The European market potential for adventure tourism

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Europeans love adventure travel. Adventure travellers contribute largely to the local economies they visit: two-thirds of all their travel expenses are spent on location. The United Kingdom and Germany are the main markets. Europeans seeking unique experiences and their changing attitude to wellness and technology are altering the market, offering you many opportunities.

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1. Product description

Adventure tourism is a tourism trip that includes at least two of the following three elements - physical activity, natural environment, and cultural immersion. It often involves risk and some skill from the tourist.

Adventure tourism is a very large tourism segment, and it consists of many niche markets. Within adventure tourism, an important distinction is between soft adventure travel 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 and hiking in extreme weather or at high altitudes. In addition, danger and skill are not firm concepts and may vary greatly depending on the tourist’s own perception.

The cultural niche markets of adventure tourism (such as tangible culture tourism), intangible culture tourism, SAVE tourism and food & wine tourism are usually not regarded as either hard or soft adventure tourism.

Figure 1: Cycling tourism is one of the larger niche markets for adventure tourism

Source: Pexels

For tourism companies, soft adventure tourism services are easier to offer, but in general this also means that the competition is bigger. Soft adventure tourism services require less expertise. Also, there is less risk involved, meaning that fewer precautions need to be taken. Finally, soft adventure travel normally requires less expensive material.

The categorization of the niche markets as soft and hard adventure travel is not rigid, and it depends on how the activities are performed. For example, cycling tourism is generally regarded as soft adventure tourism. In contrast, downhill mountain biking is generally perceived as hard adventure tourism, as it requires skill and involves a certain level of risk.

Table 1: Niche markets for soft adventure tourism

Niche market		Specialist niche markets	Example
Soft adventure niche markets			

Wildlife watching	Wildlife watching involves viewing wildlife in their natural habitats. It includes different types of safaris, such as 4x4, walking, fly-in, river/canoe and safaris on horseback. The niche also includes trips to view marine life.	Safaris, marine life watching, wildlife watching	Green safaris in Zambia offers high-end and sustainable safaris.
Birdwatching	Birdwatching is defined as tourist travel for the specific purpose of observing wild birds in their natural habitats. The niche is sometimes referred to as ‘birding’ or ‘avi-tourism’.	Hardcore birding, enthusiastic birding, casual birding	Tanzania birding offers bird watching experiences in Tanzania.
Fishing	Fishing tourism involves travel away from home for the primary purpose of fishing, either in freshwater or saltwater. Fishing is sometimes referred to as angling.	Fresh-water fishing, salt-water fishing and game fishing	Overlandethiopiatours focusses on adventure tourism, combining such activities as biking, cycling, birdwatching, rafting and horseback riding with angling, stressing exotic opportunities (e.g. seeing hippos, flamingos and giant crocodiles).

Ecotourism	Ecotourism refers to an environmentally based tourism experience that is sustainable, has low impact on the natural environment and helps to preserve the long-term nature of the community, project or site.	Agritourism, rural tourism, dark-sky tourism and camping	Three House Lodge in Costa Rica offers beachfront houses, constructed with wood from fallen trees and recycled materials, protecting a large area of rainforest and supporting the local community.
Walking tourism	Walking tourism refers to trips in which walking in the natural environment forms a significant part of the trip. It includes hiking, trekking and long-distance walking, and includes specialist techniques such as Nordic walking.	Nordic walking, long-distance walking, hiking and trekking	Wild Frontier Travels is a British tour operator offering walking holidays, in many developing country destinations, including Jordan and Ethiopia.
Cycling	Cycle tourism refers to recreational visits away from home which involve leisure cycling as a fundamental and significant part of the trip. It includes cycling types such as road cycling, mountain biking and cycle touring.	Road cycling, mountain biking, family cycling and tour cycling	Rock, Road and Rhino offers a cycling tour through the Sahara, starting in Egypt and arriving in Sudan. Exodus Travels offers guided bike trips through the Jordanian highlights of Petra and the beautiful deserts of Wadi Rum.

Water sports	Water sports tourism refers to sports that take place on the water, such as windsurfing, kitesurfing, canoeing, kayaking, water skiing and coasteering.	Windsurfing, kitesurfing, surfing, water skiing, wakeboarding, SUP, kayaking/ canoeing, coasteering, jet skiing and fly boarding/jet boarding	SurfCamps offers surf holidays to destinations like Costa Rica.
Diving	Diving tourism refers to tourism trips for the primary purpose of scuba diving. Dive tourism includes diving activities, such as wreck diving, cave diving and free diving.	Wreck diving, cold-water diving, cave diving and free diving	Dive Circle offers a wide range of diving experiences in Kenya, including opportunities for seeing sharks, dolphins, whale sharks, turtles and whales.
Sailing	Sailing tourism refers to any holiday where the main purpose of the trip is to sail or learn how to sail.	Dinghy sailing, yacht sailing and catamaran sailing	In Kenya and Mozambique, travellers can sail on a hand-crafted Arabic dhow through Explorations Company.

