

Outdoor Adventure Travellers: Characteristics, Attitudes & Motivations

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We would like to thank the CTC Partners who sponsored the study by providing prizes to encourage survey participation.

For the prize draws in the U.S.:

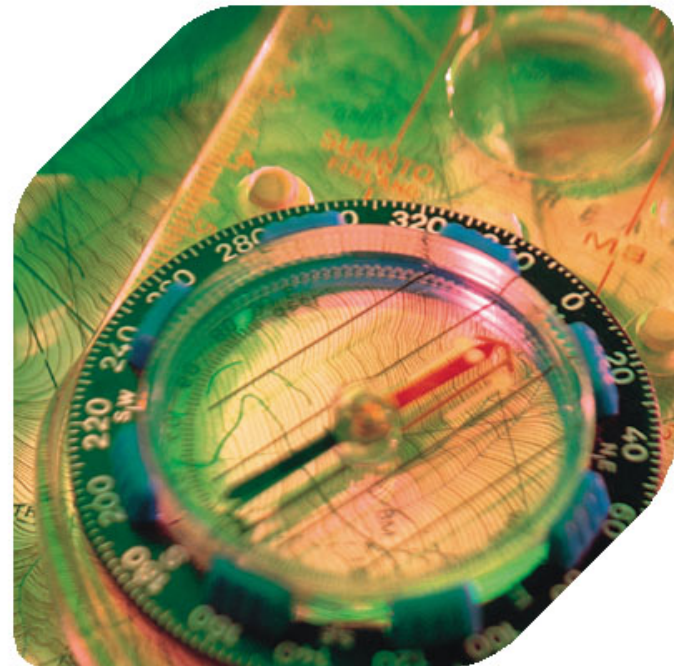
- Tourism Newfoundland
- Wilderness Newfoundland Adventures
- Continental Airlines
- Ontario Parks
- Scademia Adventure Tours
- Stan Cook Sea Kayaking
- Twillingate Island Boat Tours
- Banberry House
- Bird Island Resort
- Fishers' Loft
- Crewe's Heritage B&B
- Murray Premises

For the prize draws in Canada:

- Randonnée Adventure Travel Ltd.
- Ontario Parks
- Parks Canada
- BC Parks

Presentation outline

- The importance of this segment of travellers
- Objectives and methodology
- The main implications of the research



The Importance of Outdoor Adventure Travel



Outdoor adventure vacations are a large component of the Canadian travel sector

- The adventure travel market is an important niche sector for marketing Canada as a destination. This segment is large and it represents a significant opportunity for retaining Canadian travellers' expenditures, as well as attracting visitors from the U.S. and further abroad.



Outdoor adventure travellers are a sizeable segment of the adult population

Canadian Adults

U.S. Adults

23%

Soft Adventure
(hiking, cycling,
canoeing, etc.)

18%

7%

Hard Adventure
(mountain biking, rock
climbing, white water
rafting, etc.)

8%

Sources:

U.S. Soft Outdoor Adventure Enthusiasts - a Special Analysis of the Travel Activities and Motivation Survey (TAMS), Research Resolutions & Consulting Ltd.

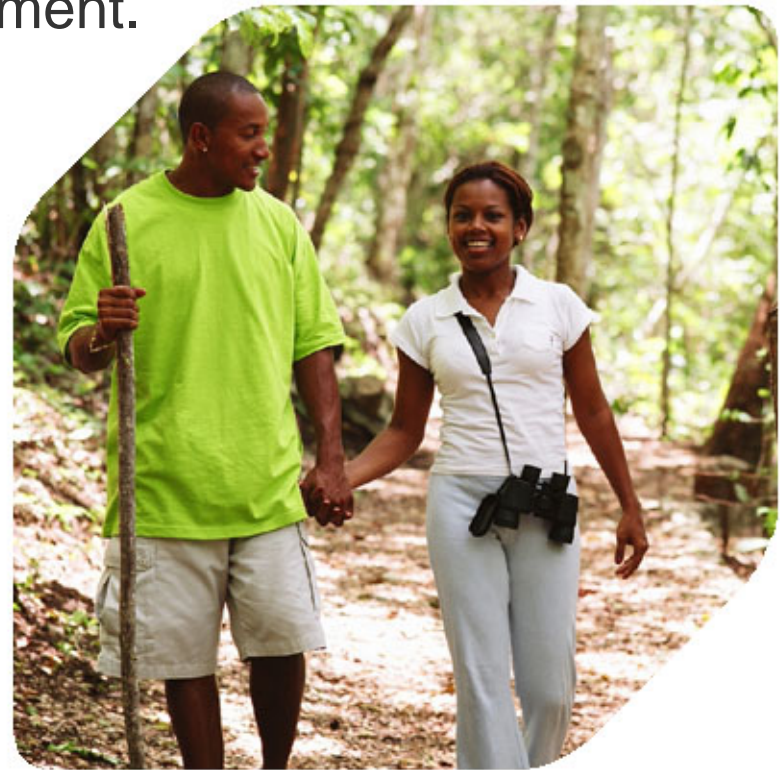
U.S. Hard Outdoor Adventure Enthusiasts - a Special Analysis of the Travel Activities and Motivation Survey (TAMS), Research Resolutions & Consulting Ltd.

