

# THE TRAVEL INDUSTRY

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Trends, Analysis & Observations  
Experiential & Services



# ADVENTURE TRAVEL BUSINESSES

2014

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## NORTH AMERICAN BUSINESSES

2014 GROSS REVENUES CHANGE OVER 2013 **+4%**

2015 REVENUE OUTLOOK **+20%**

## WHERE IS BUSINESS COMING FROM?

**36% GRAZERS**

24% OF U.S. POPULATION. NOVICE AND 1<sup>ST</sup> TIME PARTICIPANTS OF ADVENTURE ACTIVITIES, EAGER TO SAMPLE AND MOVE THROUGH THEIR “BUCKET LIST.” ACCEPT MODERATE RISK.

**37% ADVENTURERS**

20% OF U.S. POPULATION. INTERMEDIATE, THRILL-SEEKING REPEAT PARTICIPANTS IN A FAVORITE ADVENTURE ACTIVITY. ACCEPT MODERATE RISK.

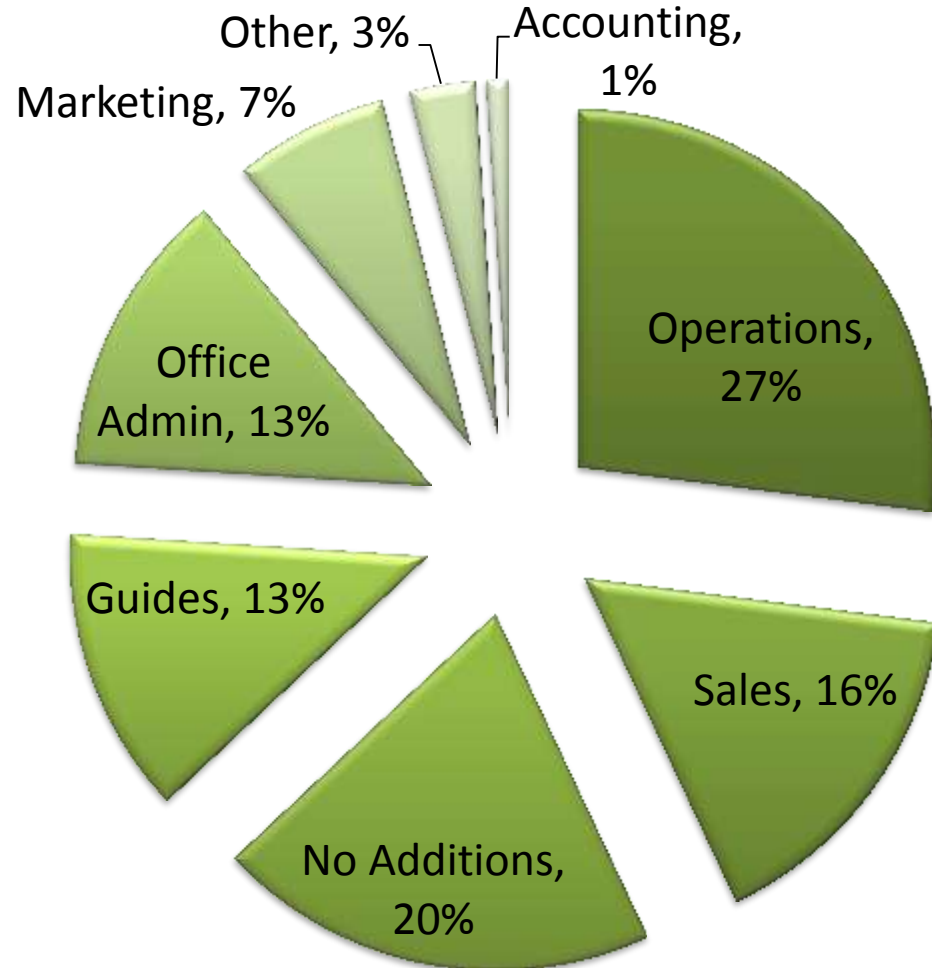
**48% ENTHUSIASTS**

8% OF U.S. POPULATION. ADVANCED, SKILLED PRACTITIONERS OF A FAVORITE ADVENTURE ACTIVITY. ACCEPT HIGH RISK.

