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ATTEMPTING TO PROFILE THE POST- COVID-19 TRAVELLER



ADVENTURE TRAVEL
TRADE ASSOCIATION



ADVENTURE
360

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ON TODAY'S WEBINAR



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OUTLINE

- About Adventure Travel Trade Association (ATTA)
- ATTA - Tuscany history
- Our methods
- 7 post-COVID-19 traveller characteristics
- Q&A





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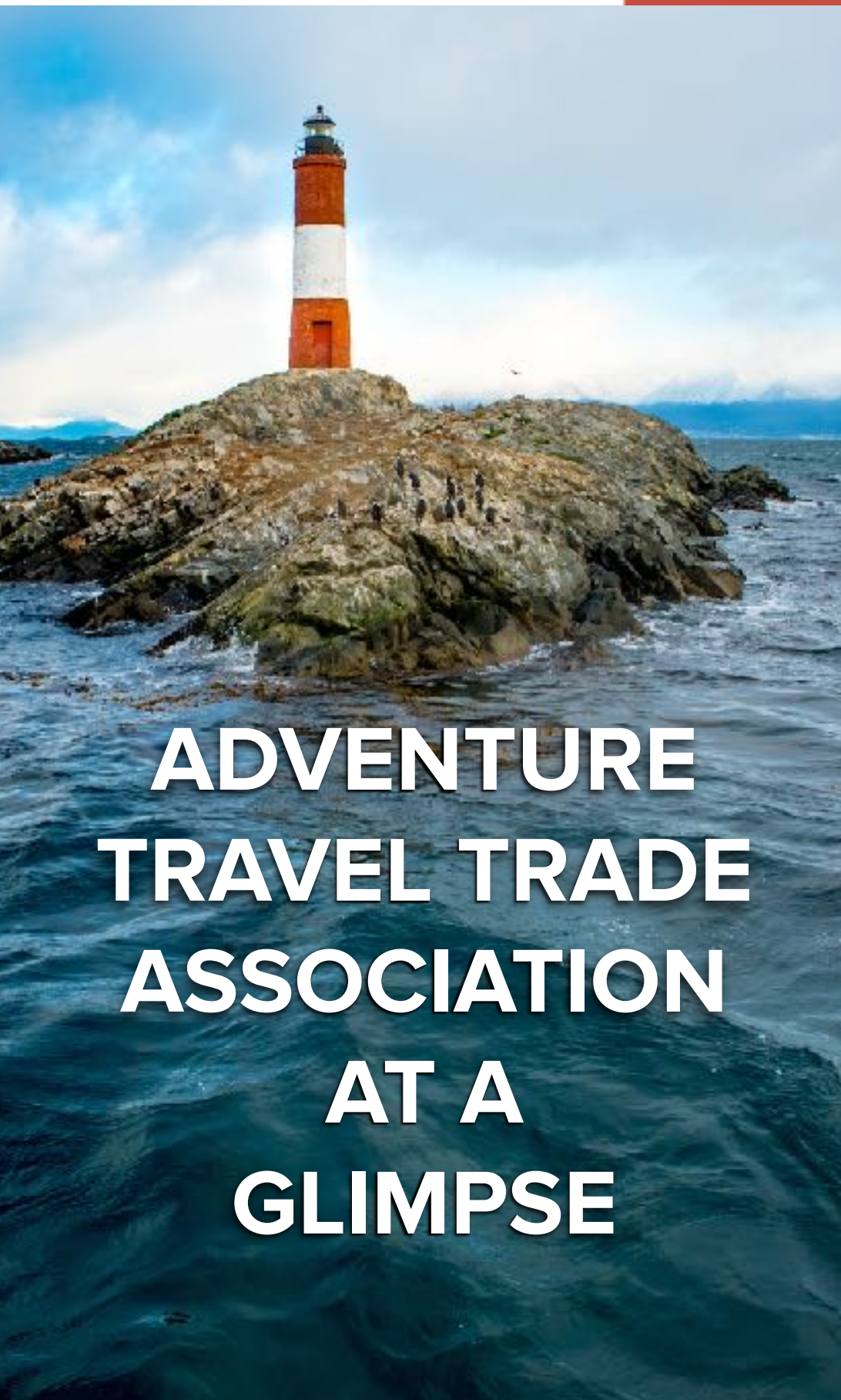
WORLD SUMMIT
SWEDEN // 2019