Canadian Soft Outdoor Adventure Enthusiasts - a Special Analysis of the Travel Activities and Motivation Survey (TAMS), Research Resolutions & Consulting Ltd.

Canadian Hard Outdoor Adventure Enthusiasts - a Special Analysis of the Travel Activities and Motivation Survey (TAMS), Research Resolutions & Consulting Ltd.

The outdoor adventure sector needs support to realize this significant opportunity

- Canada offers a diversity of destinations and activities that are ideally suited to the outdoor adventure traveller.
- Many of the operators in this sector are small and need assistance with product development. Marketing and sales support is also needed to improve the competitiveness of Canada as a destination of choice among prospective outdoor adventurers at home and abroad.



Study Objectives and Methodology



Study objectives

- In order to support expansion and development of this sector, operators and marketing organizations in Canada require a fuller understanding of this niche market.
- The central objective of this research was to gain a better understanding of outdoor travellers, their intended destinations and their underlying needs.



Study methodology

- Intercept interviews were conducted at outdoor adventure trade shows in 2005. Respondents were intercepted in Chicago; New York; Washington, DC; Vancouver, BC; Toronto and Calgary.
- This was followed by an online survey of over 1,400 travellers who had participated in outdoor adventure activities while on vacation in the past five years.
- Fieldwork was conducted from January to April 2005.



Respondents participated in one or more outdoor adventure activities while on vacation

■ Water Adventures:

- Canoeing
- Sea kayaking
- River kayaking
- Rafting
- Fishing
- Sailing
- Scuba diving

■ Land Adventures:

- Hiking
- Ice/rock climbing
- Trail riding
- Mountaineering
- Mountain biking
- Hunting
- Cycling
- Motorcycling

■ Winter Adventure:

- Dog sledding
- Snowshoeing
- Cross-country skiing
- Snowmobiling

■ Air Adventure:

- Hot air ballooning
- Hang gliding
- Helitours/flight seeing

■ Nature and Wildlife Observation:

- Bird watching
- Whale watching
- Bear watching (polar, grizzly, etc.)
- General nature observations

■ Cultural Interpretation (i.e., First Nations)

Main implications of the research

- What are the characteristics that typify outdoor adventure travellers and their trips?
- Which outdoor adventure activities do they participate in and what are their motivations for doing so?
- What is the process for selecting a destination and what elements are important to adventure travellers?
- What media and information sources are used by this niche segment of the travel market?



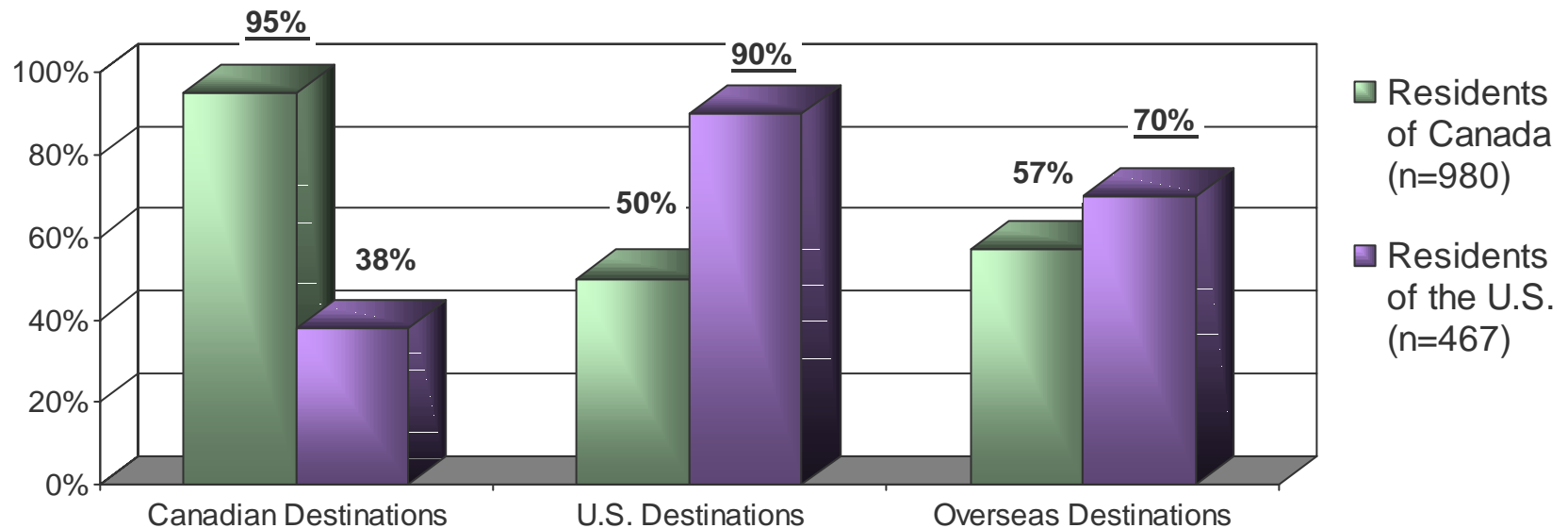
Characteristics of Outdoor Adventure Travellers and Their Trips



Outdoor adventurers travel often and to a range of destinations

- On average, these travellers have participated in outdoor adventure activities at more than four destinations in the past five years.
- Residents of both the U.S. and Canada are highly likely to have taken this type of trip in their own countries, and many have travelled overseas.

