

# **Adventure Travel Trade Association**

## **2014 U.S. Adventure Traveler Pulse**

**U.S.  
Adventure Pulse**



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Lead Researcher  
Towson University



# [Agenda]

- **Global adventure market sizing**
- **U.S. Adventure Pulse methodology**
- **U.S. Adventure Traveler Segmentation**
- **Key Characteristics of Grazers/Adventurers/Enthusiasts**
- **Traveler Motivations**
- **Use of Tour Operators**
- **Trip Satisfaction**
- **Media Behavior**
- **GenY Behavior**
- **Key Take-Aways and ATTA Advice**





# [What is Adventure Travel?]



We define adventure travel as having three attributes: interaction with the environment, physical activity and cultural exchange. When two of these are present it is adventure travel. The best adventure travel trips include all three elements.





ADVENTURE  
**TRAVEL**  
MARKET STUDY  
2013

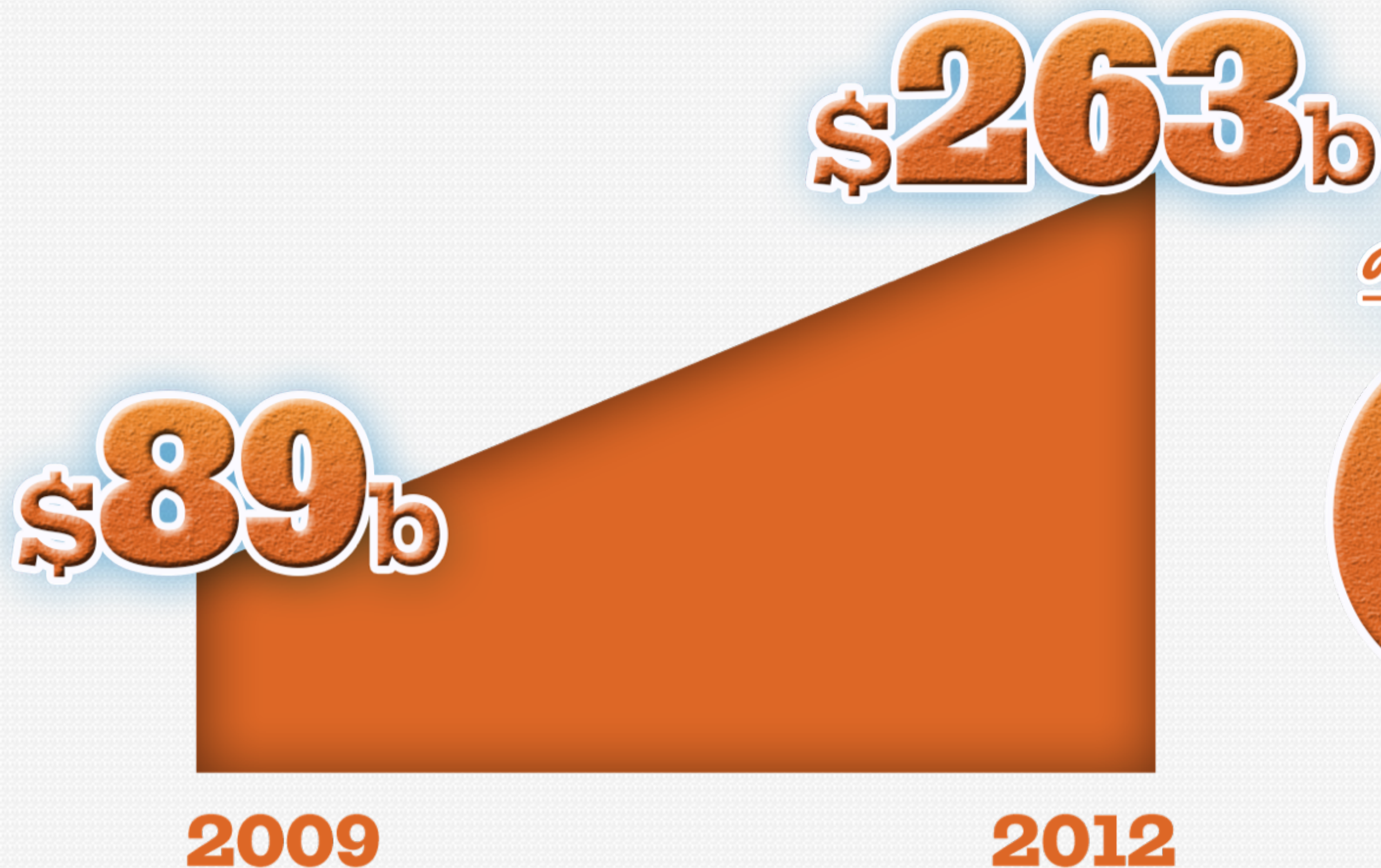
# Global Adventure Travel Market Sizing





# [Market Sizing]

ADVENTURE  
TRAVEL  
MARKET STUDY  
2013



annual growth since 2009

65%





# [Traveler Trends]

ADVENTURE  
**TRAVEL**  
MARKET STUDY  
2013

# 40.6%

**of international travelers  
have engaged in an  
adventure activity**





# U.S. Adventure Pulse





# [Methodology]

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- **Online survey**
- **1700 travelers, age 18 and older**
- **11 U.S. geographical areas:**

**Boston**

**New York**

**Washington, D.C.**

**Miami**

**Chicago**

**Austin**

**Denver**

**San Francisco**

**Los Angeles**

**Phoenix**

**Seattle**





# [U.S. Adventure Pulse Results]

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The full dataset provides the following information about U.S. adventure travelers:

