

**Adventure Travel
Supplier Survey**
(All Suppliers)

Prepared for:

Shannon Stowell
President
Adventure Travel Trade Association (ATTA)



Prepared by:

Paige P. Schneider
PhD Student
Michigan State University

Dr. Christine A. Vogt
Associate Professor
Michigan State University

MICHIGAN STATE

UNIVERSITY

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**Paige P. Schneider
Vogt**
schne252@msu.edu
PhD Candidate

Dr. Christine
vogtc@msu.edu
Associate Professor

EXECUTIVE SUMMARY

“Adventure travel” is frequently lauded as one of the fastest growing segments in the tourism industry, especially in many of the developed regions of the world. And while anecdotal evidence suggests that the niche is indeed experiencing a period of rapid expansion, business owners and managers would benefit from credible industry research. In order to continue attracting investors (and ultimately consumers), this fragmented, entrepreneurial industry must begin to define itself, quantify its existing size and understand the strengths and weaknesses of how it is positioned for future expansion. Diverse issues ranging from industry marketing initiatives to government policy will be affected by how the industry defines and organizes itself in the coming years.

In an effort to promote greater industry organization and definition, in January 2005, researchers at Michigan State University examined the adventure travel market in a study co-sponsored by the Adventure Travel Trade Association. Consumers and exhibitors at adventure travel trade shows in Chicago, New York, and Washington, D.C. participated in a survey about adventure travel. This report provides analysis of supplier surveys conducted with trade show exhibitors.

Highlights of the study include the following:

- The definition of adventure travel and broaden its scope in an effort to reach a broader range of clients, as well as provide further insight to more effective marketing strategies.
- The outlook for adventure travel is positive with the segment being seen as gaining recognition and popularity.
- Suppliers and consumers have a positive outlook for adventure travel in 2005, with customers expecting to spend more on adventure travel vacations.
- Culture, learning/education, fun and ecotourism are growing trends in the adventure travel segment with is growing interest more unusual and new destinations.
- Word-of-mouth continues to provide the greatest results in driving actual bookings from clients, while search engine optimization and Internet advertising continue to grow.
- Adventure travel consumers are both loyal and committed clients.
- Adventure travel consumers have a desire to learn from their adventures and experience new cultures. In addition, ecotourism was seen a major element of adventure travel vacations.

May, 2005

Adventure Travel Survey



Introduction:

“Adventure travel” is frequently lauded as one of the fastest growing segments in the tourism industry, especially in many of the developed regions of the world. And while anecdotal evidence suggests that the niche is indeed experiencing a period of rapid expansion, business owners and managers would benefit from credible industry research. In any industry, growth can be difficult to manage. Business owners must build their capacity to deliver existing services to additional customers, hone their product development capabilities, forge new alliances and industry relationships and attract additional investment. The adventure travel niche of the tourism industry is in the midst of a vibrant growth phase, one that is challenging small and large suppliers alike. In order to continue attracting investors (and ultimately consumers), however, this fragmented, entrepreneurial industry must begin to define itself, quantify its existing size and understand the strengths and weaknesses of how it is positioned for future expansion. Diverse issues ranging from industry marketing initiatives to government policy will be affected by how the industry defines and organizes itself in the coming years.

Recognizing the lack of definition in the industry around its core services – even suppliers don’t often agree on what activities constitute “adventure travel” - Michigan State University (MSU) and the Adventure Travel Trade Association (ATTA) partnered to design and conduct a series of in-depth surveys of adventure travel industry suppliers and consumers. In surveying both suppliers and consumers, it was hoped that survey results would reveal gaps in supplier and consumer perceptions about adventure travel activities. Understanding the differences in how suppliers and consumers define “adventure travel” would allow the industry to formulate and promote a meaningful definition of its core services. In addition, understanding supplier and consumer attitudes about current adventure travel products and services can facilitate product development – allowing suppliers to better align product offerings with consumer desires and market those products in ways to directly appeal to target consumers.

Methodology:

The current study was designed to replicate a study conducted in 1997 by researchers from Purdue University (Sung, O’Leary and Morrison, 1997). This study addresses the changes taking place in adventure travel, specifically the growing importance of the cultural and ecotourism component, and attempts to offer an alternative definition for adventure travel. Unlike the Sung, et al 1997 study, this study also surveyed attitudes about adventure travel from the consumer perspective, the results of which are presented in a separate document.