ABOUT ATTA

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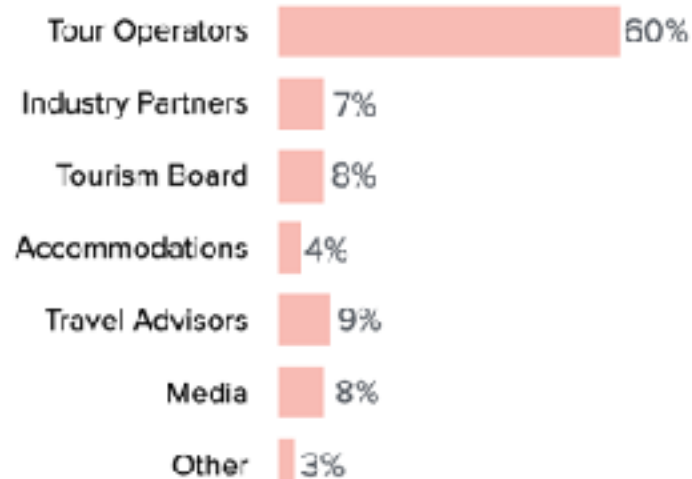
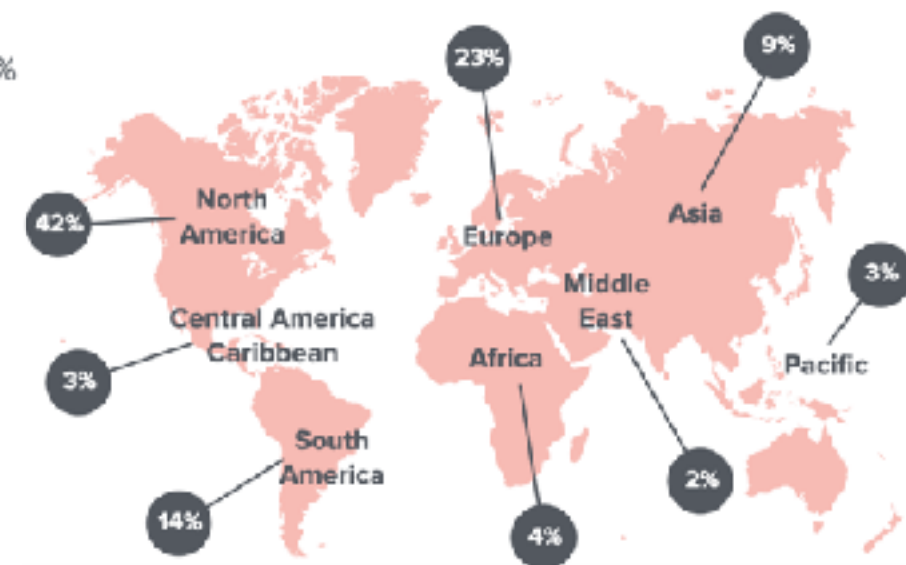
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**Mission:**

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

Membership + Trade

Established in 1990, the Adventure Travel Trade Association (ATTA) is widely recognized as a leadership voice and partner for the adventure travel industry. The association's constituency of more than 1,300 member organizations in 100 countries is made up of tour operators, tourism boards, specialty agents, and accommodations sharing a vested interest in the sustainable development of adventure tourism.