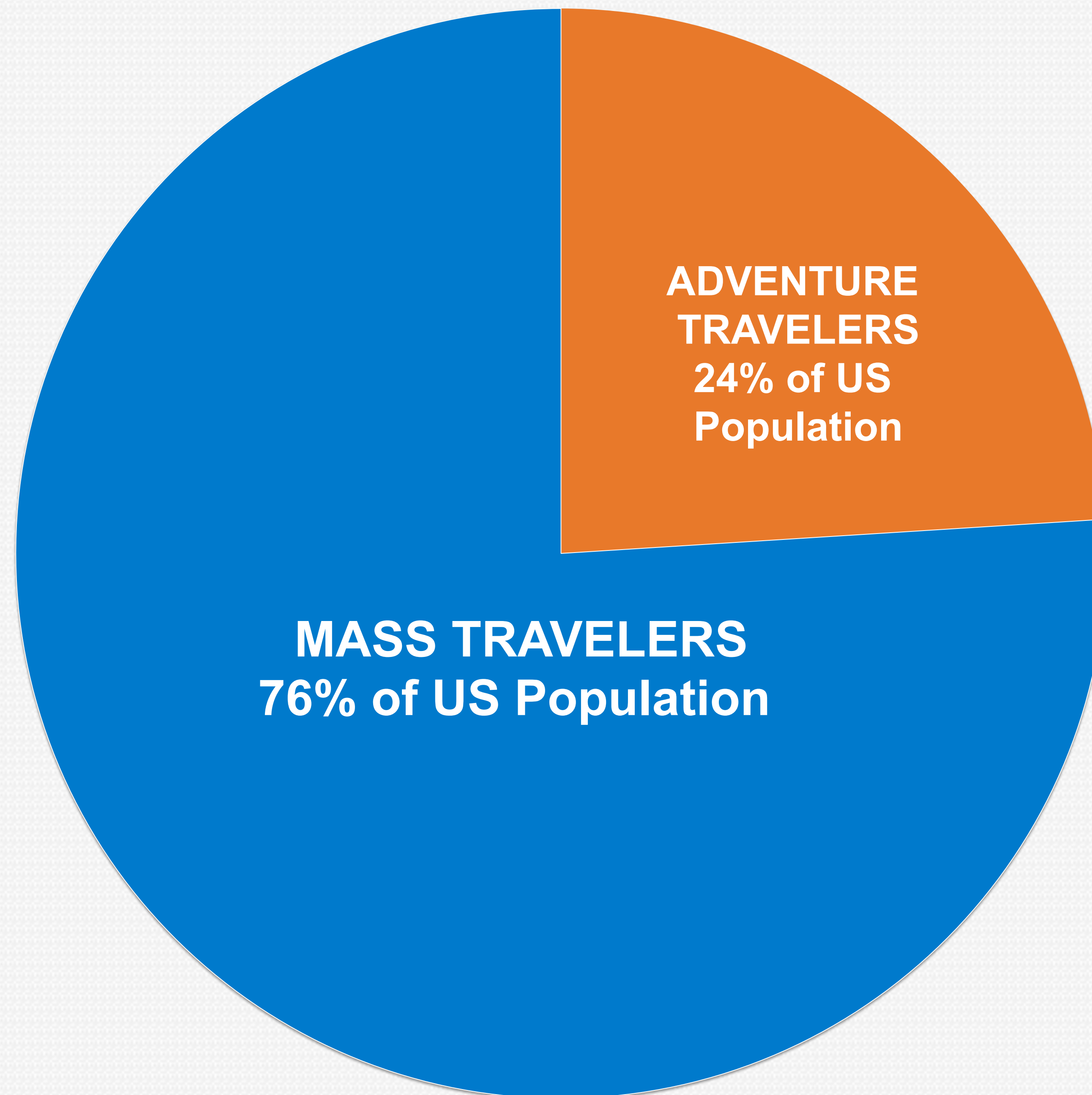
- **Basic demographics**
- **Motivation**
- **Appetite for risk and thrill**
- **Behavior in Dream-Search-Plan-Remember**
- **Trip cost, destination, activities**
- **Post-Trip (satisfaction and sharing)**
- **Attitudes toward brands**





# [Activities-Based Segmentation]

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# [Personas Defined]

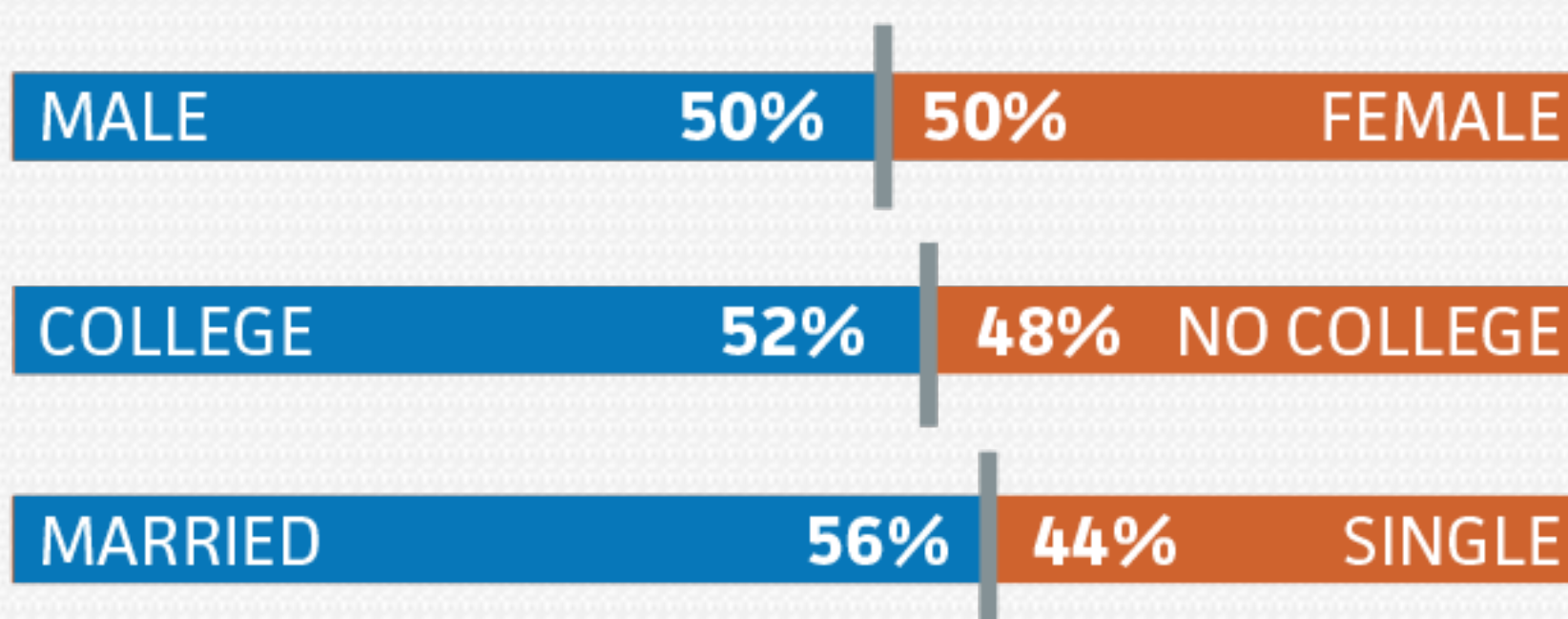
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## ADVENTURE GRAZERS

