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MEDUSA

CONCEPTUALIZATION OF SUSTAINABLE TOURISM PRODUCTS FOR THE ADVENTURE TOURISM SEGMENT

Elaborated by

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The European Union is made up of 28 Member States who have decided to gradually link together their know-how, resources and destinies. Together, during a 50-year period of expansion, they have built a zone of stability, democracy, and sustainable development whilst maintaining cultural diversity, tolerance and individual freedoms. The European Union is committed to sharing its achievements and its values with countries and peoples beyond its borders. The 2014-2020 ENI CBC Mediterranean Sea Basin Programme is a multilateral Cross-Border Cooperation (CBC) initiative funded by the European Neighbourhood Instrument (ENI).

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For more information, please visit: www.enicbcmed.eu

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1. MEDUSA OBJECTIVES AND GLOBAL MARKET RESEARCH

The main objective of the Medusa project is the development of a portfolio of sustainable adventure products in the Mediterranean region in line with environmental and economic sustainability values that generate new business opportunities for small enterprises.

Specific objectives are:

- To identify and enhance territorial assets for developing adventure tourism (AT) products with a focus on decreasing the environmental footprint of tourism activities by safeguarding biodiversity, wildlife, natural resources, and rural communities;
- To promote multi-stakeholder engagement in capacity building and the process of exchanging experiences and creating strategic alliances;
- To increase the visibility of lesser-known destinations and local communities able to generate and improve adventure tourism products;
- Creating new job opportunities, especially for women and youth;
- To implement pilot actions, rolling out new and improved AT products and developing tourism packages promoted to international markets through cross-border alliances;
- To support a more balanced distribution of tourist streams in terms of seasonality and geographical areas, as well as the inclusion of local communities in the tourism business.
- To support product commercialization on all online platforms and contact with sales channels.

Considering the Coronavirus pandemic, the idea that adventure tourism should be a meaningful and impactful force, for both the economy and society, and which has consequently gained strength and more importance. In fact, with the pandemic, it is time to ask what the purpose of tourism is and what it means to communities.

It means striking a balance among the interests of the different partners particular to each place, starting from revisiting the concept of quality, what communities' values are, how to connect people through values, and how to create meaningful connections with the community. To make things better. Defining these questions opens the way to exploring the keys to an inclusive and resilient strategy.

Per this perspective, global market research, the starting point for developing an adventure tourism package, does not only adopt a purely marketing, but also tells a story of local sustainable business. Global market research is made up of:

- 5 Country research, one for each partner, Catalonia, Puglia, Tunisia, Lebanon, Jordan and consists of two reports:
 - o Destination Review from a socio-economic, political and environmental perspective of adventure tourism (Destination Review);

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- o Attractions, inventory, and mapping for adventure tourism (Attractions Inventory)
- 1 Research and study of market demand, supply and competitiveness (Market research) with two annexes:
 - o Annex 1 - Factsheet Tour Operators
 - o Annex 2 – Factsheet Products
- 1 Study to identify and analyze sustainable innovative practices of adventure tourism (Benchmark study).



The Global research analyzes very different aspects because it aims at:

- 1) Making the 5 different destinations accessible and understandable;
 - 2) Identifying their potential (inventory) and using the same analysis methodology;
 - 3) Exploring marketing strategies and segmentation useful for all 5 destinations;
 - 4) Embedding sustainability as key factor of the adventure experience;
- o Aligning the process of product development in the 5 destinations for a better local and interregional offer;
 - o Supporting the share of comparative advantage to turn into reality an Adventure Tourism Med Cluster led by communities of Medusa pilot areas with the focus on top adventure activities.

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2. CONCEPTUALIZATION OF MEDUSA ADVENTURE TRAVEL

Medusa's conceptualization of adventure tourism has been thought of as a tool to help the small enterprises and inhabitants of the destinations in order to approach to adventure tourism with a sustainable approach.

It consists of a set of guidelines illustrating the key requisites for creating and/or managing adventure packages using the results and the recommendations from:

- country research on the analysis of the attraction potential of 5 destinations.
- benchmarking study on sustainable best practices.
- market research on outbound markets
- examples of how international tour operators design products and packages (Annex 1 and Annex 2 of Market Research).

◦ *Adventure travel definition*

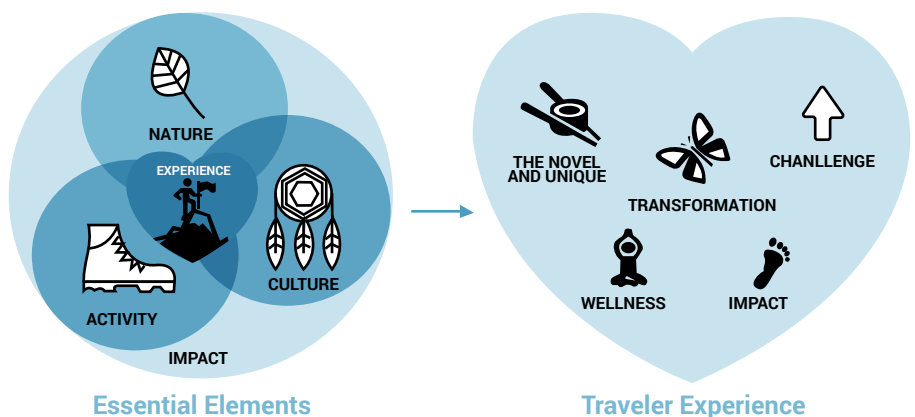
Adventure travel takes an individual outside of his/her regular environment for more than 24 hours and no longer than one consecutive year and includes at least two of the following aspects:

- physical activity;
- natural environment;
- culturally immersive experience.

The incorporation of all three elements allows for a fullest adventure travel experience.

This report is developed according to the following adventure travel definition:

As defined by ATTA, adventure travel describes trips that provide experiences (both mental and physical) to places which are novel or unique to the traveler, emphasize the natural environment, and provide challenges through experiences of culture, activities that promote physical health and excitement/fun – (Source: North American Adventure traveler 2017)



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The definition by Adventure Travel Trade Association illustrates:

- a) the 3 essential components of adventure travel: physical activity, natural environment and cultural immersion;
- b) the motivations from the traveler’s perspective: a variety of longings and desires that influence how people consume and emotionally live their trip. Travelers are seeking mental and physical wellness, novel and unique experiences, challenges—whether physical or cultural—and often, ultimately, transformation. Travelers are also keenly aware of their impact, and that is why they want to have a positive impact on the environment and communities.

In this definition, the main aspect is immersion in the destination and the host community, the activities’ cultural implications and their educational rewards.

The risks and the dangers of this description of adventure experiences are limited because what matters most is the life-changing experience that brings with it 90% of adventure activities are soft adventures.

The adventure tourism products should embed the elements of point a) and b) identifying adventure experience as the product of:

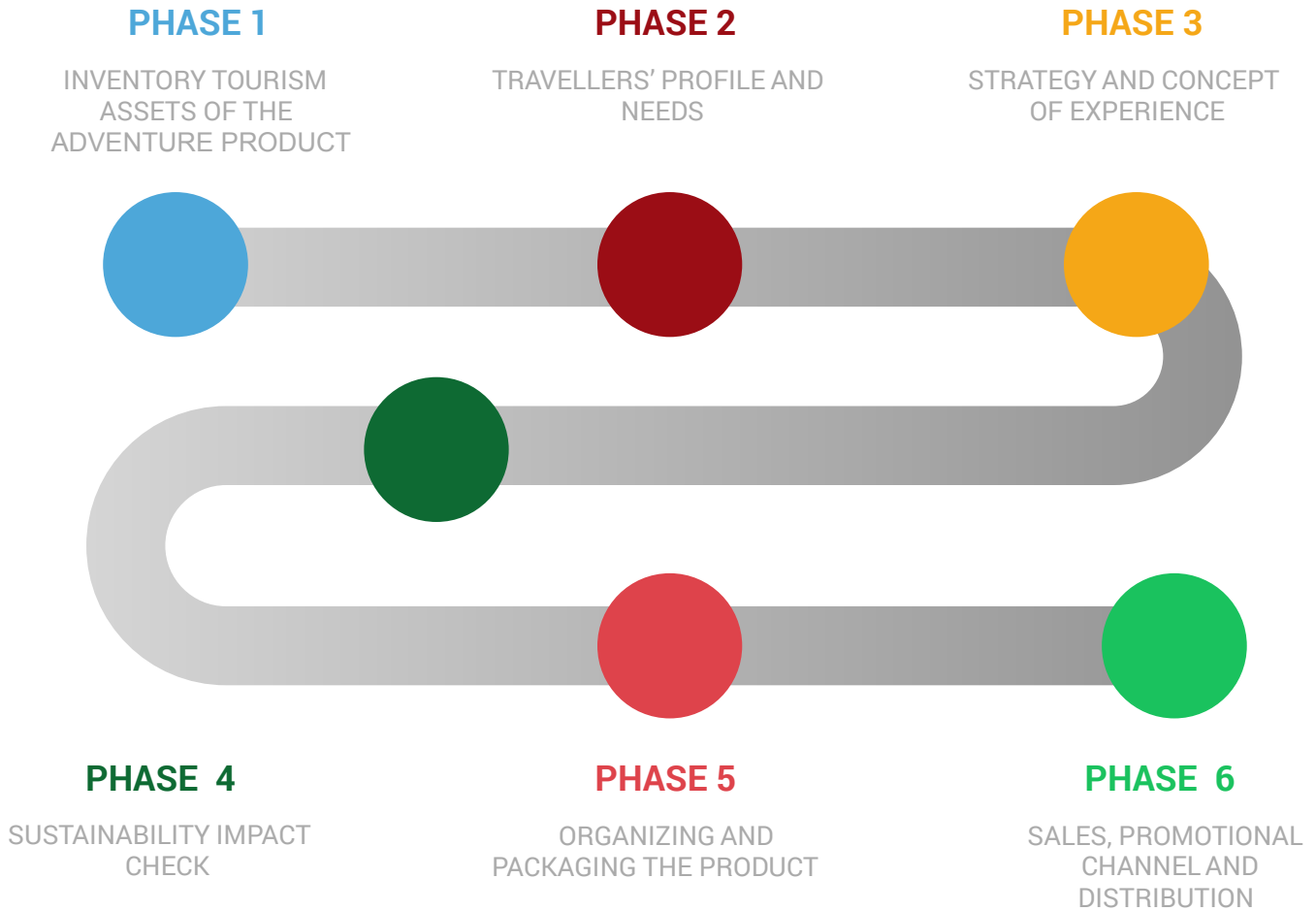
- natural environment and local culture
- challenge (both mental and physical)
- well-being and excitement/fun
- transformational experience

These are the reasons why the tourist consumers buy tourism packages, and it is important to keep them in mind to build a package.

The tourism package according to the European definition is defined as: “A combination of two or more different types of travel services for a single trip or vacation. These services may consist of transportation, accommodation, renting a vehicle or, under specific conditions, any other touristic service. The combined trip can be pre-organized made up of series of service combined by a tour operator or a travel agency or or by yourself if you would like to opt for it and organize it on your own before concluding the contract”

- Conceptualization roadmap

CONCEPTUALIZATION ROADMAP



This report develops the conceptualization of adventure travel through 6 phases:

- PHASE 1 – INVENTORY TOURISM ASSETS OF THE ADVENTURE PRODUCT
- PHASE 2 – TRAVELLERS' PROFILE AND NEEDS
- PHASE 3 – STRATEGY AND CONCEPT OF EXPERIENCE
- PHASE 4 – SUSTAINABLE IMPACTS CHECK
- PHASE 5 – ORGANIZING AND PACKAGING THE PRODUCT
- PHASE 6 – SALES, PROMOTIONAL CHANNEL AND DISTRIBUTION

Each phase is clustered in two steps of activities and ends with a template that collects the fundamental information necessary for considering the phase completed.

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	PHASE 1	PHASE 2	PHASE 3	PHASE 4	PHASE 5	PHASE 6
PHASE	INVENTORY TOURISM ASSETS ADVENTURE PRODUCT	TRAVELLERS' PROFILE AND NEEDS	STRATEGY AND CONCEPT OF TRAVEL EXPERIENCE	CECK OF SUSTAINABLE IMPACTS	ORGANIZING AND PACKAGING THE PRODUCT	SALES AND PROMOTIONAL CHANNELS AND DISTRIBUTION
STEP	SOCIODEMOGRAPHIC PROFILE OF DESTINATION /PILOT AREA	SEGMENTATION	VALUE PROPOSITION CONNECTED WITH COMMUNITY	CECK OF SUSTAINABLE IMPACT	DETAILING EXPERIENCES HEALTH SECURITY	POTENTIAL TRADE PARTNERS, INSTITUTIONS, FAIRS
	ATTRACTIONS INVENTORY OF ADVENTURE PRODUCT	NEEDS' EVALUATION	PLANNING AND PAIRING EXPERIENCES		PRICE	BUILD RELATIONSHIP WITH TRADE PARTNERS
TEMPLATE	TEMPLATE 1 INVENTORY ASSET OF ADVENTURE PRODUCT	TEMPLATE 2 LIST OF TRAVELLERS' NEEDS	TEMPLATE 3 STRATEGY AND CONCEPT OF TRAVEL EXPERIENCE	TEMPLATE 4 SUSTAINABILITY CHECK	TEMPLATE 5 CHECK THE PACKAGE	TEMPLATE 6 CHECK LIST TO TRADE IN OUTBOUND MARKET

That doesn't mean it is a rigid process. The phases are useful for cleaning data and are combined with the research on the vision and direction for product innovation.

◦ *Conceptualization keywords*

Keyword 1: Transformational needs and guide transformations

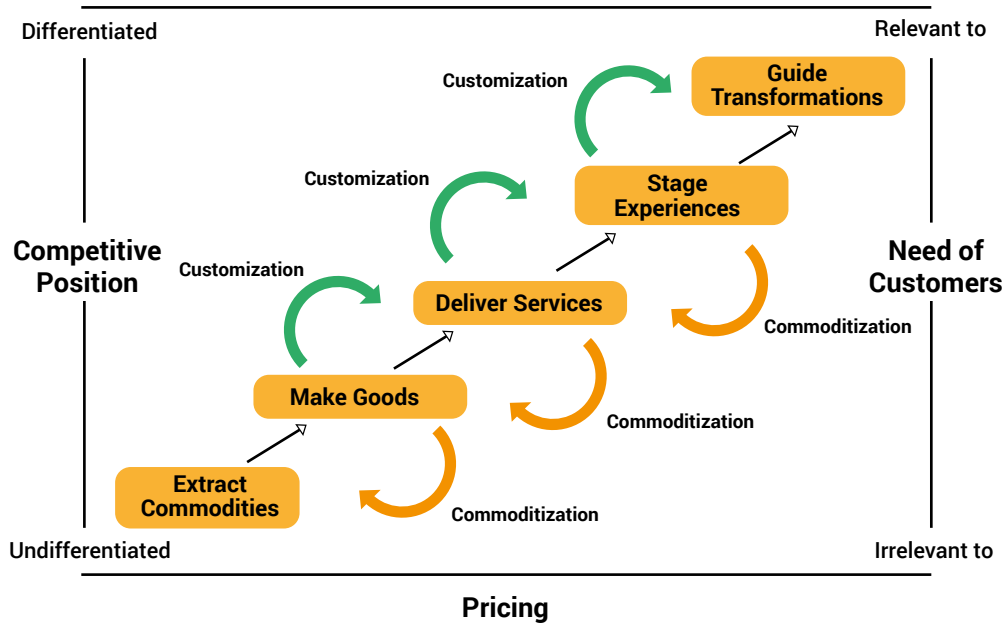
The transformational need is the most significant trend for customer behavior as identified in second phase of this report following Adventure Travel Trade Association study.