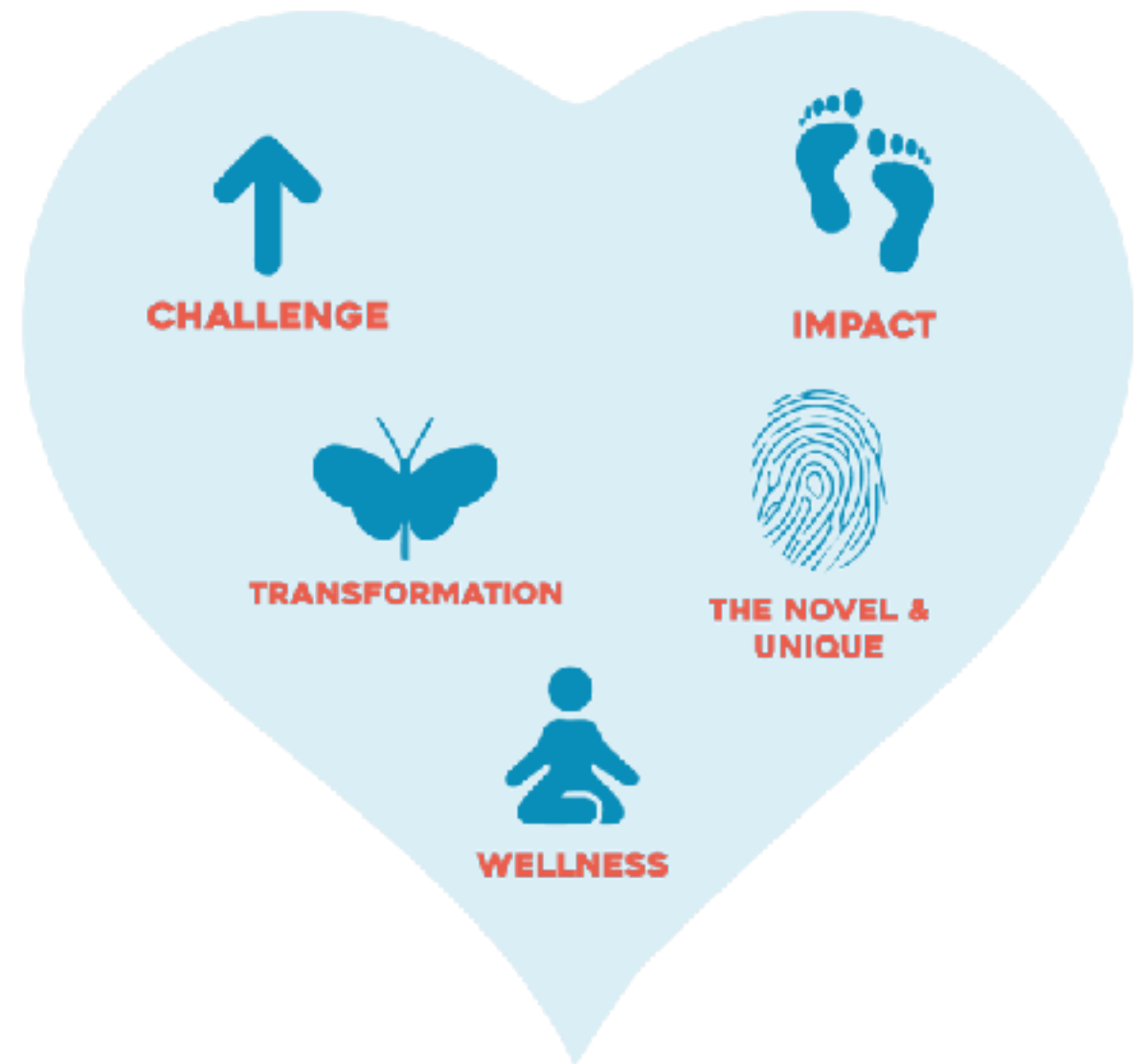
WHO OUR MEMBERS ARE**WHERE OUR MEMBERS ARE**



ADVENTURE TRAVEL



ESSENTIAL ELEMENTS



TRAVELER EXPERIENCE

"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

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.



