# AllTrails Product Development

EMG 503 Product Management
Cynthia Widjaja
November 19, 2023

# Why AllTrails?

- Spending time outdoor is one of my favorite activities.

- It helped me to understand the ratings and the terrain of the hike.

- The crowdsourced reviews provided information of the condition for the hike.

# Introduction
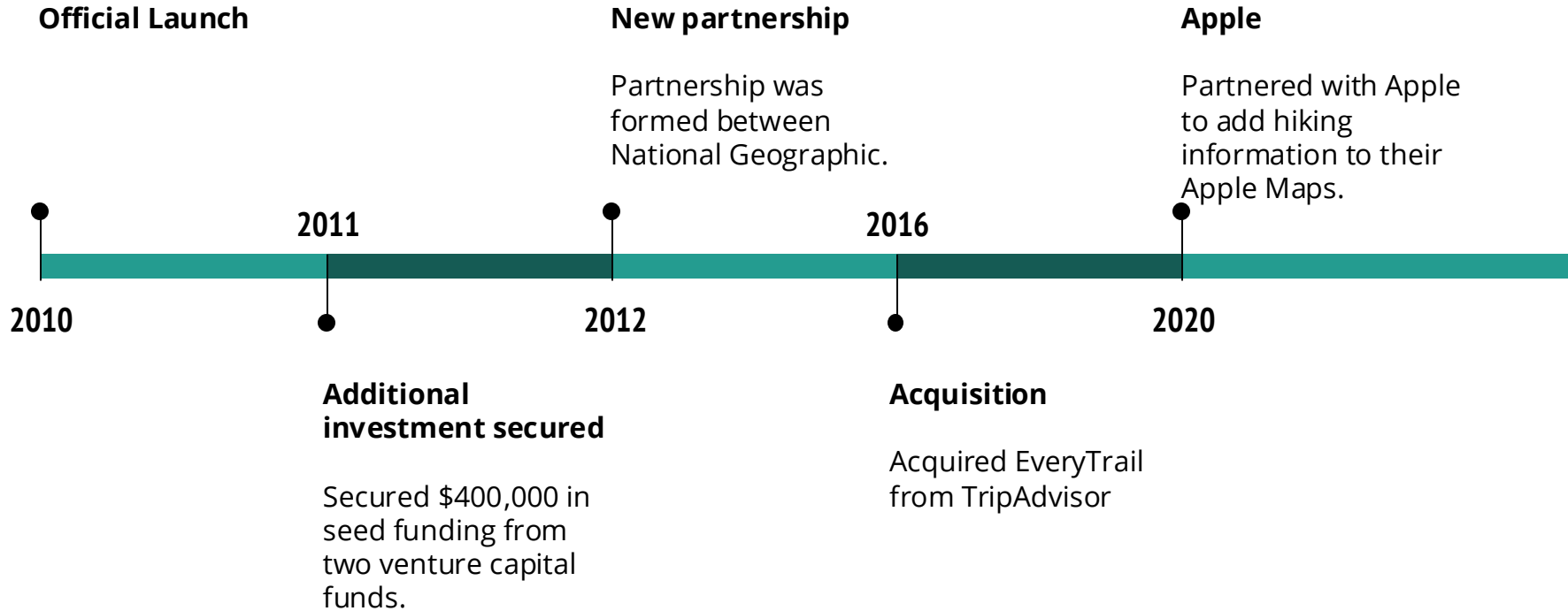
# Main features

**AllTrails**

- It's a **fitness** and **travel** mobile app used in outdoor recreational activities.

- Commonly used for **outdoor activities** such as hiking, mountain biking, climbing and snow sports.

- The service allows users to access a **database of trail maps**, which includes crowdsourced reviews and images.

- Depending on a user's subscription status, these resources can be used **online** and **offline**.

# Trails, Records, Statistics

# History

# Timeline

**Official Launch**

**New partnership**

Partnership was formed between National Geographic.

**Apple**

Partnered with Apple to add hiking information to their Apple Maps.