**24% of U.S. Population**

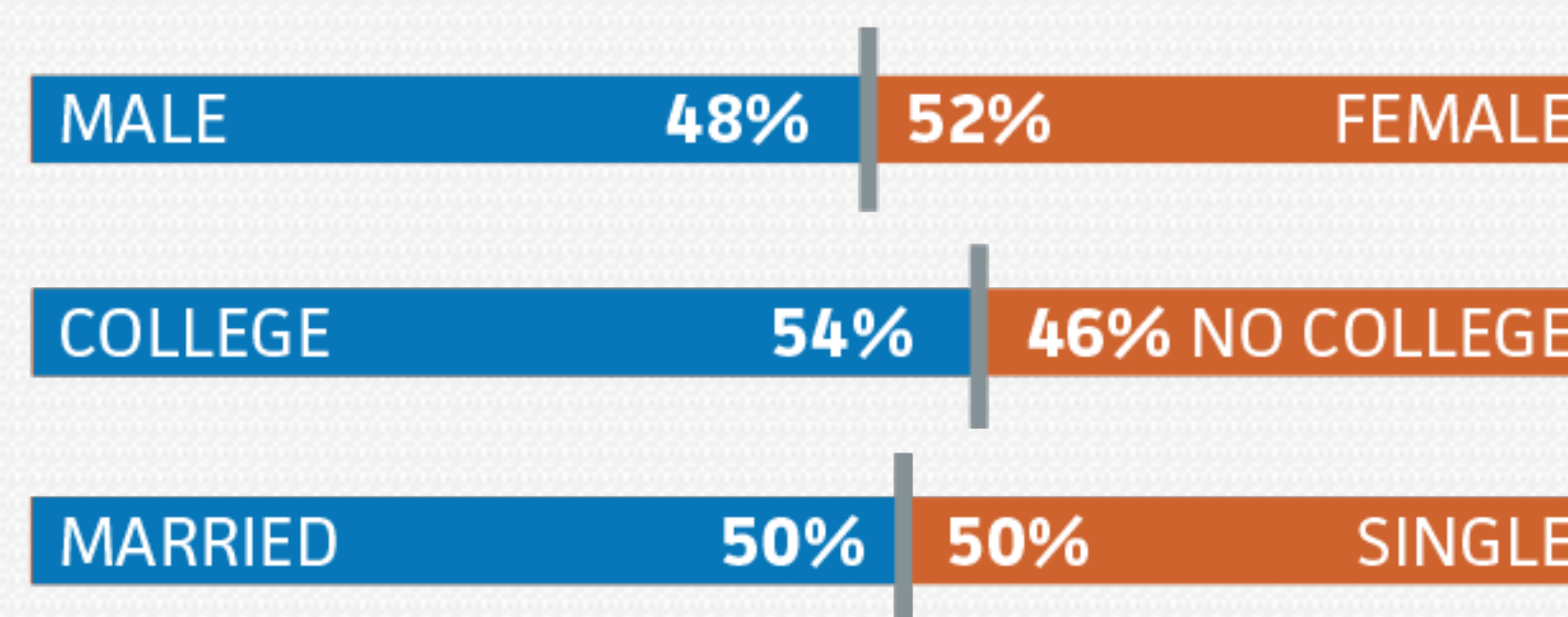
Novice and first-time participants of adventure activities, eager to sample and move through their 'bucket list.' Accept moderate risk.