The identification of this trend is thanks to the authors Pine and Gilmore and their analysis of the shifts in the evolution of economies as presented below:



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The Progression of Economic Value



Pine & Gilmore - Harvard Business Press

Over the past 20 years, they have described the rising tide of the experience economy, in which experiences are a distinct kind of economic output and represent the basis of economic activity. Recently (in mid 1990s), the same authors tackled the future of the experience economy through transformations “where experiences are used to guide customers to change. Transformations take experiences and so integrate them into customers’ lives, such that they change that customer – not just in degree but in kind- in some appreciable way”.

What does experience mean? Pine is clear in his interviews¹: “If your economic offer is an experience, your work is theatre.... And we do not mean this is a metaphor.... We recognize it is as a model. ...In the economic function that you are doing, you need to understand which is one on staging. This means designing the elements that come together to create experiences. You have to understand that experiences happen inside people; commodities are goods, services exist outside of us. But experiences happen inside us.”

For this reason, the author prefers to change the vocabulary because it helps to change the culture; he suggests using the word stage experience instead of delivering services and considering the customers as guests. “Companies should focus on reaching inside of the individual, living, breathing customer, making their offerings as personal and as individual as the customer desiring that offering.”

¹ Cfr Main Resources at the end of report

In this process, the tailored experience must be authentic because authenticity is primary criterion by which people choose what and from whom to buy. Pursuing these points will vitalize the adventure experience and its potential, going beyond experiences to transformations.

◦ *Keyword 2: Sustainability*

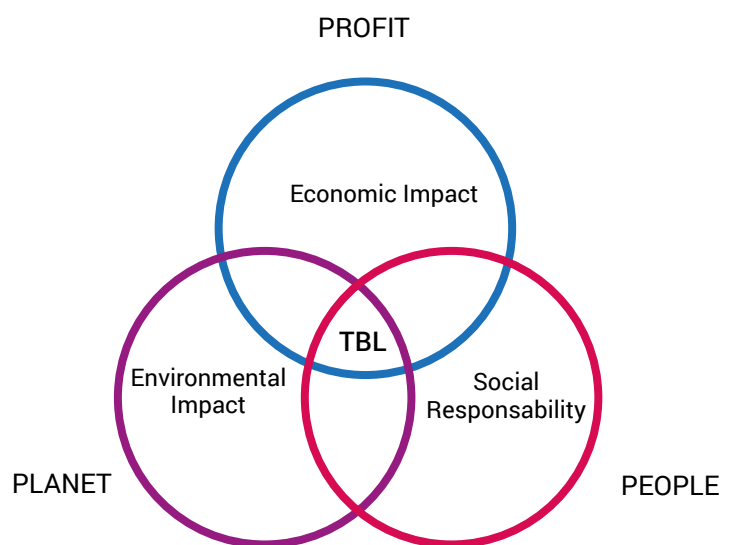
In the Medusa project, sustainability has an important role because, without it, adventure tourism can easily turn into another form of mass tourism and lose competitiveness in the future.

Post-pandemic consumers are looking for something more meaningful and brands with values they can trust in and connect with.

The relevance of sustainability (phase 3 and phase 4) and health and safety (phase 5) reflects the change in the hierarchy of output and the need to keep in mind designing all types of travel experiences and create an offer that corresponds market. To turn sustainable adventure tourism into an economic driving force, it is important to work in a professional manner and select the appropriate tourism models. In this period, some businesses feel the green pressure and respond by concealing the reality of the process and using sustainability purely as a marketing tool (greenwashing). In the Medusa project, sustainability starts at the strategic level and can develop, taking small actions following the triple bottom line theory.

The TRIPLE BOTTOM LINE is a theory that businesses have to focus on Profit + People + Planet. Sustainability is the way to understand how economic, social and environmental activities can interact without compromising the needs of future generation and all three sectors are equally important.

Triple Bottom Line Sustainability



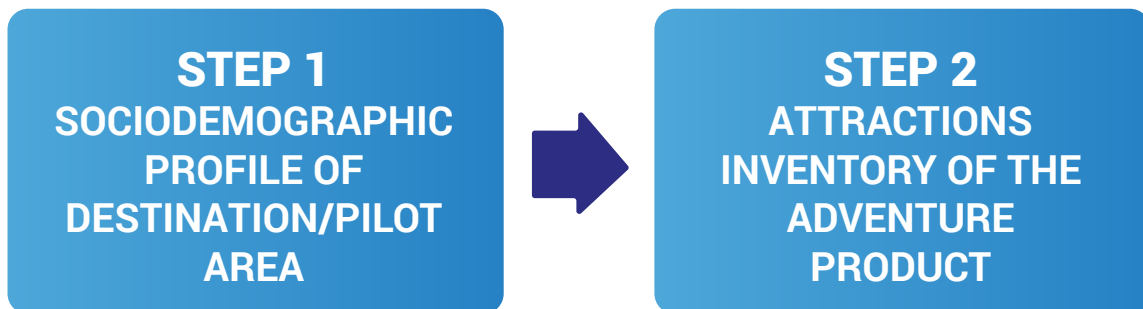
3. ROADMAP OF CONCEPTUALIZATION OF SUSTAINABLE ADVENTURE PACKAGE

PHASE 1 – INVENTORY TOURISM ASSETS OF THE ADVENTURE PRODUCT

OBJECTIVE

The objective is the analysis and evaluation of adventure tourism assets in order to identify the existing and potential opportunities presented by destinations and what makes them unique. The starting point is to have an idea about the type of adventure activity that will be turned into an adventure product. At the end of phase 1, essential trip elements and resources will be listed in order to match them with consumer’s target and needs (the phase 2).

STEPS



STEP 1. SOCIO-DEMOGRAPHIC PROFILE OF DESTINATION/PILOT AREA

This activity consists of understanding the features of destination related to:

1. the social, economic and cultural profile (administrative, political and territorial structure, demographic evolution, economic structure, employment and living conditions, local culture, gender equality);
2. the material and immaterial accessibility (hard infrastructure, soft infrastructure, accessible information);
3. the role played by tourism in the growth of destinations (weight and general dynamic of tourism, the destination management system, and the tourism strategy).

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Medusa has produced a report, “Destination review from a socio-economic, political and environmental perspective in adventure tourism,” for each partner. All these pieces of information are available in these reports for all 5 destinations.

At the end of this activity, it should be clear which pilot area/areas are engaged in the plan of product development and the potential connection with other Medusa destinations.

STEP 2 – INVENTORY OF ADVENTURE TOURISM ASSETS

◦ DEFINITION

The second step is to build an adventure tourism inventory of the adventure products aligned with the definition of adventure tourism. Regarding the adventure travel definition, the attractions inventory includes three different types of resources:

- Adventure and recreational activities
- Natural attractions
- Cultural attractions

The attractions inventory helps to:

- a. Build a pilot area of high-quality products and identify potential regional partnerships to develop multi-day itinerary products
- b. Create a common vision and start contacting stakeholders and the community members in order to discuss the long terms action plans that are needed for the development of an adventure tourism
- c. Create the first level of information to use for communication activities.

◦ STRUCTURE AND DETAILS

1. Compile a list of all relevant resources of the pilot area that can be an important part of the trip. The relevant resources are:
 - adventure activities
 - natural resources
 - cultural and historical resources
 - accommodation
 - offer of tourist services
2. Create a factsheet for each resource/trip element of each category detailing:
 - name of resource/activity

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- description
 - location with map and photo
 - accessibility (if seasonal)
 - difficult level
3. Evaluate potential for supporting product development using these criteria:
- uniqueness, aesthetic or scenic value,
 - biodiversity
 - cultural value
 - historical value
 - use and access

Global market research helps to frame the activity in two ways:

- a) the factsheets of adventure products, identified by market research, allow us to figure out which key trip elements to keep in mind for the inventory;
- b) the inventory reports of the country research make it easy to identify them in the pilot areas and understand the context in which to develop the innovativeness of offer.

◦ **MEDUSA ADVENTURE ATTRACTIONS INVENTORY APPLICATIONS**

In order to create the Inventory assets for adventure product, it is useful to start with the 5 Inventory Reports of 5 destinations produced by Medusa project:

- Attractions, Inventory and Mapping for Adventure Tourism in Catalonia
- Attractions, Inventory and Mapping for Adventure Tourism in Lebanon
- Attractions, Inventory and Mapping for Adventure Tourism in Puglia
- Attractions, Inventory and Mapping for Adventure Tourism in Tunisia
- Attractions, Inventory and Mapping for Adventure Tourism in Jordan

In each report, the list, the mapping, and a brief description of natural and cultural attractions and adventure activities in each destination are available.

Some destinations, such as Catalonia, Puglia, Jordan, and Tunisia, have decided to identify some pilot areas. Therefore, these analyses have been conducted at the level of pilot area.

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A - Regarding the Inventory of adventure activities, these 5 reports have mapped 17 adventure activities in all 5 destinations:

- ∅ **17 land activities:** trekking/hiking, walking, cycling, mountain bike, culinary activities, horseback riding, camel trekking, birdwatching, immersion in rural society, wellness focused activity (yoga, meditation), winter activity (skiing snowboard, Nordic skiing), climbing, caving photography/wildlife viewing, astrology star gazing, motorbike, safari 4x4;
- ∅ **7 water-based activities:** snorkeling, scuba diving, kayaking, wet canyoning, cruising & sailing, hot spring or mineral spring, swimming;
- ∅ **2 air-based activities:** hot air ballooning, paragliding.

The reports identify the two main categories of adventure activities:

- soft adventure: low level of risk, requiring minimal commitment and beginner skills
- hard adventure with high level of risk, requiring careful examination of commitment and advanced skills.

The soft adventures are the most spread activities.

B- Regarding the Inventory of natural resources, the 5 inventory reports have mapped in all the pilot areas of the 5 destinations:

- ∅ regional and national parks
- ∅ reserve areas, protected marine areas
- ∅ other natural areas (lakes, forest, beaches, cave, waterfalls)

C - Regarding the Inventory of cultural resources, the 5 inventory reports have mapped in all the pilot areas of the 5 destinations:

Historic and heritage attractions:

- ∅ archeological site
- ∅ architectural treasure
- ∅ religious site
- ∅ fort and historic site
- ∅ UNESCO heritage
- ∅ museum/exhibition

Cultural attraction:

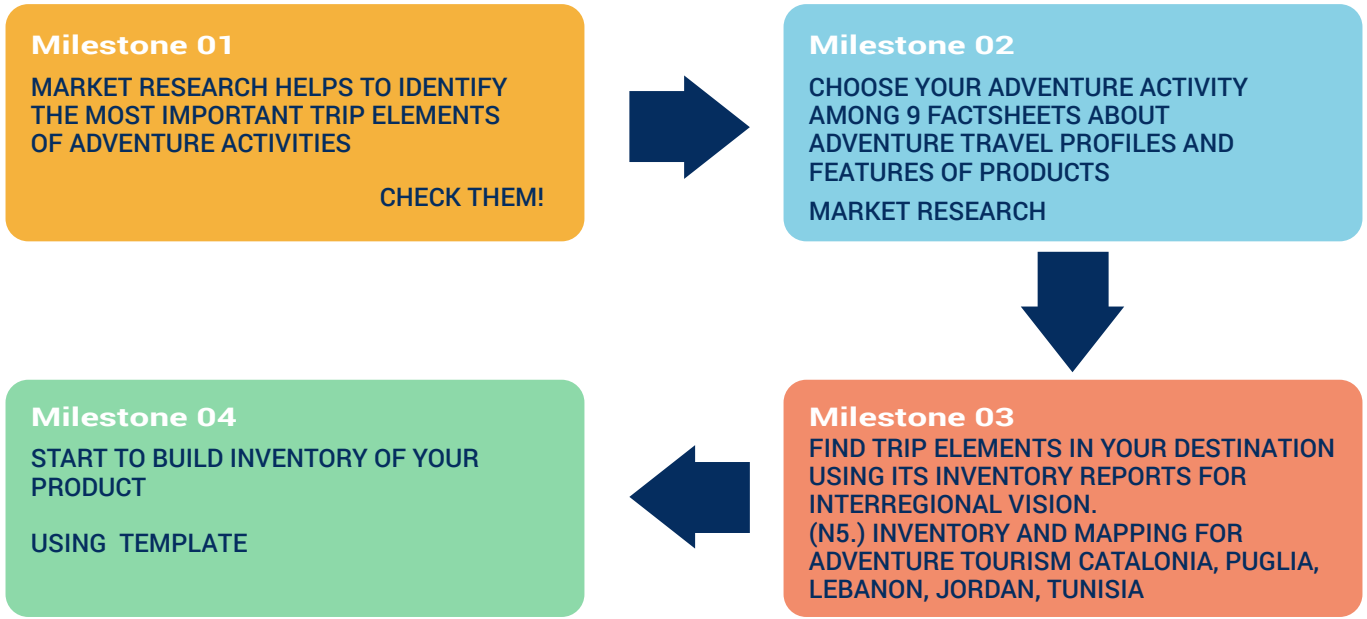
- ∅ traditional lifestyles
- ∅ religious ceremonies
- ∅ festivals
- ∅ traditional cuisine
- ∅ local activities as engagement in the rural society.