**2011**

**2016**

**2010**

**2012**

**2020**

**Additional investment secured**

Secured $400,000 in seed funding from two venture capital funds.

**Acquisition**

Acquired EveryTrail from TripAdvisor

As of May 2023, AllTrails claims a global user base of over 50 million in more than 100 countries.

# In 5 years

Add more features such as:

- Cell phone coverage map.

- Provide off-beaten path route.

- List of the peaks in the areas.

- Detailed information for maps, parking, accessibility, camping, etc.

- Access the real-time conditions of the hike.

- Marking on the trails for hiking, bicycle or pet friendly.

- Create challenges, partnership with third party.

- Information regarding hikers around the area.

# Vision & Strategy

# Product Vision

**AllTrails**

| | |
|---|---|
| **What** | AllTrails aims to be the leading platform for outdoor enthusiast, providing a comprehensive and interactive repository of world's trails and outdoor activities. |
| **Who** | Our target audience is individuals and communities seeking to connect with nature, stay active, and find solace in the beauty of the outdoors. |
| **Why** | AllTrails exists to empower users by providing easy access to a vast array of trails, fostering a sense of exploration, adventure, and a stronger connection to the environment. |

**Vision Statement:** AllTrails aims to be the leading platform for outdoor enthusiast, providing a comprehensive and interactive repository of world's trails and outdoor activities. Targeting individuals and communities seeking to connect with nature, stay active, and find solace in the beauty of the outdoors.  AllTrails sees opportunity towards encouraging an active lifestyle that promotes physical and mental well-being.

**Company Mission:** AllTrails was founded on the idea that we're all made better by spending time in nature. Each day, we strive to connect more people to the outdoors.

# Product Insights

| | |
|---|---|
| **Competitors** | Gaia GPS, Hiking Projects, National Park Service App, Komoot, Strava, and other hiking apps. |
| **Market Insight** | The global trekking and hiking market is expected to reach an estimated $182.9 million by 2028 with a CAGR of 6% from 2023 to 2028 (May 2023) |
| **Market Trends** | The market is driven by a heightened focus on physical and mental well-being, as outdoor adventures provide an avenue for exercise, stress relief, and a meaningful connection with nature. |
| **Customer Insights** | Customers want a platform that is accurate, reliable, easy to use, offers real-time GPS tracking, personalized content based on preference, skill, and location. Some user persona examples:<br><br>● **Easygoing "Jane",** prioritizes ease of use, reliable, and trails rating information.<br>● **Hardcore hiker "John",** who is looking for a real-time GPS tracking, accurate, and reliable to look for off-beaten path. |

# Challenges

| | |
|---|---|
| **Technical** | Ensuring the platform is accurate, reliable and able to connect with limited network service. |
| **Customer Pain Points** | Providing a platform that is reliable and accurate. |
| **Go To Market (GTM) Risks** | Competition in the market is fierce and we need to ensure our platform stands out and is able to attract and retain customers. |
| **Legal** | Ensuring compliance with data privacy, security regulations, geo-location and geographical restrictions, and standards such as GDPR, content moderation, safety, etc. |

