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ATTRACTING AND SERVING THE U.S. ADVENTURE TRAVELER

Mexico, Photo © ATTA / Hassen Salum

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The U.S. market for travel of all types is massive: USTOA estimates U.S. travelers generated $927.9 billion in direct spending and another $1.2 trillion in indirect and induced spending in 2014.[1] While domestic trips dominate for U.S. travelers, comprising 94% of their leisure travel[2], the UNWTO still finds that the U.S. is the second largest outbound market for international travel.[3]

For adventure travel businesses, the U.S. market represents an important business opportunity. This report presents the findings from two recent surveys of outdoor enthusiasts and adventure travelers in particular. With the goal of providing adventure companies interested in building their business with U.S. travelers, the report shares information on:

- **PRIMARY U.S. ADVENTURE TRAVELER PERSONAS**
- **FAVORED DESTINATIONS FOR U.S. ADVENTURE TRAVELERS**
- **MOST COMMONLY PRACTICED ADVENTURE ACTIVITIES**
- **ADVENTURE TRAVEL TRIP DURATION**
- **ADVENTURE TRAVEL TRIP PLANNING HORIZON**
- **TOOLS USED TO PREPARE AND BOOK ADVENTURE TRAVEL TRIPS**

SURVEY METHOD

The Adventure Travel Trade Association's 2014 U.S. Adventure Pulse survey examined adventure traveler motivations, favored destinations, activities, spending, use of tour operators, gear preferences, planning horizon and more. The study revealed preferences and behavioral patterns among U.S. adventure travelers. There were 1700 respondents to the US Adventure Pulse survey: 49% male, 51% female. A post-stratification method based on demographics was used to infer results and correct for the panel bias in the main demographic proportions. U.S. Adventure Pulse results are provided at +/-2.5% error.

In a second survey, conducted March 2015, ATTA and Outside Magazine partnered to survey U.S. outdoor enthusiasts, posing select questions from the U.S. Adventure Pulse to a panel of respondents drawn from Outside Magazine readers, Outside online users and Outside television viewers. The Outside study involved a panel of 680 respondents, 80% male, 20% female. Median age for respondents was 45.

Reviewing the results of the U.S. Adventure Pulse alongside the recent survey using Outside's panel provides fresh insight into opportunities for product innovation and marketing by adventure travel tour operators, agents, accommodation providers and retailers. In particular, both studies reveal similar findings in the following areas: activities favored by adventure travelers, trip planning horizon and trip duration.

This report is organized into three sections:

1. Understanding U.S. Adventure Traveler Personas
2. Findings to Inform Product Development
3. Findings to Support Marketing Strategy

Within each section select findings from both surveys are shared and suggestions for how adventure travel businesses focused on the U.S. market might apply the information are offered.

Mexico, Photo © ATTA / Hassen Salum

[1] US Travel Association. *US Travel Answer Sheet. Tech*. Washington, D.C.: USTOA, 2015. Downloaded May 2015 from: https://www.ustravel.org/sites/default/files/page/2013/08/US_Travel_AnswerSheet.pdf

[2] Euromonitor International. *Tourism Flows Domestic in US*. Rep. N.p.: Euromonitor International, 2014. Print.

[3] UNWTO. *Over 1.1 Billion Tourists Travelled Abroad in 2014*. World Tourism Organization UNWTO. UNWTO, 27 Jan. 2015. Web. 15 May 2015. <http://media.unwto.org/press-release/2015-01-27/over-11-billion-tourists-travelled-abroad-2014>.

UNDERSTANDING U.S. ADVENTURE TRAVELER PERSONAS

One of the most useful pieces of information to emerge from the U.S. Adventure Pulse is a more refined segmentation of the U.S. adventure traveler market.

Whereas in past studies, respondents were categorized as adventure travelers based solely on the primary activity of their last trip, in the U.S. Adventure Pulse, researchers examined adventure traveler behavior more deeply. Three primary adventure traveler personas emerged based on respondents' answers to questions about the primary and secondary activity of their last trip, skill level, comfort with risk, and whether they participated in the same activities repeatedly.

