



[What are the opportunities for adventure tourism from Europe?](#)

Europe is a key source market for adventure tourism. It offers great opportunities for developing country destinations, as experience from South Africa and Tanzania shows. European adventure travellers want to discover nature and culture through exciting experiences and physical activities. Safety is a key aspect of adventure tourism. Customised itineraries are increasingly popular, as well as adding wellness and transformative elements to adventure trips.

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1 . Product description

Adventure tourism combines physical activity with nature and/or cultural learning. The [Adventure Travel Trade Association](#) (ATTA) defines it as “trips that provide experiences (both mental and physical) to places that are novel or unique to the traveller, emphasise the natural environment, and provide challenge through experiences of culture, activities that promote physical health, and excitement/fun”. It varies from soft to hard adventure.

Examples of soft adventure tourism activities are:

- birdwatching / wildlife observation (safari)
- canoeing / kayaking / rafting
- cycling
- diving / snorkelling
- hiking / walking
- horseback riding
- surfing / sailing

Hard adventure tourism activities include:

- caving
- climbing

- kite surfing
- paragliding
- trekking

Soft adventure makes up the largest share of the market. For more information on specific types of adventure tourism, see our studies on [birdwatching](#), [cycling](#), [diving](#), [surfing](#), [trekking](#), [volcano tourism](#) and [wildlife observation](#).

Health and safety measures

When European adventure tour operators and travellers consider new destinations, they will first check the safety. Vehicles, equipment and accommodation also have to be safe. Guides need to have good local knowledge. They must know which places are safe to visit and which are not. This is especially important because travel insurance may not cover all adventure activities. Some higher-risk activities require additional insurance.

Tips:

- Pay attention to safety measures. Tour operators should, for example, regularly check vehicles and equipment, as well as hire experienced guides who know the area. Accommodation establishments should have safety measures in place, such as smoke detectors, fire extinguishers, emergency exits, first-aid kits and 24-hour medical assistance.
- Show the outcomes of safety checks and licences to your clients.
- Make sure that your guides speak good English so they can properly explain safety instructions. Provide them with English language courses by native speakers, for example.
- If you offer activities that require extra insurance, clearly state this on your website.

Political stability

Safety is important to European travellers, especially because some developing countries are politically unstable. Most commercial tour operators do not offer trips to countries that their Ministry of Foreign Affairs has declared unsafe. This has previously led to a drop in tourism arrivals in countries such as Mali, Egypt and Kenya. Kenya is set to make a comeback in adventure tourism the coming season as a volume market with low prices, provided the local situation stays stable.

Tips:

- Keep (potential) customers updated on changes in the safety situation in your area, for example via your website and staff. Be open and honest in your communication, explaining which areas are safe, or where safety might be an issue. Your client has plenty of information sources, too.
- Share safety experiences from customers on your website. Let them write about how safe they felt, since people value the experience of other travellers.
- If your region is “unsafe”, commercial tour operators are very likely not to go there. In such cases, focus on volunteer organisations and individual travellers. Check your country’s current safety status on the Ministry of Foreign Affairs website of your target countries, such as [Ireland](#) and the [United Kingdom](#).

Variety of activities

On long-haul holidays, European adventure travellers generally seek a variety of experiences. They are especially interested in soft adventure activities, such as walking, hiking and cycling. They also like safaris and cultural/natural discovery tours.

Tip:

- Include different options for activities and/or accommodation. This way, European travellers can compose their own unique adventure tourism experience.

Meeting locals

European adventure travellers also like to meet local people, for example by staying in accommodation run by local people.

Tip:

- Include local people in your product/service offering. For example, include a visit to a local community, local handicrafts workshops, a visit to local markets or events and local food.

Comfortable accommodation

Luxury is less important for European adventure travellers than for mainstream travellers. They prefer small-scale accommodation, preferably run by local people and reflecting local nature and culture. However, to balance their active days they do appreciate comfortable nights.