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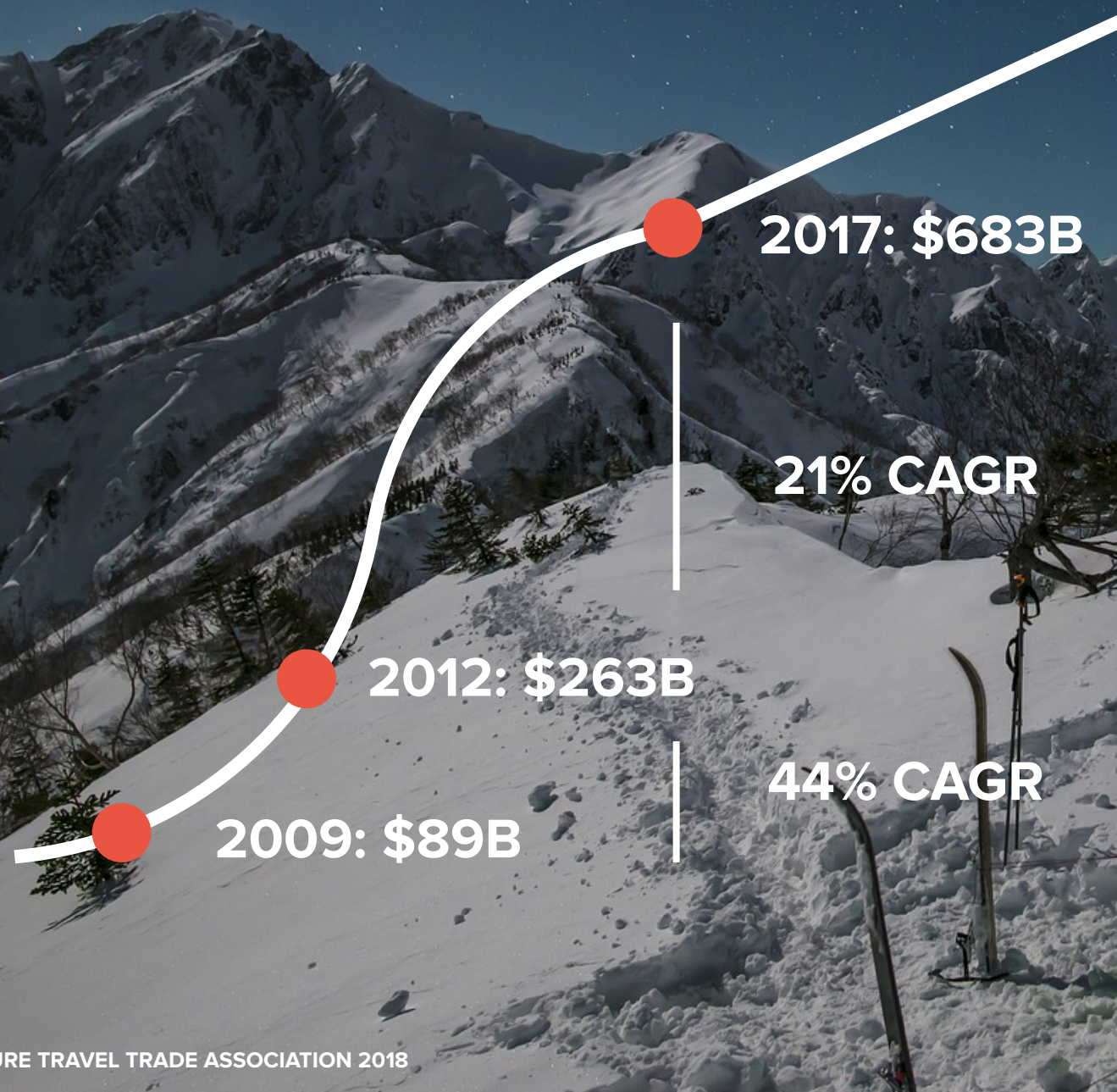
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INTERNATIONAL ADVENTURE TRAVEL MARKET SIZE