The chart illustrates a segmentation of U.S. travelers that includes Mass Travelers, "Up- and-Coming Adventurers", "Adventure Enthusiasts", "Adventurers", and "Adventure Grazers."

The chart shows:

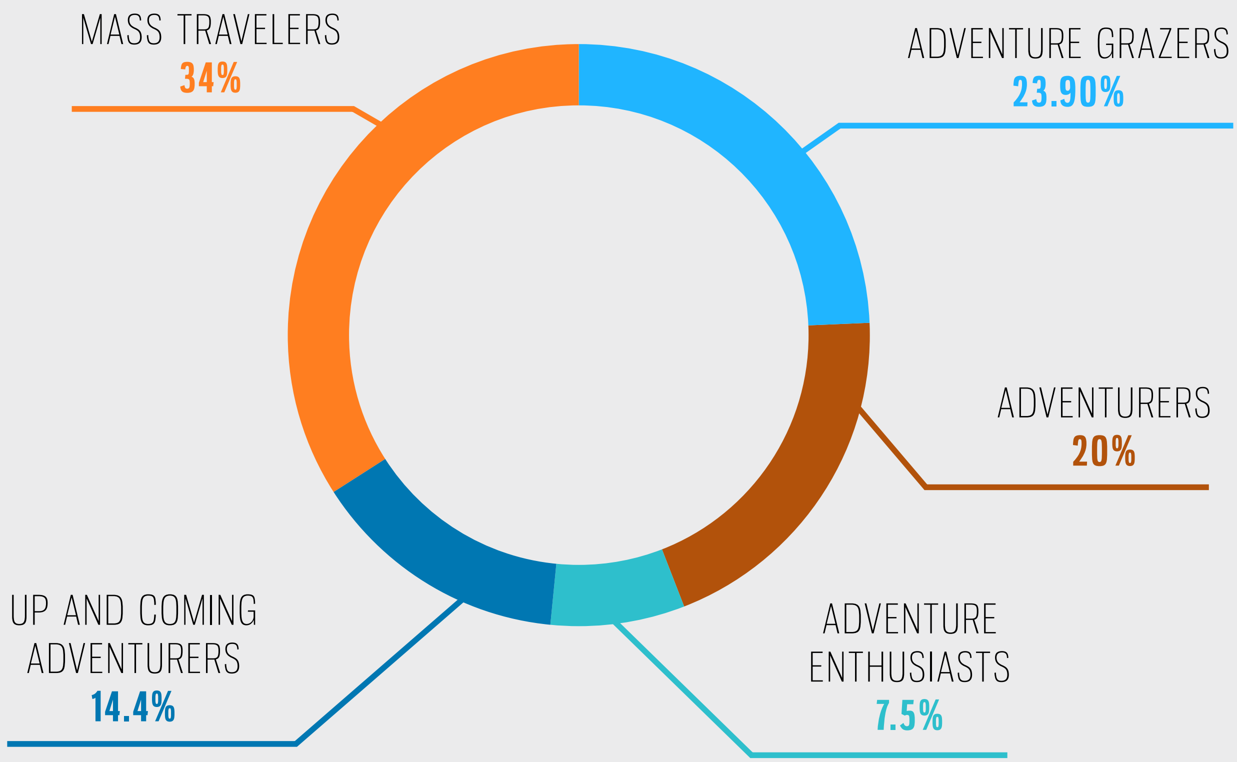
» **34%** of the U.S. population can be considered pure mass travelers

» **14.4%** are pre-adventurers or up-and-coming adventurers, having tried an adventure activity as a secondary activity to a trip in the past

» **23.9%** are Adventure Grazers

» **20%** are Adventurers

» **7.5%** are Adventure Enthusiasts



ADVENTURE TRAVELER PERSONAS

Mass travelers are those not currently participating in adventure activities. The three primary adventure traveler personas – "Adventure Enthusiasts", "Adventurers", and "Adventure Grazers" – are described in the table below. The column on the left itemizes key characteristics; the column on the right describes what motivates people within each persona to travel.

