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Perceptions of the **teutonic online market** and opportunities for **adventure travel industry**

Perceções do **mercado online teutónico** e oportunidades para a **indústria de viagem de aventura**

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Abstract | This article analyses the potential of e-commerce in the niche market of adventure travels. Tourists have been increasingly booking travels worldwide with the help of online platforms instead of the offline and traditional travel agencies. This situation performs an opportunity to maximize the online travel market. Another important trend is related to e-commerce business that has also been increasing as well as the market for adventure tourism. Under this context, the present article analyzed several existent online platforms for booking adventure travels through a survey of 310 questionnaires in order to find out the Teutonic consumer perception about such platforms.

Keywords | Adventure travel tourism, online experience economy, generation Y

Resumo | Este artigo aborda o potencial do "e-commerce" no nicho de Mercado das viagens de Aventura. Os turistas têm vindo progressivamente em todo o mundo a reservar viagens com apoio de plataformas *online* em vez das *offline* e das agências tradicionais. Esta situação origina uma oportunidade para se maximizar o Mercado de viagens *online.* Outra tendência importante, relaciona-se com o negócio do e-commerce que também tem vindo a crescer bem como o mercado turístico da aventura. Neste contexto, o presente artigo analisou diferentes plataformas online de reservas de viagens de Aventura através de uma amostra de 310 questionários de forma a se compreender a perceção do consumidor teutónico sobre tais plataformas.

Palavra-chave | Turismo de aventura, economia experimental online, geração Y

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1. Introduction

Knowing that it is traditionally difficult to find out adventure travels online and navigating the web in an efficient an easy way in a world of permanent transformation and where there is a changing mindset regarding values and desires of today's generation (Pine & Gilmore, 1998; Schmitt, 1999) it is crucial to underline and understand the importance of today's generation who have progressively been looking for extraordinary experiences (Wolf, 1999) mainly as a consequence of the consolidation of World Wide Web.

Regarding this context, it is important to note that studies and information about online tour operators providing and staging sportive adventures have been scarce and therefore there is an opportunity to try to fill this gap.

Under this context, the present paper aims to achieve some goals: (i) to get additional information about the online booking and adventure travel experiences of potential customers; (ii) to reflect on communication exchanges mainly in sportive adventure or experience travels online forums; (iii) to identify lead users, opinion leaders and travel trends and behaviours.

Therefore, this paper is organized the following way: after the introduction, section 2 presents a brief theoretical discussion about experience economy, e-commerce, and adventure tourism while section 3 describes in detail the research methodology, followed by the discussion of the most important as well as the reflection about the major findings.

2. Literature review

2.1. Adventure Tourism

The concept of adventure tourism may be defined by several different concepts. Therefore, according to ATTA (2013) in order to be able to classify a trip as "adventure", we must at least find two of the following three elements: (i) interaction with nature; (ii) interaction with culture; or (iii) physical activity. Adventure travel trips may include several different activities like white-water rafting, hiking and bird watching or mountain biking among other practices (ATTA, 2013).

The importance and the potential of outbound adventure travel market for the Americas and Europe are estimated at $263 billion. The adventure market grew at an estimated rate of 65% between 2009 and 2012. The percentage of travelers who reported an adventure activity as the main activity of their last trip worldwide rose from 26% in 2009 to 42% in 2012 in the Americas and Europe (ATTA, 2013).