# Approaches

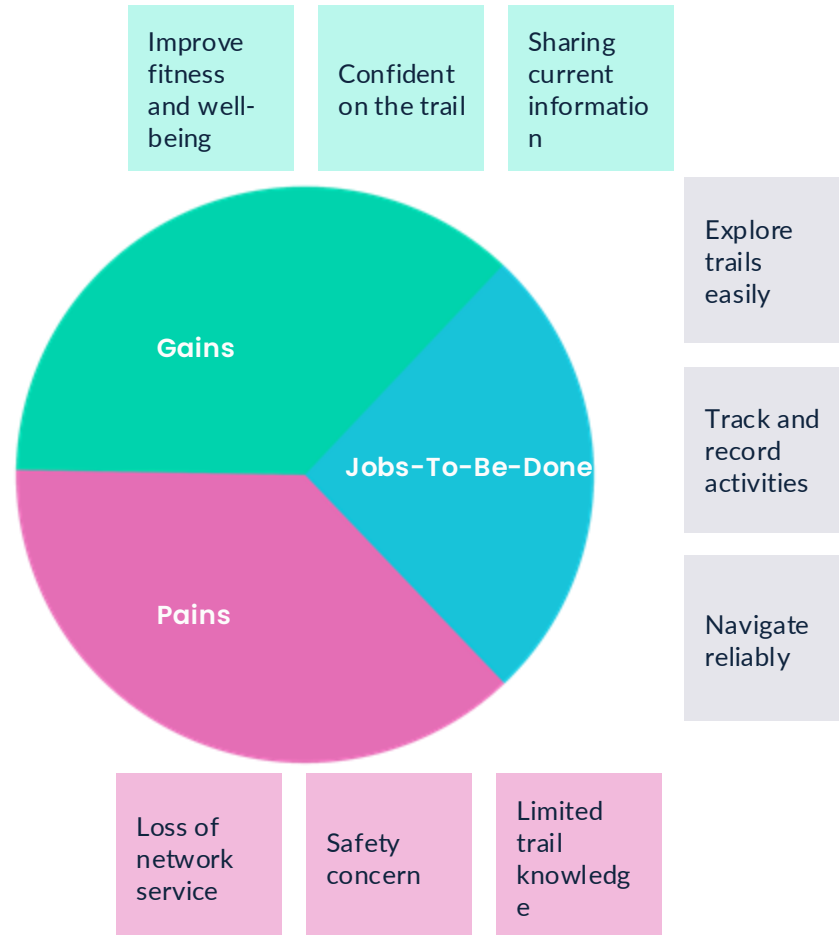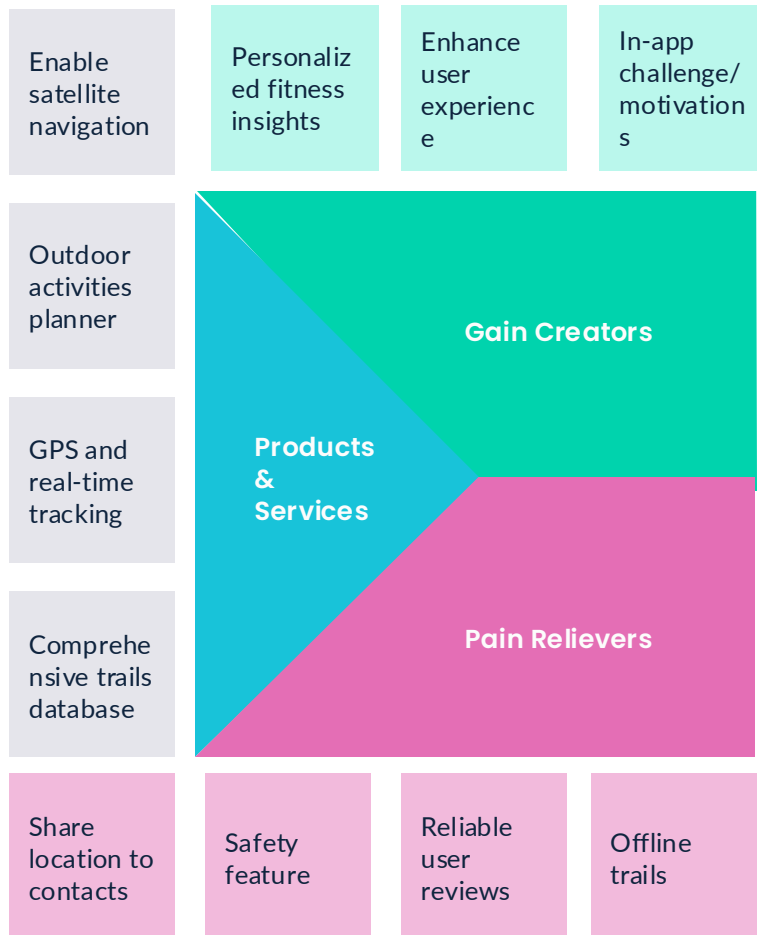| | |
|---|---|
| **Approach** | 1. Customer-centric development<br>2. Partnership and ecosystem collaboration<br>3. Scalability and globalization |
| **Overcome Challenges** | 1. User engagement and retention<br>2. Monetization sustainability |
| **Do's & Don't** | 1. Listen to the user feedback<br>2. Focus on accessibility<br>3. Ensure compliance with data privacy and security regulations and standards |