The Adventure Travel Trade Association (ATTA) permitted access for the researchers to administer survey questionnaires and collect data at adventure travel trade shows in Chicago, New York, and Washington, D.C. The population surveyed at these

shows provided researchers with a representative sample of adventure travel suppliers as well as consumers interested in adventure travel. Unlike other visitor studies, in which difficulties were encountered in sampling participants scattered over a wide range of sites, these studies were set within a well-defined, specific location and time period.

Each adventure travel supplier-exhibitor at the trade shows was contacted by the research team with a brief introduction explaining the purpose of the study and then provided with a four-page, self-administered questionnaire. Survey participants were clearly identified by their exhibitor booths, allowing the researchers to follow-up and encourage questionnaire completion. Unlike the study conducted by Sung, only one questionnaire per organization was distributed to avoid duplication of information.

A total of 115 questionnaires were distributed of which, 92 were returned completed (Chicago #1 n=65, Chicago #2 n=10, New York n=10, and Washington DC n=7). The overall response rate yielded was 80% a strong response rate for such a study. The types of businesses and organizations exhibiting at the adventure travel trade shows ranged from tour operators and Destination Management Organizations (DMO's) and National Government Organizations (NGO's) to travel related publishers (Table 1).

The table below provides an overview of the type of business engaged in by survey respondents:

Table 1. Survey Respondents

<i>Description</i>	<i>n=92</i>
Tour Operator	49%
Destination Marketing Organization	25
Other	15
Retail Travel Agency	5
Travel Carrier (Airlines, Railway etc.)	2
Equipment Manufacturer/Supplier	4
Travel Related Publisher	5

If one of the seven choices provided did not fit the business/organization description, respondents were asked to indicate a description. A total of 14 respondents or 15% indicated a different description than those provided, these are provided below.

- Airline Representative
- Conservation organization
- Cooperative marketing group
- Local kayaking club
- Nonprofit organization (education, training, environmental, research)
- Ski club association
- Travel & Tourism consultant
- Volunteer organizations
- Zoo

A four-page survey instrument (see *Appendix A*) was designed replicating the definition scale from Sung *et al.* (1997). The key variables examined were:

- Adventure activities considered part of the adventure travel category (both physical and cultural);
- Eight definitions of adventure travel and;
- Demographic variables of the participants and other descriptive variables adding to the explanatory power of the analysis.

Physical and cultural activities were rated on a five-point scale (1=strongly agree to 5=strongly disagree) for level of agreement with the activity belonging in the adventure travel category. The definition scale developed by Sung *et al.* (1997) was developed from past leisure and recreation studies. Seven alternative definitions from past leisure or recreation studies were presented along with the definition proposed by Sung (1997). The response variables were the scores on a five-point scale in terms of level of agreement with each definition.

To test the possibility if any of the alternative definitions could be directly adopted for adventure travel, respondents were asked to select the most appropriate, comprehensive definition among the eight alternatives. Two additional items were added to test whether “experiencing a new culture” and/or “ecotourism” should be included in the definition of adventure travel. Demographic profiles of the business of the participants were included to examine the empirical application of the definition of adventure travel. The key variables used were:

- The organization or business category;
- The key products or specialties featured by adventure travel businesses or organizations; and
- The proportion of business categorized as adventure travel business.

Respondents were asked to indicate those characteristics they associated with adventure travel, as well as their opinion as to the most important benefits clients seek from adventure travel. Finally, to understand the definition of adventure travel, participants were asked to select one of five descriptive statements.

The survey questions included three categories: definitional, contact with consumers, and business affiliations/operations. The remainder of this section of the report is organized in the order of the major categories of the survey:

- Section 1: Defining Adventure Travel
- Section 2: Consumer Contact/Communication
- Section 3: Business Affiliations/Operations

Section 1: Defining Adventure Travel

Growing Interest in Culture, “Enrichment” Components of Adventure Travel Experiences

In reviewing the survey data gathered to attempt to define adventure travel (questions 3,7,10,11,12,13) the team concluded that traditional definitions of adventure travel are too limited. All of the traditional definitions encompass the physical, natural and risk-taking elements of adventure travel, but none address the growing interest in education, cultural enrichment or having “fun”, which appeal to a much broader base of potential travelers (Box 1). Revising the definition and broadening its scope could allow suppliers to tailor their marketing messages to appeal to a wider client market, and provide insight to develop new products and services.