CHARACTERISTICS

» Bucket list driven

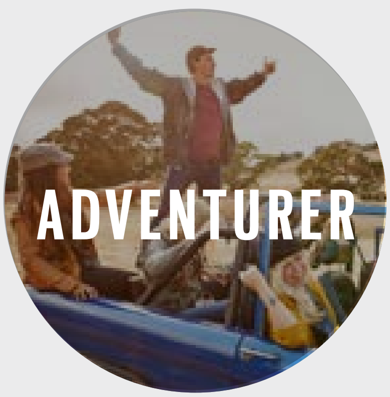
» Not likely to repeat activities once experienced

» Perform at novice/beginner skill level

» High thrill seeker

MOTIVATIONS

1. Time to be with family
2. Exploring new places
3. Time to be with friends



CHARACTERISTICS

» Actively seeking to improve and enhance skills

» Repeat a favorite activity or related activity on multiple trips

» Perform at intermediate level

» Moderate thrill seeker

MOTIVATIONS

1. Relaxation
2. Time to be with family
3. Exploring new places

CHARACTERISTICS

» Practice activities at a high skill level

» Dedicated to one activity

» Accept higher risks (as a result of higher skill level) to achieve greater thrill

» Seek unique and new destinations to practice favorite activity

MOTIVATIONS

1. Exploring new places
2. Exciting new activities
3. Relaxation

Understanding the different types of adventure travelers and what motivates them to travel is at the heart of understanding what products and marketing messages will appeal most to them.


Chile. Photo © ATTA / Camron L. Martdinell

PERSONAS IN ACTION CASE STUDY: NORTHERN OUTDOORS

One approach to applying these personas in an adventure business, is to recognize these personas among current clients. An adventure lodge based in the U.S. state of Maine, Northern Outdoors, shared how they have been able to use these personas in their business and with sharper product development and targeted marketing, enjoy greater predictability in their business.

Adventure Enthusiast

Northern Outdoors learned early that perhaps the easiest guests to understand and the hardest to replace are their Adventure Enthusiasts. For Northern Outdoors their Adventure Enthusiasts are made up of three specific types of visitors: Anglers, Hunters and Snowmobilers. Each of these different types of Adventure Enthusiasts visits at different times in the season specifically, spring / fall and winter – which is also somewhat aligned with Maine tourism's slower seasons.

Northern Outdoors noticed that each of the three different groups are very loyal to their chosen sport often traveling to multiple locations a year to participate in their chosen activity. The Adventure Enthusiasts invest time and money in equipment, books and activity-specific magazines to learn about their sport. Northern Outdoors discovered that if they met all of the Enthusiasts' needs, ie lodging, meals and activity, they would very likely come back as loyal customers and advocates year-after year.

With respect to product development, Northern Outdoors catered to the Adventure Enthusiast passion, providing the best possible experience with highly knowledgeable service.

To market to Adventure Enthusiasts Northern Outdoors relies on word of mouth, specialist agents and very targeted media advertising in narrowly focused publications with a specialist audience.

The result of this attention to the specific characteristics of the Adventure Enthusiast has allowed Northern Outdoors to enjoy repeat customers who are extremely loyal, and not overly price sensitive.

Adventure Grazers

At the other end of the spectrum are the Adventure Grazers. Northern Outdoors noticed that their Adventure Grazer clients often book late (within two weeks of departure), and many expect a deal or last minute discount. In contrast to the Adventure Enthusiasts who want to savor the experience of their favorite sport, such as a full day of fishing, the Adventure Grazers are hoping to experience many new and exciting activities on their holiday.

With respect to product development the better offer to an Adventure Grazer, Northern Outdoors discovered, was a self guided morning hike to a local waterfall, lunch at the in-house brewery and an afternoon fishing trip.