CAGR: Compound annual growth rate



ADVENTURE TRAVEL TRADE ASSOCIATION 2018

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ADVENTURE TRAVEL COMPARED TO OTHER GLOBAL INDUSTRIES



Cruise Industry
\$119B



**Global Textile
Mills Market**
\$667B



**International
Adventure Market:**
\$683B



**Global Prescription
Drug Sales**
\$774B



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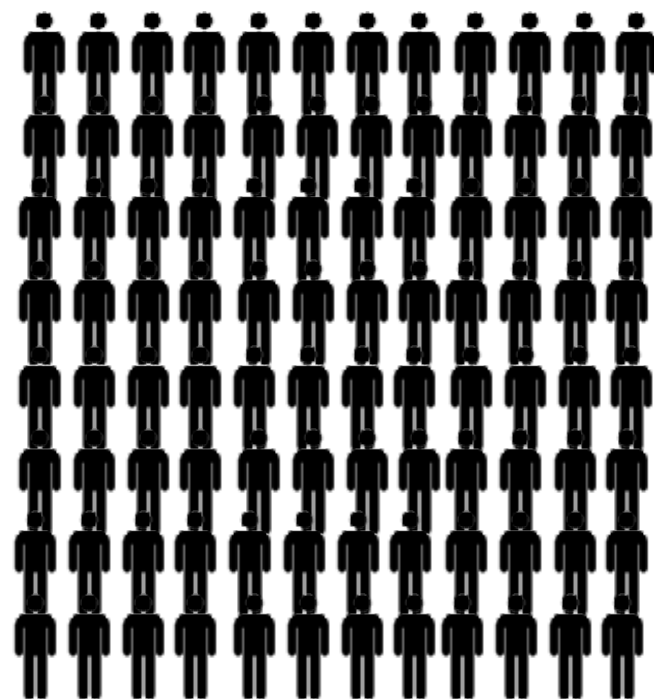
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MARKET IMPACTS

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

1.5



local jobs per \$100, 000
USD

ADVENTURE

65%

of revenues remain in the
country

2.6



local jobs per \$100, 000
USD



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ATTA - TUSCANY HISTORY: HOW IT ALL STARTED

- November 2010 - Firenze, Italy: First ATTA event in Italy: ATTA met with adventure tour operators from Tuscany
- February 2012 - Toscana Promozione Turistica joined the ATTA as a member
- October 2012 - Toscana Promozione Turistica participated at 2012 Adventure Travel World Summit (Switzerland)
- June 2016 - Toscana Promozione Turistica and ATTA initiated conversations for long term engagement
- September 2016 - Toscana Promozione Turistica participated at 2016 Adventure Travel World Summit (Alaska)
- January 2017 - Toscana Promozione Turistica and ATTA sign the 2017-2018 activities partnership agreement
- June 2017 - AdventureEDU Tuscany



ATTA - TUSCANY HISTORY: PARTNERSHIPS

- 
- AdventureConnect & Reconnaissance (April 2017)
 - AdventureEDU (June 2017)
 - AdventureWEEK Tuscany (September 2017)
 - Adventure.Travel Destination Page
 - 2017 ATWS: MediaConnect Partnership
 - 2017 WTM London: AdventureConnect Partnership
 - 2018 AdventureEDU Grosseto and Lucca
 - 2018 Adventure Travel World Summit Host
 - 2019 Adventure Travel World Summit MediaConnect Partnership



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EXTRACTING INSIGHTS ABOUT TRAVELER BEHAVIOUR

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OUR SOURCES & METHODS

Synthesis of a series of analyses on consumer behaviour, behaviour in crisis and expected impacts of COVID-19

(Pandemic Culture by Canvas8, A Post Corona World by Trendwatching, The Future of the Travel Industry by Euromonitor, SKIFT 20202 Megatrends, and others)

Internal ATTA knowledge from our tour operator and travel professional community

Insights by Milena Nikolova who is a traveller behaviour expert



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THE POST-COVID-19 TRAVELLER

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1. #VIRTUAL—IS-THE-NEW-REAL



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1. #VIRTUAL—IS-THE-NEW-REAL



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1. **#VIRTUAL—IS-THE-NEW-REAL: So What?**

Three possible effects on traveller behaviour:

1. Expectation to see and feel virtually (livestream) as part of the choice/ planning process
2. Desire to go back and revive memories (share experiences with friends) through live stream (no need of photos)
3. Possible demand for virtual experiences as the low-cost alternative to live visit



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2. #HYGIENE AS NON-NEGOTIABLE



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2. #HYGIENE AS NON-NEGOTIABLE



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2. #HYGIENE AS NON-NEGOTIABLE: So What?