Tips:

- Give accommodation establishments the look and feel of your area. Emphasise the authenticity of these establishments in your marketing message.
- Pay attention to comfort, such as clean rooms, comfortable beds, good meals and good service.

Traveller profile

Features of adventure travellers:

- usually from higher socioeconomic groups
- found in all age groups, but are generally younger than non-adventure travellers
- both men and women, in roughly equal numbers
- looking for varying degrees of physical and mental challenge
- interested in authentic experiences
- like to connect with local people

Based on age and level of adventure tourism enthusiasm, there are four segments (Figure 1).

Figure 1: Adventure travel segments



Leisure adventure travellers

This is the largest segment. These travellers mainly opt for lighter adventure tourism activities. Adventure tourism is often their main holiday activity, but they like to alternate it with other activities like cultural excursions.

Young leisure adventure travellers

This group looks for challenges and likes to take risks, within limits. They search the internet for new destinations and good deals. Some prefer a few days spent relaxing at the end of their holiday, especially travellers with demanding jobs.

Mature leisure adventure travellers

These travellers have often experienced adventure tourism in their youth and still enjoy it. They generally:

- have more time and money for holidays than younger travellers
- take several holidays per year
- book through tour operators more often than younger travellers
- keep fit in their daily life by exercising regularly
- like a physical and mental challenge, although they prefer lower-risk activities
- require more comfort than other segments, although this doesn't have to mean luxury.

Tips:

- When targeting leisure adventure travellers, be flexible. Offer both adventure and other activities, such as a sightseeing tour by jeep, or a visit to a local market.
- Provide different levels of adventure tourism activities, regarding both length and difficulty. This way you meet the needs of both young and mature leisure adventure travellers. Offer less intense activities and extra comfort options for mature travellers, for example.
- Promote your products locally, to attract individual leisure adventure travellers. For example, distribute flyers at airports or accommodation establishments in your area.

Adventure tourism enthusiasts

This group is the most active in adventure tourism. However, it is a small segment. Adventure

tourism is the main purpose of their holiday and often the only thing they do. Adventure tourism enthusiasts like to be physically and mentally challenged by their activities. They do not mind some discomfort, but safety is very important.

Young adventure tourism enthusiasts

This group consists of young and energetic people, looking for physical challenges. They are interested in high-adrenaline and high-risk or higher-risk activities.

Mature adventure tourism enthusiasts

These travellers are not necessarily thrill seekers, but are generally very fit and active. They do not need a special programme for their age.

Tips:

- When targeting adventure tourism enthusiasts, focus on the challenges that you can offer them. Provide plenty of information about the activity, such as the tracks, difficulty level, safety measures and the weather they can expect.
- Create a diverse programme. Include opportunities for recovery and relaxation in between activities.
- Do not distinguish between young and mature in your marketing message. “Older” adventure tourism enthusiasts do not like to be addressed as “older” or “mature”.

2 . Which European markets offer opportunities for adventure tourism?

Europe is a leading market for adventure travel

[Europe is a key source market for adventure tourism](#), as most international departures are from Europe and the Americas. Adventure tourism is a large and growing market. Many travellers engage in some form of adventure tourism on their holiday, either as a primary or secondary activity. The ATTA estimates [the international adventure travel market can be valued conservatively at €580 billion in 2017](#), with an average annual growth rate of 21% since 2012.

For statistics on European source markets, see our study about [European demand for tourism in developing countries](#).

3 . What trends offer opportunities on the European market for adventure tourism?

Flexible travel

European travellers like to create their own unique holiday, with the security and benefits of a package. They want more flexible itineraries, to get the most value from their holidays. This is also true for adventure travellers, who are especially interested in customised holidays. In fact, [customisable itineraries are the most popular type of trip among adventure travellers](#).

Tip:

- Be flexible in your offering. Offer tailor-made products and give your customers the option to build their own package.

Wellness and transformative travel

[Wellness tourism is a growing segment within global tourism](#), accounting for 6.5% of the market. Demand is now expanding to include an increasing focus on inner (emotional, intellectual and spiritual) wellbeing, as well as physical wellness. [Adventure travellers are also increasingly interested in including an element of wellness in their holiday](#), as a secondary activity. This can range from yoga or meditation sessions to digital detox programmes, where they disconnect from their online devices.