Marketing to the Adventure Grazers is best done through a myriad of online channels and mainstream consumer publications that catch a novice audience and can be worth the expense especially when advertising an appealing discount.

The result of Northern Outdoors' specific attention to the characteristics of the Adventure Grazers was the knowledge that this group could be useful to fill in underutilized space, with the awareness that they are not likely to be repeat clients, as they prefer instead to move on to their next adventure.

Adventurers

And finally, the Adventurers. For Northern Outdoors, this persona turned out to present itself most fully in their list of daily rafting clients. These people tend to:

» Research their trip quite thoroughly

» Ask many questions during the reservations process

» Express interest in staying an extra day or two to explore, hike on their own or simply relax

» Display loyalty to Northern Outdoors, and venturing "out-of-season" for specific trips or itineraries that can only be arranged in non-peak times

» Value the specifics of the experience more highly than the deal – for example, requesting a specific cabin or trip date

Northern Outdoors developed products to appeal to Adventurers by focusing on education, and especially training staff to help share with these guests the details and differences of the three different river trip experiences available. The company also developed a series of local hikes and driving loops to help round out the trip for Adventurers who often want to delve deeper into the community and explore the area on their own.

Northern Outdoors' marketing to Adventurers has emphasized relaxation, which is of high importance to Adventurers, as well as the benefits of experiencing the region with the company's smart and knowledgeable local staff.

As a result of shaping product and marketing specifically to their Adventurer clients, Northern Outdoors discovered that many of the Adventurer clients will over the course of three or four years return to do all three river trips.

Ecuador, Photo © ATTA / Hassen Salum

FINDINGS TO INFORM PRODUCT DEVELOPMENT

The research findings shared in this section can be used by adventure travel businesses to help inform product development efforts. This section includes detailed information on the following:

» Past and future favored destinations for U.S. Adventure Travelers

» Most popular adventure activities for U.S. Adventure Travelers

» Adventure travel trip duration

PAST AND FUTURE FAVORED DESTINATIONS FOR U.S. ADVENTURE TRAVELERS

Survey respondents were asked to provide information about their last trip and the preferred destination of their next trip. For both past travel and future travel North America is the top region for U.S. Adventure travelers in all three personas. After North America, Europe is the second most popular region to visit, followed by Central and South America, Asia and the Middle East and finally Africa. Within these regions, the top five countries most recently visited by adventure travelers in each persona are shown below.

Destinations Most Recently Visited by U.S. Adventure Travelers

	ADVENTURE GRAZER	ADVENTURER	ADVENTURE ENTHUSIAST
1	United States	United States	United States
2	Mexico	Mexico	Canada
3	Canada	Canada	Australia*
4	U.K.	Caribbean Island	Mexico
5	France	Ireland*	Bahamas
6	Caribbean Island	Bahamas	Fiji
7	India*	Japan	U.K.
8	Dominican Republic*	Costa Rica*	France
9	Bahamas	Australia*	Italy
10	Germany	China	Haiti*

*Destinations unique to adventure travelers

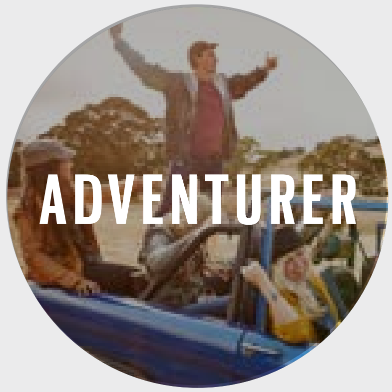
The popularity of Mexico and Canada among international adventure travelers is consistent with what is known about U.S. travelers in general. For example, Travel Weekly reported that Mexico was by far the most popular destination among U.S. travelers when they traveled internationally in 2014; approximately 34% of U.S. travelers going abroad last year visited

[4] "U.S. Visits to Mexico up 22% in 2014: Travel Weekly." *Travel Weekly*. Travel Weekly, 4 Mar. 2015. Web. 04 June 2015. <http://www.travelweekly.com/Mexico-Travel/US-visits-to-Mexico-up-22-percent-in-2014>.