# Accountability

**Metrics**

Our success will be measured by user adoption, customer satisfaction, and revenue growth.

Our goal is to achieve a user base of 60 million monthly active users and a revenue growth rate of 25% in the next year.

**Notes**

# Value Proposition

# The Canvas

**AllTrails**

Enable satellite navigation

Personalized fitness insights

Enhance user experience

In-app challenge/ motivation s

Improve fitness and well-being

Confident on the trail

Sharing current information

Outdoor activities planner

Explore trails easily

**Gain Creators**

**Gains**

**Products & Services**

**Jobs-To-Be-Done**

GPS and real-time tracking

Track and record activities

**Pain Relievers**

**Pains**

Navigate reliably

Comprehensive trails database

Share location to contacts

Safety feature

Reliable user reviews

Offline trails

Loss of network service

Safety concern

Limited trail knowledge

# Product Feature Analysis

# Product Analysis

| | Prevalence | All Trails | Gaia GPS | Hiking Project | Cairn |
|---|---|---|---|---|---|
| Pricing | Annual in USD | 35.99 | 39.99 | Free | 26.99 |
| Description (key marketing terms) | | Explore with confidence. Inspiration and guidance for wherever your trail may lead. | Maps for Every Adventure. Leave cell service and your worries behind with Gaia GPS. | A crowd-sourced hiking guide built by hikers like you. | Our community's diverse local knowledge is unlocking the best spots to play, stay and explore. |
| Search for routes | Must-have feature | Have it | Have it | Have it | Have it |
| Create & save lists | Common feature | Have it | Have it | Have it | Have it |
| Create & save routes | Common feature | Have it | Have it | Have it | Have it |
| Record activities | Must-have feature | Have it | Have it | Have it | Have it |
| GPS tracking | Uncommon feature | Have it | Have it | Have it | Have it |
| Community updates | Uncommon feature | Have it | Have it | Have it | Have it |
| Import files | Common feature | Have it | Have it | Have it | Don't have it |
| Weather updates | Uncommon feature | Have it | Have it | Have it | Don't have it |

# Product Analysis

| | Prevalence | All Trails | Gaia GPS | Hiking Project | Cairn |
|---|---|---|---|---|---|
| Safety tracking features | Uncommon feature | Have it | Don't have it | Don't have it | Have it |
| Print maps | Common feature | Have it | Have it | Have it | Don't have it |
| Download/export files | Uncommon feature | Have it | Have it | Have it | Have it |
| Offline usage | Uncommon feature | Have it | Have it | Have it | Have it |
| Cellphone signal map | Uncommon feature | Don't have it | Don't have it | Don't have it | Have it |
| Additional comments | | Connect with Garmin | Outside network subscription | | |
| Where we win/lose | | Win: have safety tracking, more features available | Lose: no connection with the Outside Network | | Lose: no cellphone signal map |
| Product market ranking | | #1 - Market leader | #2 | #3 | |

# Feature Analysis

| Finding cell coverage on trail | All Trails | Gaia GPS | Hiking Project | Cairn |
|---|---|---|---|---|
| Feature pricing | 35.99 | 39.99 | Free | 26.99 |
| Do they have the feature? | No | No | No | Yes |
| How to get the information? | N/A | N/A | N/A | User generated data |
| Type of information given | N/A | N/A | N/A | - signal strength<br>- cell carrier |
| Description | N/A | N/A | N/A | Cell phone signal map based on user-generated data |
| Additional comments | | | | |
| Where we win/lose | | | | Lose: AllTrails do not have cellphone signal map feature |