Hard adventure tourism can be divided into land-based, water-based and air-based niche markets. One specific form of hard adventure tourism is thrill tourism, which consists of activities involving a higher level of risk than other hard adventure activities. Mountaineering and white-water rafting are examples of activities associated with thrill tourism.

Figure 2: White-water rafting is an example of thrill tourism

Source: Photo by Tom Fisk on Pexels

Table 2: Niche markets for hard adventure tourism

Niche market		Specialist niche markets	Example
Land based adrenaline	Adrenaline activities refer to hard adventure activities which require a high level of expertise to take part in and usually involve an element of personal risk.	Rock climbing, indoor climbing, mountaineering, mountain boarding, sandboarding, caving, abseiling, sand kiting, ziplining, heli-biking, ATV off road, orienteering, canyoning	ActiveTours offers mountain climbing tours of several days in Pakistan.
Snow and ice-based adrenaline	Snowmobiling, snow kiting, heli-skiing, glacier trekking, ski touring, cross-country skiing, snowshoeing, dog sledding	LifeTrek offers multiple-day multiple-day ski adventures in Georgia.	

Air-based adrenaline	Base jumping, sky diving, wing suiting, bungee jumping, hang-gliding, paragliding, microlighting	Bstoked offers paragliding all around the world, including in Morocco, Kenya, South Africa and Tanzania.	

A third category of adventure tourism niches consists of activities associated with cultural tourism.

Table 3: Niche markets for cultural adventure tourism

Niche market		Specialist niche markets	Example
SAVE tourism	SAVE tourism includes four major travel profiles: Scientific, Academic, Volunteering and Educational. The sector is characterised by the acquisition of knowledge for personal or professional reasons, and volunteering is the most common link between all four profiles.	Scientific, academic, volunteering, educational	Tanzania Volunteers organises the placement of volunteers and interns in the local area throughout several establishments.

Tangible (material) heritage	Tangible (built) heritage refers to visits to cultural attractions that involve built heritage (e.g. museums) or human-made architectural structures (e.g. the Pyramids).	Museums, art galleries, historic properties, places of worship, architectural tourism, other visitor attractions	Northern Colombia has a violent history. After the demobilization of paramilitary forces, communities started to reconcile and established El Carlos Ecotourism and Archaeological Centre, which integrates tourism, handicrafts, fisheries and cacao farming.
Intangible (immaterial) culture	Intangible cultural heritage refers to experiencing the living culture of local people (e.g. attending music festivals).	Music festivals and events, films, DNA/genealogy, battlefield, dark tourism, other festivals/ events	The Mahika Mihikeng Cultural Festival in South Africa. For further details, see this short video.
Food and wine tourism	Food tourism is defined as the act of 'travelling for a taste of place in order to get a sense of place'. It is sometimes referred to as culinary tourism or gastronomy tourism. The definition also includes wine and other beverages.	Food festivals, food trails, food museums, food tastings, cooking classes, wine tastings, wine trails, vegan tourism, producer visits, local farmers' markets	Responsible Travel takes tourists on a 10-day tour centring on Ethiopian vegan dishes and cultural history.

Community-based tourism	Community-based tourism (CBT) refers to tourism experiences hosted and managed by local communities, which generate direct economic benefits and are sustainable and responsible.	Homestays, visits to villages/communities, local festivals, learning local crafts, participation in community life	Il Ngwesi offers cultural and wildlife experiences, while the profit flows back to the Maasai owners in the community.

This study provides an overview of the segment of adventure tourism, including all soft and hard adventure niches mentioned in Table 1. Note that some niche markets are addressed in more detail in specific studies. This study will also answer the questions why Europe is an interesting market, which countries offer the most potential and which trends offer opportunities.

Tips:

Focus your services on a specific niche or specialist niche market. With a clear focus, it is easier to distinguish yourself from your competitors and attract a specific target group.

Inform yourself about the niches available in tourism, to be able to make a clear choice. CBI offers an infographic which gives a clear overview on all segments and niche markets in tourism.

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. 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.

Due to COVID-19, however, the number of Europeans travelling outside of Europe decreased. In June 2020, it had decreased by 98% relative to June 2019. Adventure travel outside Europe almost completely vanished. In June and July 2021, air travel out of Europe was more than three times higher than it had been in the same period in 2020. At the start of 2022, most European countries had lifted a large share of their restrictions. According to expectations, this positive development will continue as the number of hospitalizations due to COVID-19 decreases. Adventure travel is likely to recover more quickly than other segments. There are multiple reasons for this prognosis.