These wellness experiences relieve and prevent stress, and allow adventure travellers to improve their inner wellbeing. This fits in well with another key tourism trend, referred to as transformational or transformative travel, offering personal growth and enrichment through self-reflection and (re)connecting with nature and culture. Adventure travellers are increasingly looking for such experiences, but what makes an experience transformational differs per traveller.

Tips:

- Offer (inner) wellness experiences that adventure travellers can add on to their trip.
- Emphasise the relaxing qualities of adventure activities you offer, such as canoeing, snorkelling or birdwatching.
- For more information on wellness experiences, see our studies on [inner wellness tourism](#) and [physical wellness tourism](#).
- For more information on how to facilitate transformative experiences, see the ATTA's [four steps that can help you include transformation in your travel products](#).

Small group travel

European adventure travellers are increasingly interested in small group travel (up to 12 people). Travelling in small groups has several benefits, such as meeting like-minded people, sharing a memorable experience, safety, and online networking before and after the trip. The small size of the group also allows travellers to have a more immersive experience. This fits well with the popularity of authentic experiences, which is not expected to change any time soon.

Tips:

- Develop adventure tourism packages and itineraries for small groups.
- For more information, see the segments on group travel in our study on [promising target groups in Europe](#).

Family adventure travel

[Family-friendly trips are in high demand among adventure travellers](#), including multigenerational family travel. Multigenerational family travel means grandparents, parents and children travelling together. This trend has also reached the adventure tourism market.

Tips:

- Offer family-friendly accommodation, for example with adjoining rooms, a playground or a pool.
- Package your travel product with family-friendly, memorable experiences. Include fun, educational and safe adventure tourism activities.
- Offer activities for different interests, skill levels and ages. This way, you will appeal to all family members.
- For more information, see our study about [explorative tourism by families with children](#).

Increasing use of online research

European adventure travellers increasingly research and plan their trip online. To gather information and share experiences they use:

- peer review sites, like [TripAdvisor](#) and [Zoover](#)
- travel forums, like Lonely Planet's [Thorn Tree forum](#)
- social media, like [Instagram](#), [Facebook](#), [Twitter](#) and [YouTube](#).

Personal recommendations from family and friends are also important. Online research is a trend that has increased exponentially over the past years. Although growth has peaked, the use of internet to research tourism will continue to increase. It is predicted to remain the most important research channel for years to come.

Tips:

- Maintain a strong internet presence and online marketing strategy, including social media.
- Use photos and videos to bring your story alive. For more information, watch this [webinar series on visual communication in adventure travel](#) by the ATTA and Libris.
- Use current customers as ambassadors for your company and area. Encourage them to share their experiences and visuals on social media, write blogs and review your company.
- For more information, see our [10 tips for online success with your tourism company](#).

For more information, see our study about [European tourism market trends](#).

4 . What requirements should your adventure travel product comply with to be allowed on the European market?

For general tourism requirements, see our study on [what requirements your services should comply with to attract European tour operators](#).

For adventure tourism in particular, there are some voluntary safety standards.

Voluntary safety standards

Safety is extremely important for adventure tourism. Three international ISO (International Organization for Standardization) standards support safe practices in adventure tourism: [21101](#),

[21102](#) and [21103](#). Some countries also have their own voluntary standards, such as [BS 8848](#) in the United Kingdom.

Tips:

- Study the ISO standards on adventure tourism. Use them to enhance your safety performance.
- Check for possible voluntary standards in your target markets.

5 . What competition do you face on the European market for adventure tourism products?

Popular adventure tourism destinations

[Long-haul trips are popular among adventure travellers](#), which is promising for you. Asian and African developing countries are especially popular among European travellers. This is also the case for adventure travellers in particular. Latin America is also an increasingly popular adventure tourism continent.