## MOST POPULAR ACTIVITIES FOR U.S. ADVENTURE TRAVELERS

	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

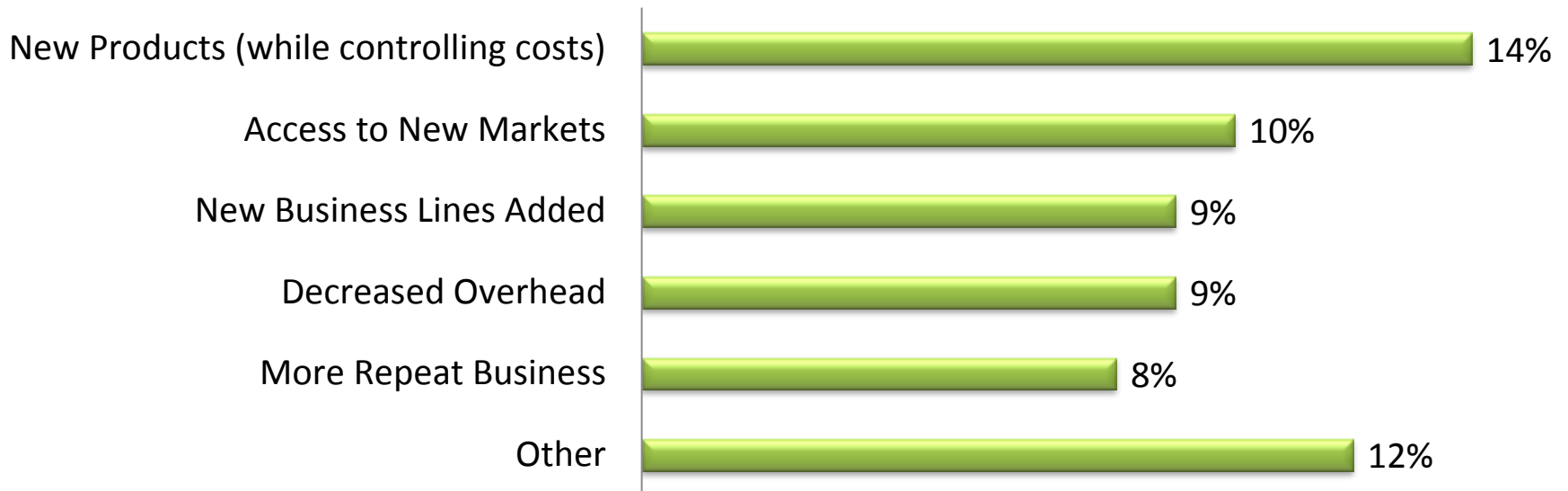
**IN WHAT BUSINESS  
AREAS DID YOU ADD  
THE MOST STAFF IN  
2014?**



## 2015 MARKETING BUDGET DETAILS

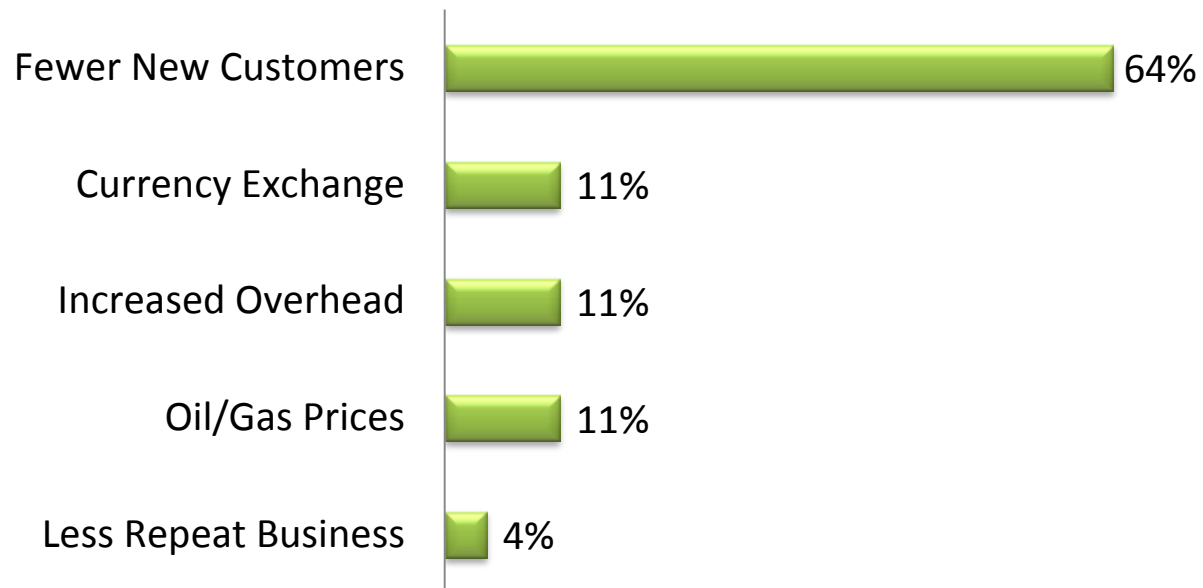
- ★ CONTENT CREATION AND SOCIAL MEDIA OUTREACH: 18.7%
- ★ TRADE EVENTS: 15.8%
- ★ ONLINE ADVERTISING AND SPONSORED CONTENT: 13.2%
- ★ SEARCH ENGINE OPTIMIZATION: 11.0%
- ★ EMAIL CAMPAIGNS: 9.1%
- PUBLIC RELATIONS: 8.1%
- ★ PRINT ADVERTISING: 6.9%
- CONSUMER EVENTS: 5.7%
- DIRECT MAIL: 5.5%