Three possible effects on traveller behaviour:

1. Travellers will expect hygiene to be weaved across services/ products/ experiences (facility design, service design and communications)
2. Hygiene and protection might fuel the popularity of new travel accessories (fashion masks, protection glasses, protection gloves, etc.) and perhaps souvenirs
3. Likely demand for formal hygiene standards and certification



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3. #CONTACTLESS EVERYTHING



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3. #CONTACTLESS EVERYTHING



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3. #CONTACTLESS EVERYTHING



Two possible effects on traveller behaviour:

1. Travellers will expect the ability to register, check-in and pay through mobile, virtual and contactless solutions
2. Likely demand for new levels of security of digital services and identity protection



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4. #VIRTUAL HUMANS AS THE NEW NORMAL



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4. #VIRTUAL HUMANS AS THE NEW NORMAL

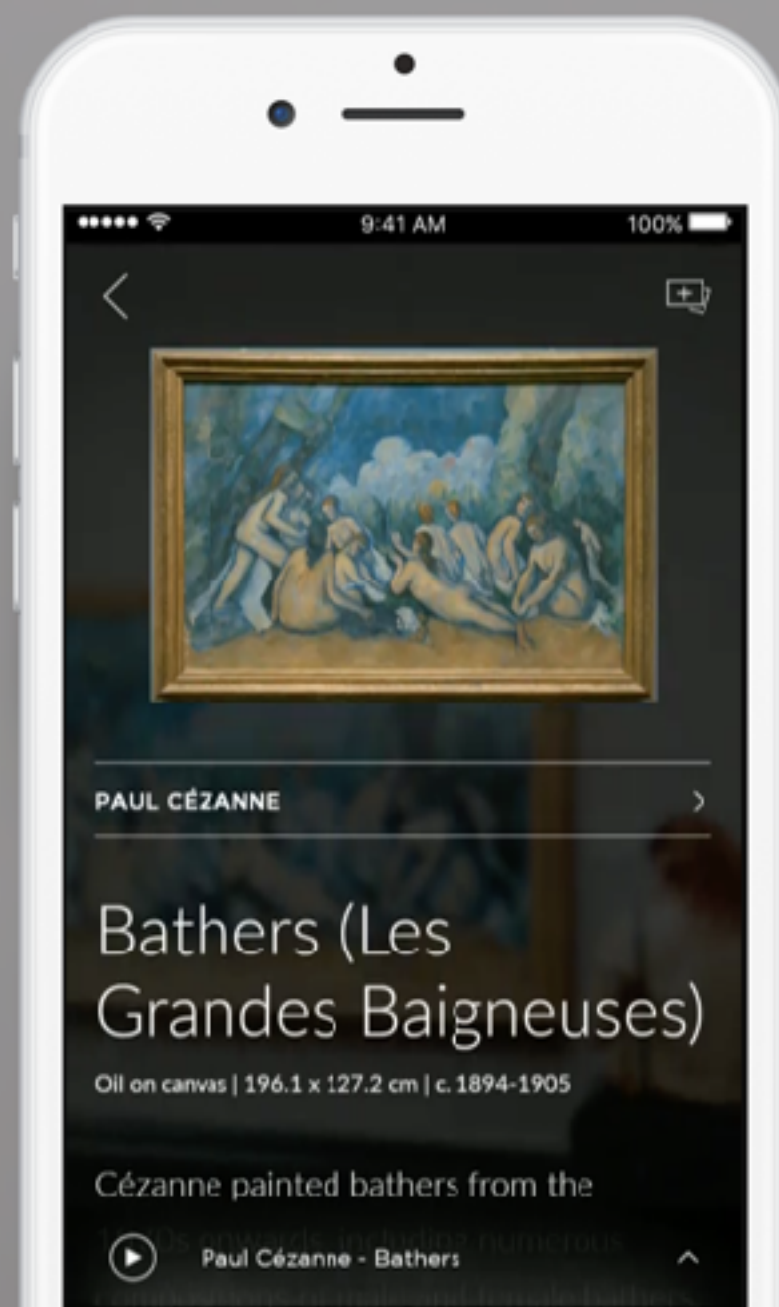
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4. #VIRTUAL HUMANS AS THE NEW NORMAL



