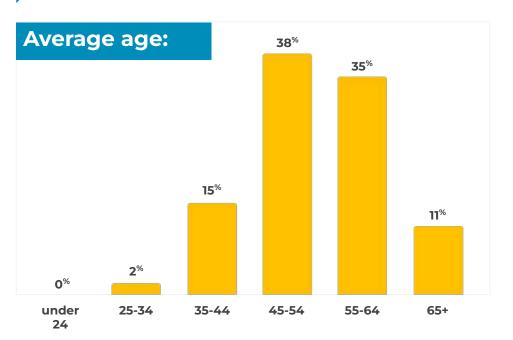
HOTTEST TRENDING DESTINATIONS



Q32: What regions of the world are you seeing customer changes of interest in booking, based on consumer demand and bookings in 2020? Base: All respondents (n=222), excluding those left blank



2021 MOST POPULAR ADVENTURE TRIP CLIENTS





Q36: What is the average age of your clients on this trip?

Q37: Can you estimate the percentage of guests on this popular trip that book double occupancy and those that book individual (single) occupancy?

Base: All respondents excluding those left blank (n=55)





\$2,900

median trip price (USD)

(does not include airfare)

8

average number of nights

Q33: What is the average retail trip price, per person per trip (in US dollars), of this popular 2021 adventure itinerary (package) sold to your selected source market? Please exclude airfare from the pricing.

Q34: What is the duration (in nights) of this popular itinerary?

Base: All respondents excluding those left blank (n=55)





2021 MOST POPULAR ADVENTURE TRIP

of the \$2,900 total trip cost is spent with local suppliers



\$2,030

per trip is spent with local suppliers (USD)



S238

average spend per guest on local handicrafts or souvenirs

Q38: Still thinking of this popular 2021 itinerary, please estimate the percentage of your trip cost spent with local suppliers based in the host market. Please only estimate your spend with suppliers from the host market, and exclude all trip expenditure with suppliers based in other nations, trip margin, and your trip operating costs.

Q39: If you can, please estimate what your average quest spends on local handicrafts or souvenirs on this popular trip in the host destination.

Base: All respondents excluding those left blank (Q38 n=55, Q39 n=42)







WHAT IS SUSTAINABLE TOURISM?

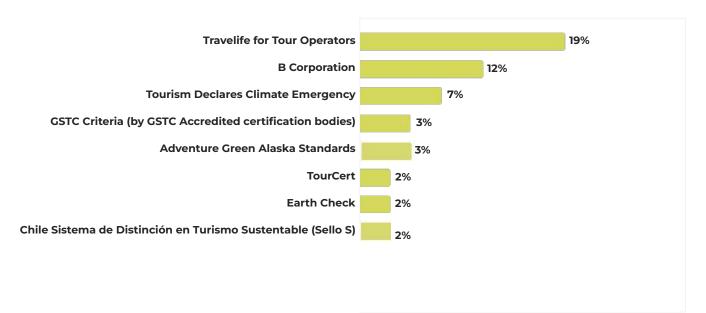
A balance must be found between:

- Making optimal use of environmental resources
- Respecting and valuing the socio-cultural authenticity of host communities, and
- Ensuring viable, long-term economic operations for the local people

Complementing this, **creating a meaningful sustainable experience for tourists** raises their awareness of sustainability issues and practices.



SUSTAINABILITY CERTIFICATION



SUSTAINABILITY MATTERS!

68%

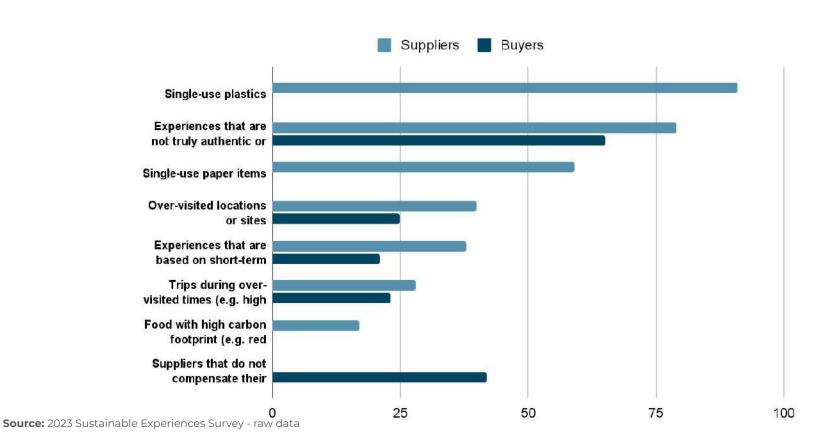
have or are working toward a sustainability certification