D- Regarding the service ecosystem inventory, the 5 inventory reports have identified in all the pilot areas of the 5 destinations:

- ∅ type of infrastructure and mobility
- ∅ type of offer of tourist services
- ∅ DMO and promotion entities
- ∅ main stakeholders

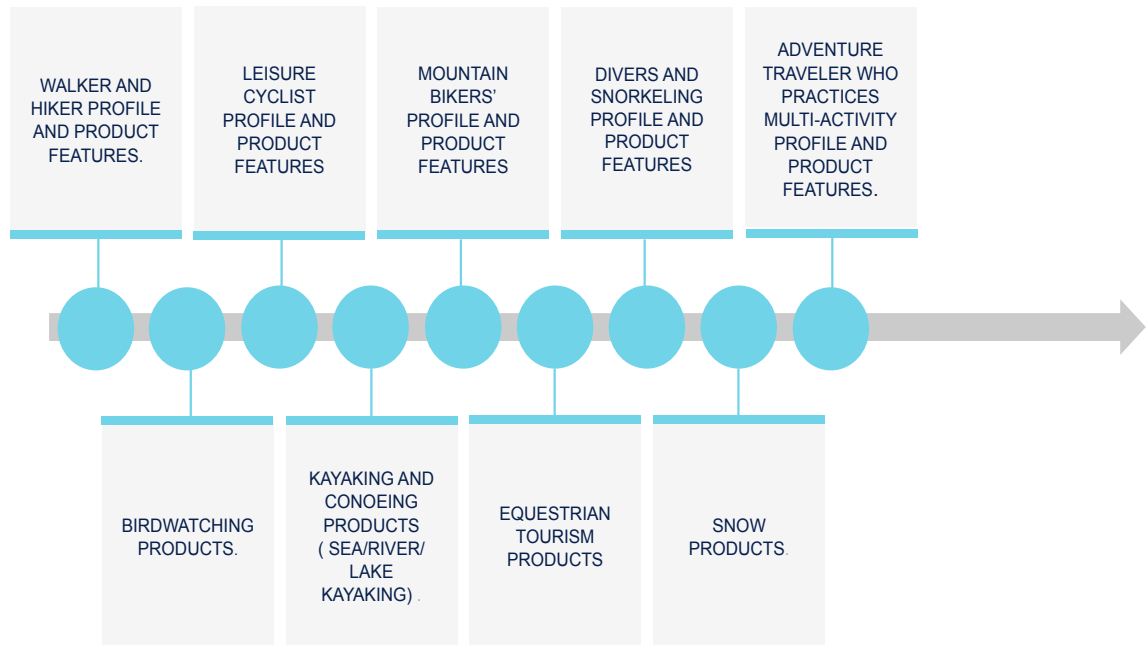


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FOCUS ON MILESTONE 2:

9 FACTSHEETS OF ADVENTURE TRAVEL PROFILE AND PRODUCT FEATURES. SOURCES MARKET RESEARCH PAG. 239-220



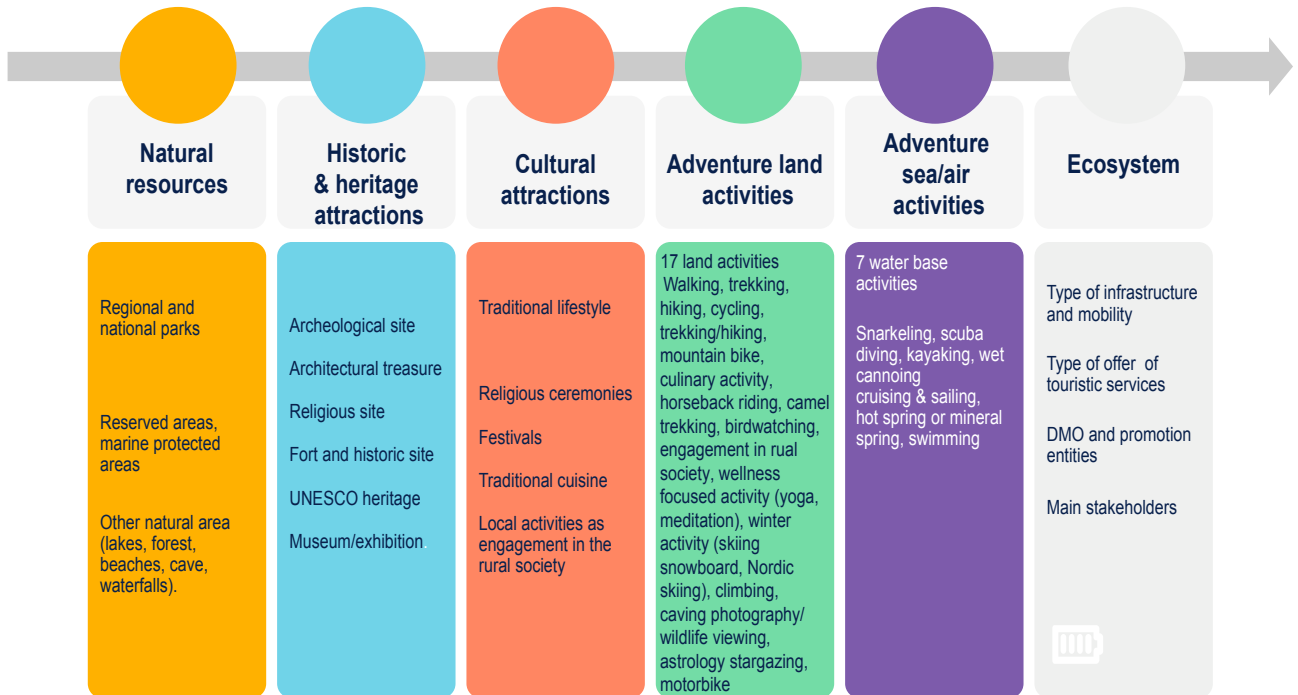
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FOCUS ON MILESTONE 3:

MEDUSA ATTRACTIONS' INVENTORY AND MAPPING FOR ADVENTURE TOURISM REPORTS



MAP OF ATTRACTIONS' INVENTORY



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TEMPLATE 1: INVENTORY OF ADVENTURE TOURISM ASSESTS

Example:

ATTRACTION INVENTORY OF MOUNTAIN BIKE PRODUCT IN.....

TRIP ELEMENTS (by Recommendations, Market research report pages 220-239)	AVAILABLE RESOURCES By Attractions Inventory report (Catalonia, Puglia, Jordan, Tunisia, Lebanon)
The cycling distance daily on mountain bike routes is usually between 35-70 km <i>Detailed itinerary descriptions and levels of difficulty</i>	Name, Description, map, photo
The standard trip is a full week trip with around 4/5 days of activity <i>Additional trail from..... to</i>	Name, Description, map, photo
The quality of paths is important, with intermediate level of the diversity and conservation of the landscape and the diversity of flora and fauna <i>Detail landscape, fauna, flora</i>	Name, Description, map, photo
Technical equipment: general own bike, quality rental bike essential, e-bike <i>Local specialized supplier</i>	Name, Description, map, photo
Tasting local cuisine and local restaurants <i>Local restaurant, Agri-tourism farmer market</i>	Name, Description, map, photo
Accommodation with bike parking	Name, Description, map, photo
Logistic service (vehicle support for luggage transfer)	Company/local supplier
Guided tours	Company/local supplier
Experience local culture	

PHASE 2 – TRAVELLERS’ PROFILES AND NEEDS

OBJECTIVE

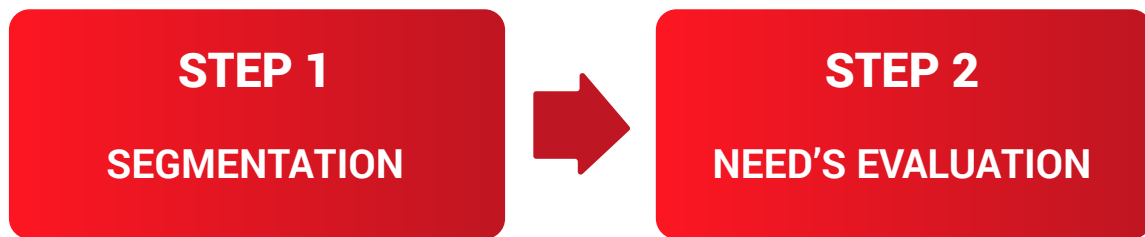
The objective of this phase is to have a checklist of traveler segments’ need and the trip elements to satisfy them.

The question is: who is the target customer we aim to develop the product for?

KEY WORDS

Empathy to better understand customer needs and how behavior is changed/changing.

STEPS



STEP 1 – SEGMENTATION

Starting point is to define the market to create the product for.

Market research (Annex 1 and Annex 2) gives a clear advice for working on a niche product based on specialized needs. That means:

- 1) focused on certain activities to be done with a very high standard. For example: mountain bike, walking etc.
- 2) multi-activity (option)
- 3) with a clear segmentation, (See Adventure Travel Trade Association definitions), regarding to:
 - ∅ Customer segments: families, seniors, couples. Millennials/Z generation, solo travel, women/men;
 - ∅ Level of knowledge of activities: experienced/Adventure enthusiast, intermediate/Adventures, beginner/Adventure Grazers;
 - ∅ Origin: national as residents /nearby areas, middle/long distance visitors, international;

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- ∅ Environmental sensitivity: dedicated sustainable travelers and soft sustainable travelers.

The market research provides all the information about each criterion and defines all target segments. Segmentation is a creative process. In fact, it is possible to use unconventional criteria such as “mood state” or “food intolerance” or explore a segment to diversify the family product in relation to the age of children or teens.

For this reason, the *segment enlargement and/or enrichment activities* have been embedded in the template 1.

STEP 2. NEEDS' EVALUATION

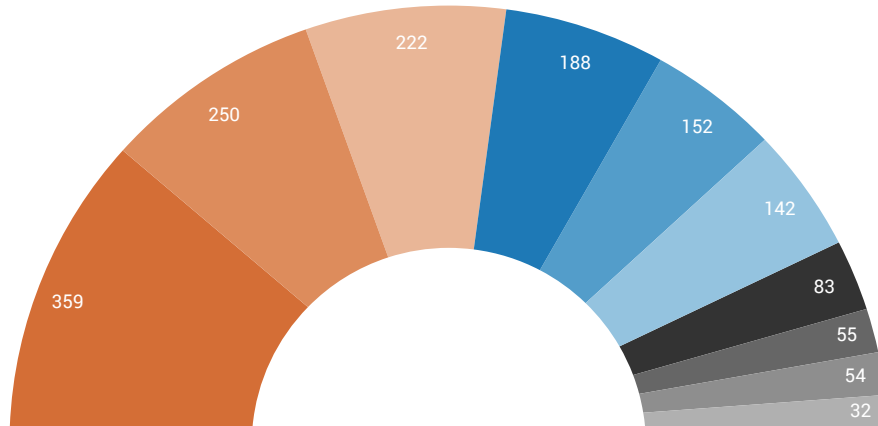
Following the methodological approach of MEDUSA's market research, the product needs to be adapted to different travelers' profiles, which are the result of:

- a- need and motivation trends for all adventure travelers;
- b- needs and motivations of adventure travelers' profile based on specific adventure activity;
- c- needs and motivation of adventure travelers regarding the outbound market.

A- Needs and motivation trends for all adventure travel

The Adventure Travel Trade Association (ATTA) identifies customer needs and motivation trends for all adventure travel market segments, and it is possible to identify three kinds of needs to match up:

- **UNIQUE EXPERIENCES NEEDS**
 - o Experiences
 - o Seeking status
 - o Personalization
 - o Most popular activities: Hiking, cycling, safaris, culinary activities, wellness-focused activities, and custom itineraries
- **TRANSFORMATIONAL NEEDS**



-  Transformation
-  Expended
-  Worldview
-  Learning
-  Nature & Discovery
-  Mental Health
-  Fun & Thrills
-  Connection
-  Meaningful Stories
-  Physical Health

The New Adventure Travel Research 2017 by the Adventure Travel Trade Association (ATTA)

One of the fastest growing demand trends is the transformational travel. *“Transformational travel is intentionally traveling to stretch, learn, and grow into new ways of being and engaging with the world”*, as defined by Transformational Travel Council (TTC) established in 2016 during Adventure Travel World Summit in Alaska. The travel experience should be an experience of fulfillment.



Maurizio Goetz Il cammino nell'era del turismo dei significati – Viandanti Festival 2020 Puglia Region

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- **SUSTAINABILITY NEEDS:** reduce the negative and maximize positive effects.

A- Needs and motivations of adventure travelers' profile based on a specific adventure activity:

Market research gives a lot of information and a list of consumer needs of adventure traveler for specific market segment:

1. walker and hiker profile and product features
2. leisure cyclist profile and product features
3. mountain bikers' profile and product features
4. divers and snorkeling profile and product features
5. adventure traveler who practices multi-activity profile and product features
6. birdwatching products
7. kayaking and canoeing products (sea/river/lake kayaking)
8. equestrian tourism products
9. snow products

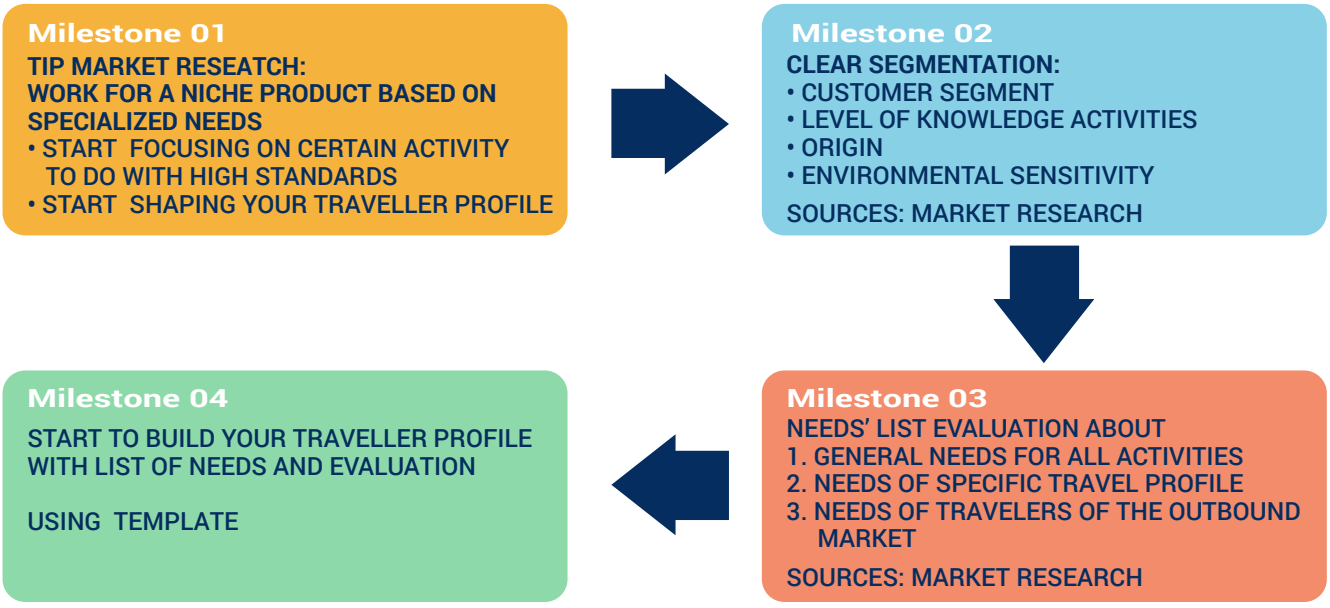
B- Needs and motivations of adventure travelers based on the outbound market:

In process of evaluating travelers' profiles and needs, it is important to identify geographic market to work on.