Mexico, with 19% visiting Canada and 18% traveling to Europe.[4] Moving out of the top three destinations however, the adventure travel population begins to veer away from the norm, with countries such as India, Australia, Dominican Republic, Costa Rica, and Haiti showing up on the list.

With respect to travel within the United States, the U.S. Adventure Pulse found that the most frequently cited destination for adventure travelers' last trip in all three personas was Colorado. The table below shows the top five states most recently visited by travelers within each persona.

States Most Recently Visited by U.S. Adventure Travelers



1. COLORADO	**1. COLORADO**	**1. COLORADO**
2. FLORIDA	**2. FLORIDA**	**2. CONNECTICUT**
3. MARYLAND	**3. NORTH DAKOTA**	**3. LOUISIANA**
4. GEORGIA	**4. MINNESOTA**	**4. NORTH DAKOTA**
5. CONNECTICUT	**5. NEW HAMPSHIRE**	**5. MINNESOTA**

The top five states cited by respondents in the Outside magazine survey are Colorado, California, Utah, Florida, and Arizona, as the most recently visited destinations.

In comparing the two sets of results it is clear that Colorado is a destination of choice for both new and experienced adventure travelers. Florida also appears in the results of both surveys. (Of note also is that Florida is expected to be the fastest growing state in the country for domestic tourism in general, with tourist arrivals estimated to grow by 14% from 2013 - 2018, at a CAGR of 3%.)[5]

The appearance of states such as Maryland, Georgia and Connecticut in the list of adventure traveler destinations could signal an opportunity for both adventure travel tour operators and destination marketers in those states to explore how adventure travelers are experiencing these destinations.

[5] Euromonitor International. *Tourism Flows Domestic in US*. Rep. N.p.: Euromonitor International, 2014. Print.

Wish List Destinations for U.S. Adventure Travelers

Looking to the future, the table below shows the countries adventure travelers said they hope to visit on their next trip.

	ADVENTURE GRAZER	ADVENTURER	ADVENTURE ENTHUSIAST
1	United States	United States	United States
2	Mexico	Canada	Canada
3	Canada	Caribbean Island	Brazil
4	U.K.	U.K.	U.K.
5	Italy	Mexico	Australia
6	Australia	Bahamas	Italy
7	Germany	Italy	France
8	France	Greece	South Africa
9	Japan	Aruba	Mexico
10	Bahamas	Costa Rica	Austria

Brazil and the Caribbean Islands are the only places to break the lock on the top three destinations held by the U.S., Mexico, and Canada. Brazil's appearance in the top three future destinations for Adventure Enthusiasts suggests that adventure travel tour operators with itineraries in Brazil might increase their marketing to U.S. adventure travelers, emphasizing the opportunity for skilled adventurers to enjoy their favorite activities in a new and exotic destination.

Wish List States For U.S. Adventure Travelers

Within the United States, adventure travelers say they plan to take their next trip to the states below.

	ADVENTURE GRAZER	ADVENTURER	ADVENTURE ENTHUSIAST
1	Colorado	Florida	Colorado
2	Florida	Colorado	Florida
3	Maryland	North Carolina	Maryland
4	North Carolina	New Hampshire	Montana
5	Connecticut	Minnesota	Minnesota
6	Pennsylvania	Maryland	North Dakota
7	California	Connecticut	New Hampshire
8	Arkansas	California	Oregon
9	Georgia	Georgia	Arkansas
10	Bahamas	Costa Rica	Iowa

Colorado and Florida appear in both past and future adventure traveler plans, and were cited by both the U.S. Adventure Pulse respondents and the respondents participating in the Outside magazine survey. This suggests that adventure businesses with offerings in these states should continue to build and market their services in theses places, as they appear to be in high demand.