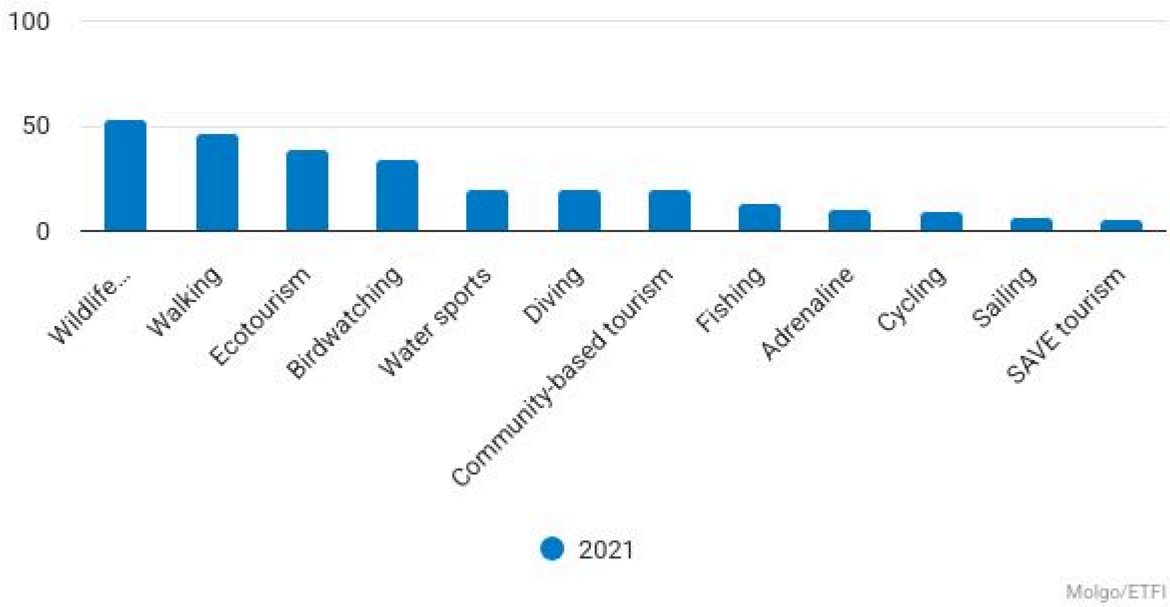
- Adventure tourism involves many small-scale tour operators, which tend to have a very loyal group of customers. These small-scale tour operators have a high credibility and will be much more trusted when they

communicate that a destination is safe, compared to some bigger tour operators.
- Adventure tourism suppliers mostly use small-scale accommodations, which are better at offering space and distance. These smaller companies are also more flexible, and do not need such a high occupancy ratio. Of course, the adventure tourism market is very large, and adventure tours are also offered by very big European tour operators, who will not profit from these advantages.
- For adventure tourists, travel is more important than for pure leisure tourists. Therefore, in general they will be more eager to reschedule their trip and start travelling again.

Before the coronavirus pandemic, European residents made 10 million trips annually 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.

Based on an analysis of 303 European tour operators active in developing countries, it was found that 80% of these tour operators were active in the adventure tourism market, by offering services in at least one of the niche markets. A closer look revealed that the most important adventure tourism niche market is wildlife watching. Out of all European tour operators, 55% offered wildlife watching activities. The second largest niche market is walking (46%), followed by ecotourism (39%) and birdwatching (34%). Note that the market for soft adventure activities is much bigger than the market for hard adventure activities and the SAVE tourism market.

Figure 3: Percentage of the European tour operators that offer services in an adventure tourism niche
in %



Tips:

Target small-scale adventure tourism companies. They will probably be among the first to send their clients to your destinations. Independent travellers will be less important. Once COVID-19 restrictions are lifted, Europeans will be eager to travel, but they will also seek the safety that a tour operator can offer. One good source of buyers is on the Adventure Travel World Summit or online. For more information on where to find online buyers, read our tips on how to find buyers.

Keep informed about how to respond to COVID-19 and on how to manage the effects of COVID-19. Read about financial strategies to deal with the current economic uncertainty in a report written by ATTA for adventure tourism companies.

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.

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.

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. European baby-boomers enjoy active holidays with culture and nature-based experiences but will most likely not be involved in hard adventure.

Generation Y or millennial tourists, born between 1980 and 1995, are more likely to test new kinds of experiences, according to a 2019 Europe 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.

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.

Figure 4: Waves of good quality are an important asset for surf tourism

Source: photo by Kammeran Gonzales-Leola on Pexels

The older age groups tend to have more money and focus more on low-risk, soft adventure 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).