## ADVENTURERS

**20% of U.S. Population**

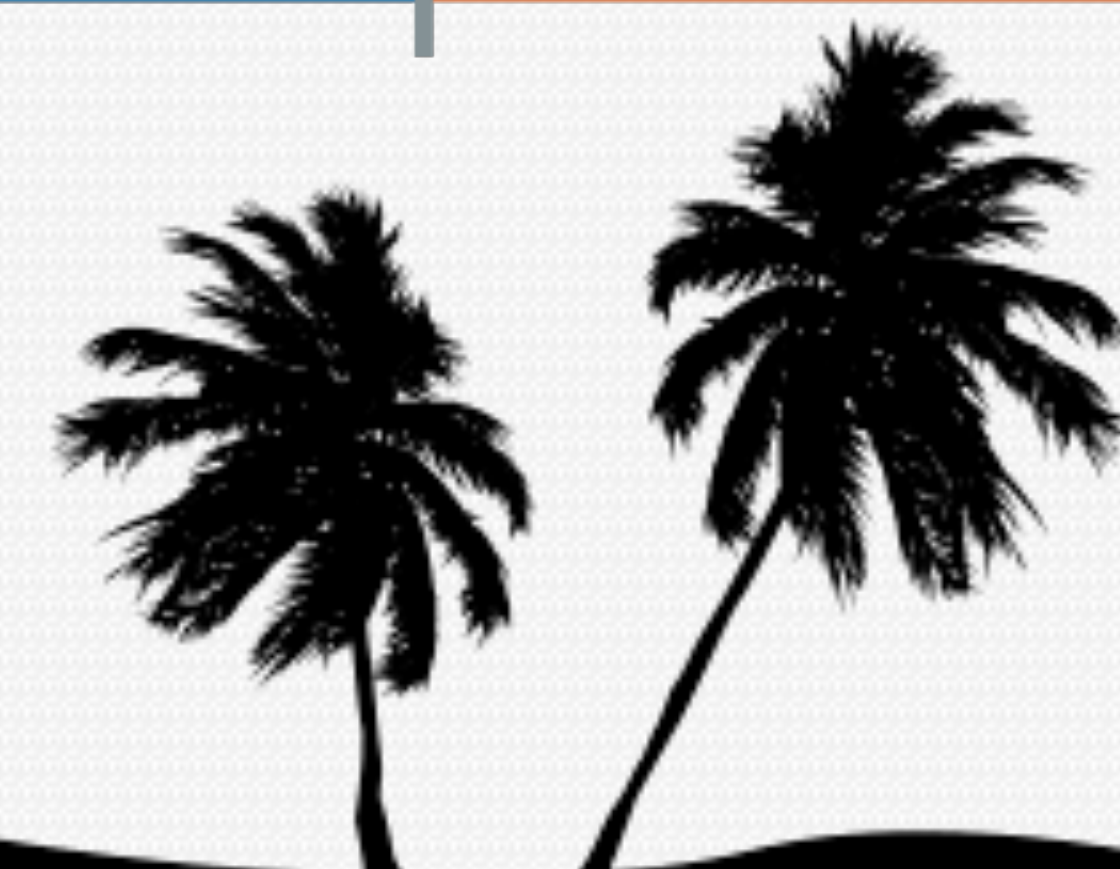
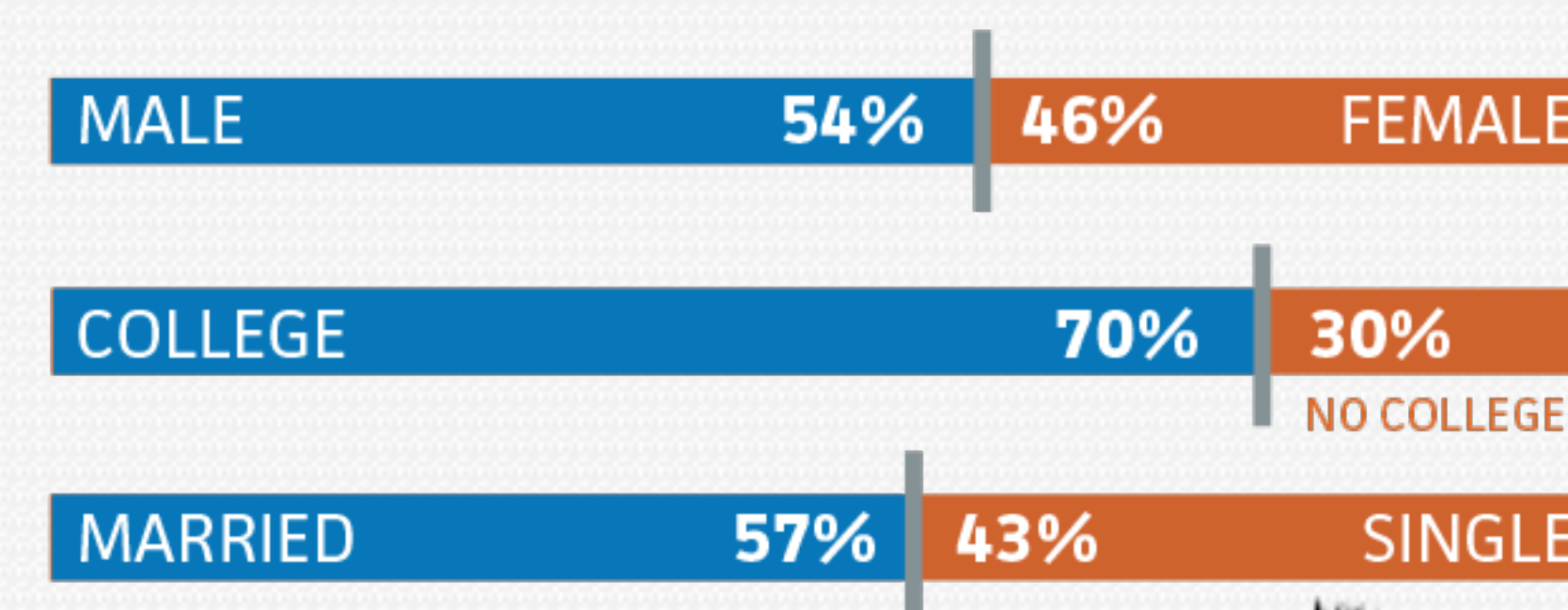
Intermediate, thrill-seeking repeat participants in a favorite adventure activity. Accept moderate risk.



