



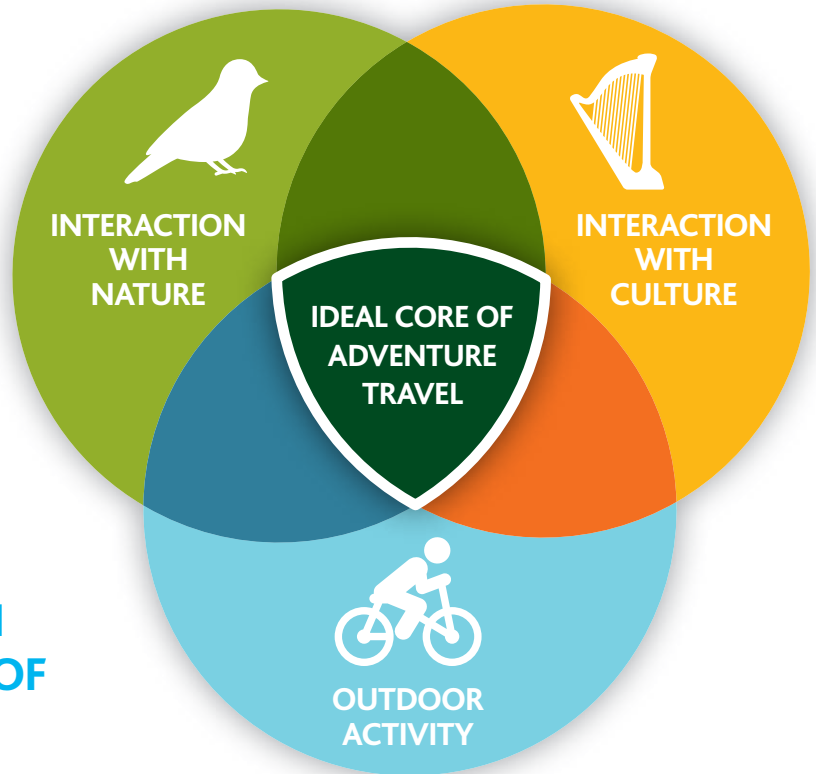
What is Adventure Travel?

A holiday may be classified as an "adventure" trip if it combines two of the following three elements:

- 1 Interaction with nature
- 2 Interaction with culture
- 3 An outdoor activity

... while the ideal core of adventure travel involves all three elements.

(Source: Adventure Tourism Market Study 2013).



ADVENTURE TRAVEL CAN INVOLVE A WIDE RANGE OF OUTDOOR ACTIVITIES:



Walking



Cycling



Fishing



Bird watching



Archaeology



Interaction with Nature



Interaction with Culture and meeting locals



Nature Photography



Equestrian



Canoeing



Kayaking



Swimming



Coasteering



Stand Up Paddle Boarding



Kite Surfing



Boating

Traditionally adventure was viewed as high octane activities for thrill seekers, however, in reality **90%** of adventure travel is 'soft' adventure, with biking, trekking and interaction with culture most sought after.

ADVENTURE TOURISM GLOBALLY

(Source: Adventure Tourism Market Study 2013)

**\$263
BILLION**

The value of the outbound adventure travel market for the Americas and Europe is estimated at \$263 billion

41.9%

**↑
26.3%**

The percentage of international travellers from the Americas and Europe classified as adventure travellers rose from 26.3% in 2009 to 41.9% in 2012.



Average trip spending increased from \$593 in 2009 to \$947 in 2012.

65% of spend is thought to be spent with local providers within the destination (Source ATWS Industry Snapshot 2013).



Adventure travellers research their trips online and by consulting friends and family.

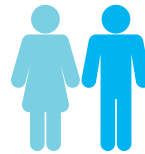


Compared to non-adventure travellers, adventure travellers are more likely to use professional services such as guides, tour operators and instructors.

Adventure travellers use of Adventure Tour Op/Specialist agent is influenced most by 'the importance they place on the destination local expertise' and 'the time needed to plan the logistics'

ADVENTURE CUSTOMER DEMOGRAPHICS

(Source: ATWS Industry Snapshot 2015)



FEMALE 51%: MALE 49%

Party make up: **26% Group / 20% Solo; 17% Families/ 37% Couples**

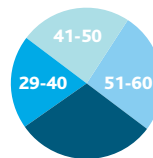
Greatest growth in demand for: **Custom Itineraries, soft adventure and Multi generational adventure trips**

**36yrs
AVERAGE AGE**

Global adventure travellers are younger than non-adventure travellers, with an average age of 36.

**48yrs
AVERAGE AGE**

Average age of Adventure traveller using tour operator/adventure specialist travel agent is 48 years



Largest 3 Segments of adventure traveller using Tour Operator/Adventure Agent are:

19% - Age 29-40

24% - Age 41-50

27% - Age 51-60



55% of bookings from European Markets are made online, growing to 69% for North America. 57% of ATWS Industry surveyed offer online booking option (direct or through 3rd party)

ADVENTURE TRAVEL & IRELAND (Source: Survey of Overseas Travellers, Failte Ireland 2014)

+€900MN

Latest research shows that the overseas adventure sector was worth **€900+ million** to Ireland in 2014 (Survey of overseas travellers).

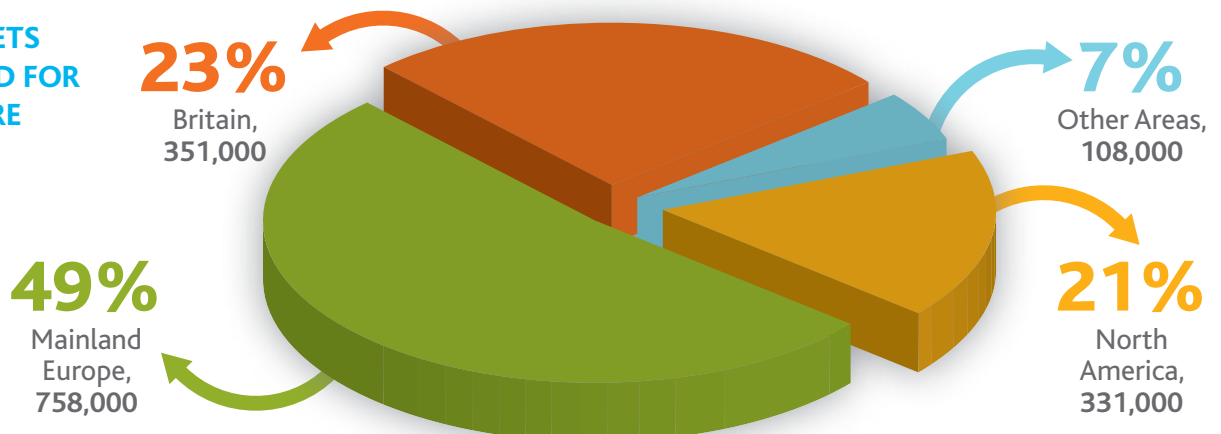
↑40%

Adventure travellers are a high yield segment **spending on average 40% more** than the average holiday maker. Adventure travellers tend to **stay 30% longer** than the average holiday maker (8.9 days on average).

1.5 MILLION

1.5million visitors engaged in adventure activities in Ireland in 2014.

KEY MARKETS TO IRELAND FOR ADVENTURE TRAVEL:



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