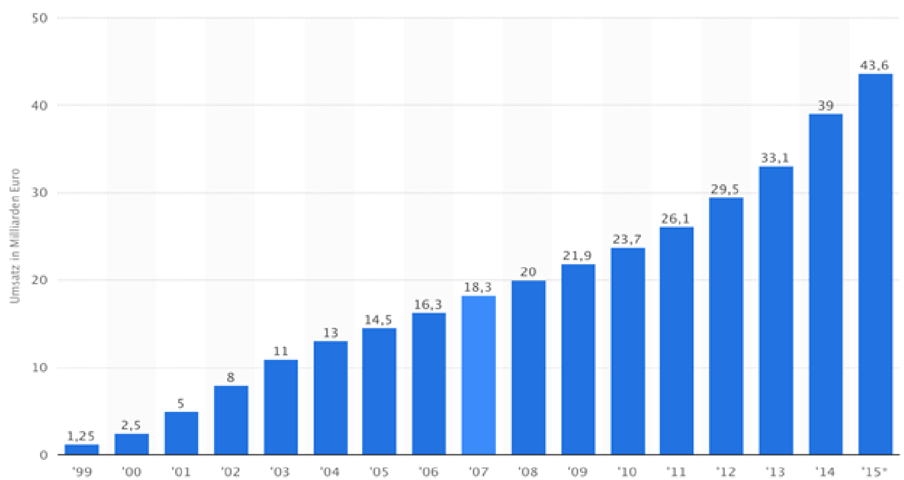
Following the former ATTA's study, the main trends of this segment can be summarised as it follows: (i) the average age of an adventure traveller is 36 years; (ii) in 2012 adventure travellers spent an average of 947 USD per trip; (iii) there are more male (57%) than female (43%) adventure travellers; (iv) few adventure travellers travel by themselves; (v) the average duration of an adventure travel was 10.2 days (ATTA, 2013).

For this adventures tourists, it is crucial to create new experiences that involve the 5 senses of the consumer. Furthermore, Pine and Gilmore (1998) noted that, as consumers develop a willingness to pay, companies will be able to charge customers for staged experiences. Chang and Chieng (2006) stated that creating customer experiences becomes synonymous with the brand. By providing such unique, memorable and long-lasting experiences, adventurer's sites will remain in the mind of its customers and create long lasting relationships for the future. In this context, retaining customers is a big part of the holistic concept, as it has been shown to be four times cheaper than attracting new customers (Kotler & Keller, 2012).

2.2. Online Travel Bookings

Electronic commerce (e-commerce) - as a consequence of the Internet development - has been in these last years growing steadily. In the literature, we often find various definitions. Despite these definitions, it is widely accepted that e-commerce is somehow related to buying and selling of goods and services, or the transfer of funds or data over an electronic network such as the Internet (Techtarget, 2014). The e-commerce business presents various core benefits for consumers such as: (i) accessibility; (ii) convenience factor (it is available 24 hours); (iii) the selection benefit through a wide array of products; (iv) the international reach (Techtarget, 2014); (v) safe costs of retail floor space; (vi) staff and (vii) inventory (Kotler & Keller, 2012).

However, we can also face some serious drawbacks resulting in insufficient customer service, no instant gratification (you have to wait for product delivery) and no ability to physically experience the product (see, feel, touch) that may limit the e-commerce experience. E-commerce has taken a drastic growth over the last decade and has become a major revenue driver for businesses. B2C e-commerce sales amounted to more than 1.2 trillion US dollars in 2013 (Statista, 2014). The following graph illustrates the growth of the e-commerce market in Germany.



Source: Statista, 2014

Figura 1 | E-Commerce sales in Germany 1999-2014 and projections (*) for 2015

In 2014 the German e-commerce market accounted for 39 billion dollars in sales, which constitutes for 11.1% of the total retail industry in Germany (Statista, 2015). Even in 2009, when the world was facing an economic crisis the e-commerce market experienced growth.

A more recent development that is starting to play an increasingly important part of the e-commerce business is m-commerce (mobile commerce) which are typical transactions initiated through the use of smartphones or tablets and have the benefit of purchasing without the limitation of time and location (Xu & Yang, 2012). From 2012 to 2013 the m-commerce sales doubled from 3%

to 6% in respect to the total e-commerce market in Germany (Statista, 2014). The growth of the smartphone market is a driving force for the expansion of m-commerce and indicates a huge potential for the industry.

For example, the m-commerce market in the United States is much further developed than in Germany. Forrester research predicts that m-commerce already makes up one-third (29%) of the whole e-commerce market in the United States, which is closely related to the high number of smartphones amongst the American population. With the number of smartphones growing worldwide (38.4% from 2012 to 2013), m-commerce will play a major role in the e-commerce sector as offers several advantages (Mulpuru et al., 2014).

m-Commerce may have some advantages: (i) services and goods can be targeted to a context specific situation making use of the location of the person, the time and the interests of the user; (ii) Ubiquity; (iii) readiness and convenience; (iv) spontaneous decisions and needs - low involvement and small buying decisions, which don't require extensive information search can be easily purchased via mobile (Jahanshahi et al., 2012).