## ADVENTURE ENTHUSIASTS

**8% of U.S. Population**

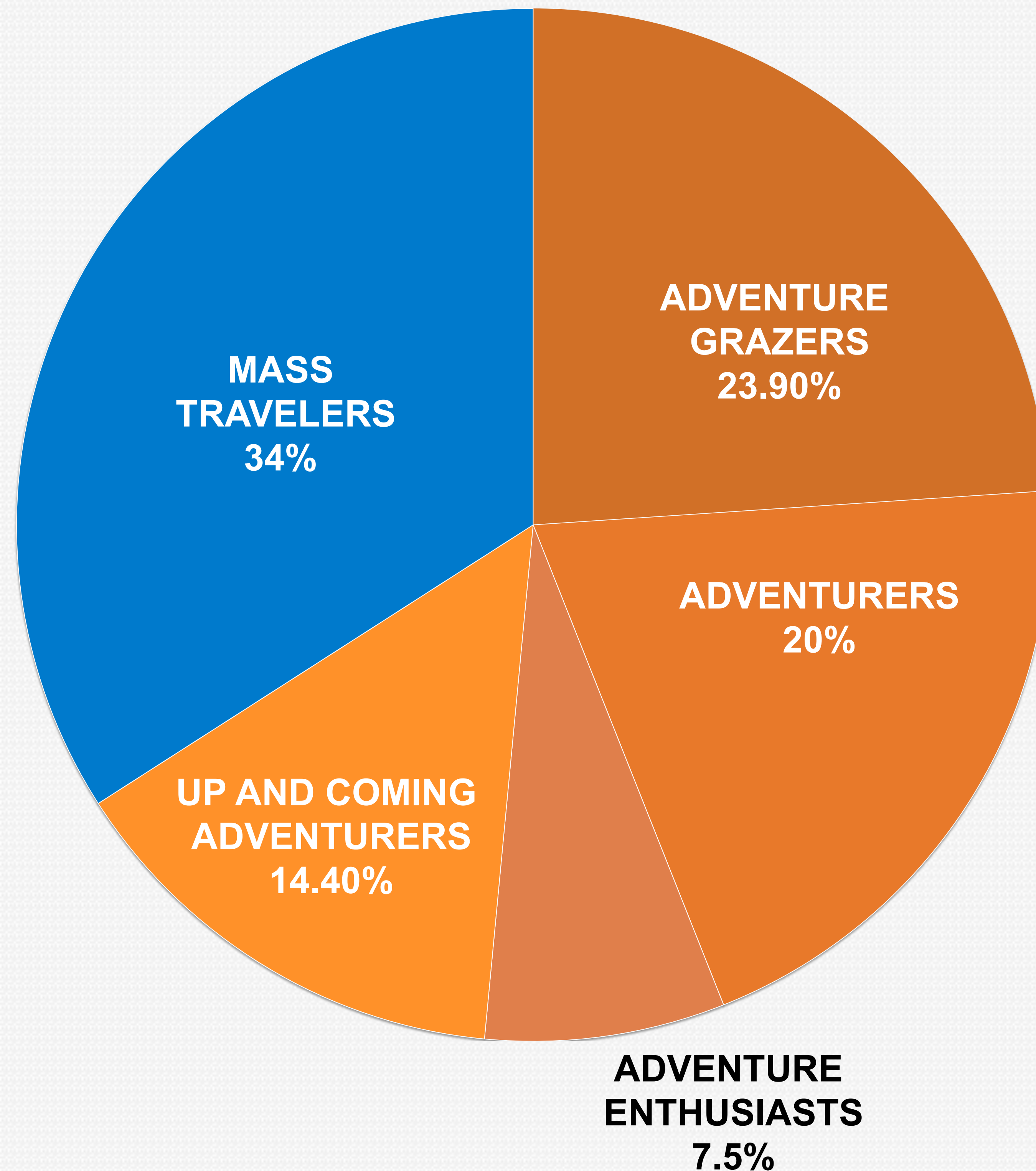
Advanced, skilled practitioners of a favorite adventure activity. Accept high risk.





# [U.S. Traveler Segmentation]

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# [Key Characteristics of the Grazer]

## DEMOGRAPHIC

A Younger professional (equally male or female), living with a friends in a major city area.

Aged 18 to 40, HHI \$75k.

## RISK

Takes some risks when on vacation and seeks maximum thrill

## PERSONAL VALUES

Wants to accomplish something





# [Key Characteristics of the Adventurer]

## DEMOGRAPHIC

Probably a middle-aged female (53%), most likely with children, although, probably from previous marriage as 51% are unmarried

College level education (53%), working or stay-at-home mom in a major city area. Aged 18 to 40, HHI \$75k.

## RISK

Enjoys Risk and thrill but manages these by acquiring proficiency in the activity undertaken.

## PERSONAL VALUES

Values family and security first, and also wants to accomplish something





# [Key Characteristics of the Enthusiast]

## DEMOGRAPHIC

More likely a **male** (54%),  
boomer (41 – 70),

**College** educated

**High earner** - HHI \$81k

## RISK

An **expert** in the activity undertaken. Always strive for a **new challenge**, but with **measured risk**

Like to push his **physical limits** (48%) and seeks thrill

## PERSONAL VALUES

**Early adopter** and an opinion leader. He values **accomplishment** not because a personal risky challenge he sets for himself, but because of the level of **expertise** and the **risk control** he has achieved over the years