## PRIMARY FACTOR INFLUENCING NET PROFIT PROJECTIONS POSITIVELY





## PRIMARY FACTOR INFLUENCING NET PROFIT PROJECTIONS NEGATIVELY



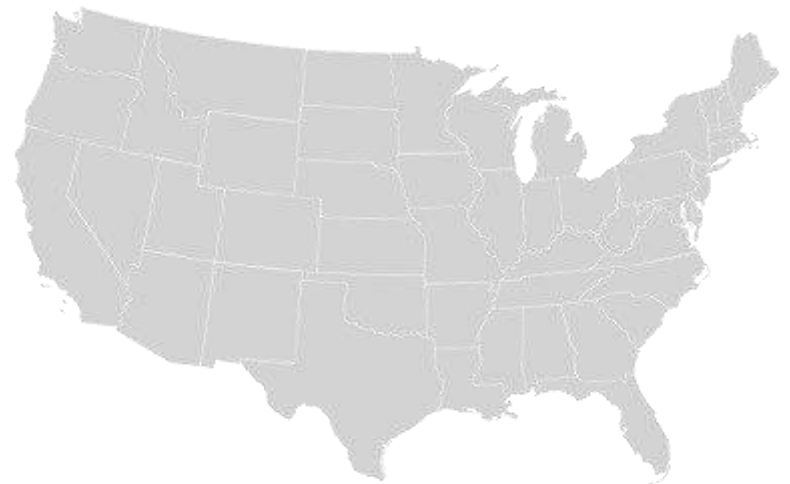
# ATTRACTING NEW CLIENTS

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## POLL: OUTDOOR ENTHUSIASTS

**38% NEVER TRIED FLY FISHING  
BUT WERE INTERESTED**



## POLL: OUTDOOR ENTHUSIASTS

### 38% NEVER TRIED FLY FISHING BUT WERE INTERESTED

- 35% HOUSEHOLD INCOME OF \$100K - \$200K
- 58% WERE FEMALE
- 18-76 YEARS OLD
- AVERAGE AGE: 38

## POLL: OUTDOOR ENTHUSIASTS

### WHY THEY NEVER TRIED?

- NEVER HAD THE OPPORTUNITY
- DON'T KNOW ANYONE WHO DOES IT
- DON'T KNOW HOW
- DON'T HAVE THE EQUIPMENT
- DON'T LIVE NEAR A LOCATION

## POLL: OUTDOOR ENTHUSIASTS

### WHAT WOULD ENTICE THEM?

- PART OF ANOTHER EXPERIENCE
- CHANCE TO DO IT WITH FRIENDS/FAMILY
- LESSONS
- EQUIPMENT TO USE/BORROW
- AN INVITATION

# ORVIS® ENDORSED PARTNERSHIP

## Orvis Endorsed Partnership

### Licensing

#### Our Commitment to Building the Orvis Fishing/Hunting Brand

Making the Orvis® Brand a Market for Success to Licensee

Only fly-fishing company that has sold in the last 20 years under the same ownership

### Resource



### Marketing

#### 2015 Recap

Orvis Advertisements reached an audience of over 12.6MM in 2015, through digital and print platforms.

Orvis provide a program to get your business in front of highly qualified, affluent customers who like to fly fish, hunt, and travel.