A trend, which will change the way we look at e-commerce today, is the development of the Web 3.0. The Web 3.0, sometimes also called "semantic web" or "the internet of things" will fuel the digitalization of the regular retail industry and meet online and offline offers. 58% of customers are already using their smartphones when shopping offline to compare prices online and 35% use blogs or online forums to gain specific knowledge about a product (BITKOM, 2013). Companies will have to rethink and redevelop their distribution channels, merging their off and online appearance.

2.3. Teutonic travel market at a glance

The German tourist and travel market has been growing, and it accounts for 97 billion Euros of the country's GDP. In 2010, 2.9 million people were directly employed by the tourism industry and an additional 2 million people were indirectly generating income through the tourism industry (German Tourism Information, 2014). That accounts for about 12% of all employed people in Germany (BMWi, 2012). In 2013 there were 9.729 traditional travel agencies in Germany. German tourists prefer to travel within their own country (30%). The average length of a trip declined from an average of 13.8 days in 2000 to an average of 12.4 days in 2013. Finally, trips are becoming more frequent and shorter (German Tourism Information, 2014).

A study performed by the "Verband Internet Reisevertrieb" (VIR, 2015), a German online travel research institute shows that 41% of German travelers used the Internet for online travel bookings and about 70% of German travelers access the Internet to search for information about their trip.

German tourists are very active in using social media for sharing their travel experiences since 36% shared travel experiences online. This percentage is higher for the age group of 14 to 29-year-olds (51%). The main network amongst Germans has been Facebook, where 73% shared their travel experiences, followed by travel websites (26%) such as tripadvisor.com or holidaycheck.com or other photo or video platforms. (13%) (VIR, 2015).

3. Methodology

We used a quantitative approach through an online survey so that we could get information about the online booking and adventure travel experiences of potential customers. In detail, we intended to find out (i) whether tourists had already booked adventure travels; (ii) which kind of adventure travels they would be interested in, (iii) how they evaluate the booking process and (iv) how much they would be willing to spend for adventure travels. It is important to note that a qualitative analysis was also performed as a basis for the quantitative analysis. With this qualitative approach, we were able to analyze communication exchanges in adventure or experience traveled in several online forums and identified lead users, opinion leader, some travel trends, and behaviors.

3.1. Quantitative research and data collection

The questionnaire was designed trough specific software for online surveys named "Sawtooth" and spread through online communities devoted to adventurer services. All the participants received a short introduction to the questionnaire and functionality of the program. The questionnaire was divided into three main sections that included demographic, market specific and product specific questions. Besides this aspect, participants answered questions about their experiences with adventure travels, based on Pine and Gilmore (1998) and Schmitt (1999), and how an online booking platform could be improved. In the last part, participants answered demographic questions, such as marital status, income among other issues. We used ordinal, interval and nominal scale questions as well as several open-ended questions.

The survey started with a filter question to know if one had already purchased an adventure experience. Dependent on the answer, participants were provided with an adequate set of questions that was unique to each group.

Final data was collected through the online survey and distributed over online communities of adventurer services in order to better capture the target population. Data was collected during six weeks (from January until mid-March 2015). Before the survey was launched, a pilot sample of 5 potential customers (personally interviewed) was employed to ensure that the questionnaire was clear.

3.2. Data analysis and results

We found a sample of 310 participants (168 were female, and 142 were male). With an average age of participants of 24.2 years, 69% were university students, 14% were "employed with university degree" and "employed without University degree" (5.5%). Finally, we found 2.5% of "high school students", (1.9%) "self-employed" (1.9%) and "other" (5.2%).

Concerning the available funds for leisure activities, 21.4% indicated to be able to spend between 0 and 50 euros, 39.9% between 50 and 150 euros per month, 22.4% between 150 and 300 euros, 8.4% between 300 and 500 euros and 7.8% more than 500 euros.

48% of the sample participates in sportive activities between 2 to 4 times per week while 11% between 5 to 7 times. The reminiscent sample engages once or less per week.