Popular adventure tourism destinations include:

- Chile
- Morocco
- Peru
- Tanzania
- Thailand
- Vietnam.

Examples of upcoming adventure tourism destinations are:

- Bolivia
- Cambodia
- Costa Rica
- Ethiopia
- Myanmar
- Zambia.

Tips:

- In your marketing message, emphasise those adventure tourism elements that travellers cannot find in competing countries.
- [New Zealand](#) and [Slovenia](#) for example, have been very successful in adventure tourism country branding. They are now established adventure tourism destinations.

Adventure Tourism Development Index

The [Adventure Tourism Development Index](#) (ATDI) assesses a country's adventure tourism potential, based on ten pillars:

- sustainable development

- safety
- health
- natural resources
- cultural resources
- adventure activity resources
- entrepreneurship
- humanitarian
- tourism infrastructure
- brand

It tells European tour operators which destinations are attractive for adventure tourism development. The ATDI also tells you in which areas your country is performing well, and perhaps even more importantly, in which it needs to improve.

The highest-ranking developing countries are:

1. Chile
2. Jordan
3. Costa Rica
4. Uruguay
5. Turkey
6. Botswana
7. Dominica
8. Armenia
9. Philippines
10. Kazakhstan

Chile scores particularly high on sustainable development and safety, as well as natural and adventure activity resources, entrepreneurship and humanitarian. Among the fastest climbing countries in the ranking are the Philippines, Uzbekistan and the Comoros.

Tips:

- Use the [ATDI Report](#) and [ATDI Dataset](#) to compare your destination with competitors. See in which areas popular adventure tourism destinations like Chile are doing well.
- Look at the performance of your own country. In which areas does it score well? Emphasise this in your marketing message.

For more information, see our study on [what competition you face on the European outbound tourism market](#).

6 . Which channels can you use to market your adventure tourism products in Europe?

Selecting smaller specialised tour operators

Adventure travellers are more likely to use professional services, such as tour operators and guides, than non-adventure travellers. Especially when it comes to lesser-known developing countries, or more challenging adventure tourism activities. Tour operators therefore remain the most important trade channel. Smaller European tour operators specialised in adventure tourism or your destination offer the best opportunities.

You can identify relevant tour operators via trade associations, events and databases, such as:

- [Adventure Travel Show](#) - annual adventure tourism trade event, January, London
- [Adventure Travel Trade Association](#) (ATTA) - global trade organisation for the adventure travel industry and organiser of the Adventure Travel World Summit ([search for members](#))
- [ITB](#) - annual tourism trade event, March, Berlin
- [Top Resa](#) - annual tourism trade event, September, Paris
- [Wanderlust](#) - magazine for adventurous, authentic travel (browse their [tour operator directory](#))
- [World Travel Market](#) - annual tourism trade event, November, London.

Generating direct sales

Although European adventure travellers still prefer to book through more traditional channels, it is important to be visible online. It increases awareness of your product and/or service, your professional image and your trustworthiness. You can promote your product on (adventure) tourism websites/portals, for example from this [list of adventure tourism websites/portals by activity](#).

For an overview of the trade structure for tourism, see our study on [the channels and segments of the European tourism market](#).

7 . What are the end-market prices for adventure tourism products?

Travellers have many destinations and types of holiday to choose from. This makes tourism a relatively price-sensitive and competitive industry. The price of a long-haul trip consists of three dimensions:

1. The exchange rate between the currencies of the country of origin and the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the traveller consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins vary between 10–25%. Prices of holiday packages vary widely as they depend on a lot of factors, such as:

- availability
- destination
- modes of transport
- period of travel
- number of travellers
- length of stay
- type of accommodation
- included activities.

Tips:

- Check which countries have cheap (direct) flights to your destination, for instance at [Skyscanner](#). This gives you a competitive advantage in those countries.
- You can compare prices for adventure travel products via portals like [Lonely Planet Adventure Tours](#).
- Tourism Council WA has some useful [online tools for pricing tours and accommodation](#). These help you determine the break-even point and ideal retail price of your tourism product.

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