In survey question #3, respondents were given an open-ended question in which they were asked to describe the three characteristics that come to mind when *they* think about adventure travel. Over half the respondents (51%) described at least one of the characteristics as learning/education, cultural activity, or fun (see *Appendix B*). However, when presented with the eight definitions that were replicated from the Sung *et al.* (1997) study (survey question #12), few definitions yielded strong support. In fact, only about one-third of the respondents strongly agreed with three of the definitions from a possible list of eight.

Box 1. Definitions of Adventure Travel

Definitions as presented in Survey Question #12

- **Definition a:** ‘Adventure travel is any number of leisure pursuits, which provide exposure to physical danger.’
- **Definition b:** ‘Adventure travel is all pursuits that provide an inherently meaningful human experience that is directly related to a particular outdoor environment – air, hills, mountains, and water.’
- **Definition c:** ‘Adventure travel is activities that involve human participation as response to the challenge offered primarily by the physical, natural world such as hills, air current, and waves.’
- **Definition d:** ‘Adventure travel is outdoor activities involving the natural environment where the outcome perceived by the participant is unknown.’
- **Definition e:** ‘Adventure travel is travel for the specific purpose of pursuing adventure recreation.’
- **Definition f:** ‘Adventure travel is variety of self-initiated activities utilizing an interaction with the natural environment, that contains elements of real or apparent danger, in which the outcome, while uncertain, can be influenced by the participant and circumstance.’
- **Definition g:** ‘Adventure travel is a broad spectrum of outdoor touristic activities, often commercialized and involving an interaction with natural environment away from the participant’s home range and containing elements of risk in which the outcome is influenced by the participant, setting, and management of the tourist’s experience.’
- **Definition h:** ‘Adventure travel is the sum of the phenomena and relationship arising from the interactions of adventure touristic activities with the natural environment away from the participant’s usual residence area and containing

elements of risk that the outcome is influenced by participation, setting, and the organizer of the tourist's experience.'

Table 2. Adventure Travel Definitions

<i>Definition</i>	<i>n=</i>	<i>Strongly</i>			<i>Strongly</i>		<i>Mean</i>
		<i>agree</i>	<i>Agree</i>	<i>Undecided</i>	<i>Disagree</i>	<i>disagree</i>	
Definition c	63	35%	51%	6%	8%	0%	1.9
Definition b	63	33	51	5	11	0	1.9
Definition g	62	24	55	15	7	0	2.0
Definition e	64	31	39	19	11	0	2.1
Definition h	63	18	59	13	11	0	2.2
Definition d	62	23	39	26	11	2	2.3
Definition f	63	16	52	18	13	2	2.3
Definition a	64	9	22	22	45	2	3.1

(1=strongly agree, 2=agree, 3=undecided, 4=disagree, 5=strongly agree)

Respondents were then asked (survey question #13) to select from the eight definitions presented, the most appropriate and comprehensive definition of adventure tourism. Again, as in the earlier study conducted by Sung et al., there was no one definition that yielded strong support.

Table 3. Most Appropriate Definition of Adventure Travel

<i>Definition</i>	<i>n=</i>	<i>%</i>
Definition c	10	16
Definition h	9	14
Definition b	8	13
Definition e	7	11
Definition f	7	11
Definition d	6	10
Definition g	6	10
Not listed	6	9
Definition a	4	6
Total	63	100%

This is further supported by the response to survey question #10 in which respondents were asked if they felt that experiencing a new culture plays a significant role in a person's participation in adventure travel. Over 75% of the respondents indicated "yes." In addition, 58% of those who said "yes" also provided a description as to why this experience is so important (see *Appendix C*). **The overriding theme of the responses was that people have the desire to learn from their adventures and experiences of new cultures.**

Role of Ecotourism

Although ecotourism was not specifically identified as a characteristic of adventure travel, when asked if it is a major element of "adventure travel vacations" (survey question #11), 66% indicated that it was. Therefore, it should have some role in a revised definition of adventure travel. Based on these findings the definitions that respondents had to choose from are not inaccurate, only incomplete.

When asked to indicate the level of agreement with “specific activities placed in the adventure travel category” (survey question #7) the activities that fall under the traditional definitions yielded the strongest support along with ecotourism and the unexpected bird watching and backpacking (Table 4). However, “educational programs” and “cultural activities” faired extremely well with over 67% and 75% respectively either agreeing or strongly agreeing with their placement in the adventure travel category, again supporting the conclusion that the traditional definitions need revision.