Two possible effects on traveller behaviour:

- 1. Increased comfort with digital assistance and guiding but expected sophistication and human-like interface**
- 2. Opportunity for new solutions for independent travellers (adaptive styles and personalities)**



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5. #SOCIAL WITHOUT CROWDING



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5. #SOCIAL WITHOUT CROWDING



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5. #SOCIAL WITHOUT CROWDING

Two possible effects on traveller behaviour:

- 1. Demand for smaller-group experiences and family/ friend travel**
- 2. Expectation that destinations/ operators incorporate measures to avoid crowding at all costs**
- 3. Demand for more isolated off-the-beaten path experiences**



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6. #CARE AS THE NEW SERVICE



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6. #CARE AS THE NEW SERVICE



master



card.



EASY TARGET®



6. #CARE AS THE NEW SERVICE

Two possible effects on traveller behaviour:

1. Expectation that care for each other will remain a core characteristic of services and experiences also after the COVID-19 crisis
2. Expectations that companies and brands will continue being good members of society and will be proactive in taking stance on topics that are important for society



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7. #VALUE AS THE BASE CURRENCY



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7. #VALUE AS THE BASE CURRENCY



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7. #VALUE AS THE BASE CURRENCY

Two possible effects on traveller behaviour:

1. Travellers will be more focused on the value that travel experiences offer and will evaluate prices on that basis
2. Destinations and service providers have a chance to be inventive and highlight the emotional, wellness, self-enhancing and other benefits that their offerings



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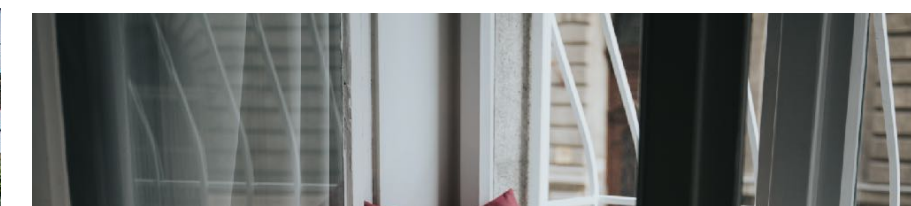
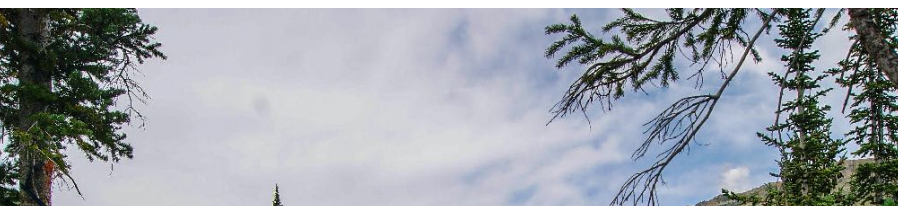
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IN SUMMARY...



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THE POST-COVID-19 TRAVELLER: **KEY TAKEAWAYS**

There is only **one thing that is certain** about the COVID-19 crisis and it is... **uncertainty**.

It is exceptionally **difficult to figure out** what the post-COVID-19 travellers will be like...

...but we know that the current crisis experience will leave a **deep mark on the attitudes and expectations** that will be shaping their decision making and consumption of future travels.



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THANK YOU



@adventuretweets



gergana@adventure.travel

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Grazie per l'attenzione.

Pubblicheremo presto le risposte a tutte le domande a cui oggi non abbiamo fatto in tempo a rispondere all'indirizzo

team.toscanapromozione.it.

Allo stesso indirizzo troverai le slide e le registrazioni video.

Per ogni informazione puoi scriverci a territori@toscanapromozione.it

Ci vediamo al prossimo Lab!