# Competitive Market Analysis

# SWOT

| Strengths | Weaknesses |
|---|---|
| - Comprehensive features such as user reviews, weather updates, GPS tracking, connectivity to Garmin<br>- A community of more than 60 million people and has more than 420k curated trail routes worldwide | - Paid service for offline maps, copy and download other people's routes |
| **Opportunities** | **Threats** |
| - Adding more features such as cell phone signal searcher<br>- Global updates<br>- Partnership with third parties | - Hiking Project provide free maps and information<br>- Gaia GPS has better maps and navigation<br>- Cairn have cell phone signal coverage map |

# Porter's 5 Forces

| | | |
|---|---|---|
| **Threat of new entrants** | Low | AllTrails is well-established with loyal user base |
| **Bargaining power of suppliers** | Low | AllTrails rely on user-generated data and also partnership (national parks) |
| **Bargaining power of buyers (customers)** | Moderate | AllTrails would need to keep up with the customers expectation in giving the best features |
| **Threat of substitutes** | Moderate | AllTrails have comprehensive features from routes, navigation, tracking and also related information such as weather, parking, trail condition |
| **Competitive rivalry** | High | Multiple applications provide similar service as AllTrails, some has better maps and navigation, some are free, but most of them are able to search, record and navigate the route |

# PESTEL

| | |
|---|---|
| **Political** | Support from government, ie connectivity in county/state parks |
| **Economical** | Monetization of the app |
| **Social** | Connectivity with like-minded individuals |
| **Technological** | GPS, satellite, augmented reality |
| **Environmental** | Take your litter home campaign, trail and wildlife sustainability |
| **Legal** | Data privacy issue |

# User Personas

# Persona 1: Cindy Wong

**Name**

Cindy Wong

**Job**

Full-time Master student

**Facts**

- Enjoys outdoor activities
- DIY arts and crafts
- Events

# User Interview Questions

## Tell me about yourself?

- Amateur photographer
- Read and watch bits of news and information
- Experiment with cooking or baking

## What would say are some of your concerns?

- Finding accurate information for the current condition of the road  where there is  no visible trails
- Tips about getting to the location, parking
- Share GPS tracking when there's no connectivity

## Which features have you used in All Trails  the past month?

- Search routes
- Navigation
- Read comments and reviews

## What are your top three strengths?

- Problem solving
- Creative
- Decision making

## Which activities consume most of their time?

Searching for the detailed information for the route, mostly not available on the apps

## What tools do you use most?

All Trails, Strava, Instagram, Facebook, websites

## How would you describe your behaviours?

I tend to use one app and multiple websites/ forums to find information regarding the trails conditions

## What types of topics are you interested in?

- Nature hikes
- Travelling
- Arts and crafts

| Age | Gender | Income | Education Level | Location |
|-----|--------|--------|-----------------|----------|
| 35 | Female | N/A | Master degree | San Jose |

## Emotional Drivers

| Professional Goals | Motivators | Challenges |
|--------------------|------------|------------|
| Work life balance | Live happy and enjoy life | Finding passion |

## Blockers

| Pain Points |
|-------------|

1. Search for routes on a certain peak that has no visible path
2. Find location where there's signal to check on routes or inform safety
3. Detail satellite image on the trails

# Persona 2: Min Lee

**Name**

Min Lee (She/ Her)

**Job**

Housewife

**Facts**

- Likes technology applicable for kids
- Farmers market
- Fashionista

# User Interview Questions

**Tell me about yourself**

- I'm a busy mom with 3 kids
- I like practical solutions
- I love to cook and explore new ingredients