Table 4. Adventure Travel Activities

Activity	n=	Strongly agree	Agree	Undecided	Disagree	Strongly disagree	Mean
Kayaking/sea/whitewater							
Climbing-Mountain/Rock	92	71	27	2	0	0	
Trekking							
Rafting							
Safaris							
Hiking							
Canoeing	91	59	37	3	0	0	
Diving-scuba							
Camping	90	51	41	6	2	0	
Ecotourism							
Backpacking	90	50	33	3	2	2	
Bird Watching	90	47	40	9	3	1	
Sailing							
Snorkeling							
Horseback Riding							
Bicycling	90	51	32	14	2	0	
Orienteering							
Skiing							
Fishing/fly-fishing							
Env. sustainable activities	89	44	37	16	3	0	
Research expeditions							
Walking tours							
Archeological expeditions	39	33	41	21	5	0	
Cultural activities	91	32	46	14	7	1	
Educational programs	90	32	38	18	12	0	
Visiting historical sites							
Hunting							

(1=strongly agree, 2=agree, 3=undecided, 4=disagree, 5=strongly agree)

Conclusion

The appeal and popularity of niche tourism markets, particularly the adventure travel market, is growing. As travelers continue to demonstrate a desire for new experiences and a willingness to try new activities, travel industry suppliers have developed a range of new products to take advantage of this consumer interest. And while the adventure tourism “phenomenon” is currently receiving a great deal of attention, there remains much disagreement with regard to what it means to engage in “adventure travel.” Although the individuality of adventure travel trip suppliers, often owner –operator entrepreneurs, is a feature that appeals to consumers, without a greater level of industry organization and standardization, many would-be adventure travelers remain confused and overwhelmed, daunted at the prospect of identifying a trip and supplier suitable for their

needs. In addition, potential investors, and federal and state policymakers remain unaware of the importance of the adventure travel segment, with its economic and environmental and potential.

Section 2: Consumer Contact/Communication

It is apparent that adventure travel suppliers have a well-defined client base as revealed by responses to the question asking respondents to indicate the proportion of clients they serve that they would characterize as “adventure travelers.” Sixty-five percent stated that more than half of their business is attributable to adventure travelers. We can conclude that the adventure travel consumer is loyal and committed and that suppliers regularly cater to a well-defined niche market.

In an effort to understand how suppliers communicate with their adventure travel customers, questions regarding the most useful information sources were posed. According to respondents, word-of-mouth provides the greatest results in driving actual bookings from clients (82%), while search engine optimization and Internet advertising were both noted as being extremely effective (Table 5).

Table 5. Information Sources Suppliers Feel Lead to Bookings

<i>Source</i>	<i>n=</i>	<i>Extremely Effective</i>	<i>Effective</i>	<i>Undecided</i>	<i>Ineffective</i>	<i>Extremely Ineffective</i>	<i>Mean</i>
Word of mouth	61	82%	16%	2%	0%	0%	1.2
Search Optimization	55	49	40	9	2	0	1.6
Internet advertising	59	44	41	12	3	0	1.8
Publicity	57	39	46	14	2	0	1.8
Travel agent	55	31	55	2	7	6	2.0
Brochures	58	21	62	16	2	0	2.0
Newspaper	57	30	40	18	11	2	2.1
Guidebooks	55	22	55	20	4	0	2.1
Magazine ads	56	16	50	29	5	0	2.2
TV	53	32	25	30	9	4	2.3
Online keyword buying	55	20	40	33	2	6	2.3
Magazine classifieds	55	11	38	40	11	0	2.5
Direct telephone calls	55	13	40	26	15	7	2.6

(1=extremely effective, 2=effective, 3=undecided, 4=ineffective, 5=extremely ineffective)

Additionally, respondents were asked (survey question #5) to review the list of information sources provided and to identify in their own words the three that they consider most important or effective for their business or organization. A total of 60 out of 65 respondents or 92% provided responses (Table 6).

Table 6. Most Important/Effective Information Sources

<i>Source</i>	<i>%</i>
Word of mouth	60
Internet	53
Travel Agents	23
Publicity	23
Search Engine Optimization	20
Newspapers	20
Magazines	15
Brochures	15

Multiple responses allowed.