# MOTIVATIONS

**ADVENTURE GRAZERS**

**ADVENTURERS**

**ADVENTURE  
ENTHUSIASTS**



**FAMILY TIME**



**RELAXATION**



**EXCITING NEW ACTIVITIES**





# BOOKED WITH A TOUR OPERATOR OR TRAVEL ADVISOR\*

ADVENTURE GRAZERS

ADVENTURERS

ADVENTURE  
ENTHUSIASTS

GRAZERS

36%



ENTHUSIASTS

48%

ADVENTURERS

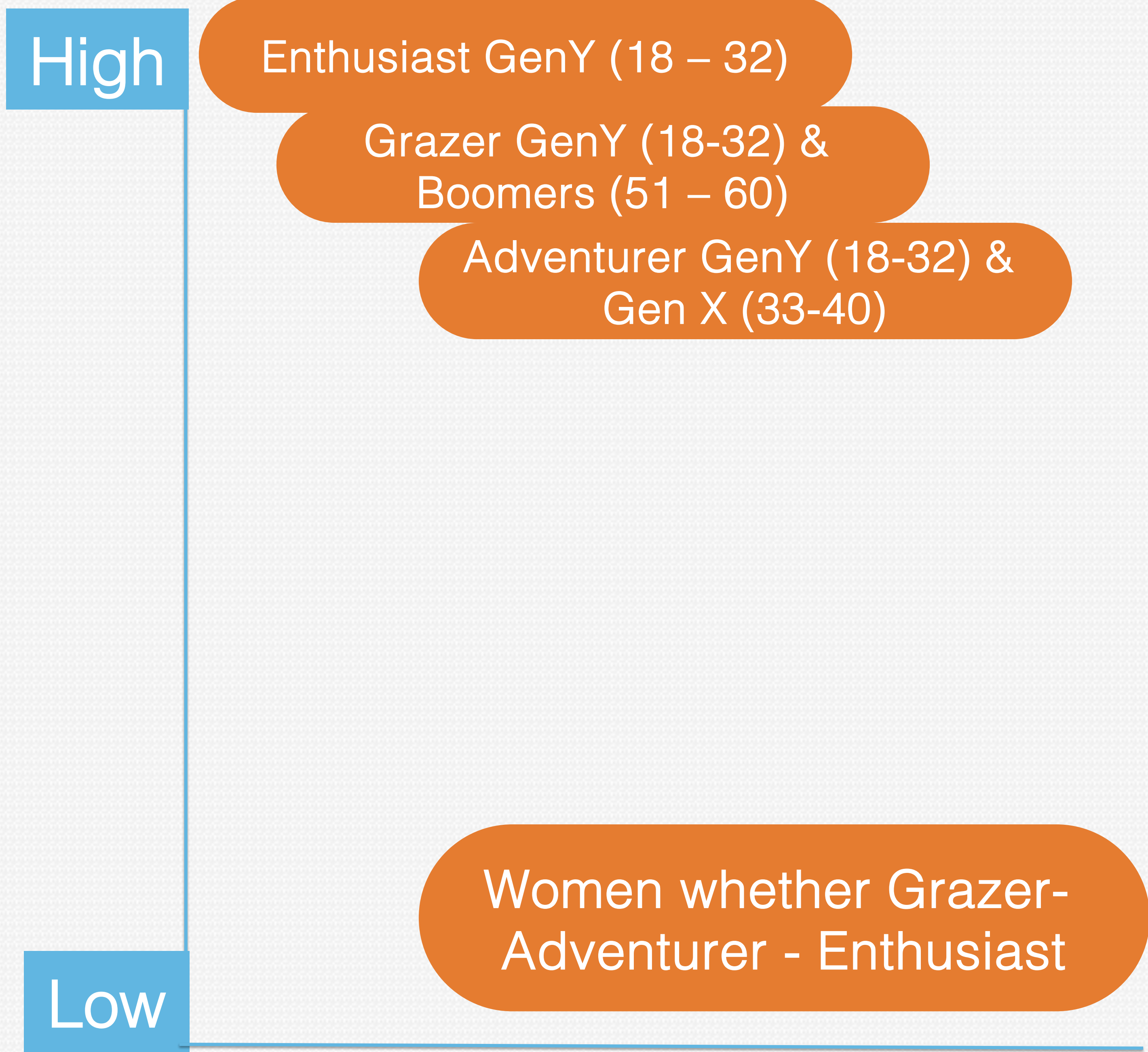
37%

\* At least part of the trip





# [ Closer Look: Likelihood of Using an Intermediary ]





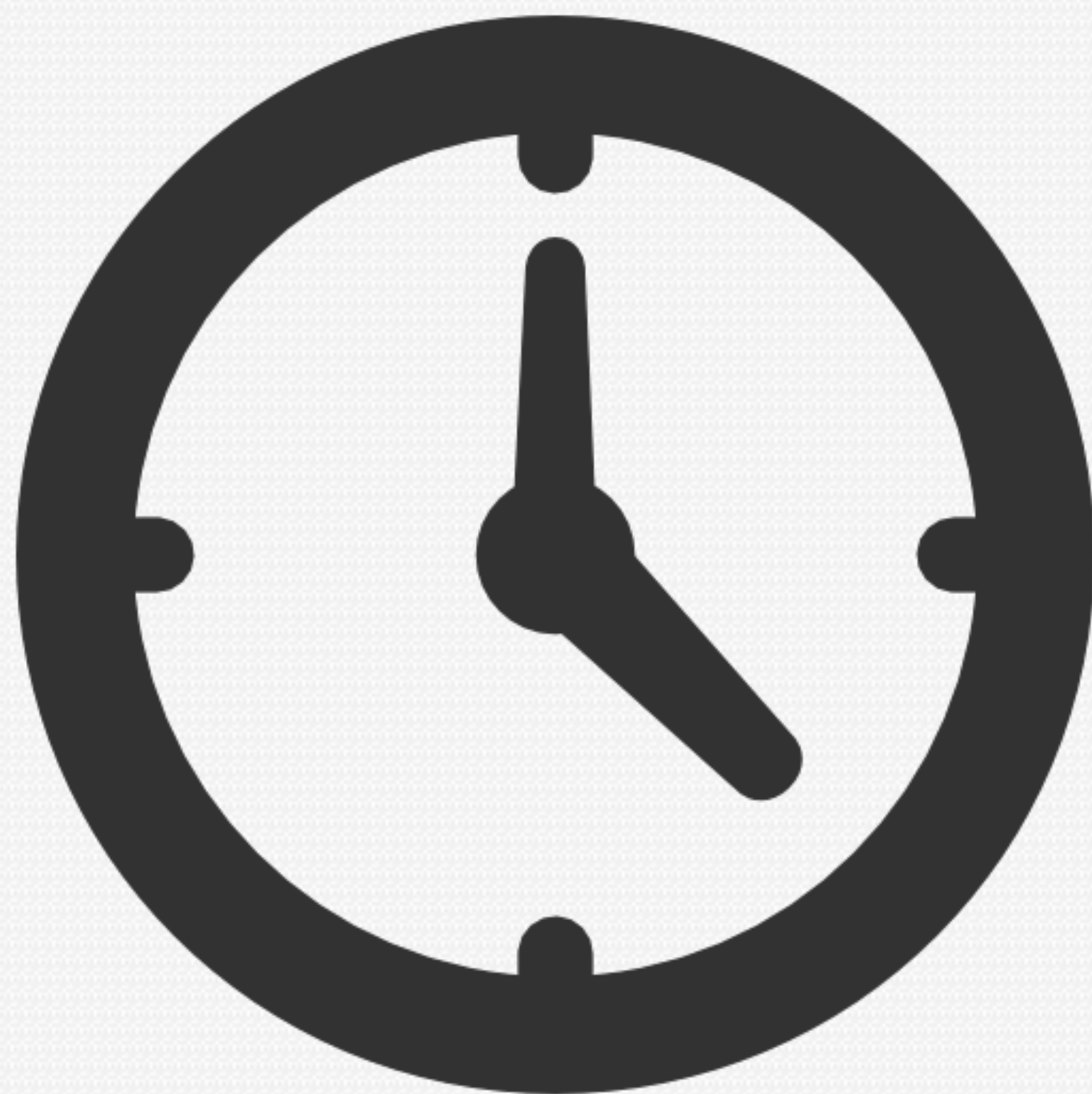
# [Why They Use Intermediaries]