Hard adventure activities are most popular with young, extroverted men.

Tips:

- Develop a clear proposition, where you focus on one of the segments in Figure 3. 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.
- 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.

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

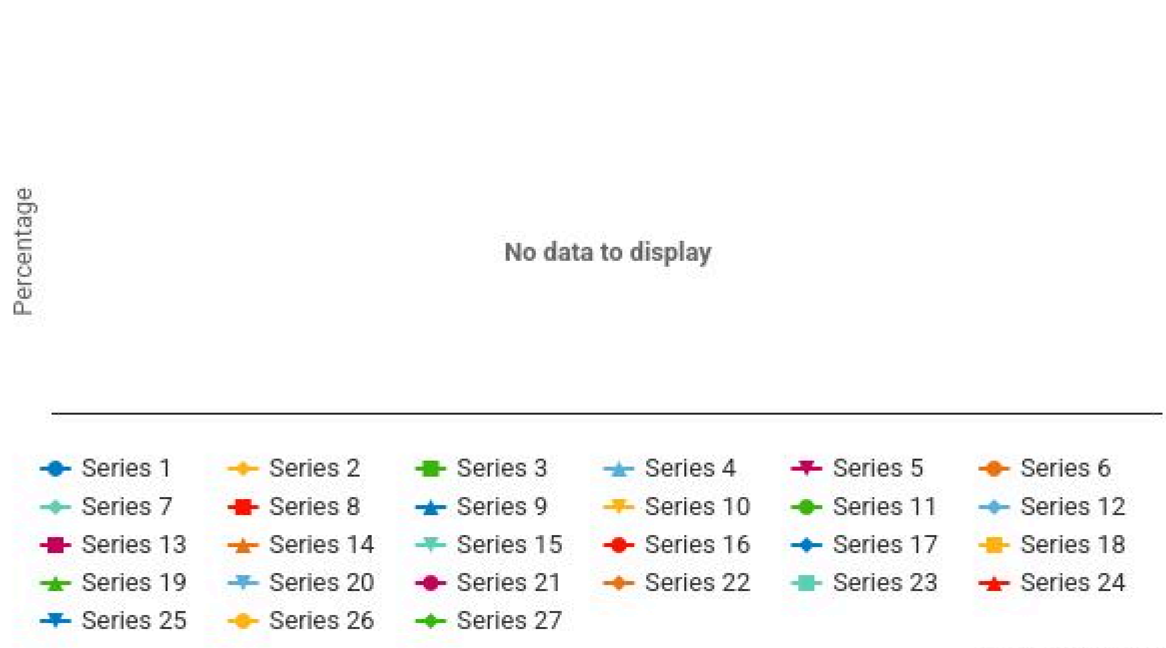
The United Kingdom, Germany, the Netherlands, Sweden, Spain and Italy are the most important source countries.

Adventure tourism is a very diverse segment, and the most important source countries therefore highly depend on what you offer. The most important source countries for culture-related adventure tourism (e.g. tangible culture tourism) are Spain, Italy, Sweden and Germany. Many of the travellers in these countries base their destination choices on the cultural offerings of a destination. These travellers are also quite willing and financially able to travel to destinations in developing countries.

Even though it is not one of the top six source countries, France may still be a major source for companies based in French-speaking destinations. Relatively few French travellers base their destination choices on the natural environment (36%) and on the available cultural offerings (39%). These shares are lower than average for most other European countries.

To see the proportion of the travellers in each European country basing their destination choices on the available cultural offerings, hover your cursor over the countries shaded in blue in Figure 5.

Figure 5: Proportion of the travellers that base their destination choice on the cultural offerings in 2021
2021