Destinations of Trips Involving Outdoor Adventure Activities in Past 5 Years



They are young to middle-aged, affluent and gender balanced

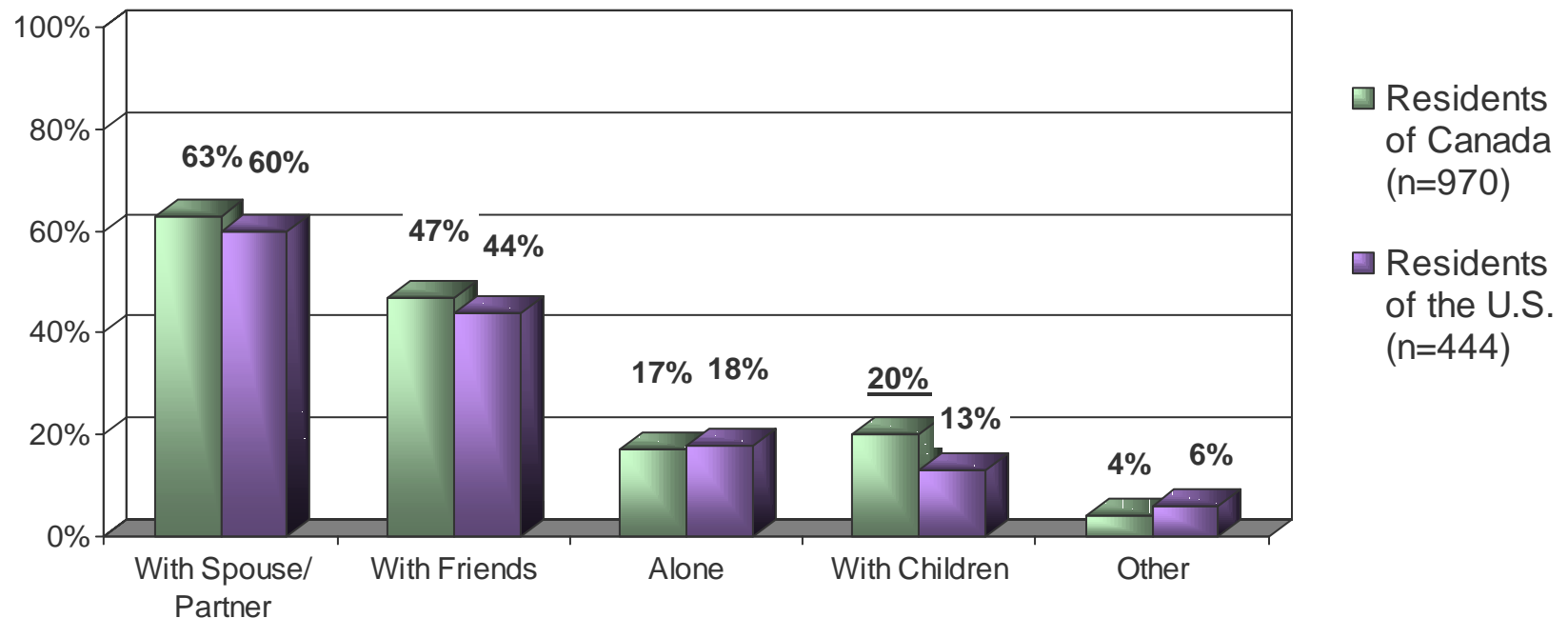
- Gender balance is near 50:50, male to female.
- They tend to be young to middle-aged (61% are 30 to 54 years of age).
- Three-quarters earn household incomes of \$45,000 per year or more and 28% earn \$100,000 or more.
- Respondents who live in the U.S. were more likely to be female (56%) and reported higher income levels than Canadians (39% earn \$100,000 or more).