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**ADVENTURERS  
ENTHUSIASTS**

Value Knowledge



**GRAZERS**

Value Time





# [Why They Don't Use Intermediaries]

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**FLEXIBILITY**



**BETTER DEALS**





# [Likelihood of Booking with a Tour Company Prior to Departure]

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GRAZERS



ENTHUSIAST



ADVENTURER



Low

High

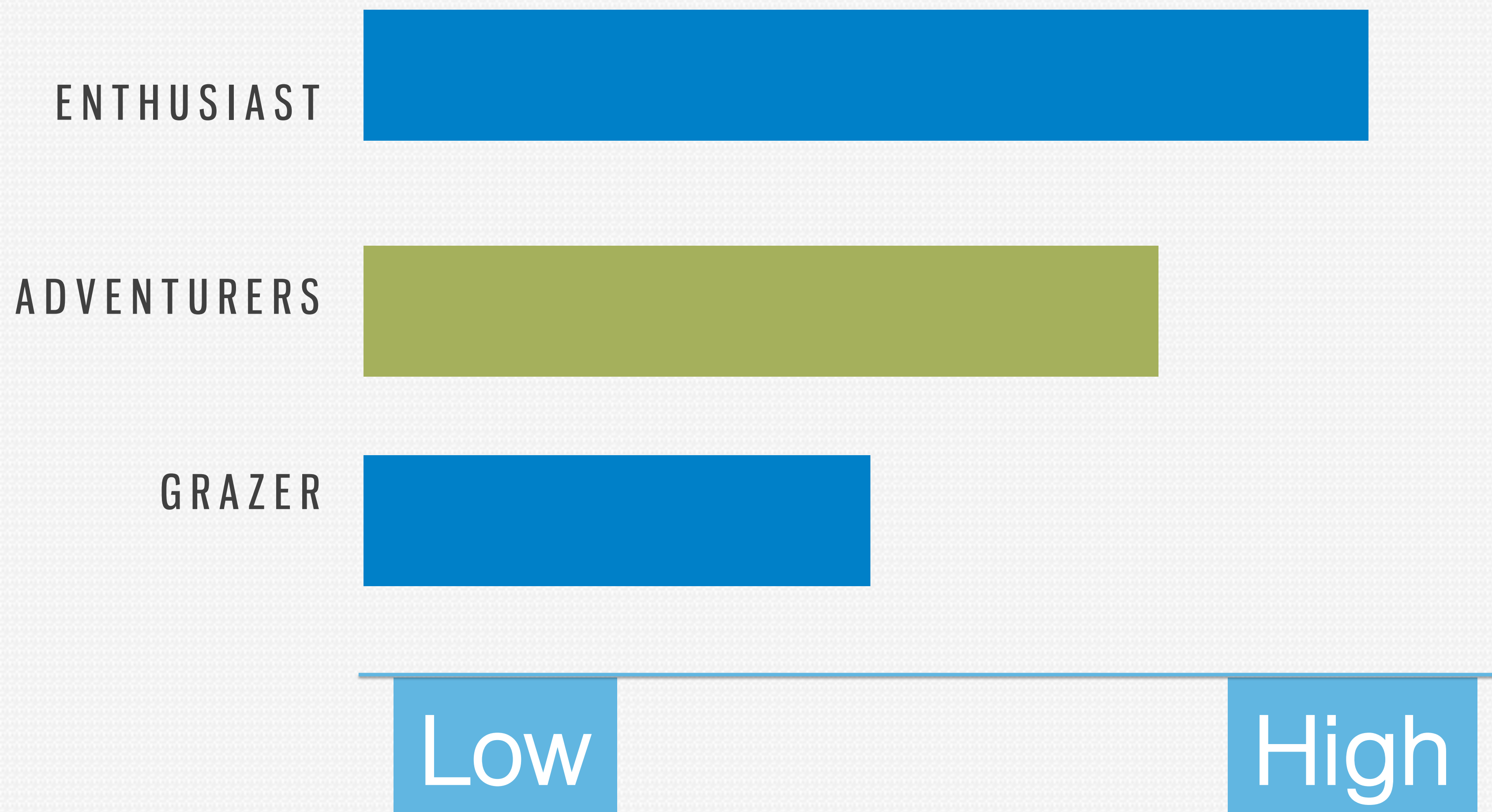
Lead time for all personas: 1 – 4 months





# [Likelihood of Paying a Local Guide Prior To Departure]

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# LIKELIHOOD TO RECOMMEND A SIMILAR TRIP TO A FRIEND\*

## ADVENTURE GRAZERS

88%

TELL FRIENDS AND FAMILY  
SOCIAL SHARING, DURING  
SOCIAL SHARING, AFTER  
TRAVEL WEBSITE

41%

21%

18%

11%



## ADVENTURERS

Over 80 percent!