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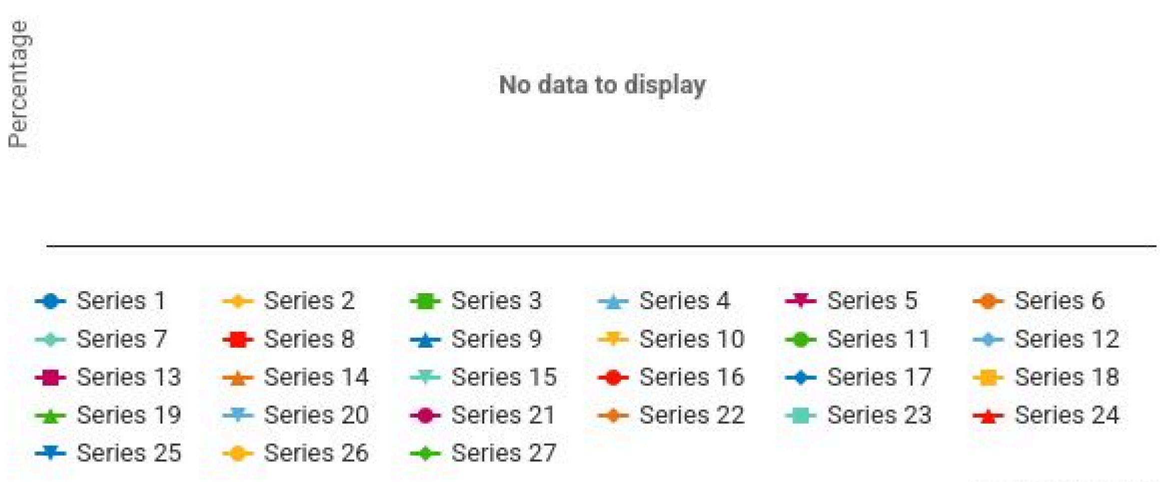
If you offer nature-related adventure tourism (e.g. wildlife watching, walking, cycling and bird watching), the Netherlands, Sweden, Spain and Germany are the most important source countries. A large share of the travellers in these countries base their destination choices on the natural environment in the destination. These travellers are also quite willing and financially able to travel to destinations in developing countries.

To see the proportion of the travellers in each European country basing their destination choices on the natural environment, hover your cursor over the countries shaded in blue in Figure 6.

Figure 6: Proportion of the travellers that base their destination choice on the natural environment in 2021

2021



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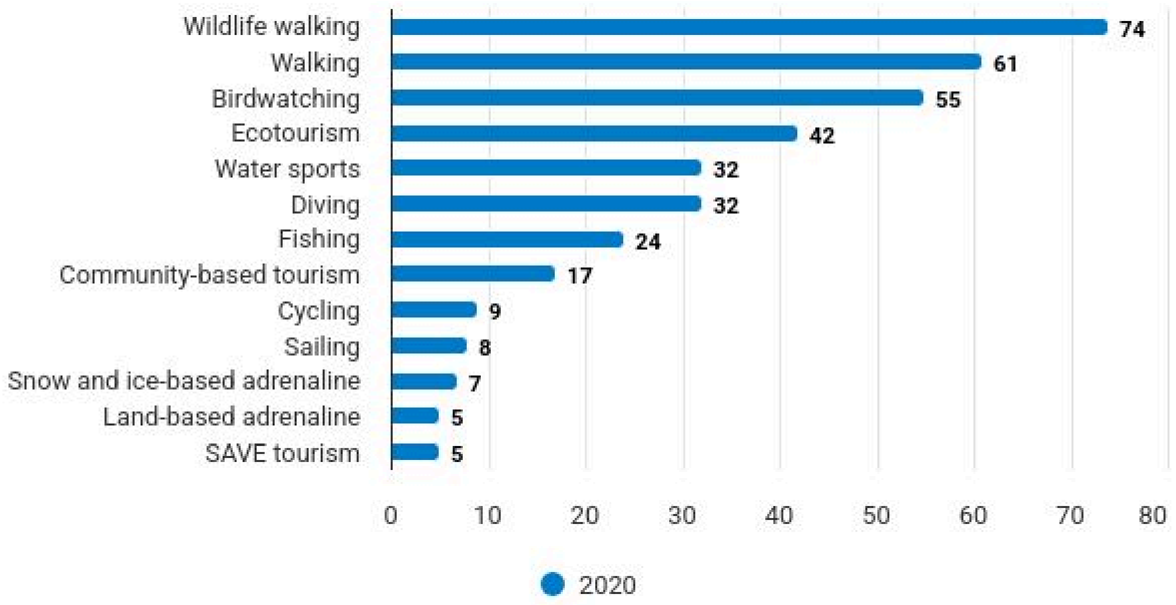
The United Kingdom: Top market, especially on cultural adventure travel

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.

Recent CBI research showed that – out of all British tour operators active in developing countries – 87% were active in at least one adventure tourism niche market. The most important niche markets are wildlife watching (74%), walking (61%) and birdwatching (55%). The United Kingdom is by far the largest market for birdwatching.

Figure 7: Percentage of British tour operators that offer adventure tourism niche products by type



Molgo/ETFI

In recent years, adventure holidays have increased in popularity particularly with people 18–24 years of age. Once COVID-19 restrictions are lifted, ABTA expects the emergence of British 'catch-up travellers', leading to more long-haul travel and once-in-a-lifetime trips. Almost half of all travellers expect to spend more money on travel in 2022.

British travellers are more likely to book their trips through a tour operator than they were in the past. This is because they are seeking guidance with pandemic-related travel requirements. They also prefer the security of package holidays. These travel products are crucial in the United Kingdom, with 78% of all British travellers considering package travel important. This reduces the number of opportunities to attract independent travellers, whilst enhancing opportunities to sell to British tour operators.