MOST POPULAR ADVENTURE ACTIVITIES FOR U.S. ADVENTURE TRAVELERS

The most popular activity for U.S. adventure travelers in all three personas is backpacking/hiking/trekking. The table below provides further detail on other activities of interest for each persona from the U.S. Adventure Pulse survey.

	ADVENTURE GRAZER	ADVENTURER	ADVENTURE ENTHUSIAST
1	Backpacking/Hiking/Trekking	Backpacking/Hiking/Trekking	Backpacking/Hiking/Trekking
2	Camping	Camping	Camping
3	Fishing/Fly-fishing	Fishing/Fly-fishing	Snorkeling
4	Bird watching	Climbing Mountain/Rock	Fishing/Fly Fishing
5	Snorkeling	Snorkeling	Bird Watching
6	Horseback riding	Bird Watching	Sailing
7	Climbing mountain/rock	Skiing/snowboarding	Skiing/Snowboarding

The top three activities are the same for Adventure Grazers and Adventurers: backpacking/hiking/trekking; camping; and fishing. Bird watching, a soft adventure activity, appears in the list of activities for all three personas, including the Enthusiasts, who typically have greater skill and greater comfort with risk. Also worth noting is the interest in mountain and rock climbing for the Adventurer and Grazer personas, in which people are novice and intermediate participants and look to guides to mitigate risk and compensate for their inexperience.

Adventure businesses considering how best to apply this information might consider for example, adding short introductory climbing activities into a varied itinerary for Grazers, who are interested in sampling many activities. To appeal to Adventurers, the persona most interested in building their skills, an afternoon of climbing instruction might be a welcome add-on. Acknowledging that all three personas are interested in backpacking and camping indicates that developing varied itineraries incorporating these components as an option could be appealing to different types of adventure travelers. For example, consider providing an optional single night of camping to appeal to Grazer clients, the option for a slightly more strenuous two night option with more challenging hiking for Adventurers, and a self-guided option with company support to carry gear and food supplies for Enthusiasts who typically have high skill levels for the activities they pursue.

Ecuador, Photo © ATTA / Hassen Salum

The Outside survey further confirms the interest in backpacking and camping. That survey found the most popular past activities for survey respondents as follows:

1. Hiking
2. Camping
3. Backpacking
4. Road cycling
5. Downhill skiing
6. Mountain biking
7. Trail running
8. Kayaking
9. Boating, sailing or yachting
10. Scuba diving or snorkeling

For adventure travel businesses, recognizing that U.S. adventure travelers (as captured by the U.S. Adventure Pulse) and general outdoor enthusiasts (as captured by the Outside Magazine survey) favor backpacking, hiking and camping is significant. One of the possible lures of backpacking, hiking, and camping is that they can be approached by both novice and experienced people, offering a way into adventure travel for people with little experience, and with a variation in route or duration perhaps, a rewarding challenging experience for people who have been honing their backcountry skills for years. For adventure travel businesses one product development opportunity could be to bring backpacking and camping components into more trips.

In addition, the Outside survey asked respondents to share information about activities in which they would like to enhance their skill on their next adventure/sports focused trip. Respondents were “extremely interested” in the following activities:

1. Biking
2. Skiing
3. Kayaking
4. Photography
5. Fishing
6. Rafting
7. Rock climbing
8. Trail running
9. Adventure writing
10. Video/Film making

Considering the findings from both studies suggests that incorporating activities such as hiking, backpacking, and camping into adventure tours seems to elevate and add value to the experience of these activities and could enhance existing product offerings to appeal to adventure travelers not currently using industry services. Further, developing trips accessible to novice participants that have a component of skill-building in biking, skiing or kayaking for example, may attract new customers.

Mexico, Photo © ATTA / Hassan Salum

Ecuador, Photo © ATTA / Hassen Salum

ADVENTURE TRAVEL TRIP DURATION

Creating adventure travel trips of the right length is a challenge many companies grapple with, especially when working in destinations with so much to offer in the way of nature, culture and physical activity.