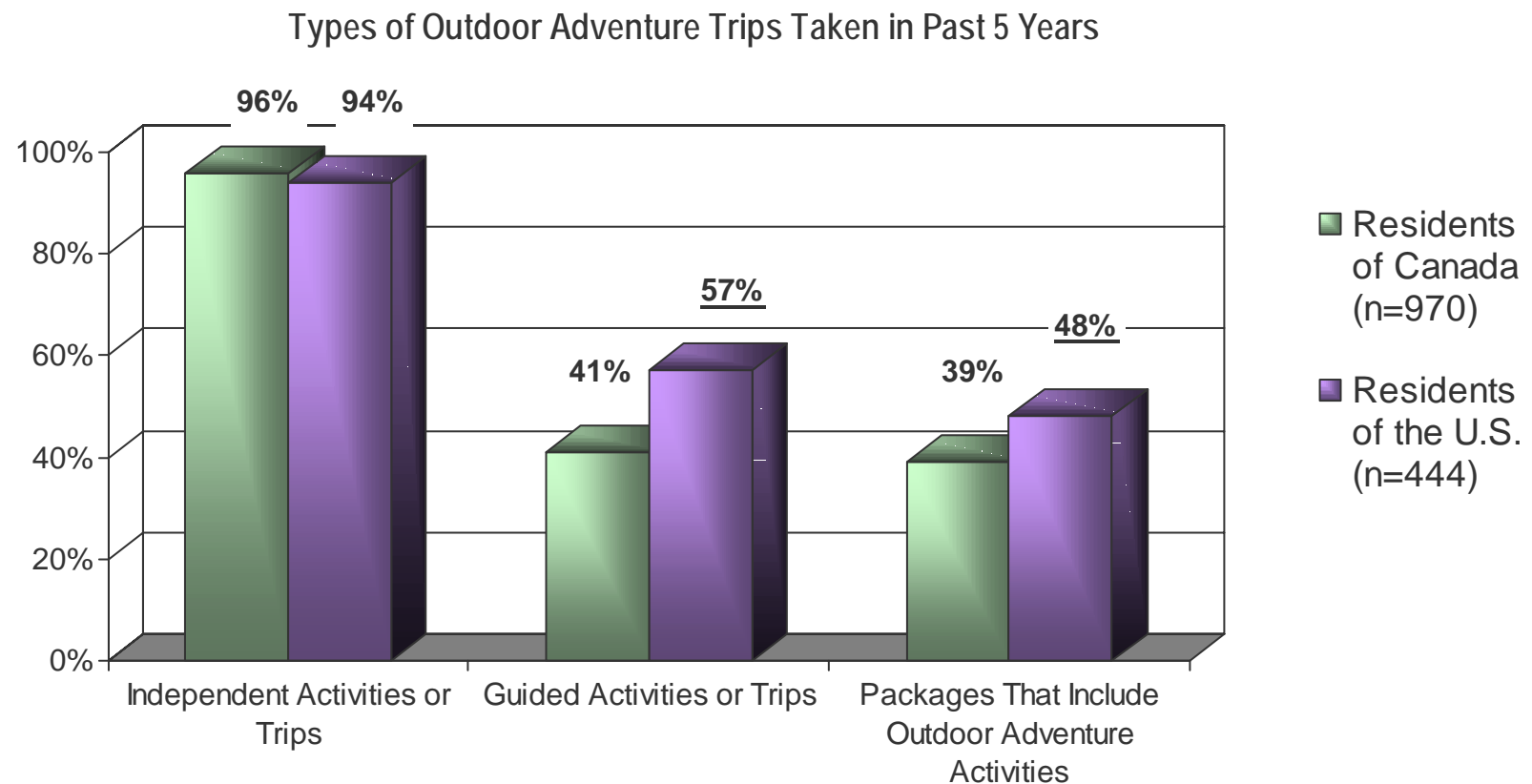
They spend heavily and travel with a variety of companions

- They spend an average of nearly \$3,000 per trip.
- Many travelled with their spouse or friends. Significant proportions also travelled alone or with children.

Travelling Companions of Trips Involving Outdoor Adventure Activities in Past 5 Years



While most travel independently, many use guides and purchase packages



- Adventurers taking independent trips will need detailed information, while those taking guided trips will need to find an appealing offering.