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 developing country destinations most visited by British travellers.

Germany: Europe's largest market for nature-adventure travel

Of all German tourists, 32% prefer active holidays involving 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% prefers active vacations.

Based on research by Sand, mountain biking is the hard adventure activity that the most Germans (slightly more than 30%) reported having already experienced at least once. This is followed by kayaking and diving (both just over 20%) and climbing and rafting (both almost 20%). Although few German activity travellers have actually engaged in diving, rafting, paragliding and skydiving, many are interested in these activities (36% interested in diving, rafting or paragliding; 34% interested in skydiving).

Other soft adventure activities that many adventure travellers have performed before include walking (76%), camping (54%) and high ropes courses (36%). Safaris (53%), canoeing (37%), sailing trips (37%), supping (32%), trekking (32%) and backpacking/bikepacking (31%) are soft adventure travel activities that many are interested in but have not yet experienced.

In Germany, most soft adventure activities are performed by both women and men. Examples include cycling (52% women; 48% men) and walking (54% women; 46% men). Although many hard adventure activities are dominated by men, but the situation is changing for some activities (e.g. such as climbing).

Slightly less than half (45%) of all German travellers base their destination choices on the natural environment. This is higher than the European average of 43%. Interest in nature is especially high amongst women, millennials (25–39 years of age), baby boomers (55 years of age and older) and those living in rural areas.

Slightly less than half (45%) of all German travellers base their destination choices on cultural offerings. This is comparable to the European average (44%). Interest in cultural activities is especially high amongst Generation X (40–54 years of age), people living in cities and those living alone or with a partner.

Of all German travellers, 5.5% prefer sports-related trips. This is above the European average of 4.4%.

Germany is a leader in sustainability, and German tourists are therefore likely to be most interested in sustainable tourism activities. For example, 56% of the German population believe that ecological and social sustainability are important factors to consider when going on holiday. According to data provided by World Animal Protection, 88% of all Germans feel that tour operators should avoid activities that cause suffering for wild animals.

Table 4: German travellers' long-haul destinations in 2019 compared to 2017

Destination	Percentage of bookings in 2019	Percentage of bookings in 2017	Change
Southeast Asia	18%	23%	−5%
North America	23%	23%	0%
Caribbean	11%	15%	−4%
Africa	14%	14%	0%
Latin America	11%	8%	3%
India	8%	6%	2%
Middle East	5%	6%	−1%
China	4%	4%	0%
Australia and New Zealand	6%	4%	2%

Source: Reiseanalyse, 2020 and 2018

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

Spain

According to a study by brandwatch, the Spanish have the strongest preference for adventure trips, by far. With approximately 15% preferring adventure travel, their preference is about three times as high as the Italians in second place. Just like the Italians, many Spanish prefer cultural aspects above nature.

Nearly half (49%) of all Spanish travellers base their destination choices on the natural environment. This is higher than the European average of 43%. It is also higher than the German average. Interest in nature is especially high amongst men, baby boomers (55 years of age and older) and those living in urban areas.

Slightly more than half (51%) of all Spanish travellers base their destination choices on cultural offerings. This is one of the highest shares in Europe, and it is much higher than the European average (44%). Interest in cultural activities is especially high amongst millennials (25–39 years of age), people living in cities and those living alone or with a partner.

The overall holiday budget of Spanish travellers has dropped from €1,798 in 2019 to €1,347 in 2020. This is comparable to the budget of the Italian travellers, but lower than those of German, British and French tourists.

Morocco is a particularly important destination. Due to strong historical ties, tourism for the purpose of visiting family, friends and relatives offers opportunities for Moroccan suppliers. Other important destinations include Mexico, Thailand, Turkey and China. Many Spanish-speaking countries are also in the top 10 destinations, including the Dominican Republic, Peru, Ecuador and Cuba.

The Netherlands

The Dutch are known to be very active travellers, preferring outdoor activities when on holiday. Together with the British, the Dutch score especially high in the niche markets for cycling and birdwatching.

More than half (54%) of all Dutch travellers base their destination choices on the natural environment. This is amongst the highest shares in Europe, and it is much higher than the European average of 43%. Interest in nature is especially high amongst men, couples without children and baby boomers (55 years of age and others), as well as those living in rural areas.

One third (33%) of all Dutch travellers base their destination choices on cultural offerings. This is much lower than the European average of 44%. Interestingly, this does not apply to Dutch students, whose interest is comparable to the European average. The number basing their destination choices on cultural offerings is also much higher amongst travellers from urban areas (42%), as compared to rural areas (25%).