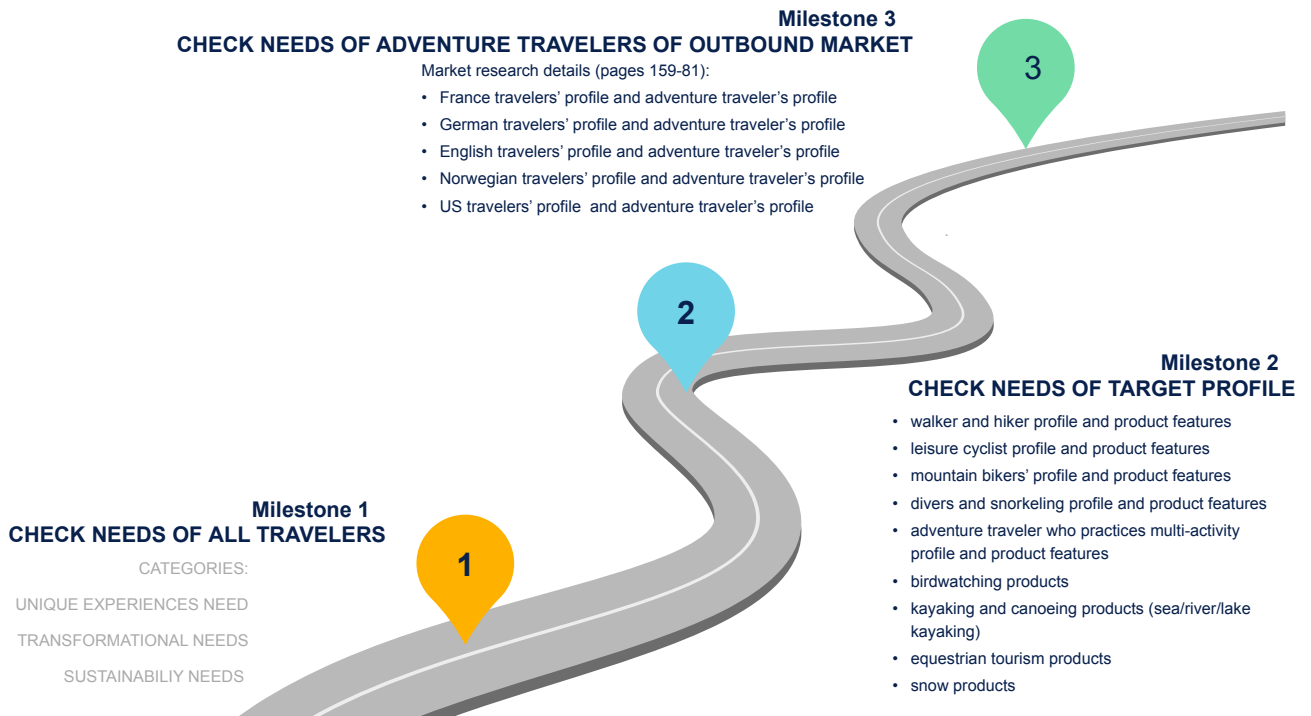
The Market research report provides information on select outbound markets (pages 81-159) as follows:

- French travelers' profile and adventure traveler's profile
- German travelers' profile and adventure traveler's profile
- English travelers' profile and adventure traveler's profile
- Norwegian travelers' profile and adventure traveler's profile
- US travelers' profile and adventure traveler's profile

MEDUSA focuses on Europe and North America because these geographical areas are the main feeder markets for adventure tourism, and they have a strong list of tour operators that MEDUSA partners and associated stakeholders can connect with to sell their products through.



FOCUS ON MILESTONE 3:



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TEMPLATE 2: LIST OF CUSTOMERS' NEEDS

SECTION A - IDENTIFICATION OF TARGET SEGMENT	
<input type="checkbox"/>	Activity
<input type="checkbox"/>	Multi-activity
NOTE: _____	
<input type="checkbox"/> Families	<input type="checkbox"/> Seniors
<input type="checkbox"/> Couples	<input type="checkbox"/> Millennials
<input type="checkbox"/> Generation Z	<input type="checkbox"/> Solo travelers
<input type="checkbox"/> Female travelers	
NOTE	
<input type="checkbox"/> Experienced	<input type="checkbox"/> Intermediate
<input type="checkbox"/> Beginner	
NOTE	
<input type="checkbox"/> Dedicated sustainable travelers	<input type="checkbox"/> Soft sustainable travelers
NOTE	
<input type="checkbox"/> Visitors from nearby area	<input type="checkbox"/> Middle distance visitor
<input type="checkbox"/> International visitors	
NOTE	
<input type="checkbox"/> Segment enlargement	
NOTE	
<input type="checkbox"/> Segment enrichment:	
NOTE	
SECTION B – LIST OF NEEDS	
<input type="checkbox"/> Needs and motivations trend for all adventure travelers _____	
<input type="checkbox"/> Needs and motivations of specific adventure traveler profile (walker, leisure cyclist, etc.) _____	
<input type="checkbox"/> Needs and motivations of adventure traveler based on to the outbound market _____	

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PHASE 3 – STRATEGY AND CONCEPT OF THE TRAVEL EXPERIENCE

OBJECTIVE

The objective of phase 3 is matching customers' needs with the travel experience, creating something greater than the sum of the key trip parts identified in phase 1 and 2 and integrating the tourism sector with other industries to design a seamless tourism experience. At the end of this phase, you should have the skeleton of the travel experience. This phase is important because the tourism offer needs constant innovation and update over time.

KEY WORDS

Imagination, integration of tourism with other sectors, ecosystem.

STEPS



STEP 1 – VALUE PROPOSITION CONNECTED WITH COMMUNITY. BENCHMARKING OF SUSTAINABLE INNOVATIVE PRACTICES OF ADVENTURE TOURISM.

To build a product for a particular market segment with unique and transformational experiences, it is important to create the value proposition with great attention, a lot of creativity and innovation.

MEDUSA project embeds in the process of developing the value proposition a sustainable approach and introduces the benchmarking of best practices of sustainable adventure products. The Benchmarking study can help us imagine a new relationship with the community and how to create innovative products. Sustainability introduces a holistic approach to understanding what it is good for the community and allows us to understand how to redesign the recovery. Travelers, during the pandemic, have rediscovered the pleasure of spending time in nature. When it comes to purchase, people have dedicated more time to making conscious decisions. There has been a shift, whereby what had been considered a supplement now has become a must when it comes to sustainability development.

MEDUSA has identified 45 sustainable practices from across the world to come out with local narratives about locals' benefit from sustainable practices in adventure tourism and inspire tourism destination stakeholders to adopt them.

The Benchmarking study gives innovative sustainable practices for these 8 adventure products:

- *adventure travel in protected areas*
- *hiking/trekking trail*
- *cycling/mountain biking*
- *spiritual experiences (religious routes, spiritual hiking, yoga...)*
- *water experiences (kayaking, canoeing, caving, diving, waterways)*
- *city experiences, cultural experiences (cultural heritage, local tradition...)*
- *art & craft (ceramics, weaving workshop)*
- *leisure experiences, innovative initiative (platform, soft mobility...)*

There are two common factors in all sustainable practices:

- a shared agenda that puts destination and community needs at its center.
- the collaboration across sectors.

This means being willing to change mindsets, be proactive in the community in order to promote sustainability approach and create a vision and a clear direction for the whole ecosystem of goods and services.

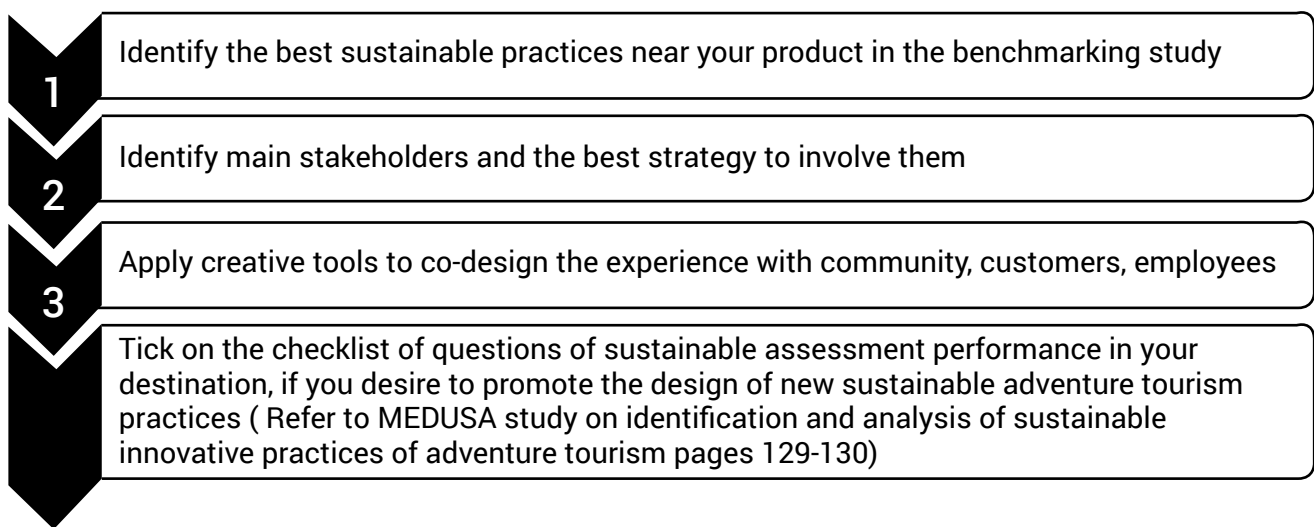
In fact, MEDUSA puts sustainability at the forefront of accelerating a destination stewardship approach that *"implies a conscious, proactive effort by Travel & Tourism public, private and third sector, stakeholders to ameliorate people's lives and the places they operate in"*.

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This is not “just a collaboration” but it means creating meaningful connections and co-creating the value of places to improve people’s lives.

This approach boosts the possibility of involving visitors in everyday life, because if you improve the quality of inhabitant’s lives and the services provided for them. it becomes easier to reach and more accessible for tourists. therefore, tourists would become the protagonists if their own trip experience. For this reason, stewardship and work with the community can reinvigorate the destination and improve the value proposition of the product.

To frame this topic in the process and to define the value proposition, it is useful to:



STEP 2 – PLANNING AND PAIRING EXPERIENCES

This step involves the development of a system for pairing various experiences on offer, the mechanism for interaction of all trip elements and the identification and development of overall storytelling.

Planning travel experiences is like writing a script for a film: it is necessary to have a scene, a theme and the plot; the script arranges events in a logical order and progressive intensity where climaxes lead to an important one.

The theme helps to shape the experience and should be different: religious, historical, cultural/ food, special interest, (botany, birdwatching), etc.

To get an idea about key components adventure tourism products should have, it is time to look at the products of tour operators selected by different activities from different countries. MEDUSA market researchers have analyzed 31 adventure products producing 31 factsheets that are gathered in the Annex 2 of the Market Research document. They can be used as examples to design adventure products.

See below the list of selected analyzed products:

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Recommendations	FACTSHEET: PRODUCT TITLE AND DESTINATION	AGENCY COUNTRY
Walking & hiking, trekking	CHARMING NATURE TRIP TO MADEIRA / Madeira (Portugal)	France
	THE GATES OF THE LEVANT / Lebanon	France
	IRISH DECLIC / Ireland	France
	DISCOVER OF ALBANIAN RIVIERA BY HIKE AND KAYAK / Albania	France
	DONKEY WALK GERMANY - GLAMPING IN THE BAVARIAN FOREST	Germany
	IN STEP WITH BEDOUINS - CAMEL TREKKING THROUGH THE SAHARA /Tunisia	Germany
	THE TURQUOISE COAST / Turkey	US
	JORDAN YOGA &ADVENTURE TOUR /Jordan	Norway
Leisure cycling	CYCLE LEBANON	UK
	THE DORDOGNE VALLEY / Dordogne (France)	UK
	PUGLIA 5 NIGHTS	Norway
Mountain biking	MTB-REISE SIZILIEN / Sicily	Germany
Diving & snorkelling	DIVE SANTA MARIA / Azores	UK
Multi activity product	MALTA-GOZO ISLAND ADVENTURE / Malta	UK
	SPAIN – PYRENEAN FAMILY ADVENTURE	UK
	SAIL AND EXPLORE GREEK ISLANDS / Cyclades Islands (Greece)	UK
	WINDSURF EXPERIENCE IN FUERTEVENTURA/ Fuerteventura Spain	UK
	SONORAN DESERT, MTB & CAMPING/ United States	US
Birdwatching	TUNISIA	UK
Kayaking and canoeing products (sea/ river / lake)	DES CANYONS DU MONT PERDU A LA SIERRA DE GUARA/ France, Spain	France
	SEA KAYAK CROACIA- BAHIA DE KVARNER; Croatia	Germany
Equestrian product	THE WADI RUM RIDING / Wadi Rum (Jordan)	France
Snow product	HOTEL LE SKI D'OR / Val Claret (France)	UK
	NOUVEL AN SUR LES CRETES DU JURA BOURS D'AMONT/ France	France
	NORWAY CROSS-COUNTRY SKIING IN SLANGENSETER / Slangen Seter (Norway)	Germany
	THE BEST FREERIDE SPOT IN ST. MORITZ (Switzerland)	Norway
Cultural - Culinary	FROM OPORTO TO LISBON/ Portugal	Germany
	A WALK IN COASTAL PUGLIA/ Puglia	US
	CATALONIA CULINARY CYCLING TOUR	US
	UMBRIA, MAGNIFICENT FLOWERING – LA FIORITURA / Umbria	Norway