In terms of determining how "adventurous" participants were, we found that participants were open towards new sports and experiences, that classified themselves as adventurous and that they liked to find new places.

We split our sample into two groups with a specific set of questions for each other: those who had already booked/purchased an adventure activity or adventure travel (64.8%) and the remaining others who didn't.

The first group stated that the most important categories they purchased were: water sports (74%), ski and snow (58%) and fun sports (43%) such as paintball or laser tag. It is important to notice that 21% reported that they had already booked extreme sports (bunjeejumping, speed flying or wild water kayaking).

Most of these experiences were booked for personal use. 64% did not book these experiences online. In terms of gender behaviors we found out that women preferred mountain sports over fun sports, which seems to be a male domain.

In terms of reasons for booking adventure experiences: 96% chose fun; 67.7% stated variety and 44.8% the adrenalin factor as a result of "try something new" or "holidays". On the other hand, we found group pressure (6.5%) and "present" (13.9%) as rare reasons.

In what concerns the price range of adventure bookings, we concluded that around 63% reported spending less than 300 Euros for a trip/activity, while around 10% of purchases were between the 300 and 500 Euros. The rest of the sample said that they spent 500 Euros or more.

In terms of total expenditures for adventure travels and activities during the year, it is important to stress that 46% spent between 0 - 150 Euros, 20% between 150 - 300 Euros, 14% between 300 and 500 Euros and 20% spent 500 Euros or more.

In what concerns the amount of yearly spending on adventure experiences, there is a huge difference between male and female participants since almost 25% of all man spent more than 500 Euros per year and only 17% of all women spent more than 500 Euros. A crucial aspect is that almost 50% of all participants plan to spend more money on adventure activities in the future.

Furthermore, a strikingly 83.6% of participants indicated booking their adventure at a local provider. 38.3% indicated that they had access to booking references and evaluations before making their purchase.

Taking into consideration the way participants got to know about a certain adventure trip, we concluded that word of mouth from friends and family played a major role in the process of getting to know about a trip (around 50%). In the second place, we found that 34% of participants got to know about a provider through the use of search engines. On the other hand, advertisement (5%), as well as social media (2%), were almost inconsiderable. Taking into consideration the second part of the sample, we analyzed the case of participants who answered "No" to the question whether they had already booked an adventure travel. We found several different reasons that explained this option: 51% indicated that it was too expensive, 31% wanted a "quiet and relaxing" holiday experience, 17% didn't know any offers or places for booking, 17% didn't find a companion to go with while 13% were "afraid" of action experiences.

Anyway, around 79% of this sample accepted to purchase an adventure trip in the future in the following activities: 60.6% may purchase a water sports activity, followed by fun sports (50.5%), air sports (31.2%), ski and snow (30.3%), mountain sport (24.8%), motorsports (22%), extreme sport (16.5%) and biking (5.5%).

In what concerns to the price range in which the participants would purchase an activity we found out that, 39.4% indicated spending between 50 – 150 Euros, 21.1% between 150 – 300 Euros, 22% between 300 – 500 Euros and 13.8% might spend more than 500 Euros. Another question analyzed what participants would value the most when booking an adventure trip. Under this context, 78.9% quoted that the "action factor" is important. 58.7% also stated that the price is important, followed by a "beautiful landscape" (51.4%), getting to know a different culture (47.7%) and the adrenaline kick (21.1%).

The following set of questions were given to both groups, whether they had already purchased an adventure or not. Asked whether participants plan on booking an adventure experience in the near future, 46.1% said yes. Over sixty percent (60%) of the group that already had booked an adventure answered with yes, whereas only 20% of the group that had never booked an adventure answered with yes.

Over fifty percent (56.5%) of the whole sample indicated watching short, inspiring adventure or sport clips online. However, that happens on a very infrequent basis. When we compared the purchasing with the non-purchasing group, we found considerable differences, since 12% of the purchasing group watches promotional videos while only 3% of the non-purchasing group does so.

In what regards the main aspects to develop in a well-functioning online platform, participants emphasized the package (place, accommodation, activities, etc.) as being the most important issue and on the other hand they minimized access videos were asked to evaluate various functions on a scale from 1 (not important at all) to 4 (very important).