**Which features have you used on All Trails the past month?**

Nearby routes

**Which activities consume most of your time?**

Search for kid-friendly routes and read information

**How would you describe your behaviours?**

I tend to use different website  to find hiking locations

**What worries/ concerns you?**

Find routes friendly for children

**What are your top three strengths?**

- Conducting research
- Problem solving
- Creative

**Most-used Tools/ Apps**

Websites, instagram

**What types of topics are you interested in?**

- Kids related events
- Home and kitchen essentials
- Stand up comedy

**D**

| Age | Gender | Income | Education Level | Location |
|-----|--------|--------|-----------------|----------|
| 30 | Female | N/A | Associate Degree | San Francisco |

**E**

| Professional Goals | Motivators | Challenges |
|--------------------|------------|------------|
| Use tech to help manage schedules for the family | Cares about family welfare and climate change | With a hectic schedule, Min find escape through watching fun and informational reels |

**B'ockers**

| Pain Points |
|-------------|

1. Easy information for kids friendly hikes
2. Simple search for routes difficulties
3. Share tracking information

# Feature Prioritization

# MoSCoW Method

**AllTrails**

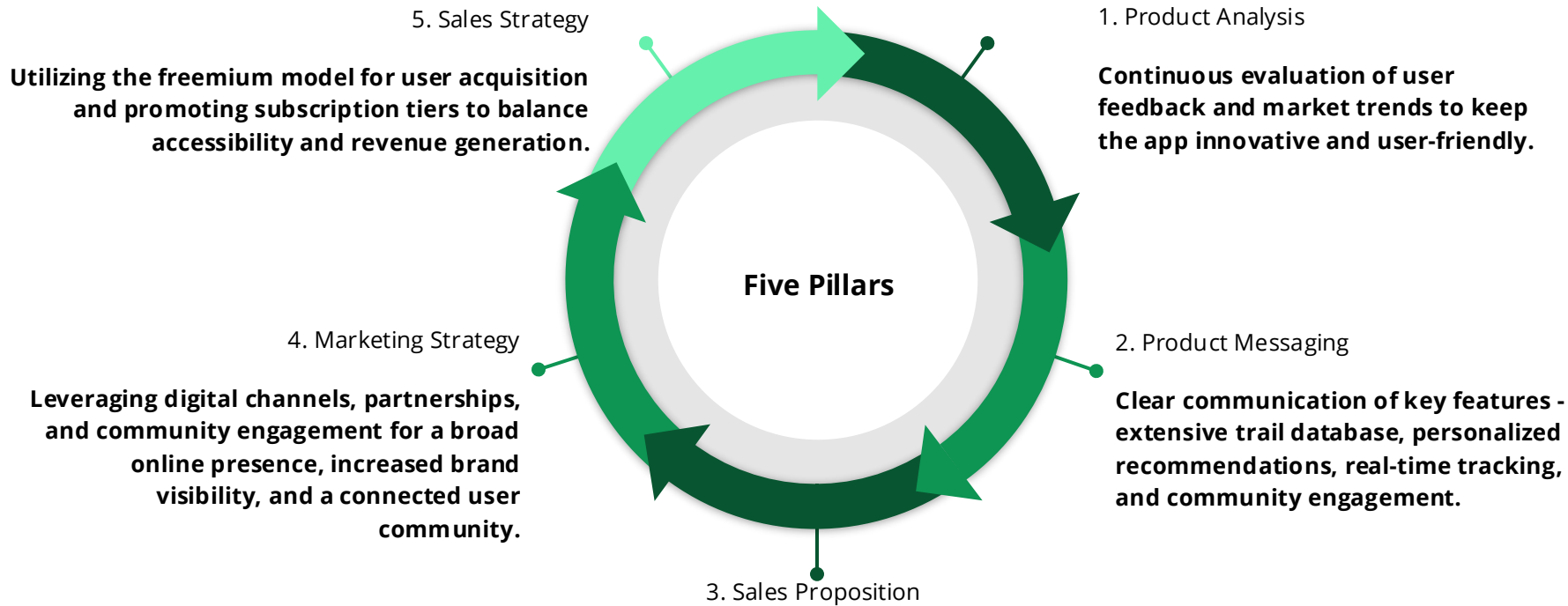| Must | Should | Could | Would |
|---|---|---|---|
| <ul><li>Create account function</li><li>Login function</li><li>Community engagement</li><li>User safety and tracking</li><li>Comprehensive database for trails</li></ul> | <ul><li>Personalized recommendation</li><li>Accessibility</li><li>Ask for help feature</li><li>Follow other users function</li></ul> | <ul><li>Weather integration</li><li>Satellite view</li><li>Gamification</li><li>E-commerce integration</li></ul> | <ul><li>Advertising</li><li>Blog</li><li>Chat with other users</li></ul> |