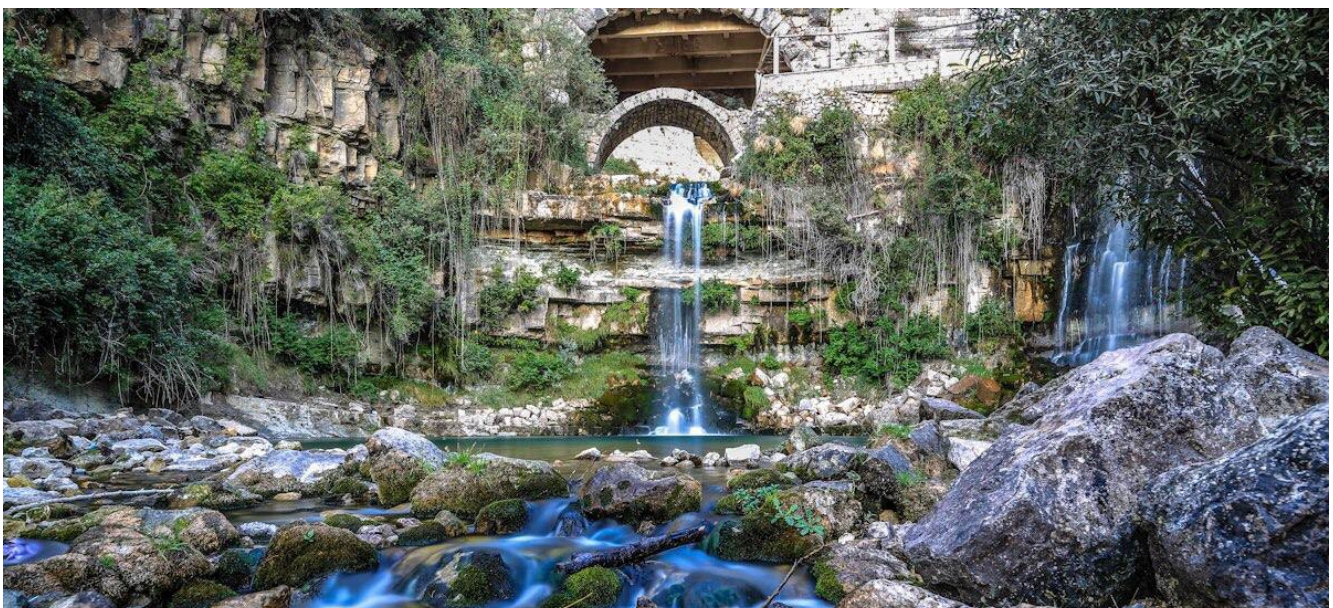
Going through these factsheets, one would understand how to put into practice five key actions:

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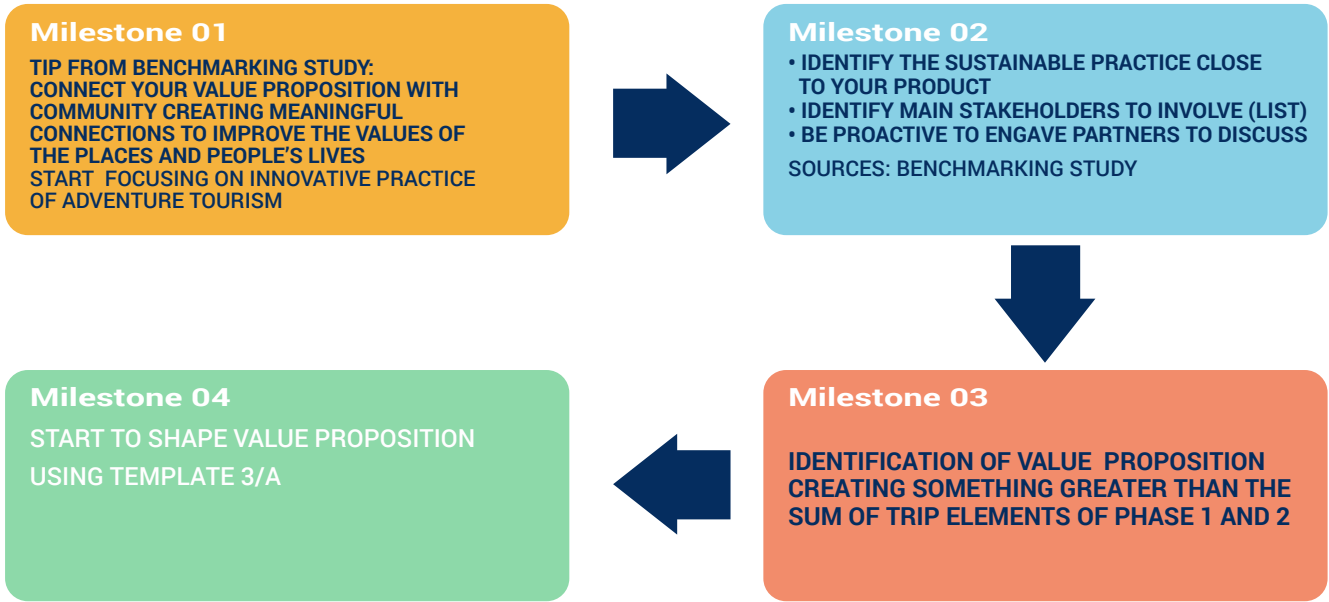
1. Map the customer's journey in the destination: actions, key interactions, identifying emotions and feelings
2. Map the employee/supplier journey: the process to deliver the experience (internal and external resources)
3. Find the interaction between customer journey and employee/supplier journey and identify what make it successful and the pivotal moments
4. Evaluate through consumer perspective
5. Evaluate the agreements with local services to create the integration of tourism with other sectors:
 - to stage a purposeful and seamless experience
 - to share operational standards

All these elements will be elaborated on in Phase 5.

HIGHLIGHT:
MEDUSA implementation includes specialized activities in all MEDUSA sites to improve the process of co-creating travel products

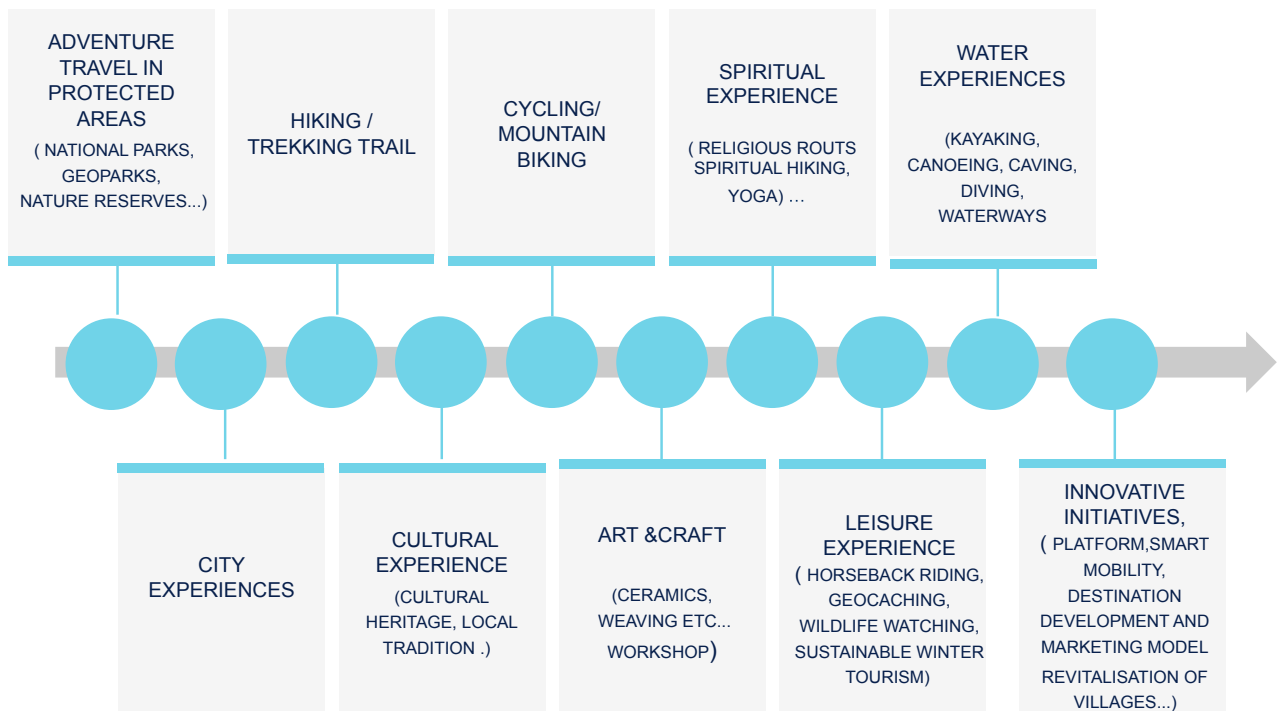


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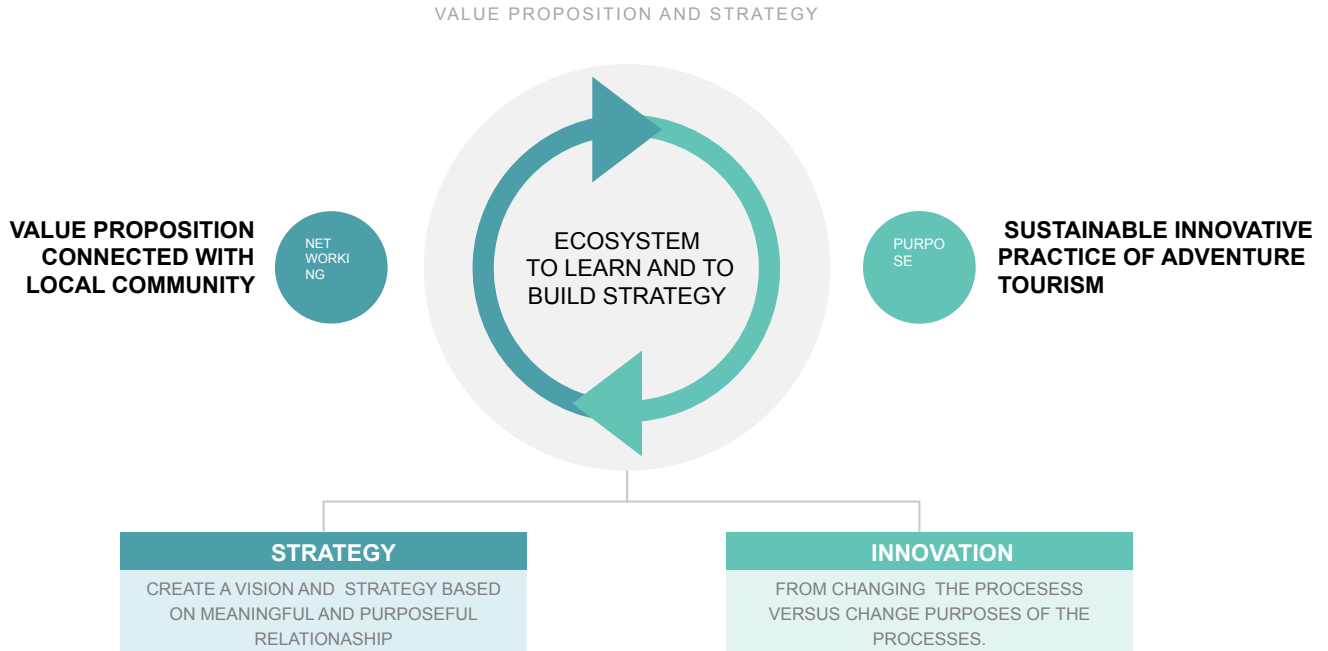
MILESTONE 1:

10 FACTSHEETS OF INNOVATIVE SUSTAINABLE ADVENTURE EXPERIENCE Sources BENCHMARKING STUDY

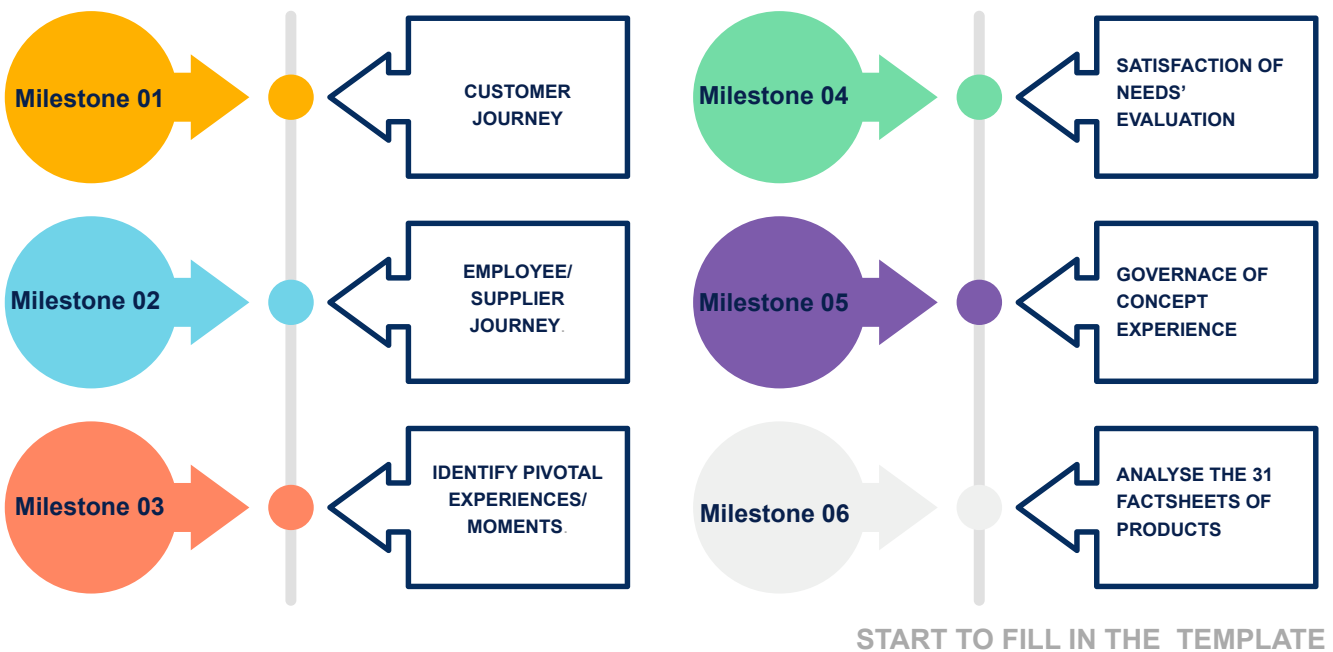


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MILESTONE 2-3-4:



