

The European market potential for adventure tourism

Europeans love adventure travel. Every year, Europeans make 100 million adventure trips in another country. Besides there being many adventure travellers, they also contribute immensely to the local economies they visit: two-thirds of all travel expenses of adventure travellers are spent on location. Europeans seeking unique experiences, plus changes in technology and the growing interest in wellness experiences are affecting the adventure tourism market, offering you many opportunities.

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1. Product description

One of the [many definitions of adventure travel](#) is a trip that contains at least two of these three elements: physical activity, natural environment and cultural immersion. Adventure tourism also often involves risk and some skill from the tourist.

Adventure tourism contributes greatly to local economies: approximately two-thirds of the money spent on adventure travel stays on location. This is approximately €350 per day per visitor on average.

Adventure travel can be divided into soft and hard adventure travel:

Soft adventure travel is relatively safe and hardly requires skills and experience. Some examples include backpacking, birdwatching, camping, canoeing, fishing, hiking, horseback riding, kayaking, safaris, sailing and surfing.

Hard adventure travel is riskier and requires more skills and experience. Examples include caving, rock climbing and trekking. Sometimes soft adventure activities become hard adventure activities, such as kayaking in a wild river, hiking in extreme weather or on high altitudes, etc. In addition, danger and skill are not firm concepts and may vary greatly depending on the tourist's own perception.

Figure 1: types of hard and soft adventure tourism



Source: [Adventure Travel Trade Association](#)

In addition to helping you choose between hard and soft adventure travel, figure 1 can help you further narrow your focus. Note that some activities can be combined; tourists interested in birdwatching for example, will probably also be interested in safaris.

A specific form of hard adventure tourism is thrill tourism, which consists of activities of higher risk than other forms of travel. Mountaineering and white-water rafting are examples of activities associated with thrill tourism.

Market segmentation

Adventure tourists are very diverse, but many have certain features in common. European adventure travellers have disposable money to spend and are well educated; they are young on average, especially in hard adventure activities. [Generation Y and Z](#) are well presented and are interested in authentic experiences and connecting with local people.

Based on age and level of enthusiasm, there are four segments in adventure tourism (Figure 2).

Figure 2: Adventure travel segments



Low specialism adventure travellers are mostly interested in a range of soft adventure tourism activities and like to alternate it with other activities, like cultural excursions. This is the largest segment.

Tips:

Develop a [clear proposition](#), where you focus on one of the segments in figure 2.

Collaborate with other tour operators to offer a diverse proposition of soft adventure activities to attract leisure adventure travellers.

Make sure your proposition is at least partly child friendly, as many leisure adventure travellers bring their children. For example, when offering kayaking tours, also offer a tour [suitable for children](#).

High specialism adventure travellers will also be doing different activities but will probably have a clear focus on one often hard tourism activity. They tend to spend more money on one activity and come well prepared.

Make sure to promote your unique selling points by, for example:

- Promoting the remoteness or the unexplored nature of your site;
- Point out unique details, like having the highest rocks in an area to attract rock climbers, or the most beautiful night skies when lodging is distant from a surf spot, for example. Every place has unique details.

The older age groups tend to have more money and focus more on low-risk activities, although they may be looking for physically challenging activities. People between 40 and 70 account for two-thirds of the market, according to the [Adventure Travel Trade Association](#) (ATTA).

Tips:

Offer more comfort, but not luxury, to older adventure travellers, such as high-quality beds and chairs, quiet nights, fresh air and air conditioning in the room, and curtains that ensure complete darkness.

Be creative in offering a unique adventure experience, like the [Gibbon Experience Trail](#) in Laos. Have a clear proposition, focusing on one or a few activities. However, you need to offer sufficient alternatives to serve people with a variety of physical conditions and skills.

Use the segmentation of adventure travel types to determine the focus of your company. But don't use these terms to attract European tourists, who simply don't know any of these terms.

To attract high specialism adventure tourists, make sure you are a specialist within your business. Make sure you know everything about the service you are offering.

2. What makes Europe an interesting market for adventure tourism?

According to the Adventure Travel Trade Association, Europe is the main source market for adventure tourism companies in Africa (43%) and Asia (30%). South America profits mainly from North American tourists (54%), followed by European tourists (33%). Within Europe itself, European tourists are accountable for almost 60% of the adventure travellers.