Only 14% of the sample indicated that videos were very important.

Those who have already booked adventure trips valued videos as being more important than those who have not done so.

Pictures played an important role as 28.1% thought they are "very important", 44.2% thought they are "important" and only 24.8% thought they are "not so important".

In the last part of the market and product specific questions, participants were asked to indicate which areas of adventure travel platforms could be improved. 53.2% indicated that design and presentation of trips and offers could be improved. 52.6% thought that offers could be arranged more clearly, 38.4%, would like to see more personalized offers, 31.3% can imagine a better service, 19.7% hope for more offers and 7.7% thought that nothing needs improvement.

4. Discussion and limitations

Taking into account the enormous amount of different travel websites, blogs, forums and communities we can conclude that travelers are rather outgoing personalities. In other words, adventure travelers are eager to share their experiences and help others with their journeys. They also seem to be looking for information and advice from like-minded people. Also, the structure and organization of travel forums allow to better identify lead users, as well as opinion leaders. In other words, those who may be characterized as "destination experts" in a Tripadvisor forum, may be categorized as opinion leaders. If we analyze their posts, we can conclude that they receive a greater amount of attention and have a larger impact than posts from common users. This situation may be explained by the trust that users generate when somebody with extensive experience and knowledge is helping them. Similarly, the lead users in the Bootsnall forum can not only be identified easily by labels and the number of postings but also generate more trust. Taking into account the former observations we can conclude that outdoor and adventure travelers are seeking expert opinions, which are tailored to their specific needs and situation.

Another important issue is related to the great number of discussion topics in the tripadvisor.com forum about a certain tour operator. We noticed that adventure travelers often ask for the experience of other community members with a service provider in order to get extra information, as well as a better overview. This situation shows that participants carry high amounts of uncertainty when they have to spend a large amount of money for an adventure travel. Therefore, it is important to assure transparency and give the best possible insights regarding partnering tour operators. A relevant issue that arouses from the service provider is whether to book at a smaller and local tour operator or whether to book with an international and larger tour operator. Based on the sample traveler's preferences, opinions diverged on this matter. It is important to stress that participants who regularly book adventure and outdoor travels seem to prefer local providers.

This may be explained by two reasons. First of all, they have more travel experience and thus they are more confident about their traveling capabilities. Secondly, those participants who are more experienced travelers, often value flexibility as well as the lower prices offered by local providers.

On the other hand, inexperienced travelers tend to book their trips through international tour operators as they value security over flexibility. Furthermore, these participants in most cases have less time for vacation and therefore safe time with the organization of their travels as the operator takes care of everything. When we analyzed different posts, in many cases, we found out that travelers would like to have the possibility to review and evaluate the tour operator. Even tough, it is important to stress that customers emphasize to evaluate the customer service rather than the product or offers of a tour operator.

As a consequence, this situation conducted this analysis to a consumer trend that stats increasingly tailored and personalized travel offers, greater transparency, and access to customer reviews.

Overall, the active participation demonstrated that user generated content is very important as it was trusted by the traveling community. This is a consequence of people's expectation of the opinions of other travelers that they claimed to be unbiased and "honest" as one of the posts showed. However, we have to stress that this analysis faces one limitation since our findings may not be fully generalizable as a result of being a mere expression of individual opinions about traveling. In other words, the target group can be both understood as strength as well as a limitation.

In this study, we were able to get insights into the mind of people who already have a passion or interest for traveling but need further assistance or guidance. But, on the other hand, we were not able to analyze those participants or people who have not thought about traveling or who did not participate in travel forums. This means, that we miss to know about desires, specific questions as well as uncertainties from people who have not traveled.

Finally, as a preparation for the quantitative analysis, we went through the study of a considerable amount of forum posts. From this analysis, we verified that outdoor as well as adventure travelers were eager to explore, find new destinations and activities and were willing to put time, effort and money into their adventures.

In fact, several of their posts clearly showed that it was possible to feel a certain enthusiasm about traveling to far away destinations, which are located off the beaten path. One of the motivating reasons may be the drive to explore something unknown, something new and special.