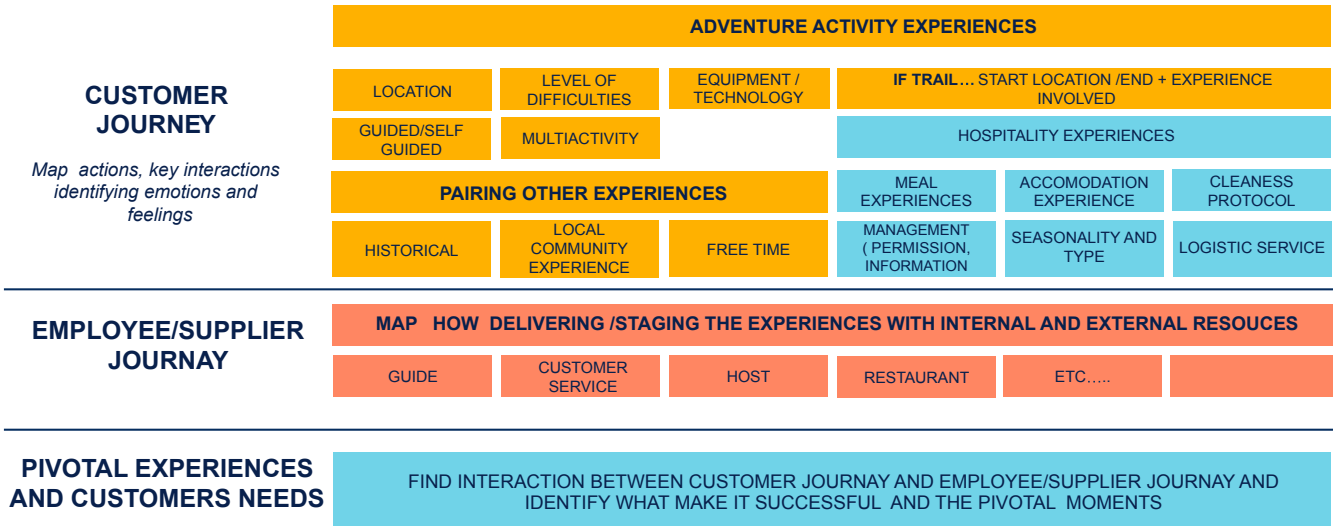
ROADMAP SECTION B: SKELETON OF EXPERIENCE



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IN EXPERIENCE ECONOMY, YOUR WORK IS THEATRE ...WE RECOGNIZE IT IS A S A MODEL ...
THAT MEANS DESIGN THE ELEMENTS THAT COME TOGETHER TO CREATE THE EXPERIENCE
YOU HAVE TO UNDERTSAND THAT EXPERIENCES HAPPEN INSIDE PEOPLE, COMMODOTY IS A GOOD, SERVICE EXIST OUTSIDE OF
US BUT EXPERIENCES HAPPEN INSIDE US

BY PINE & GILMORE



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TEMPLATE 3: STRATEGY AND CONCEPT OF TRAVEL EXPERIENCE

SECTION A – STRATEGY AND VALUE PROPOSITION	
1.	Name of product
2.	Travelers’s profile
3.	List of stakeholders to collaborate with the local community members List of stakeholders that collaborate to co-create new “resources and values” communities and the touristic products in Medusa destinations
4.	Attend meetings in your community and be proactive to engage partners to discuss attending Medusa activities
5.	Identification of value proposition in connections with community evaluating the results of activities n.4

SECTION B – PLANNING THE TRAVELLER EXPERIENCE IN THE DESTINATION (skeleton of experience)

B1 - CUSTOMER JOURNEY

Adventure activity experience_____

- Location_____
- Level of difficulties_____
- Equipment/ technology (for example GPS map...) _____
- If trail ... start location/end location + experience involved (map and description)

- Guided/self-guided

- **Multi-activity**

Selection and pairing to other experiences, which really help boosting the offer. Include

- Historical experience
- Culture and authentic experiences by local community,
- Planning free time

Hospitality experience

- Breakfast, lunch/dinner experience _____
(indicate if culinary products provided during the tour are local and/or come from local producers)
- Accommodation experience _____
(indicate if the properties are local and/or family-run business; the types of accommodations are farmhouse, country homes, cottages, camp sites, small hotels)
- (Optional) wellness experience (spa, fitness) _____
- TV experience _____
- Other's services (internet connection, parking, laundry) _____

Cleanliness: protocol used _____

Management (number, permission, information) _____

Seasonality and type: weekend, short vacation _____

Logistic service _____

Price positioning _____

B2 - EMPLOYEE/SUPPLIER JOURNEY

Guide _____

Customer service _____

Host_____

Restaurant_____

Baker_____

_ecc..._____

B3 - PIVOTAL EXPERIENCES/MOMENTS

Describe_____

B4 - EVALUATION

Describe how these experiences satisfy the specific needs and general transformational needs of traveler’s profile:

- Self-awareness_____
- Authentic, Unique and amazing experience_____
- Growth and learning_____
- Expands world view_____
- Personalization (ex-flexible itineraries, self-guided option) _____
- Deeper connections (engagement with local community_____
- Fun_____
- Specific needs of traveler’s profile_____

B5 – GOVERNANCE OF CONCEPT EXPERIENCE

Explore local agreements with local services to create the integration of tourism with other sectors:

- to stage a meaningful and seamless experience
- to share operational standards

PHASE 4 – CHECK OF SUSTAINABLE IMPACTS

OBJECTIVE

The objective of this phase is to elaborate the evaluation of sustainable impact of the new travel experience applying Benchmarking study.

STEPS

STEP 1 – SUSTAINABILITY CHECK

Sustainability check is a strategic activity. Travelers seek experiences that are aligned with their values, and where the community's purpose and openness are the core of the destination's DNA.

The benchmarking study analyses the best practices of sustainable adventure tourism evaluating four key sustainability areas following the four-pillar proposed by the Global Sustainable Tourism Council (GSTC):

- A - Sustainable management;
- B - Social;
- C - Culture;
- D - Environment.

GSTC has approved guidelines to apply for international certification.

To make the work of sustainability easier, the Adventure Travel and Trade Association (ATTA) has produced a guide for adventure tourism experience providers to minimize or mitigate negative environmental, economic or social effects & enhance the positive impact of their operations.

ISO 20611:2018 Adventure tourism: *Good practices for sustainability – requirements and recommendations*. It is a guideline about sustainability standards for:

- natural resources' use, reducing pollution of land, water and air, reducing and offsetting carbon emissions, protection of biodiversity and natural habits, and animal welfare;
- social aspect and equity

In order to minimize the impact on natural areas, another key point to bare in mind is the practical guidelines of "Leave No Trace", an international association that provides educations and research to help people maintaining outdoors spaces. For any further detail visit www.int.org.

To manage this topic, it is important:

- to do an easy and clear plan for sustainability actions starting from the benchmarking study and analyzing the references made;
- to fill in the following form, looking at the examples and the recommendations provided in the benchmarking study.
- to take small actions forward and evaluate the process

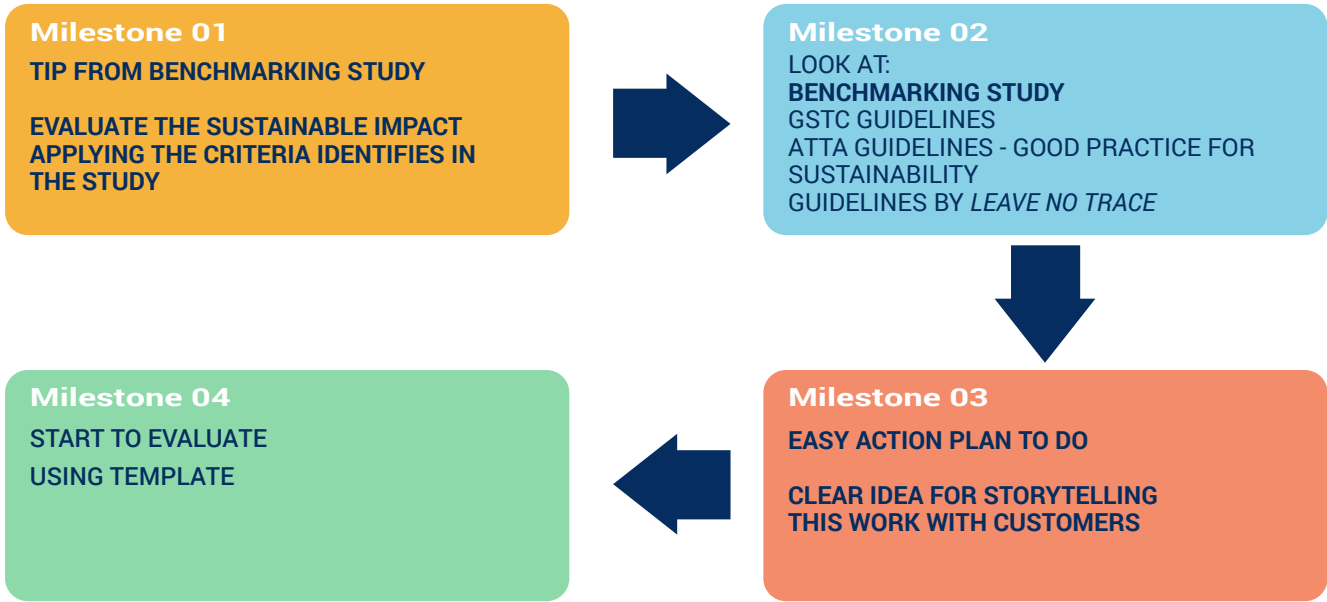
Promoting and knowing well how to sell the workings of the product enhances the relationship with customers.

HIGHLIGHT:

Medusa implementation includes specialized activities in all MEDUSA sites to improve private-public alliances to promote stewardship approach for sustainable adventure tourism.



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TEMPLATE 4: SUSTAINABILITY CHECK

<p>Sustainable planning <i>Monitoring and management</i></p>	<hr/> <hr/> <hr/>
<p>Community benefits <i>Maximizing social & economic benefits for local community (jobs, income, entrepreneurship)</i></p>	<hr/> <hr/> <hr/>
<p>Cultural Heritage <i>Enhancing cultural heritage, the authenticity of destination, promoting local tradition, architecture, and cuisine</i></p>	<hr/> <hr/> <hr/>
<p>Impact on the environment <i>Minimizing negative impact on the environment and natural resources</i></p>	<hr/> <hr/> <hr/>

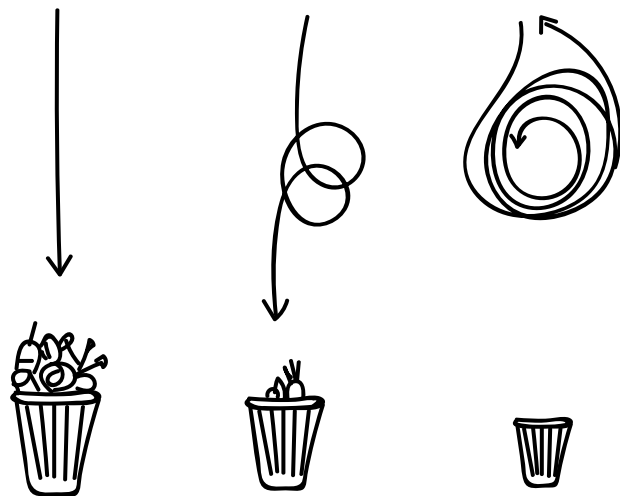
Choose where you are:

- Linear economy
- Recycling economy
- Circular economy

LINEAR ECONOMY

RECYCLING ECONOMY

CIRCULAR ECONOMY



cfr. Ellen Macarthur Foundation, Learning program

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PHASE 5 – ORGANIZING AND PACKAGING THE PRODUCT

OBJECTIVE

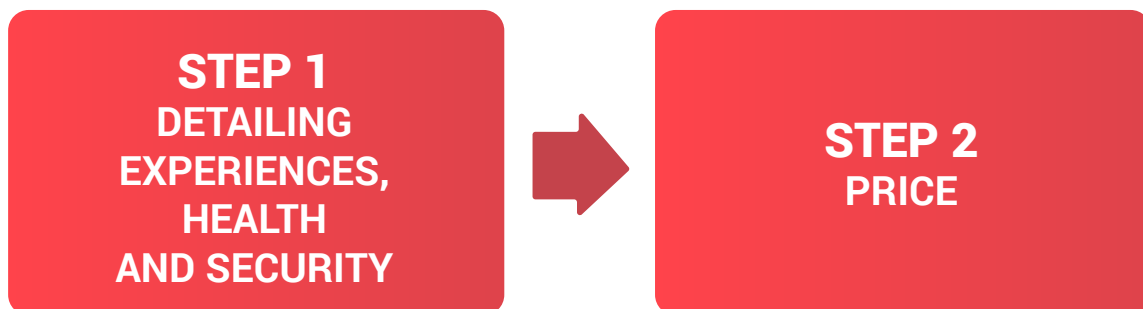
Objective of this phase is to package the product and prepare it for the market afterwards:

- Detailing all activities and operations and provide a quality check
- Assessment of each cost and the prize

KEY WORDS

Transparency on internal operations to build the trust with customer.

STEPS



STEP 1 – DETAILING EXPERIENCES, HEALTH AND SECURITY

Objective of this step is to detail the activities and the resources, both material and immaterial, needed to deliver the travel experiences.

Check of main activities:

1. Define Group sizes and profile.
2. Define seasonality.
3. Manage the arrival, transfer and departure of the guests, their luggage and equipment, in addition to internal transfers, for example: type of vehicle; driver; time, language, near/ long distance.
4. Equipment for adventure activities: rent e-bike/Bike/ horse-camel/table for sea sport etc.

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5. Local guide who fits the needs of travelers and/or customer service.
6. Agreement with local suppliers for authentic experiences.
7. Select accommodations: per the recommendation tailored to traveler's profile.
8. Select catering following the recommendation tailored to traveler's profile.
9. Quality control: cleanliness, hospitality, visiting all suppliers monitoring the cleanliness protocol applied.
10. Check regulation and legal rules in the destination.
11. Check regulation and legal rules to travel from outbound markets.
12. Risk assessment.

Improve safety and hygiene: stringent health and safety standards are important to permit re-opening and holding activities safely once again. About these topics, two different sets of standards/recommendations are useful:

- Set of standards/recommendations related to promote safe practices in light of the COVID 19 pandemic (Public authority and other international organizations have developed guidelines, for example Adventure travel COVID 19 Health and Safety guidelines by ATTA).
It is important to control if the government of the destination has adopted the recommendations and rules.
- Set of standards/recommendations (optional) related to promote a more systematic approach to managing the safety and quality of adventure tourism:
- *ISO 21101:2014 Adventure tourism – Safety management systems – Requirements.* The benefits of having a Safety Management System (SMS) that conforms to standards could include a better safety record, a strong reputation as a safe provider, and improved service delivery overall.
- *ISO 21103:2014 Adventure tourism – Information for participants* specifies the minimum requirements for the information provided to participants, before, during and after adventure tourism activities.
- *ISO/TR 21102:2013 Adventure tourism – Leaders – Personnel competence* sets out desirable competencies and the related expected results of competencies for adventure tourism activity leaders common to any adventure tourism activity.

STEP 2 – PRICE

Focus on the better value for money. The price should balance two kinds of costs:

1. price of services delivered in house.
2. price service delivered through suppliers and profit margins.

The result of this balance (price) should be a better money for the travelers' requirements, comparing the competitive offer in the destination and the added value of the new adventure products.

The factsheets of the 31 adventure products (Annex 2 - Market research) specify the prices and identify what it is included and what is not.

At the end of this phase, it is possible to complete the definitive factsheet of products following the template provided in Annex 2 - Product of Market research

HIGHLIGHT:

MEDUSA implementation includes specialized workshops and training activities focused on local guides and business planning in all MEDUSA areas.