The Dutch tend to be price-conscious holiday bookers who aim to achieve good value for their money. The largest age groups of Dutch tourists are 65 years and older and between 45 and 64 years. Travellers between the ages of 45 and 64 years spend the most on holidays, with an average of €1,687. Online bookings are the most popular amongst the Dutch, with 80% of all bookings being made online.

Italy

Of the leading European source markets, Italy ranks second in the preference for adventure travel. More specifically, 5% of all Italian travellers prefer adventurous trips. This is higher than for German or British travellers.

Nearly two fifths (39%) of all Italian travellers base their destination choices on the natural environment. This is lower than the European average of 43%. Although travellers from Generation X (42%) and travellers without children (40%) have a slightly higher preference, there are no major differences between target groups in terms of the share basing their destination choices on the natural environment.

Almost half (48%) of all Italian travellers base their destination choices on cultural offerings. This is higher than the European average of 44%. Interest in the cultural offerings of a destination is especially high amongst millennials (25–39 years of age), students and people living in cities.

Italy was one of the first places in Europe where the COVID-19 pandemic broke out. The country was impacted heavily and had a relative high death rate and experienced serious economic impact. The decline in GDP in 2020 for Italy is estimated at 11.2%, which is above the European average. The overall holiday budget of Italians has dropped from €1,757 in 2019 to €1,377 in 2020, which is lower than the budget of the German, British and French tourists.

Especially countries close to Italy can still profit from Italian adventure travel.

Table 5: Top 10 markets for Italian tourists (adventure tourism and other forms of tourism combined).

Destination	Number of travellers in 2018	Market share on trips to developing countries
Albania	436,103	10.2%
Egypt	421,992	9.9%
Morocco	305,505	7.2%
Turkey	284,195	6.7%
Thailand	279,891	6.6%
China	277,776	6.5%
Cuba	208,287	4.9%
Mexico	183,913	4.3%
Brazil	175,763	4.1%
India	126,931	3.0%

Source: World Tourism Organization (UNWTO)

Sweden

Slightly more than half (52%) of all Swedish travellers base their destination choices on the natural environment. This is amongst the highest in Europe, and much than the European average of 43%. Interest in nature is especially high amongst women and millennials (25–39 years of age).

Slightly less than half (45%) of all Swedish travellers base their destination choices on cultural offerings. This is comparable to the European average (44%). The ratio of travellers who base their choices on cultural offerings is highest for men, baby boomers (55 years of age and older) and travellers from urban areas. Swedish travellers love outdoor nature activities, such as cycling, hiking, canoeing and camping.

Tips:

- Focus on Germany or the United Kingdom if you want to enter the largest European adventure travel markets.
- Target the Dutch or Swedish market if you offer adventure tourism services in nature, such as tour cycling and birdwatching.
- Focus on the United Kingdom, France, Spain or Italy if your adventure travel activities are more cultural in nature.
- Read our studies on specific aspects of adventure tourism, such as birdwatching tourism, cycling tourism, diving tourism, surf tourism and wildlife tourism, if your company specialises in one of these activities.

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

The European market for adventure tourism is constantly changing. The main trends within this market involve travellers seeking unique experiences, an increasing demand for combining adventure travel with wellness activities, and the increased use of technology, social media, online booking and specialized mobile apps.

Seeking 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.

Especially travellers from Generation Y and Generation Z look for interaction and deeper engagement with local culture. They like to do and see things and are less attracted to pure leisure. An example of a unique and never-to-be-forgotten experience is playing cricket with Maasai warriors and enjoying a chat afterwards, instead of ‘just watching’ a ritual dance. Another example is ‘the Big 5 Marathon’: running a marathon while enjoying wildlife. Doing so would create a far more memorable story and experience then ‘just sitting in a jeep and looking’ at wildlife. Safety and wildlife protection are ensured by carefully planning routes as well as using the marathon for raising funds for community development and wildlife conservation.

Figure 8: Joining locals in a game of street football can make for an unforgettable immersion experience.

Source: Shutterstock

Because experiences are becoming more important, the marketing strategy of tourism companies is also changing. While many suppliers still base their communication on listing services they offer for a certain price (commodity marketing), many companies now focus on offering experiences. These experiences should suit your targets personas, their values and their needs.

An example of a company doing this very well is &Beyond. Instead of communicating deals, prices and services, this companies' communication is based on offering 'extraordinary guest experiences' and promising a positive impact on the local environment. These promises of experiences are combined with amazing films of possible life-changing experiences and beautiful pictures. When you click on a destination, the website points out unique details of the destination and relates this to your personal experience. For example, Kenya is described as "spectacular natural beauty in one of the most unspoiled places on earth, but it also brings you up close and personal with Africa's most sought-after wildlife".