When asked about the current state of adventure travel (survey question #15), the majority of respondents indicated the segment as ‘gaining recognition and popularity’ (Table 7). In contrast, Sung *et al.* (1997) found that only one-third viewed the segment as ‘gaining recognition and popularity’ while more than half of respondents viewed the segment as ‘newly emerging’ showing a shift in the growth and maturity of the adventure travel segment.

Table 7. State of Adventure Travel

<i>State</i>	<i>Schneider (2005)</i>	<i>Sung et al. (1997)</i>
	%	%
Gaining recognition and popularity	63	29
Newly emerging tourism segment	34	51

Only the two categories with greatest response included.

Respondents were further asked (survey question #24) to rate clients’ spending habits. These results support the gaining recognition and popularity by indicating that clients are not being deterred by prices (Table 8).

Table 8. Client Spending Outlook

<i>See clients spending...</i>	<i>%</i>
More	50
Same	47
Less	3

In addition, the business outlook for 2005 looks promising by the results of survey question #23 where respondents were asked to rate their business optimism on a 10-point scale with 1= highly optimistic and 10=highly pessimistic (Table 9).

Table 9. Business Optimism

<i>Level of Optimism</i>	<i>%</i>
Optimism between 1 and 4	79
Neutral or Pessimistic*	20

**Respondents selecting a response higher than 5, although no one Indicated 10 or “highly pessimistic”*

Several survey questions related to what suppliers believe their clients need. (questions 5, 6, 14). Again, culture, learning/education, fun and ecotourism were recurring responses. When asked if respondents see changes in their clients’ destination interests in the next year (2005), 95% of the respondents responded ‘yes’ to this question and 39% included an open-ended response indicating:

- More cultural immersion travel;
- Increased interest in South and Central America; and
- An interest in more unusual and new destinations.

Again, the desire for more culture activities was evident in the responses.

Response to the survey question #6, “Do you see changes in client activity interests in the next year (2005)?” showed that 36% of the respondents saw changes in activity preferences, specifically regarding cultural activities and interests, as well as ecologically oriented activities.

In survey question #14, respondents were asked to list the most important benefits their clients seek from adventure travel. The most popular words were:

- Experience
- Challenge
- Education
- Fun
- Memories
- Physical activity
- Self awareness/growth

The finding that culture, environment and natural settings are included in many of the responses supports the important role culture and ecotourism play in a definition of adventure tourism. One respondent stated “*An enriching experience personally and within nature’s environment*” as well as “*Experiencing the unknown world and cultures.*” It is evident that both suppliers and consumers are clearly identifying culture as being a prominent part of the adventure travel experience. Therefore, a definition of adventure travel that includes culture as a component will offer a broader base to market to, as well as increase the interest level of those consumers not traditionally defined as adventure travel consumers.

Section 3: Business Operations/Affiliations

In reviewing the survey data pertaining to business operations/affiliations there is a general consensus about the positive outlook for adventure travel. Additionally, it is apparent that adventure travel businesses/organizations view supporting social causes as an important activity. Although there is agreement about the benefits of trade membership associations/organizations, very few suppliers are members of these types of associations/organizations. It can be concluded that there is a need for clear communication from trade organizations about the benefits available to members and a need for the most valuable benefits suppliers seek to be expanded as one way of encouraging involvement.

Response to survey question (16) “Is your business or organization currently a member of the Adventure Travel Trade Association (ATTA)?” found 11% were current members of ATTA. In addition, respondents were asked, “Is your business or organization a member of some other organization that serves the adventure travel community?” Again, there was little indication of membership in trade organizations catering specifically to the adventure travel market and 66% indicated no current membership in a trade organization. Of those businesses/organizations indicating they were members of an adventure travel organization those indicated included (please note not all of those organizations listed are adventure travel trade organizations):

- American Trails-American Hiking Society National Partnership for National Trails
- American Society of Travel Agents (ASTA)
- We are not members, however we work with local adventure travel organizations in Crete
- CMSC
- Crossphere
- Diving, snorkeling
- Federal Ski Council Federation
- IATA
- International Ecotourism Society
- NTA
- PPA, ACA
- RCI
- TAPS
- Leave No Trace
- National Interpretive
- Trade/region specific organizations
- Travel Industry Association of Canada, Tourism Calgary

Respondents were asked to describe what benefit/s would be of most value that could be provided by a trade organization. Interestingly, 77% (n=50) of the respondents selected “networking”, “education” “publicity” and “research.” As one respondent stated, “bring the industry together,” indicates support for networking within the industry. A list of all responses is provided (see *Appendix B*).