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TEMPLATE 5: CHECK THE PACKAGE

This template follows the structure of datasheet used for each of 31 adventure travel products gathered in Annex 2 - Product of Market research. To fill in, control this report.

GENERAL INFORMATION

Main product_____	Meals_____
Type of activities. _____	Accommodation_____
Level_____	Itinerancy Yes/No
Destination	Possibility of extension Yes/No
Tour type Guided/not guided/	Protected area YES/NO
Nights	Assistance
Time of the year	Keyword

PRICE

Commercialization is an important part of the package. This item describes what it is included in the price and what is not.

STRUCTURE OF EXPERIENCE

C1) ITINERARY	C2) ADDITIONAL INFORMATION
Description of main activities during the trip day by day	Accommodation Food Equipment: includes/ does not include possibility to rent Transportation: includes/ does not included/ transportation and luggage transfer Wellness: sauna yoga, etc...

Comments/Observations: the last part of the factsheet presents concrete and detailed information on each product to provide further familiarity with the offer.



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PHASE 6 – SALES AND PROMOTIONAL CHANNEL AND DISTRIBUTION

OBJECTIVE

The objective of this phase is to explore the different distribution channels available, detailed by the market research. In this phase, it is important to use channels which resources are already considered reliable by potential clients.

In this phase, the company could add the development of its own marketing plan and communication strategy on online channels.

KEY WORDS

Channels mix evaluation.

STEPS

STEP 1 – IDENTIFYING POTENTIAL TRADE PARTNERS, INSTITUTIONS, MEDIA, FAIRS

“The way to introduce the destination in outbound market depends a lot on the product, the target to which it is directed and especially the outbound country to which it will be addressed. It is not the same to introduce a multi-activity product for young people in the United States as in Germany” “Firstly, companies must clearly define the marketing channels through which they want to sell their products. The companies can decide to do so by directly selling or doing so through a tour operator” (for more information: Research and study of market of market demand, supply and competitiveness. Pages: 212-213)

Medusa project has developed market research on 5 outbound markets and, for each market, 4 databases are available:

- a. database of adventure travel tour operators;
- b. database of adventure specialized media;
- c. database of institutions related to adventure tourism;
- d. database of adventure events and exhibitions.

A- ADVENTURE SPECIALIZED AND ACTIVE TRAVEL AGENTES AND TOUR OPERATORS

Market research has identified the most important specialized tour operators for adventure activities in each outbound market as the numbers below:

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	France	Germany	Norway	UK	US	TOTAL
Identified tour operators	49	34	29	71	53	236
Total analysed	15	15	5	19	10	64

The information available for all 236 tour operators are:

- 1) outbound market
- 2) website
- 3) the main specialized adventure products marketed and sold

The list is detailed for each outbound market (France, Germany, Norway, the United Kingdom, the United States) in the market research, in chapter 4, entitled “Outbound market”.

In the Market Research, Annex 1 - Factsheets Tour Operators, 64 tour operators specialized in different typologies of activities and with clients’ different target have been chosen and analyzed. In this report, there is one factsheet for each tour operator selected with data about:

- the most important product offered;
- the main characteristics;
- sustainability communication (it reflects the Tour Operator’s emphasis on sustainability);
- analysis of tour operator’s website to commercialize it;
- classification of products used (by activities/ by country).

B – ADVENTURE SPECIALIZED MAGAZINE AND PORTALS

It is an important tool for figuring out market trends, segmentation, relations, and contacts. Market research, in chapter 4, “Outbound market”, mentions magazines and specialized platforms/websites for adventure tourism for each outbound market (France, Germany, Norway, United Kingdom, United States).

NUMBERS	France	Germany	Norway	UK	US	TOTAL
Media/Portals	23	23	11	23	16	96

The datasheet used to describe is:

- type: online/ magazine
- name
- web
- topic and description

MOST COMMON TOPICS
<ol style="list-style-type: none"> 1. General: natural travel, outdoor sport, adventure travel, 2. Specialized in one specific adventure activity chosen among: <ul style="list-style-type: none"> • Land sport: walking, trekking, hiking, climbing, mountain bike, winter sport (skiing, snowboarding, other), bike travel, horse. • Sea sport: diving, sea and river kayaking, sailing, fishing, surfing, paddle sport 3. Thematic: travel and photography; travel and gastronomy; travel and archeological and art; travel and family

C – INSTITUTIONS AND ENTITIES RELATED TO ADVENTURE TRAVEL IN OUTBOUND MARKETS

Market research, chapter 4, “Outbound market”, mentions the public institutions and entities as well as associations linked to adventure and nature activities adventure with, name, descriptions and contacts details for each outbound market (France, Germany, Norway, the United Kingdom, the United States).

INSTITUTIONS	France	Germany	Norway	UK	US
NUMBERS	10	14	7	12	12

D- ADVENTURE SPECIALIZED EVENT AND EXHIBITIONS

Moreover, the list of adventure tourism fairs has been selected in each outbound market in accordance with the importance of the touristic fair within the market and its relationship with adventure tourism.

FAIRS/EVENTS	France	Germany	Norway	UK	US
NUMBERS	11	15	7	8	18

The datasheet used to describe is:

- name;
- location;
- date;
- participants;
- website.

STEP 2 – BUILDING RELATIONSHIP WITH TRADE PARTNER

Market research lists some recommendations for selling products through tour operators. The process has been organized in four main work pages:

1. **Analysis of tour operators for:**
 - understanding the characteristics of the product sold;
 - matching the product with the travels offered by tour operator;
 - using keywords that draw the attention of the tour operators

It is possible to use the databases of step 1.

2. **Creation of a dossier with all information in the language of tour operators or in English about:**

- activities and itineraries
- accommodation
- practical information as transportation
- calendar or period
- age and levels

It is possible to use the results from the activity of phase 5.

3. **Attendance of specialized fairs with a commercial agenda.** Market research identifies the most important fairs and events dedicated to the adventure sector in France, German, Norway, the UK, and the US.

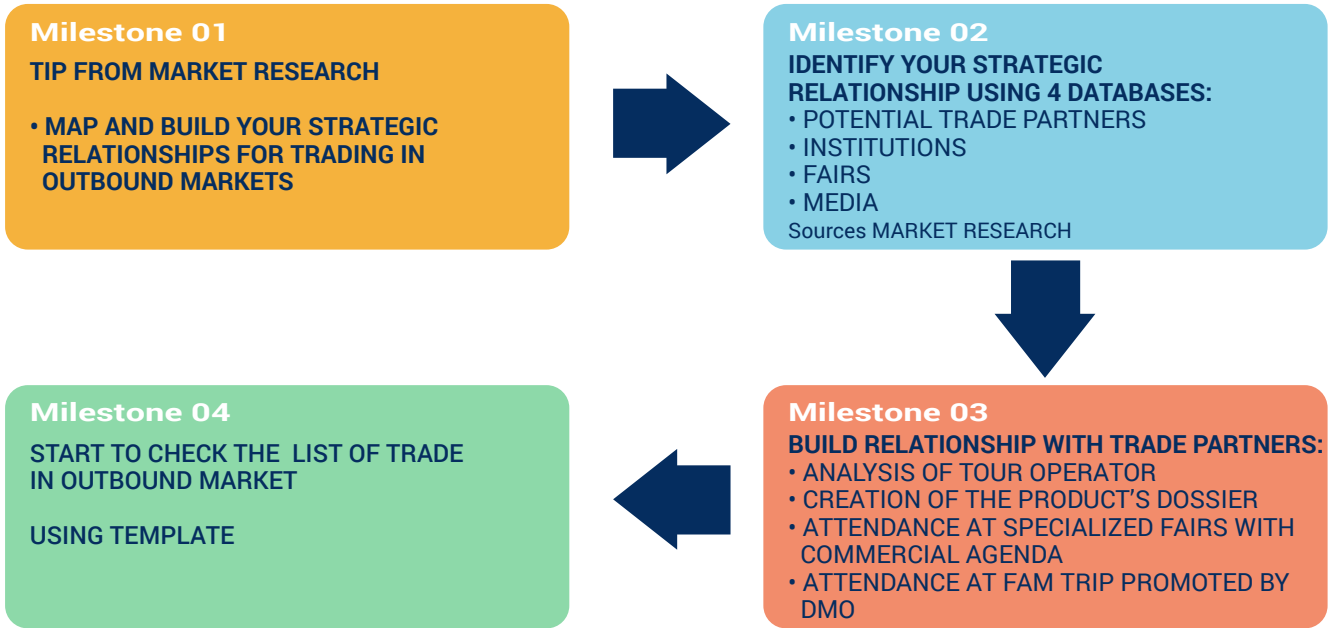
4. **Attendance at fam trips and workshops with buyers promoted by DMO to create and manage contacts.**

HIGHLIGHT:

MEDUSA project implementation includes specialized activities for marketing adventure products.

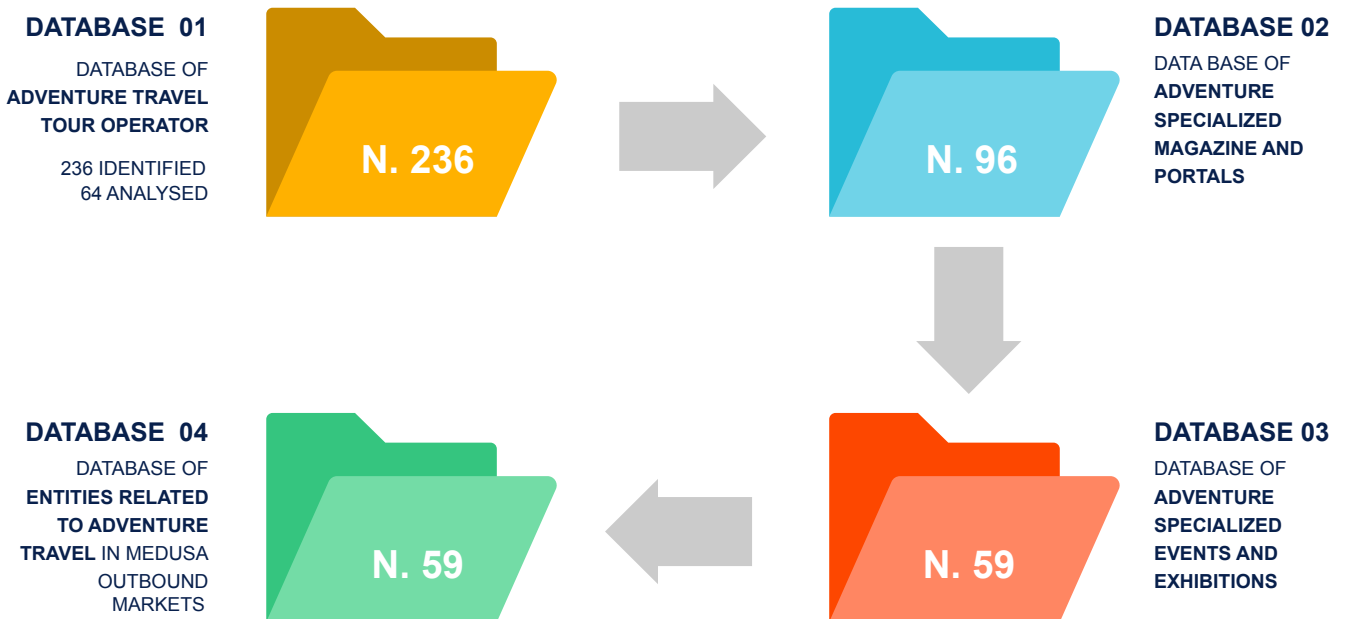


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MILESTONE 2:

DATABASES FOR STRATEGIC PARTNERSHIPS IN MEDUSA OUTBOUND MARKETS SOURCES MARKET RESEARCH



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TEMPLATE 6: CHECKLIST TO TRADE IN OUTBOUND MARKET

TOUR OPERATOR:	
1. LIST:	
2. TOUR OPERATOR FACTSHEET:	
General information (name address, post code, town, country, telephone number, email address, web page)	
Product offer:	Client type:
Main Characteristics:	Commercialization online yes/no
Sustainability communication:	Classification about the products used (by activities/ by country):
Website and social media	Newsletter:
NOTE	

ADVENTURE SPECIALIZED MAGAZINE AND PORTALS	
1. LIST:	
2. MAGAZINE AND PORTALS FACTSHEET:	
Name:	Type: online/magazine:
Website:	Topic/Description:
NOTE	

INSTITUTIONS AND ENTITIES RELATED TO ADVENTURE TRAVEL IN OUTBOUND MARKETS	
1. LIST:	
2. INSTITUTIONS AND ENTITIES RELATED TO ADVENTURE TRAVEL IN OUTBOUND MARKETS - FACTSHEET:	
Name:	Website:
Topic and descriptions of main activities:	Attendees:
NOTE	

ADVENTURE SPECIALIZED EVENT AND EXHIBITIONS	
1. LIST:	
2 ADVENTURE SPECIALIZED EVENT AND EXHIBITIONS FACTSHEET	
Name:	Location:
Date:	Website:
Attendees:	
NOTE	

MARKETING ACTIVITY OF YOUR DESTINATION	
Fam trip:	Workshops with T.O.:
Attendance to regional, national, fairs and events:	Attendance to international fairs and events:
NOTE	

DOSSIER FOR EACH PRODUCT TO COMMERCIALIZE	
1.	Activities and itineraries
2.	Accommodations
3.	Practical information: (i.e. transportation)
4.	Calendar or period
5.	Age



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ANNEX 1: HIGHLIGHTS FROM SWOT ANALYSIS OF COUNTRY RESEARCH

The 5 reports review destinations from a socio-economic, political, and environmental perspective make the five destinations accessible and understandable.

The 5 reports named Attractions, Inventory and Mapping for adventure tourism embed at the end the SWOT ANALYSIS about the gaps and opportunities of adventure travel in each destination. During the research, all partners have asked for a focus on comparative analysis to frame adventure travel trends in 5 destinations. During this activity, the Adventure Travel Trade Association had published the Adventure Tourism Development Index 2020. It is a *“benchmarking tool in the form of an index for destinations seeking to develop sustainable adventure tourism markets. The ATDI evaluates countries’ potential and readiness to compete in the global adventure tourism market based on their score on ten pillars”*. The ten pillars of Adventure market Competitiveness are organized in three factors as shown below:

Safe and Welcoming	Adventure	Readiness
Sustainable development	Entrepreneurship	Humanitarian
Safety	Adventure resources	Infrastructure
Natural Resources		Cultural Resources
Health		Image

The ATDI rankings 2020 is organized in two groups:

- Developed countries. Spain and Italy attend to this group. The top five are: Iceland, Switzerland, New Zealand, Germany, Norway;
- Developing countries. Jordan, Tunisia and Lebanon attend this group. The top five are: Czech, Chile, Slovak Republic, Slovenia, Israel.