Every year, European residents make 10 million trips to other countries primarily for sports activities. The number of outbound European trips where travellers enjoy sport activities abroad but don't see it as the main reason to go on holiday, is approximately 100 million, based on Eurostat and UNWTO numbers combined.

Adventure tourism has been growing worldwide at an [average annual rate of 21% since 2012](#). Based on interviews with experts, we expect the European adventure tourism market to also grow in the coming years at an average annual rate of at least 21%, however with some variation per sector.

Older European travellers are engaging more in adventure travel than they did in the past, as older Europeans remain healthy and active nowadays than in previous generations. Europeans aged 55 and older are [most likely to enjoy nature](#) as the main reason to go on holiday, mostly doing soft adventure activities like hiking. This group however will be less interested in harder types of adventure tourism.

Generation Y or millennial tourists, born between 1980 and 1995, are more likely to test [new kinds of experiences](#), according to a 2019 Europ Assistance Ipsos survey. An impressive 59% of European millennials had at least one kind of adventure experience, like staying in a cabin in nature, camping in the wilderness or travelling around the world, according to the same survey. Although above the European average of 53%, European millennials are less likely to experience new kinds of activities compared to American millennials (83%), Mexican millennials (81%) or Chinese millennials (77%).

Together with generation Z tourists, born between 1995 and 2010, [millennials](#) are [most active during their holidays](#), especially before having children. Adults with younger children tend to enjoy less-active holidays, but their activity returns when the children grow older or move out. Generation Y and Z tourists without children are the most likely group to enjoy hard tourism activities.

Tip:

Offer safe and clean services. Most Europeans are less adventurous than they like to think they are, especially in this category. When offering a hike for example, make sure that the route is very clear and the chances of getting lost are zero. When offering a surfing course, make sure you inform your customers about the risks involved and the experience required. When offering an overnight stay with locals, make sure the beds are clean. Prepare your customers well with photos and sufficient information.

3. Which European countries offer most opportunities for adventure tourism?

In Europe, demand for adventure activities per capita is the largest in Austria, Czech Republic, Belgium, Iceland and Luxembourg; the latter two being very small markets. Focus on one of the largest adventure travel markets in size — the UK, Germany and France — or choose a smaller market with a high focus on sport-related activities, which are Austria, Czech Republic and Belgium.

The number of people looking for adventure travel varies by European country. Because adventure travel has such a broad definition, there is no specific information available about it per EU country. If your company has a strong focus on the natural or cultural elements of adventure travel, we advise you to read our studies on [nature and ecotourism](#) and [cultural tourism](#).

Hover your mouse cursor or pointer over the countries in blue on the map below to see the percentage of travellers in each EU country who prefer adventure travel in the overall tourism market of that country. Since there is no specific data for adventure travel per EU country and physical activity is such a distinctive element in adventure travel, figure 3 below shows data for sport-related activities during holidays.

[Based on Eurobarometer statistics](#)

The United Kingdom - top market, especially on cultural adventure travel

According to UNWTO, the United Kingdom offers [the largest adventure tourism market](#) in Europe, accounting for 19% of the world's adventure travel tourists. Among British tourists, 40% prefer active vacations. For British teenagers, this share is 45%, and for tourists in their twenties 54%. Preference for sport-related activities as the main reason to go on a holiday (3.2%), however, is below the European average of 4.4%. British travellers consider their adventure trips as less sport related

With a population of 66 million and a GDP of €2.6 trillion, the United Kingdom is it the fifth-largest economy in the world and the second in Europe. With a GDP per capita of €38 thousand per year, the British have an income above the European average. British travellers have a strong preference for developing countries as travel destinations. Turkey (1.6 million trips), and Thailand and India with 1 million trips each are the [most developing country destinations](#) most visited by British travellers.

Germany is the second-largest adventure travel market in Europe

Germany offers [the second-largest adventure tourism market](#) in Europe, accounting for 12% of the world's adventure travel tourists. Among German travellers, 5.5% prefer sport-related trips, which is [above the European average of 4.4%](#). Out of all German tourists, [32% prefer an active vacation](#) doing and seeing lots of things, compared to 57% who prefer to relax and take it easy. This means German travellers are less active than the British and the French and prefer pure leisure holidays. Among teenagers between 15 and 19 years, 47% prefer active vacations.

Germany has Europe's largest population: 82 million. It is also the largest economy in the EU and the fourth economy in the world, with a gross domestic product of €3.5 trillion and €43 thousand per capita.