Length of Last Trip

The table below shows the average length of all adventure travelers' last trip, and also provides a segmentation showing the difference in duration for travelers who booked with the help of a tour operator, agent, or on their own.

	ADVENTURE GRAZER	ADVENTURER	ADVENTURE ENTHUSIAST
All adventure travelers	6.5 days	6.5 days	7 days
Adventure travelers using a tour operator or travel agent	**7.5 days**	**7.8 days**	**8.4 days**
Adventure travelers assembling trip all on their own	6 days	6 days	6 days

For the majority of adventure travelers, the average trip duration is 6.5 days. The U.S. Adventure Pulse results show that adventure travelers booking through a tour operator or travel agent spent an extra day on their trip, excluding travel to and from their home: Grazers and Adventurers in this case spent 7.5 to 7.8 days traveling, while for Enthusiasts the trip duration extended to 8.4 days. This is in contrast to adventure travelers assembling their trips without support – their trips lasted only six days.

The results from the Outside survey show that the majority of people felt that the ideal length of time for an adventure trip was six to seven days (34%), followed by one to five days (33%) and then eight to ten days (21%). Trips longer than 11 days were favored by only 12% of respondents.

"Bleisuring"

When it comes to combining business and pleasure the U.S. Adventure Pulse found ten to twelve percent of travelers across the three personas stating that they were adding the adventure portion of their trip onto an existing business trip, with the business portion of the trip lasting approximately three to four days, and the adventure portion of the trip lasting four (adventurer), five (grazer) or six days (enthusiast).

This is more than double the amount of time that mainstream travelers have been found to add on to their business trips: travel research company Skift shares in a Bridgestreet Global Hospitality survey of 640 international guests[6] that mainstream travelers add an average of only two days to their business trips. The report further notes that people who do "bleisure" do so nine out of ten business trips. Although the Bridgestreet Hospitality research is global (which may be partly responsible for the lower average number of days reported) whereas the adventure traveler research reports only on U.S. traveler behavior, it is clear that the "bleisure" trend is worth paying attention to for adventure travel companies. Finding ways to design trips in such a way that they are accessible to people traveling on business – for example possibly making gear available to reduce packing concerns, or setting departures for Saturday when business meetings have concluded — are two product innovation ideas that may help adventure travel tour operators cater to the adventurous business traveler.

Mexico, Photo © ATTA / Hassen Salum

Considering the results of these two studies suggests that developing itineraries for adventure travelers six to seven days in length is ideal for most U.S. adventure travelers, while some adventure travelers (notably the Enthusiasts) will travel for longer: between eight and 11 days. Marketing four to six day adventure trips to business travelers is also recommended. For tourism managers responsible for marketing in states such as Colorado and Florida, building awareness among business travelers for the state's adventure opportunities could help encourage people to stay longer when traveling for meetings.

[6] *The Bleisure Report 2014.* Rep. Skift, n.d. Web. 4 June 2015. <http://skift.com/wp-content/uploads/2014/10/BGH-Bleisure-Report-2014.pdf>.

FINDINGS TO SUPPORT MARKETING STRATEGY AND TACTICS

The results shared in this section can be used by adventure travel businesses to support their marketing strategy. This section includes detailed information on the following:

» Adventure travel trip planning horizon

» Adventure traveler tools used in trip planning

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ADVENTURE TRAVEL TRIP PLANNING HORIZON

Adventure travel businesses can better plan their marketing activities when they have a sense of how and when travelers are planning their trips. The U.S. Adventure Pulse results show that nearly half of all adventure travelers (46%), regardless of persona, begin planning their adventure travel trips one to four months in advance. The next most common planning time horizon cited for all three personas was five to seven months in advance, followed by less than one month in advance. Not surprisingly, Adventure Grazers and Adventurers are the most likely to plan with less than a month's notice, while Adventure Enthusiasts were the least likely to plan a trip with less than one month lead time.