# RICE Scoring

| Feature | Reach/week | Impact | Confidence | Effort | RICE score (R*I*C/E) |
|---|---|---|---|---|---|
| Login function | 8,000 | 3 | 90% | 4 | 18,000 |
| User safety and tracking | 5,000 | 3 | 80% | 5 | 9,600 |
| Comprehensive database for trails | 10,000 | 3 | 90% | 8 | 33,750 |
| Personalized recommendation | 4,000 | 2 | 70% | 3 | 5,333 |
| Follow other users function | 7,500 | 1 | 70% | 6 | 875 |
| E-commerce integration | 3,500 | 1 | 50% | 10 | 175 |
| Chat with other users | 1,000 | 1 | 50% | 6 | 83 |

# Go-To-Market Strategy

# Go-To-Market Strategy

**AllTrails**

**Five Pillars**

**5. Sales Strategy**

**Utilizing the freemium model for user acquisition and promoting subscription tiers to balance accessibility and revenue generation.**

**1. Product Analysis**

**Continuous evaluation of user feedback and market trends to keep the app innovative and user-friendly.**

**4. Marketing Strategy**

**Leveraging digital channels, partnerships, and community engagement for a broad online presence, increased brand visibility, and a connected user community.**

**2. Product Messaging**

**Clear communication of key features - extensive trail database, personalized recommendations, real-time tracking, and community engagement.**

**3. Sales Proposition**

**A freemium model attracts a broad user base with essential features for free, while subscription tiers like AllTrails+ offer advanced features for a seamless, ad-free experience**

# Additional Feature

# Satellite Connectivity for Outdoor Enthusiasts

**Problem**

The identified problem is the **lack of connectivity** in remote outdoor areas where traditional mobile signals are often unavailable. This presents a challenge for users who may need to make emergency calls, access essential information, or stay connected during their outdoor adventures.

**Idea for the Feature**

Introduce a **satellite connectivity** feature that allows users to establish a connection in areas with no traditional mobile signal. This feature aims to leverage satellite technology to enable communication, ensuring users can make calls and access critical information even in remote locations.

# Satellite Connectivity for Outdoor Enthusiasts

**Assumptions**

The primary assumption is that there is **no signal available in the targeted outdoor areas**. The hypothesis is that by integrating satellite connectivity, users can establish a connection and access communication services through Wi-Fi.

**Hypothesis**

If we integrate satellite connectivity into the app, users will be able to **establish a reliable connection in areas with no phone signal**. This will empower them to make calls, send messages, and access essential features using available Wi-Fi, enhancing their overall outdoor experience.

**MVP Experiment**

Conduct a controlled experiment with **a subset of outdoor enthusiasts who frequently venture into areas with poor or no phone signal**. Provide them with the app featuring satellite connectivity and gather feedback on the usability, effectiveness, and overall satisfaction with the new feature.

# Satellite Connectivity for Outdoor Enthusiasts

**Metrics:**

**Number of Accesses in Signal-Scarce Areas:**
- Track the frequency with which users access the app in areas where traditional phone signals are typically weak or absent.

**User Feedback and Satisfaction:**
- Collect user feedback on their experience with the satellite connectivity feature.

**Emergency Call Success Rate:**
- Measure the success rate of emergency calls made using the satellite connectivity feature.