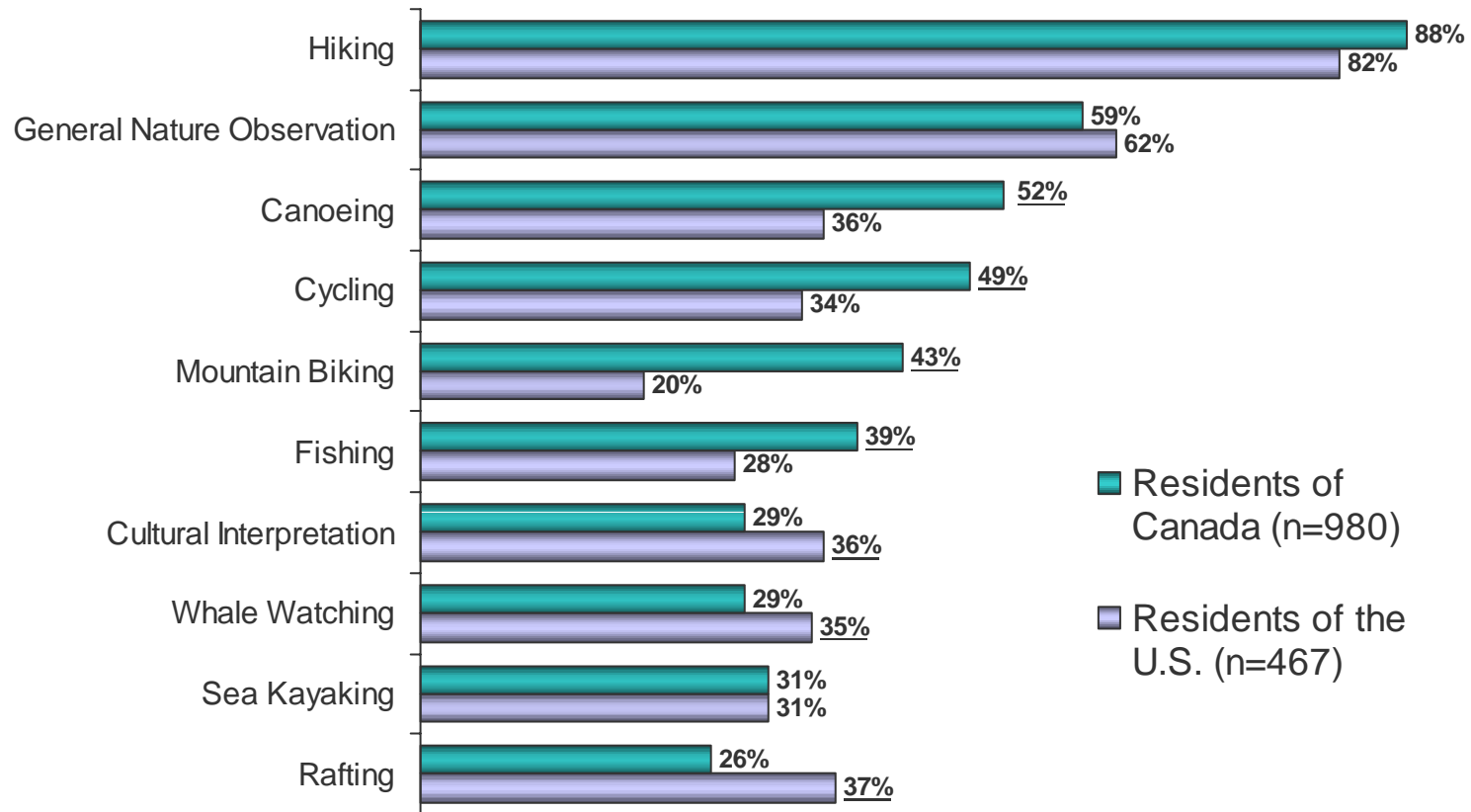
Preferred Activities and Motivations



Travellers participate in a variety of outdoor adventure activities

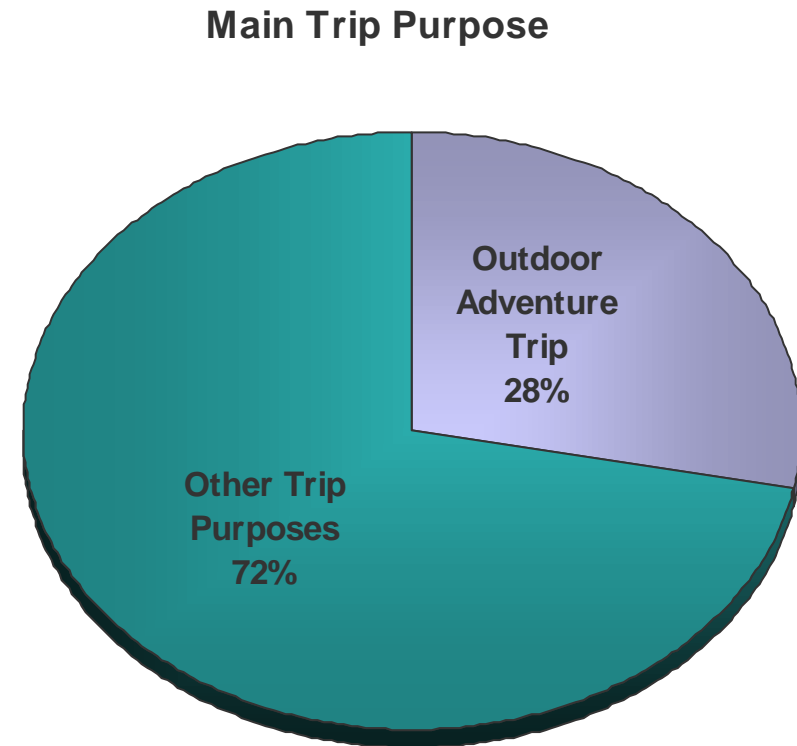
- Average number of outdoor adventure activities in past five years: 6.8

Top 10 Outdoor Adventure Activities While on Vacation in Past 5 Years



Outdoor adventure activities are often not the main trip purpose

- The proportion of trips taken expressly for the purpose of outdoor adventure is just over one-quarter.