(32% are not)

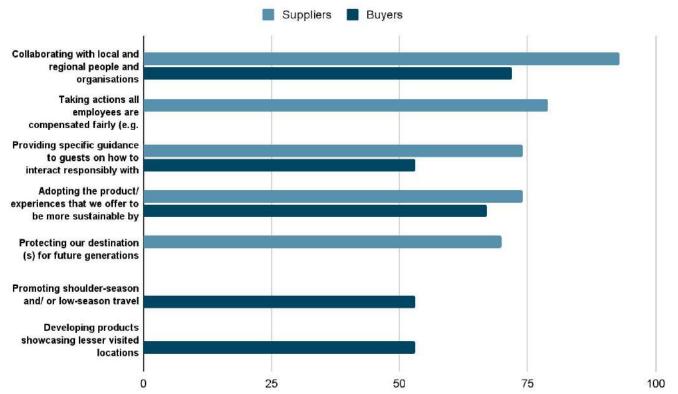
Source: 2023 Adventure Tour Operator Snapshot Survey - raw data





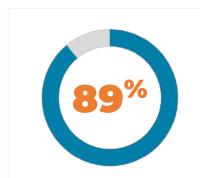






Source: 2023 Sustainable Experiences Survey - raw data

SUSTAINABILITY IN ITINERARIES



environmental impact when creating itineraries

think about how to reduce



agree they need to work on changing to more sustainable means of transportation & it's a priority for the next 12 months



like using public transportation in the itineraries offered for travelers



try to **avoid** public transportation when creating itineraries

Numbers signify the percentage of respondents who selected "agree" or "strongly agree."

Q19: Considering your organization's attitude toward sustainability when creating itineraries for your target audience, please indicate the level you agree with the following statements.

Base: All buyer respondents excluding those left blank (n=45)



HELPING TRAVELERS ACT SUSTAINABLY

On the other end of the scale, efforts to help travelers use public transportation are not popular, likely due to a lack of availability of reliable, efficient, and safe public transport methods.



give discounts on accommodations for travelers arriving in the destination with public transportation

17%

provide luggage/gear transfer within the country of destination

9%

offer special ticket prices for clients to use public transportation

26%

inform clients about the availability of more sustainable forms of travel for arrival and within the destination

Q22: What does your organization do to help your clients act more sustainably while traveling? Select all the things you do:

Base: All respondents excluding those left blank (n=111)



-

TOP 3 CHALLENGES FACING SUSTAINABLE OPTIONS

- Lack of physical infrastructure for sustainable operations (71%) (e.g., lack of alternative energy sources like solar, no waste management or recycling facilities, etc.)
- 2. Lack of physical infrastructure to use public transportation (67%)
- **3** My clients are not interested in taking public transportation (37%)

"Private transport all the way through as public transport is not reliable."

"This is not really an option for my guests given safety, convenience and reliability concerns."

"Our public transport system is not clean so we are not able to use it more."

"Most of our guests are from the older generation (55+) and are used to driving."

"My clients, mostly affluent Boomers, would never use public transport in [my location]. It's very slow and not the style of exploring these clients want."

"Our customers do not want to use public transit except trains in Europe because it is easy, reliable, clean, mostly safe."

"Public transport [in my destination] is hectic and not secure, reliable and safe."

"There is no safe public transport [in my destination] and I don't see that changing anytime soon. There is no government appetite or funding for this."

(comments from survey, may be slightly edited for clarity or to maintain anonymity)

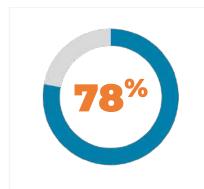
Q23: What are the main challenges your organization faces in bringing more sustainable products/offers to the market?

Base: All respondents excluding those left blank (n=111)



TOP 3 GOVERNMENT POLICY CHANGE REQUESTS

When asked which environmental measures they would like to be implemented in the destination where they live, the most popular responses were developing more and better cycling infrastructure, taking measures to reduce congestion in busy areas, and offering financial incentives to use public transport.



Developing more and better cycling infrastructure



Congestion reduction measures on busy roads, e.g. in city centres

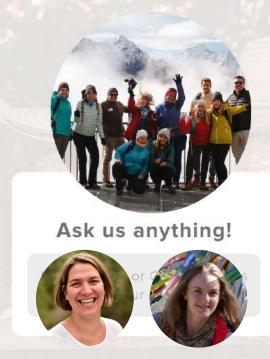


use public transport

Q24: Which of the following environmental measures would you like to be implemented in the destination where you live, no matter if they do or do not directly affect you?

Base: All respondents excluding those left blank (n=122)







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