Adventure travelers were looking to push themselves beyond their boundaries and master new challenges to grow on a personal level. In other words, they were looking for personal growth and expanding their horizons. Anyway, in several cases, these adventures and challenges often needed the guidance and help of professionals to be accomplished.

5. Conclusion

In this article, it was possible to identify several main tendencies of adventure tourism market. Mainly based on quantitative analysis, we were able to analyze and reflect on a product that may add value to adventure travelers. With our sample, we were able to conclude that this market may appear as an opportunity for anybody who may be interested in the online context. Several studies show that internationally, Europe has been the most popular travel destination where the young people segment (15-34) is the fastest growing demographic taking into account international travels (ATTA, 2013).

The market potential for the DACH region in the sport and adventure travel sector is an estimated 3.7 billion Euros. With an average commission of 10% per booking, the turnover potential is about 370 million Euros. Online travel bookings have increased by an average of 14% throughout the last three years. Taking this number into account the potential turnover increases to about

543 million Euro by 2019 (Adventure Travel News, 2013).

Under this context, we saw that adventure travelers were typically younger than non-adventure travelers with an average age of 36 years. In this context, it is important to state that young German travelers (15-29) account for almost 20% of Europe's holiday travel market for this particular young age group. The Adventure travel sector has been rapidly growing and had an estimated value of US$263 billion in 2013.

As mentioned earlier, about 40% of our sample could spend between 50 and 150 Euros while about 20% was able to spend between 150 and 300 Euros. Taking into account these numbers, we can assume that these numbers could probably be higher if our sample would be more representative.

Taking into consideration the size and growth of the adventure travel market, we can accept that our results support the research findings. In detail, with 65% of participants already having booked an adventure and about 50% planning to do so in the near future, we can easily conclude not only that this market is already quite popular but also that its growing and expanding tendency is supported.

Regarding the modality of the adventure, we found out that the main activities privileged by these participants are respectively: water sports followed by ski and snow activities. In gender terms, we concluded that man valued fun and motorsports whereas women preferred mountain sports. This information is crucial in order to fully identify the major market and target segments necessary to build a strong web platform.

Another important result that is in consideration to the research literature is related to the online booking rate. If we compare the 41% value, proposed by the VIR German Travel Institute (2014), our study showed that 36% of participants used the internet for travel bookings. Therefore, if we look at the high density of local travel agencies, it is possible to conclude that this number has a strong potential for development.

In what concerned the way how participants got to know about an offer or a provider, we observed that almost half of the sample indicated that they knew about certain offers through friends or family. In order to build a customer base and get referrals, the trips must be exciting and exactly what the customer was looking for. Expectancies have to match with actuality. According to them, websites must not only be entertaining but also engaging. Besides referrals from friends, search engines, in particular, google, play a crucial role. Accordingly, search engine optimization must play a critical role in order to acquire and maintain customers successfully.

Besides these aspects, it is important to stress that design and the content of the website play as crucial role since they must be seen as core factors.

hen the participants were asked what could be the major developments on travel platforms, almost half mentioned in the first place the importance of a clear design and arrangement as well as a lively illustration of offers. This is of extreme importance since it means it will be important to find an intuitive way of categorizing different offers such as by region or activity. Another 30% of the sample stressed the importance of offer personalization as well as good service. If we join both attributes, we can conclude about the importance of information to be not only available but also and easily reachable as well as to be responsive to personal desires and needs.

This study also confirmed the importance of the need for high-quality images and videos as a crucial tool for an adventurer.

Curiously, when participants had to allocate the main attributes of a site, only pictures seemed to be very important since the video wasn't so much of a game changer meaning that a systematic review system, which was also seen as very important, will be a vital part of any website.

Adventure travelers are active social media users and share their experiences with friends and family. As a consequence, online bookings have been progressively becoming more and more popular, and e-commerce has been assuming a crucial role, which is expected to maintain in the future.

The increasing popularity of online travel bookings and the enthusiasm to use social networks to communicate about adventure experiences provides a solid foundation for engaging in an e-commerce business.

As a final remark, there is no doubt that Teutonic may play an important role in the improvement of the former tendency since it seems to be a promising starting departure due to its financial health as well as a wealth nation, with a young demographic population that wishes to travel and may engage in adventure activities.

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