Percent of Longest Trips Taken by Outdoor Adventure Travellers (n=1,441)

Outdoor adventure travellers often combine activities on VFR and touring trips

- Main trip purposes are similar among residents of the U.S. and Canada.

Purpose of Longest Trips Involving Outdoor Adventure Activities in Past 5 Years	Percent of Residents of Canada	Percent of Residents of the U.S.
Total – Actual	(970) 100%	(444) 100%
Outdoor Adventure Trip	28	27
Visit Friends and/or Relatives	20	19
Touring Trip to a Number of Destinations	17	17
Trip to Experience Native and Indigenous Cultures	4	<u>6</u>
Cultural/History or Heritage Trip	3	<u>6</u>
Wintertime Beach Resort Trip	<u>5</u>	3
Summertime Beach Resort Trip	4	3
Ski Holiday	3	3
Trip to a City	2	2
Other Trip Purposes	7	11

These travellers also participate in a wide range of non-adventure activities

- Adventure travellers who reside in the U.S. are likely to participate in more activities as compared to Canadians.
- For effective positioning, it is important to promote the variety of activities available in and around the outdoor adventure destination.

All Activities on Longest Outdoor Adventure Trips in Past 5 Years	Percent of Residents of Canada	Percent of Residents of the U.S.
Total – Actual	(970) 100%	(444) 100%
Sightseeing	68	<u>76</u>
Visit Parks/Natural Areas	59	<u>68</u>
Outdoor Land Adventure Activities (Hiking, Mountaineering)	56	61
Outdoor Water Adventures (Canoeing, Boating, Fishing)	46	43
Swimming, Sunbathing or Other Beach Activities	<u>47</u>	36
Visit Historic Sites	45	<u>52</u>
Visit Friends or Relatives	<u>42</u>	36
Informal or Casual Dining	39	<u>51</u>
Shopping	37	<u>45</u>
Nature and Wildlife Observation	36	41
Visit Museums/Art Galleries	28	<u>40</u>
Other Arts/Cultural Events/Activities	26	<u>35</u>
Nightlife or Entertainment	26	<u>34</u>
Outdoor Cultural Interpretation	24	<u>34</u>
Visit Local Festivals	23	<u>30</u>
Fine Dining	18	<u>32</u>
Wine Tours/Tasting	10	<u>18</u>
Other Activities	52	<u>60</u>

Outdoor adventurers are motivated by a love of being active in a natural environment

- They embrace outdoor adventure activities because of a powerful love of immersing themselves in a natural, outdoor environment and the “joie de vivre” of being active. The top four motivators are:
 - Enjoying the fresh air and exercise;
 - Immersing yourself in the outdoors;
 - Getting away from the urban environment; and,
 - Enjoying the beauty of the scenery.



Attributes that are relatively unimportant include earning “bragging rights” and thrill-seeking

Rank order of importance* among residents of ...

<u>Canada</u>	<u>US</u>	
1	2	Enjoying the fresh air and exercise
2	4	Enjoying the beauty of the scenery
3	1	Immersing yourself in the outdoors
4	3	Getting away from the urban environment
5	5	Connecting and bonding with travelling companions
6	8	An opportunity to learn and to grow as a person
7	10	Challenging your skill set for this activity
8	6	Meeting and connecting with other outdoor travellers
9	7	Experiencing world famous site for specific outdoor activities (famous trails, rapids, rock climbing routes, etc.)
10	12	Increasing your mastery of the skill of this sport
11	9	An athletic challenge
12	14	Enjoyment of trying to exceed your own previous “records”
13	11	Learning about natural history first hand
14	13	Earning “bragging rights” after the adventure
15	15	A bit of excitement because it is a little less safe
16	16	A big thrill because it is a risky activity