Although there was consensus from respondents regarding the benefits a trade membership organization could provide, there was no consistency of membership or support of such organizations. This supports responses indicating a need for education and training and perhaps communication in this area could be improved. Networking and a sense of travel “community” could be enhanced by involvement of business/organizations in associations offering benefits that they find valuable.

When asked to indicate if their business/organization ever exhibited at a travel trade show before, 81% of the respondents (n=51) answered “yes.” Respondents recalled exhibiting at shows as far back as 2002, primarily in North America at such locations as

Chicago, New York, Miami, and Toronto. In addition some respondents noted exhibiting at shows “all over the world” and “all over the United States and Europe.”

To understand the importance of tradeshow in relationship to return on investment, respondents were asked, “does your business/organization feel travel trade shows are a valuable investment of company time and resources” and an overwhelming 92% (n=59) indicated they were a valuable investment. Open ended comments regarding the value of trade shows included such comments as “allows us to reach a specific audience,” “good networking opportunity,” “new contacts,” “a great way to really know how people feel about travel at the moment” and “agent contacts and exposure” (see *Appendix B*).

Respondents were asked to think of trade memberships their business/organization has or has had in the past and rate the importance (1=strongly agree and 5=strongly disagree) of each of the benefits (Table 10).

Table 10. Trade Membership Benefits

Benefits	n=	Strongly			Strongly		Mean
		Agree	Agree	Undecided	Disagree	Disagree	
Industry information/news	59	32%	54%	10%	2%	2%	1.9
Contact with tour operators	58	35	43	16	7	0	2.0
PR, Marketing, Sales Assist	57	33	40	19	7	0	2.0
Industry research	58	28	47	22	2	2	2.0
Co-op advertising	57	30	42	21	5	2	2.1
Market research	58	28	45	22	5	0	2.1
Directory listing	57	26	49	21	4	0	2.1
Educational programs	57	23	55	21	2	2	2.1
Leads/business generation	58	29	38	22	9	2	2.2
Contacts with travel agents	58	26	43	19	12	0	2.2
Standards/Certificates	45	24	27	33	13	2	2.4
Networking	57	16	47	23	12	2	2.4
Discounts on goods/services	56	14	41	36	5	4	2.4
Insurance packages	56	18	25	39	14	4	2.6

(1=strongly agree, 2=agree, 3=undecided, 4=disagree, 5=strongly disagree)

Response to the survey question, “what research data would be most valuable to your business/organization if it were available” found that over sixty-percent (62%) (n=40) of respondents indicated some type of research they are most interested in receiving. The most popular answers were “demographics”, “information sources used by clients” and “travel trends.” One respondent indicated interest in research about “What adventure travel companies are doing related to ecotourism principles.” To what degree they incorporate sustainable practices (claims vs. actual) and do they need training in sustainability/ecotourism?” (see *Appendix B*)

Businesses/organizations were asked to indicate their gross revenues for 2004 with 91% (n=59) of the respondents providing a response (Table 14).

Table 11. Gross Revenues

<i>Gross Revenue</i>	<i>n=</i>	<i>%</i>
\$50,000 or less	6	10
\$50,001-\$250,000	6	10
\$250,001-\$500,000	5	9
\$500,001-\$1million	9	15
\$1million-\$5million	10	17
\$5million-\$10million	3	5
\$10million or more	10	17
Don't know	10	17
Total	59	100%

Response to survey question (26) “Does your business/organization support, promote or belong to any of the following organizations that promote environmentally/culturally responsible travel?” found that no one organization was supported by the majority of the respondents (Table 15). Although *Leave No Trace* and the *National Parks and Conservation Society* received a quarter of the respondents support, it is clear that being involved in some capacity with a socially responsible organization is important to respondents. Additional evidence of the growing support for socially conscious organizations is reflected on websites and brochures where companies tout their affiliation with these types of organizations.