Another interesting example of a company focusing on offering unique and personal experiences is Paramount Journey in Tajikistan. Instead of listing deals, they focus their communication on the personal experience you will have when travelling with them.

Tips:

Read our study on how to get started developing your tourism product, based on your customers personas. Besides showing you what to focus on when developing products, creating personas will also help you to communicate more effectively to your target group.

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 of 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.

Adding wellness activities to travel packages

Mental and physical well-being 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 their physical condition.

Adventure tourists are likely to engage in wellness activities for several reasons:

- They are eager to experience new activities.
- They would like to destress by engaging in activities.
- Some wellness tourism activities involve immersion in local culture and are therefore part of adventure tourism. Examples include Thai massages in Thailand, visiting a hammam in Turkey and working with local herbs or applying other traditional wellness methods.
- Some wellness activities assist recovery after physical exercise.

The following are examples of adding wellness to an adventure package:

- Offering a sauna in the accommodation is very appealing to many Europeans. Infrared saunas are in especially high demand after physically demanding adventure activities, as they enhance muscle recovery.
- Add a hot tub to your lodges, or even to tents, if you offer adventure activities in a remote place. Travellers will enjoy allowing their exhausted muscles to recover in the hot water, while listening to the sounds of nature and gazing at the stars.
- Adding a gym or swimming pool to your accommodations, or offering yoga and meditation classes, will also be of interest to many adventure travellers. If this is not possible, consider collaborating with a local gym.

Figure 9: A hot tub with a great view will appeal to many nature-lovers

Source: Shutterstock

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 wellness tourism.

Social media, online booking and specialized mobile apps

Digital technologies in the form of adventure travel content on social media, blogs, websites, online booking and specialized apps are playing an increasingly important role in all phases of the customer journey for adventure travel.

Although tips from friends and family are still important, European travellers now receive their inspiration primarily from the internet. They read blogs, watch vlogs and see the holiday photos their friends post on social media. As a tourism company, you can play an important role in promoting the photos shared by your visitors. For example, you could do this by connecting to your visitors online, liking their photos and stories, and resharing them. You could also facilitate this process further by connecting to your own customers online and sharing your own photos (obviously with permission). Your customers are likely to share these photos further.

Attracting travellers through social media creates opportunities for small tour operators to gain market share, even if they lack the budget for large-scale marketing campaigns.

Outdooractive is Europe's leading outdoor platform with more than 11 million users. It includes more than 660,000 tour descriptions, offering inspiration to many. Adventure tourists and outdoor sports enthusiasts use the platform to plan, carry out and share experiences with friends or the Outdoor community.

Partly in response to the COVID-19 pandemic, travellers are increasingly booking holidays online. The following are several examples of eco-friendly companies that allow booking adventure travel online:

- Contiki
- Better Places
- Intrepid Travel
- Much Better Adventures

Finally, travellers are increasingly using mobile phone apps and other tools during their travels. 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:

Increased use of social media, online booking and specialized apps is a trend in all sectors in tourism. Read more about this trend in the CBI studies Which trends offer opportunities? and Tips to go digital.

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.

Virtual (VR) reality, augmented reality (AR) and more

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 360º 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 360º video, you need a special omnidirectional camera; for a 360º picture, you can just use the camera on your mobile phone.

Tips:

- Share a 360º video or several 360º pictures of your accommodation. You can use high-quality images, such as the Atlantis Dubai tour.
- Make a 360º video or 360º 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 360º pictures, which don't require any investment. You can also use Facebook and the Google Street View app to enhance them.
- To make 360º videos, you need to buy a special camera starting from approximately €170, or hire someone to do it for you.

The market for adventure travel is becoming more age-diverse

Generation Y and Z are more active when travelling than previous generations and focus more on personal growth and development as well. This is an important driver for many changes in the market, including digitalization.

While adventure travel was once mainly for younger people, older Europeans are now also becoming more engaged in adventure travel. Older travellers are remaining fit by staying active. Two advantages of targeting this group is that they have most money to spend and, when retired, they are also able to travel off-season. Members of this target group are more interested in comfort than in luxury. For example, it is important to provide comfortable beds, ensure silence at night and use a simple booking process. These travellers are less interested in luxurious decorations and well-dressed employees. In addition, pandemic-related hygiene regulations are more important to this target group.

Many older travellers are also willing to travel with their relatives and enjoying time with their families while they are still in good health. When providing travel services to multi-generational families, you should offer adventurous activities that are suitable for all generations.

Tips:

- Read our study on Generation Y, our study on baby boomers or our study on multi-generational families to learn more about these target groups.
- Spend time with your customers and talk to them. Talk about your adventure activities, which is something they are interested in 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.

Molgo and ETFIcarried out this study on behalf of CBI.

Please review our market information disclaimer.