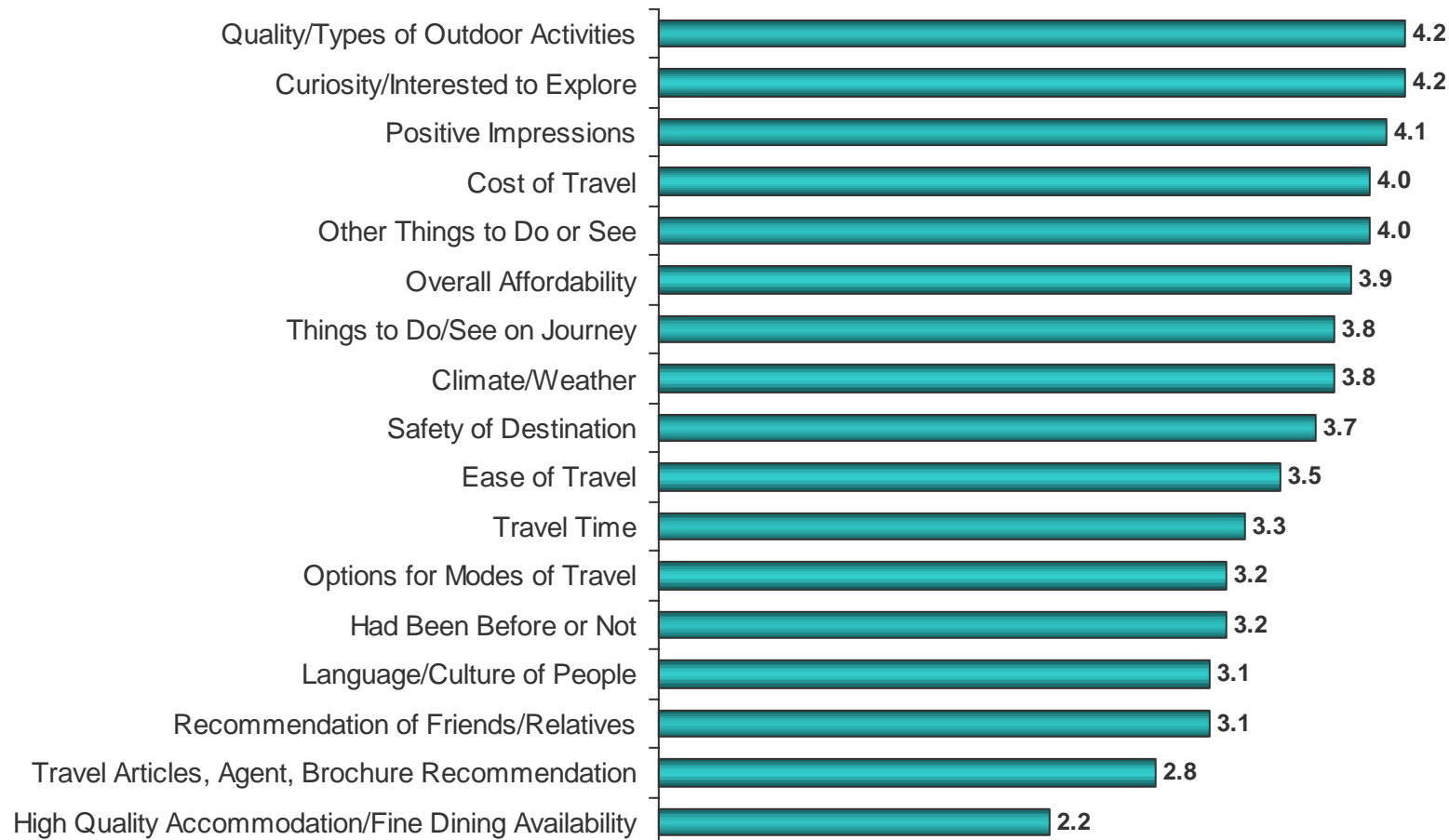
* Rank order based on Jaccard analysis against the ideal point of “the perfect outdoor activity for me.”

Decision Making and Information Requirements



Available activities drive the destination selection

Importance of Aspects in Selecting a Destination for a Trip Involving Outdoor Adventure Activities



Average Ratings* Provided by Total Outdoor Adventurers (n=1,474)

* Average ratings are based on a five-point scale where five means "Very Important" and one means "Not at all Important" and exclude "Don't Know" responses.

The Web is now the dominant media for information on outdoor travel

- The Web can provide detailed information that independent travellers need to plan their outdoor activities, as well as support providers of guiding and outfitting services and packages.

Information Sources Used in Destination Selection	All Information Sources Used	Most Useful Sources
Total – Actual	(1,474) 100%	(1,474) 100%
Internet/World Wide Web	78	48
Friend/Relative	71	30
Articles in Magazines	58	16
Travel/Trade/Consumer Shows	41	9
Travel Guides (Fodors, Frommers)	39	13
Travel Agent	38	10
Newspaper Articles	37	5
Tourism Bureaus/Offices	27	6
Auto/Travel Club Brochures/Books	19	5
Groups/Organizations	15	3
Television Programming	13	2
Paid Advertisements in Magazines	9	*
Newspaper-Paid Advertisements	8	1
Others	6	2

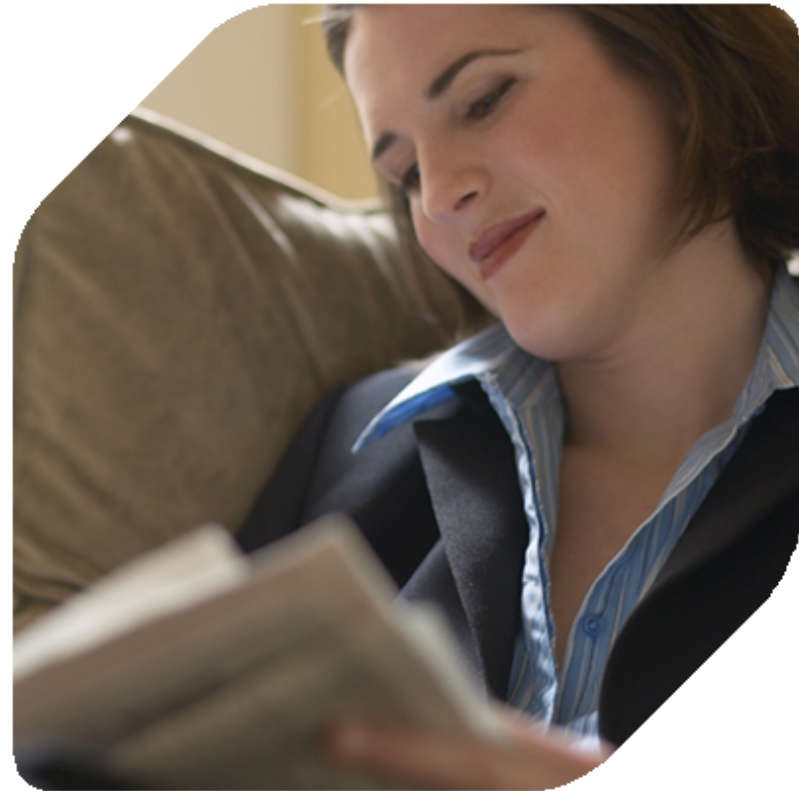
Outdoor adventure travellers who live in the U.S. are more likely than Canadians to use the Internet