These results are similar to the findings from the Outside survey, where the majority of respondents said they plan trips three months or more in advance (38%). The next most popular trip planning time horizon cited was one month or more in advance (23%), followed by six months or more in advance (19%).

Considering the findings from both studies, it seems that approximately six months prior to departure is the best time to start trying to capture the attention of adventure travelers planning their trips. At three months out, consider heavily promoting trips with a scheduled departure. And finally, when marketing trips launching within the month consider appealing to male Adventure Grazers and male Adventurers. This suggestion comes from considering the similar results from the U.S. Adventure Pulse and the Outside survey, and bearing in mind that respondents in the Outside survey were 80% men.

ADVENTURE TRAVELER TOOLS USED IN TRIP PLANNING AND BOOKING

The section above provided details on the trip planning time horizon. This section discusses the tools most commonly used in trip planning and can provide guidance on where to market in order to best capture the attention of adventure travelers.

The table below shows the percentage of adventure travelers in each persona using each of the different tools available for trip planning.

	ADVENTURE GRAZER	ADVENTURER	ADVENTURE ENTHUSIAST
Friends/Family	29.4%	30.2%	30.5%
Review Site	17.4%	19.4%	21.7%
No Preparation	12.9%	12.6%	5.2%
Travel Deal	10.9%	10.5%	10.9%
Travel Magazine	10.7%	10.5%	15.8%
Travel Blog	0.9%	0.9%	1.5%
Social Site	9.9%	9.4%	10.0%
Travel Show TV	1.6%	1.2%	1.2%
Travel Show Online	0.6%	0.2%	0.0%
Other	5.8%	5.2%	3.2%

Best Social Media, Review Sites and Travel Magazines to Reach U.S. Adventure Travelers

Diving further into the topic of tools used in planning, the U.S. Adventure Pulse asked respondents to share which online sites they frequented when preparing for their trips. The most used social media site for all three personas was Facebook, followed by YouTube, Twitter and then Pinterest. Facebook was also used most by all three personas when looking for new travel ideas.

TripAdvisor was the most popular travel review site.

When asked about travel magazines, the leading publications are National Geographic, Conde Nast Traveler, and Outside Magazine. National Geographic and Outside were especially favored by Adventure Enthusiasts, whereas the Adventure Grazers and Adventurers cited Budget Travel as the third most commonly referred to travel magazine when planning trips.

Among travel deal sites, Groupon led the way for all three personas, followed by LivingSocial.

CONCLUSION

From this research a more refined view of U.S. adventure travelers has emerged. Understanding the different adventure personalities (in contrast to the more frequently used age-based demographic segmentation, for example) allows adventure travel businesses to design products and market them very specifically to people based on a complete profile of their preferences and motivations.

Taking this powerful information and linking it to an understanding of the domestic and international destinations U.S. adventure travelers have visited and where they dream of traveling, along with their preferred trip duration provides the fundamental building blocks of adventure travel itineraries.

Ecuador, Photo © ATTA / Hassen Salum

APPENDIX: LIST OF ADVENTURE TRAVEL ACTIVITIES

Appendix: List of Adventure Travel Activities

Survey respondents were organized into traveler personas (Up-and-Coming Adventurer, Adventure Grazer, Adventurer, Adventure Enthusiast) based on an analysis of the primary and secondary activities of their last trip, skill level, likelihood to participate in the same activities repeatedly, and comfort with risk.

Archeological expedition

Backpacking / Hiking / Trekking

Bird-watching

Camping

Canoeing

Caving

Climbing – Mountain / Rock

Fishing/fly fishing

Heli-skiing

Horseback riding

Kayaking/sea/whitewater

Kite surfing

Motorized sports (motorcycle / snowmobile /4x4, etc)

Mountain Biking

Orienteering

Paragliding

Rafting

Research expeditions

Road Cycling

Sand-boarding

Safaris

Sailing

Scuba diving

Snorkeling

Skiing/snowboarding

Standup paddle boarding

Surfing

Volunteer tourism