Table 15. Environmentally/Culturally Responsible Organizations

<i>Organization</i>	<i>n=</i>	<i>%</i>
Leave No Trace	28	25
National Parks and Conservation Society	28	25
The International Ecotourism Society (TIES)	28	21
World Wildlife Federation (WWF)	28	21
In-house company or organization	28	18
Wildlife Conservation Society	28	14
American Outdoors (AO)	31	13
Sustainable Tourism International (STI)	28	11
Alaska Wilderness Recreation and Tourism Association (AWRTA)	31	3
International Galapagos Tour Operators Association (IGTOA)	31	0
Mexican Nature Conservation Fund (MNCF)	28	0
Project Green Macaw/The Neotropical Foundation	28	0
World Literacy of Canada	28	0

Additional environmentally/culturally responsible organizations that were listed by respondents as those that their business/organization supports or belongs include:

- American Wildlands
- APTA
- Audubon Society Belize
- Belize Eco-Tourism
- Belize Tourism Industry Association (BTIA)
- Civil Aviation Authority (CAA)
- Coral Realm
- Green Party
- Green Peace
- Many grass root projects in countries we visit
- Mountain Wilderness Association
- National Park Service (NPS)
- Polar Bears International
- Travel Industry Association of America (TIA)
- The Nature Conservancy (TNC)
- Travelers Conservation Fund
- Tread Lightly

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Next Steps

Based on the findings of this research on the supply-side of the adventure travel market, the following next steps are suggested:

- Release consumer survey results for Chicago, New York and Washington DC
- Capture feedback from ATTA advisory committee on supplier survey results
- Develop strategy for follow-up studies, including
 - Organizational membership and the role it plays in the success of businesses and organizations;
 - More detailed and sophisticated analysis of suppliers and consumers through
 - Focus groups with suppliers and consumers

Appendix A
Exhibitor Survey

Appendix B
Open Ended Question Responses

Survey question 2:

“What are the key products or specialties of adventure travel that your business/organization features?”

- A unique travel experience
- Two Resorts in Belize
- Accommodations and hospitality and ownership
- Adventure travel and tour in Panama
- African safari-climbing-Kilimanjaro and Zanzibar Beach
- All destinations, all activities
- Amazon rainforest excursions
- Annual trip seminar
- Bicycle and adventure trips
- Canoe trips, international kayak and multisport trips
- Canoe, kayak, biking, hiking - winter
- Coordinate between volunteer ski/social clubs and industry suppliers and providers
- Costa Rica
- Country as destination
- Cruises (small ship) with activities such as kayaking, hiking, wildlife observation
- Cultural and destination based experiences
- Culture, organic farming, cuisine
- Current project with women’s travel accessories
- Customized high end cultural tours - soft adventure
- Customized vacation packages to Belize
- Educational content/advertising
- Exotic cruises - medium size ship, unique itineraries and lectures
- Flexible, packaged adventure travel around Victoria, BC on Vancouver Island - CANADA
- Golf, shore excursion
- Gourmet culinary adventure tours
- Hiking, biking, extreme sports park, NASCAR, skydiving
- Information about aviation
- Key are hiking, biking, water based canoe and kayak - as national tourism office - all
- Low cost adventure travel for college students and young professionals
- Marketing support to adventure travel companies
- Members comprised of outfitters offering wildlife viewing, cultural interpretation, hiking, climbing, hunting/fishing, kayaking, dog sledding, floe edge tours
- Multi day cycling, mountain bike and multi-sport
- Private, custom Tanzanian safaris
- Rafting trips on the Colorado River...In Grand Canyon
- Rainforest, diving, hiking, snorkeling
- Run safari's-sell memberships
- Scientific research to help conserve biodiversity of cultural heritage
- Scuba diving is our main focus and windsurfing, snorkeling, kayaking are secondary focus.
- Scuba diving, instruction, also arrange lodging
- Scuba, jungle biking, kayaking, water sports
- Scuba, sport fishing, ecotourism, kayaking, sailing
- Scuba, walking, camel treks, hiking, biking
- Sea kayaking, dog sledding, soft eco-adventures
- Short term volunteer opportunities for those seeking meaningful travel experiences, 100's of programs in 20+ countries
- Ski-fly fishing-outdoor recreation in a western resort town
- Small groups-we send out own guides on our trips
- Snorkel, dive, kayak, Jet Ski tours, parasailing, sailing, bird watching, bicycling, fishing
- Soft adventure in Alaska including rail travel and alternative aspects of soft adventure
- Soft luxury adventure travel