All five partners are losing competitiveness and are ranked in the middle of their own group. They should aim to move into higher clusters.

The gaps identified in SWOT ANALYSIS confirm the difficulties and they have been organized in four main sectors, entrepreneurial ecosystem and entrepreneurial culture, innovation and environmental sustainability as presented below. These are common factors in all destinations with different nuances.

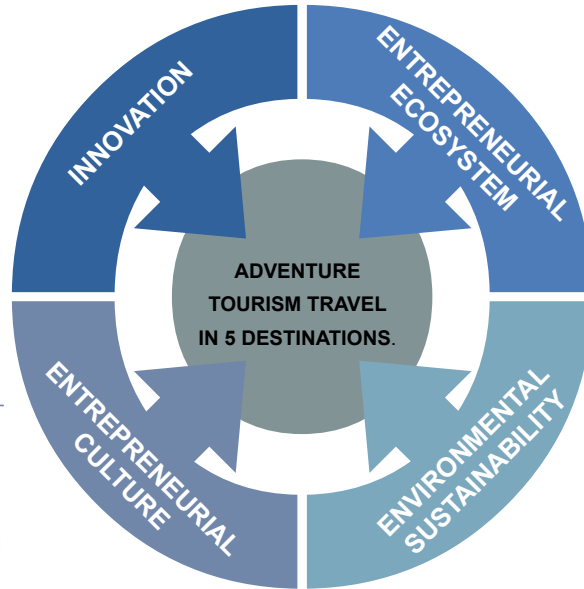
1. CUMBERSOME REGULATORY FRAMEWORK CATEGORISING COMPANIES WORKING IN ADVENTURE ACTIVITIES

2. LOW DIGITALIZATION

3. LOW LEVEL ABOUT CIRCULAR ECONOMY AND KNOWLEDGE ABOUT ITS APPROACH AND DESIGN

1. EXTREMELY SMALL SIZE OF MOST ADVENTURE TOURISM COMPANIES MAKES THEM MORE VULNERABLE

2. LOW COLLABORATIONS BETWEEN TOURISTIC SECTOR AND OTHER INDUSTRIES



1. LOW COLLABORATIONS AND COORDINATION BETWEEN TOURISM STAKEHOLDERS

2. LACK OF CLEAR AND DETAILED ROADMAP FOR THE DEVELOPMENT OF THE ALTERNATIVE TOURISM SECTOR INCLUDING ADT BETWEEN PUBLIC AND PRIVATE SECTOR

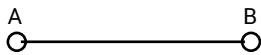
1. MORE EFFECTIVE PUBLIC REGULATORY FRAMEWORK FOR THE NATURE ACTIVITIES SECTOR

2. DETERIORATION OF NATURAL AND CULTURAL ASSETS AND NEW CHALLENGES DUE TO THE CLIMATE CHANGE

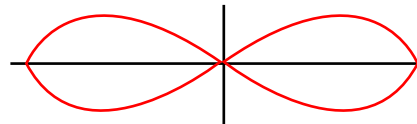
3. NATURE CONSERVATION AND MAINTENANCE ISSUES. WASTE MANAGEMENT

It is important to choose how to read SWOT ANALYSIS

In his book "The infinite game", S. Sinek writes that we can choose the mindset with which think:



Finite game



Infinite game

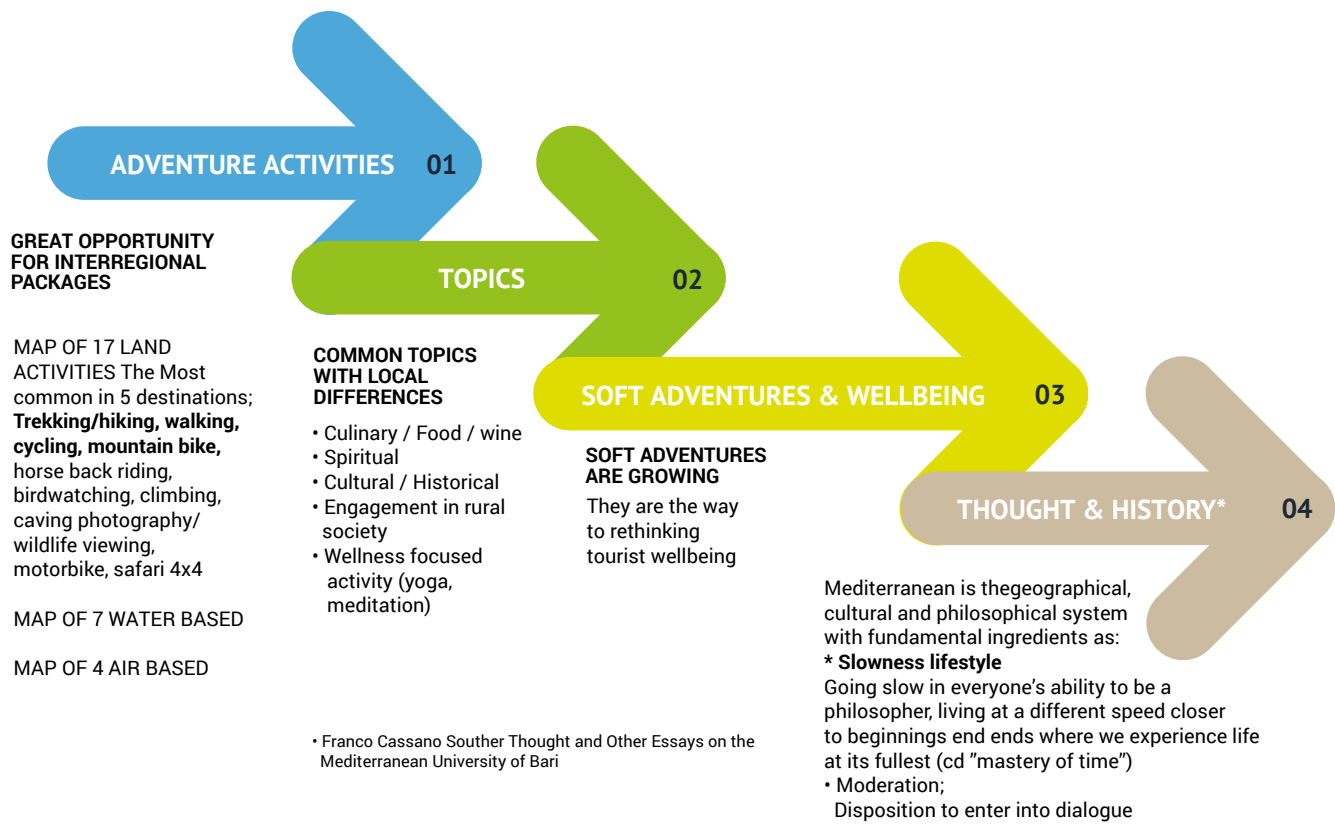
In the finite game, players are known, and the rules are fixed. Short term vision.

In infinite game, the rules are changeable and it is not defined by an end point "There is no such thing as winning or losing, there is no such thing as being the best, there's only ahead and behind and the goal is not to beat competition but overcome competition. The only true competitor in the infinite game is yourself."

For tourism sector it means:

- How do we make our products better than those offered before the pandemic?
- How should we accelerate the process of creating an optimal environment for people and companies to gather innovation and facilitate ideation?

Countries researches explains why these questions should be addressed altogether.



In fact, the researches describe that all five destinations have all the requisites for satisfying people's appetite for transformative and healing experiences and they share a lot of cultures and traditions, adventure activities, and important natural resources. There are great opportunities that became a relevant cluster of adventure touristic offers in the Mediterranean area and the activities of the Medusa project can help to frame this idea, starting with specific and concrete steps as below.



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ADVENTURE ACTIVITIES MED CLUSTER FOR BETTER INTERREGIONAL OFFER

COMPARATIVE ADVANTAGES

THE DESTINATIONS HAVE ALL FACTORS FOR SATISFYING PEOPLE'S APPETITE FOR THE TRANSFORMATIVE AND HEALING EXPERIENCES

THE DESTINATIONS HAVE SOCIAL, ECONOMIC, RESOURCES AND DMO TO MAKE A GOOD CLUSTER WITH CLEAR FOCUS

MEDUSA GLOBAL MARKET RESEARCH

WHAT? ADVENTURE INTERREGIONAL PACKAGES

ABOUT TOP ACTIVITIES

FOR EXAMPLE WALKING &HIKING, TREKKING, LEISURE CYCLING, MOUNTAIN BIKING

EACH ACTIVITY SHOULD MULTIPLY FOR DIFFERENT TOPIC
CROSS-EXPERIENCES: CULINARY, SPIRITUAL, CULTURAL, LEISURE

START WITH MEDUSA SUB-GRANT ACTION TO CREATE ADVENTURE PRODUCTS

HOW?

- LED BY COMMUNITY:**
NETWORKING STARTING FROM PILOT AREAS
WORKING TOGETHER FOR INNOVATION,SUSTAINABILITY ENTREPREUNERSHIP START WITH
- MEDUSA MARKETING PLAN BETWEEN 5 DESTINATIONS
 - 5 STEWARDSHIP PLANS

WHAT'S NEXT?

AT THE END OF PROJECT WE SHOULD FIGURE OUT STARTING FROM SWOT ANALISYS AND THE RESULTS OF THE MEDUSA ACTIVITIES THE FEASIBILITY OF THE DEVELOPMENT OF THIS CLUSTER

DIRECTION: PHI DIGITAL HUB OF ADVENTURE TOURISM ECOSYSTEMS (KNOWLEDGE ECOSYSTEM, INNOVATION ECOSYSTEM, BUSINESS ECOSYSTEM) TO CREATE THE BEST ENVIRONMENT TO GUIDE TRANSFORMATIONS IN EXPERIENCE ECONOMY BY IDEATION AND IMMAGINATION TO DRIVE MINDSET CHANGES, BY LEARNING TO DESIGN STRATEGIES, BY NEW OPERATIONAL STANDARDS

Facing the gaps identified by SWOT ANALYSIS, needs innovative design choices and imagine this cluster as a phi digital hub of adventure business' eco-systems where knowledge ecosystem, Innovation ecosystem and Business ecosystem (focused on creating customer value) are connected to producing the drive for change. Working together by 2022 to produce a basket of adventure products from the 5 destinations and sharing marketing strategies to promote them and all other activities to enhance new operational standards will help to shape this scenario



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ANNEX 2: LIST OF ICONS' ATTRACTIONS AND ACTIVITIES

Team of experts of country research coordinated by Puglia Region has shared the list below to make it easier to recognize activities among the destinations.

The companies in the Medusa project could share the same list to make it easier to compare between the pilot areas of 5 destinations.

1. LIST OF ACTIVITIES FOR ICONS RELATED TO MAP OF ADVENTURE ACTIVITIES

Land based activities and winter activities are done on land, mountains, snow, rock

Archeological expedition	Climbing (Mountain, rock)	Running / cross country*
		
Walking	Trekking	Abseiling
		
Hiking	Mountain bike*	Zip lining
		









Cycling 	Caving 	Eco-Tourism
Birdwatching 	Motorbike 	Observation of flora, fauna
Horseback riding 	Getting to know the locals 	Camel trekking*
Canyoning* 	Astrology / stargazing 	Camping




Quad biking 	Safari* 	Four wheel drive excursions 
Yoga, meditation 	Golf 	Winter activities (skiing, snowboarding) 
CULinary activities 	Eco-adventure park 	Educational program 
Photography/Wildlife viewing 	Archery 	Orienteering 





Water based activities are experienced in the sea, rivers, lake, water reservoirs of dam

Rafting	Surfing	Kayaking/sea/white-water
		
Sailing	Canoeing	Wet canoeing*
		
Snorkelling	Cruise	Scuba diving
		
Fishing	Swimming / bathing	Water trails
		

Paddle boarding*	Kite Surfing	Hot springs, mineral springs
		

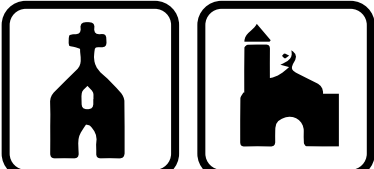

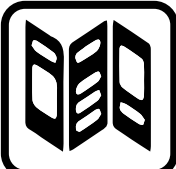

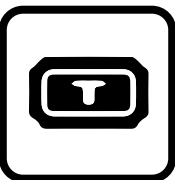







Air base activities involve jumping off from great heights that could be from an aircraft or from a high elevation landscape

Hot air ballooning*	Paragliding*
	

2. LIST OF NATURE ATTRACTIONS TO SELECT ICONS FOR NATURE MAP

National park	Protected area	Naural reserve
		

3. LIST OF ICONS FOR CULTURAL ATTRACTION

Religious venue, temples, mosques	Unesca heritage*	Open air museum
		
Historical site	Festival / event	Architectural treasures (palace, etc)
		
Walking tours	Educational program culinary experience	Museum and exhibitions
		
Traditional cultural experience	Art & craft	Fort
		

MAIN RESOURCES

Adventure travel Trade association studies as below:

- Taste the adventure Exploring the intersection of food experiences and adventure travel
- Tourism perceptions of Tuscany, June 2017
- Adventure travel trade perceptions of Catalonia, July 2017
- Jordan and the Near East: an emerging adventure destination, June 2019
- The State of Gear Purchasing in the Adventure Travel Industry, January 2020
- Adventure travel trend snapshot, April 2019
- Adventure Tourism Development Index, Report 2018, Report 2020

UNWTO Global report on Cultural Routes and Itineraries 2015

Vicky Katsoni Marival Segarra-Ona Smart Tourism as a driver for culture and sustainability Fifth International Conference IACuDIT Athens 2019 Springer International 2019

Eduardo Fayos- Solà- Chris Cooper. The future of tourism Springer International Publishing 2019

Steve Taylor, Peter Varley, Tony Johnston adventure tourism, meanings, experience and learning Routledge Taylor & Francis Group 2013

B. Joseph Pine II, Jonas H. Gilmore The Experience Economy Updated edition Harvard Press 2011

B. Joseph Pine II The experience economy: past, present and future Researchgate 2013

A. Rossi a M. Goetz. Tourist experience design Hoepli 2020

Nicholas Hall, Ceo Digital Tourism Think Tank Best tips on how to be resilient, innovative and purpose-driven December 2020 www.thinkdigital.travel

Carolina Bremner Accelerating Travel Innovation after Coronavirus Euromonitor International November 2020

Ellen MacArthur Foundation Design and the circular economy www.ellenmacarthurfoundation.it

M. Goetz, Imagination Design Coaching Il designer come generatore di futuro: immaginazione, conoscenza, emozione e desiderio, nei processi di design nell'era della complessità [https:// Medium.com](https://medium.com) Apr. 27 2021

Boundaryless conversations Podcast Experience Platforms: Staging Experiences through an Ecosystem - with B. Joseph Pine II – Nov 2020.

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