Information and Planning Sources Used in Destination Selection	Percent of Residents of Canada	Percent of Residents of the U.S.
Total – Actual	(980) 100%	(467) 100%
Internet/World Wide Web	76	<u>81</u>
Friend/Relative	<u>74</u>	65
Articles in Magazines	55	<u>64</u>
Travel Agent	<u>41</u>	31
Newspaper Articles	33	<u>47</u>
TV – Programming	14	12
Paid Advertisements in Magazines	10	8
Newspaper – Paid Advertisements	<u>9</u>	6
Radio – Programming	2	2
TV – Paid Advertisements	2	1
Radio – Paid Advertisements	1	*

* Equals less than one-half of one percent.

These travellers consider paid advertisements to be less useful

- Although paid advertisements are seen as less useful, they can support awareness of activities available at Canadian destinations.



Summary of Implications of the Research



Summary of implications

■ Who are outdoor adventure travellers?

- Travellers who participate in outdoor adventure activities while on vacation tend to be young to middle aged and affluent. They participate in a variety of activities while on vacation, including both outdoor adventure and other activities.

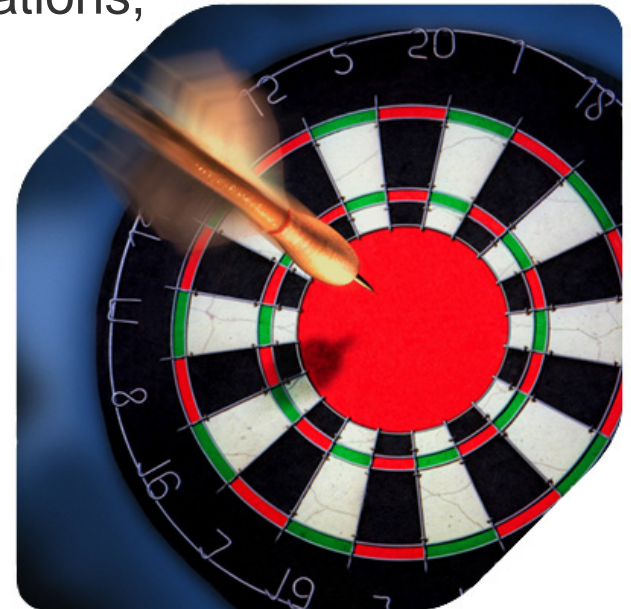
■ Which outdoor activities do they prefer and why?

- These travellers tend to prefer relatively moderate, accessible activities such as hiking, nature observations, canoeing, cycling and mountain biking.
- Outdoor adventurers embrace these activities because of a powerful love of immersing themselves in a natural, scenic outdoor environment and the “joie de vivre” of being active.

Summary of implications (cont'd)

■ What is their destination decision-making process?

- The availability of preferred outdoor activities is one of the most important aspects when selecting a destination; however, these travellers are attracted to destinations that offer other activities as well. Interest in exploring the destination and affordability are also of primary importance.
- To effectively position Canadian destinations, it is important to increase awareness of the variety of activities in and around the destination—including, but not limited to, outdoor adventure activities.
- Operators and service providers can leverage their resources by:
 - Cross-selling;
 - Packaging; and,
 - Bundling.



Summary of implications (cont'd)

■ Which modes of communication will be effective?

- It is important to position Canadian destinations to meet the needs and aspirations of this segment. Also, while these travellers tend to discount the importance of paid advertising, awareness of destinations and of both outdoor adventure and other activities needs to be communicated. Then, Canadian destinations will make it onto the “short-list” for travellers in this niche.
- Once a high level of interest has been established, these travellers need information that is both specific and credible. Travellers planning independent activities need detailed information. Those seeking packages and guided trips need to be able to find both appealing destinations and service providers.

Summary of implications (cont'd)

- The Web is a dominant channel of information for these travellers when they are evaluating and researching destinations. It provides an excellent means to provide detailed information required by travellers in this niche.





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