Table 1: German travellers' long-haul destinations 2017

Destination	Percentage of bookings
South East Asia	23%

North America	20%
Caribbean	15%
Africa	14%
Latin America	8%
India	6%
Middle East	6%
China	4%
Australia and New Zealand	4%

Source: [Reiseanalyse](#) 2018

You need to offer sufficient information to attract German tourists. They tend to seek a lot of information before deciding to go visit a place. Like most Europeans, Germans are quite straightforward in their communication style, but they are also well known for their organisation and punctuality.

France

France has the third-largest population in the EU, with approximately 67 million people. It is also the EU's third economy and the seventh largest economy in the world with a €2.4 trillion GDP. A [44% share](#) of French tourists prefer active holidays. For French teenagers between 15 and 19, this is 50%, and for those in their twenties this is 52%. Only [2.5% of French tourists see sport activities as the main reason](#) to go on holiday, which is below the European average of 4.4%.

[Important developing country destinations](#) for the French include Morocco (1.6 million in 2017), Thailand (740 thousand), Turkey (58 thousand), Tunisia (57 thousand) and China (49 thousand). For the French, natural features are [the most mentioned reason](#) to return to a previously visited destination. Almost 80% of the French tourists [prepare their holidays online](#).

Austria has the second-highest percentage of personalised bookings in Europe

Austria is a small market of approximately 9 million people. Austria's GDP per capita is approximately €45 thousand, indicating that the Austrians also have disposable income to spend on holidays. German is the dominant language in Austria, but especially younger Austrians master English as well. Austria has the [highest preference for sport activities](#) during their holidays in Europe: 8.9% of Austrian travellers see sports activities as the most important reason to go on holiday.

Czech Republic

Czech Republic is a small market of 10.6 million people and a GDP per capita of approximately €20 thousand. However, a significant 8.7% of the Czech tourists consider [sport activities as the main reason](#) to go on holiday. With more than 125 thousand trips in 2017, Turkey is the main developing country destination for Czech tourists, followed by Ukraine (67 thousand), Tunisia (62 thousand), China (35 thousand), Albania (18 thousand) and Sri Lanka (16 thousand). Some Czechs, especially the more educated, also speak English and German.

Belgium

In Belgium, 7.6% of travellers see sport activities as the main reason to go on holiday, which means this can be an interesting market as well. Belgium's population is 11.5 million with a GDP per capita of €42 thousand. Approximately four out of five Belgians go on holiday [at least once a year](#). For the Belgians, recommendations from family and friends, as well as online sources, are the main factors for deciding where to travel to. Approximately 60% of the Belgian population speaks Dutch, the other 40% speak French. Besides Dutch and French, most Belgians will also be able to speak English or German.

Tips:

Focus on Austria or Belgium if you aim to maximise a limited marketing budget, and you are highly focused on sport adventure travel.

Focus on Germany or the United Kingdom if you want to enter the largest European adventure travel markets.

Focus on the United Kingdom or France if your adventure travel activities have a more cultural nature.

Stay up to date on [Brexit news](#) when you target the United Kingdom, as their economy will be highly influenced by Brexit, especially in the short term.

Read our studies on specific aspects of adventure tourism, such as [birdwatching tourism](#), [cycling tourism](#), [diving tourism](#), [surf tourism](#), [trekking tourism](#), and [wildlife tourism](#), if your company specialises in one of these activities.

4. What trends offer opportunities in the European adventure tourism market?

European adventure travellers seek unique experiences

According to ATTA, customised travel itineraries is the main trend in adventure tourism worldwide in 2019. Recent interviews with European travel experts confirmed that this was also the case for Europeans travelling to developing countries. European travellers tend to look for unique adventure travel experiences. This means they buy less predefined tours via tour operators, but instead determine their own routes. Adventure travellers will be very flexible in their adventure activities.

Tips:

Read our study on [FIT tourism](#) to learn more about how European travellers plan their own trips. Read also [our study on trends in the tourism market](#). Most trends in the European tourism market will also apply for adventure tourism.

Attract tourists on location, as many European tourists decide on the spot in which touristic activities to participate.

Target European tourists directly by promoting stories, photos and videos about your activities. Promote your own stories or invite a [European blogger or vlogger](#).

Give your customers personalised advice to make their experiences unique. This can be a slightly different route, a unique rock to climb or a special snorkelling spot.