89%

\* FOR TRAVELERS USING A TOUR OPERATOR OR TRAVEL ADVISOR

TELL FRIENDS AND FAMILY  
SOCIAL SHARING, DURING  
SOCIAL SHARING, AFTER  
TRAVEL WEBSITE

42%

19%

21%

13%

## ADVENTURE ENTHUSIASTS

83%

TELL FRIENDS AND FAMILY  
SOCIAL SHARING, DURING  
SOCIAL SHARING, AFTER  
TRAVEL WEBSITE

39%

19%

15%

18%





# [Media Behavior]



GRAZER

New Media



ADVENTURERS

New Media



ENTHUSIASTS

Traditional Media







# GEN Y

young adventure travelers





# [Young U.S. Adventure Travelers]

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Percentage of GenY (18 – 32) travelers within each persona

**GRAZERS**

**24%**

**ADVENTURERS**

**29%**

**ENTHUSIASTS**

**29%**





# [GenY Grazers and Adventurers Book On Their Own]

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*GenY Grazer and Adventurers are more likely to book on their own than GenY Enthusiasts.*

**GRAZER**

**63%**

**ADVENTURER**

**63%**

**ENTHUSIAST**

**40%**



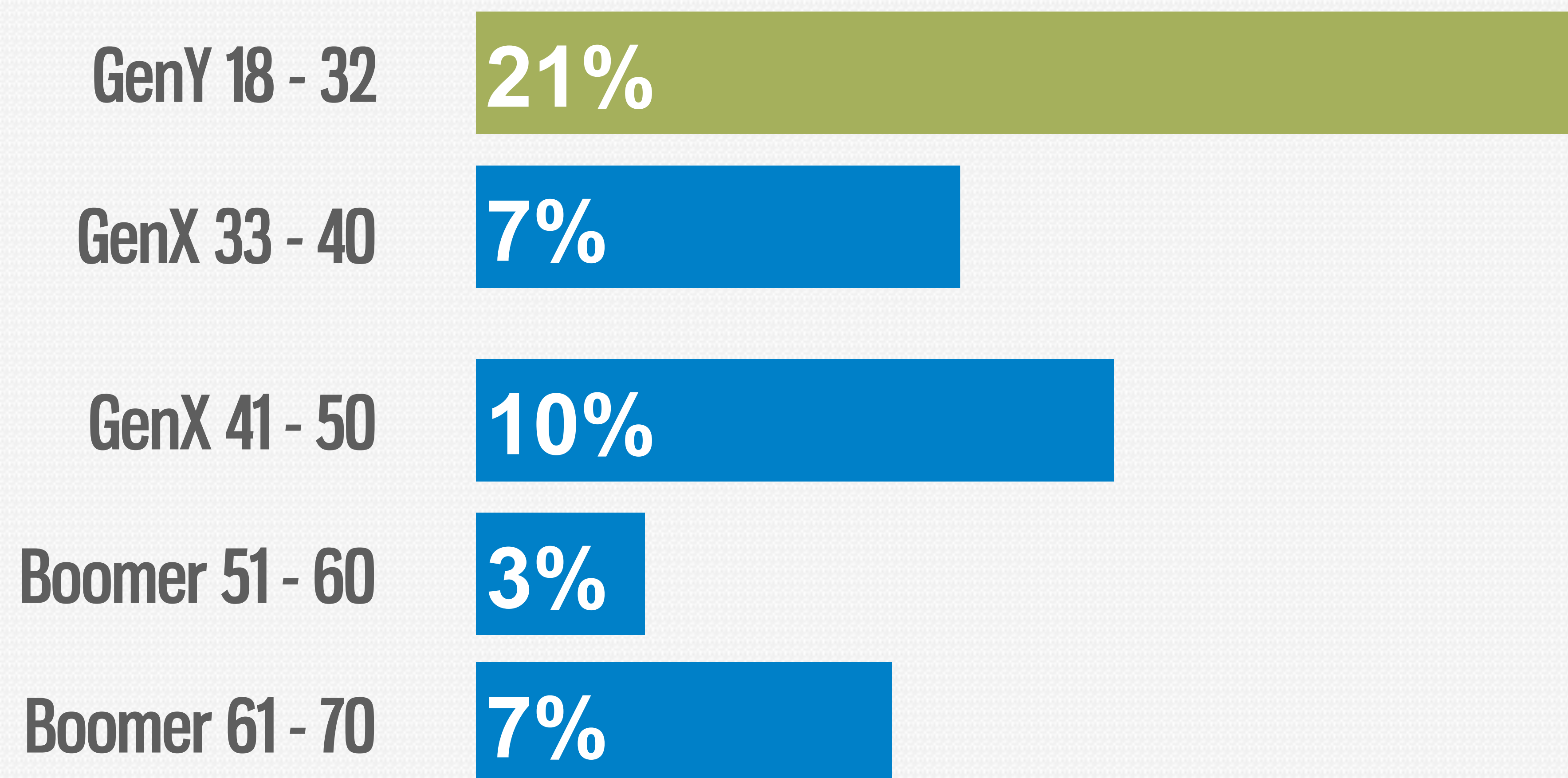


# [GenY Enthusiasts Most Likely To Use Tour Companies]

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*Looking at Enthusiasts from all personas, Gen Y Enthusiasts age 18- 32 are the most likely to use tour companies.*





# [Take-Aways]

## If You Are An Agent or Tour Operator

- When marketing to Grazers, emphasize ability to save them precious time
- When marketing to women enthusiasts, the group most likely to have booked with a agent in the destination
- Emphasize your ability to help with booking specific activities
- An app for Grazers or a web tool for enthusiasts could be very valuable





# [Our Advice]

**A** Determine which adventure persona will do the best for you: sometimes targeting influencers (such as the enthusiast market, even though its smaller can be a good idea, for example)

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**B** Target your product to the right adventure persona

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**C** Tune your message to their values and their motivations, address their concerns

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**D** Distribute your message via a medium that they are likely to see





# THANK YOU!

## QUESTIONS?

Send an email to  
[info@adventuretravel.biz](mailto:info@adventuretravel.biz)

Subject: *Adventure Pulse Research Question*