Adventure tourism more related with wellness

Mental and physical wellbeing are growing in importance for Europeans. This is especially the case for adventure travellers, who see their activities partly as a way to de-stress and improve physical condition.

Tips:

Be very clear to your visitors about the level of challenge an activity offers. Adventure travellers will like challenges, but only challenges they know they can conquer. Provide tour operators with sufficient information, like clear brochures including detailed photos. European travellers demand lots of information. For example, if you organise a bike ride, just saying that it happens in the morning is not enough; you should also provide the distance travelled, the change in altitude, the duration and the number of breaks, especially if your target group is older.

Give travellers the feeling that they can improve their level of competence within the activity by advising a bigger challenge when they complete the initial challenge.

Offer healthy choices. For example when offering a meal, make sure you also offer options with many vegetables, or offer supplements like nutrition bars.

Offer information on calories burnt during activities. You can easily give an estimation by multiplying the average time of the activity by [the number of calories burnt during the activity](#).

Read our study on [physical wellness tourism](#) and [inner wellness tourism](#).

Adventure travel more related with technology

As technology becomes more present in people's lives, it is also the case in adventure travel. Hikers, cyclists, climbers, sailors, skiers, horseback riders and many others find their trails or spots online. This is especially the case for [generations Y and Z](#). Websites like [Wikiloc](#), [More Dirt](#) (for mountain bikers) and [Snorkelling Report](#) (for snorkelling) inform travellers of routes and places for practice. In addition to websites, there are also many apps, like [RouteYou](#) (for hiking and cycling, but also for canoeing and more), [Komoot](#) (for cycling and hiking) and [ViewRanger](#) (integrated with virtual reality).

Tips:

Make sure that the routes and spots near you are described online or in an app. This will require some work, but you can collaborate with other entrepreneurs on it. Add photos to a route to make the route attractive.

Advise your customers to use a specific website or application where your routes can be found.

Ask your customers which application or website they use to find spots and routes. Many activities will use a specific application, like [SurferToday](#), which is specifically for surfers.

Tourism organisations are starting to use [virtual reality \(VR\)](#), [augmented reality \(AR\)](#) and [mixed reality \(MR\)](#). With these techniques, potential visitors wear a headset and are able to 'walk through' and act in the environment you created for them. This involves visual as well as auditive elements. These are new ways to give potential visitors a very vivid insight into your activities. Since you need a headset to show these techniques, and most European tour operators don't work with these headsets yet, these techniques will

probably not help you at the moment but may become more common in the coming years.

What is more useful to you now is the possibility of making 360° videos and pictures, which allow viewers to look around while watching the video or photo. This will give an even more vivid experience of your activities than a regular video or picture. To make a 360° video, you need a special omnidirectional camera; for a 360° picture, you can just use the camera on your mobile phone.

Tips:

Share a 360° video or several 360° pictures of your accommodation. You can use high-quality images, such as [the Atlantis Dubai tour](#), or something more simple, like the [online tour through hotel El Cactus](#).

Make a 360° video or 360° photos of your adventure experiences, such as [hiking](#), [climbing](#), [sailing](#) or [kayaking](#).

Share your videos and pictures online on YouTube and other media, including your website and social media.

Start with making 360° pictures, which don't require any investment. You can also use [Facebook](#) and the [Google Street View app](#) to enhance them.

To make 360° videos, you need to [buy a special camera](#) starting from approximately €170, or hire someone to do it for you.

Younger travellers more important in the adventure tourism market

Generation Y and Z are more active when travelling than previous generations and focus more on personal growth and development as well.

Tips:

Read our study on [generation Y](#), to learn more about this target group.

Spend time with your customers and talk to them. Talk about your adventure activities, which is something they are interested as well.

Make sure to provide an environment where it is possible for travellers to do work on the go, such as offering internet access.

Blurring of education and travel projected

Many European parents see travelling as one more aid in their children's education, exposing them to different cultures during holidays. A very few will even take kids on year-long trips, which require kids being out of school for that whole period. Travel is expected to be weaved into education more in the future.

Tips:

Offer information to visitors about the environment, culture, nature, and other specifics of your area. Include information that is accessible to children.


Offer activities for children to learn about local nature and culture. [Tugela Tours](#), for example, offers tours for children to learn about nature while on vacation.

Address parents and tell them about what your trips bring to their children. [Aj Kenya Safaris' website](#), for example, communicates in a way that is appealing to European parents.


This study has been carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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