- Southern Africa safaris
- Sustainable tourism certification program
- The American Discovery Trail is a new (not legible) of national trails it reaches across America linking community to community in the nations first coast to coast non motorized trail
- Tour operator software
- Trekking, rafting, mountain bike, hang gliding, surf, canopy, caving
- Walking, cycling, kayaking, climbing
- We are a ski-summer resort, destination area-Promote ski/winter and summer recreation
- We are the number one polar bear tour operator in the world. We also travel to other select destinations in Canada's north
- We provide travelers with information to make more sustainable choices in their travel as well as provide training and education in the tourism industry in order to promulgate sustainable practices
- We provide whitewater kayak instruction in Chicago
- Western experience tours - Alberta, Canada
- Whitewater rafting, kayaking, climbing, rappelling...outdoor adventures
- Wildlife and scenery viewing/fishing

Survey question 3:

“When you think about adventure travel, what three characteristics come to mind?”

- Action-nature-risk
- Action, some level of thrill, learning
- Active participation, pro guides or naturalists, small groups
- Active, exciting, unforgettable
- Active, learning, exotic
- Activity - non consumptive - nature - learning
- Activity, energy, excitement
- Adventure-safari-white sand beach-climbing
- Adventure, no bus tours, no large groups of tourists
- Affordable, neat, secure
- Animals-nature-fun
- Challenge - fun - unique
- Different culture, exciting places
- Different from what most people would do, provides sense of excitement, provides experience different than ordinary
- Discovery, fun, challenging
- Do something fun and challenging you never did, something exciting
- Education - adventure
- Excitement, risk, nature
- Exciting recreation-exotic destinations-new experiences
- Exercise-adventure-fun
- Exotic, animals, waterfalls
- Exotic, remote, cultural diversity
- Experience, education, culture
- Finding something that is physically challenging, remote location, group oriented or cultural exchange
- Food, art, music
- Foreign destinations, athletic/outdoorsy activities
- Foreign lands-new experiences outside one's regular lifestyle-new people
- Fun, educational, entertaining
- Fun, exciting, warm
- Fun, variety, excitement
- Hiking, canoe, kayak
- Jumping off of cliffs
- Multi-activity, outdoor activities, active vacation
- Nature-based, action oriented, different cultures
- New experiences, personal challenges, outdoor activities
- Not too adventurous (soft adventure); still some comforts; seeing interesting places
- Out of the ordinary experiences; desire to experience new culture, a more meaningful experience than just lying on a beach
- Out of the ordinary; off the beaten track, learning
- Outdoor activity, participation with likeminded individuals, physical exertion
- Outdoors-low stress-exercise
- Outdoors, excitement, outgoing people
- Outdoors, new experience, excitement
- People adventure, learning
- Perceived risk taking, thrills, unique experience
- Physical activity-small groups-nature
- Primitive, extreme, unique
- Raw exposure to nature/wildlife, sustainable tourism (non-consumptive), and small groups/professionally led
- Remote-culturally diverse-physically challenging
- Remote locations - adrenaline, and needing to return to work so I can rest up FROM my trip
- Remote, overwhelming experiences, tests mind and body
- Risk, wildlife, remote areas
- Safaris, worldwide travel, whitewater rafting
- Shore excursions, diving, water sports
- Soft adventure - multi sport - F&B
- Unique, away from the crowd, challenging soft
- Wild unspoiled scenery, travel by own energy, discover new places
- Wild, exotic, adventurous

Survey question 5:

“Do you see changes in client’s destination interests in the next year (2005)?” If yes, please describe.”

- After tsunami disaster I believe people will be more focused on going to Latin America
- Always shifting
- Cultural point of view, more to Caribbean destinations
- Dream vacations
- Especially China
- Healthful activities and places
- Looking for more of the unusual
- More 1st time adventure travelers
- More coming to Florida Keys
- More cultural immersion travel
- More domestic
- More exotic - less traditional
- More interested in out of the ordinary experience
- More traveling to Costa Rica
- Panama
- People looking for new destinations
- Possibly LA area travelers because of increased flights
- Short destination trip instead of long hauls
- They are continuing to look for cheap
- Tsunami affected areas; Argentina; China; Chile
- US travel increase
- Will venture out of US more; war fears calming

Survey question 6:

“Do you see changes in your client’s activity interests in the next year (2005)?” If yes, please describe.”

- Active fun activities
- As new sports emerge
- Balcony
- Cultural activities
- Family oriented
- Fewer groups, more individual
- Golfers, 3 new courses
- Looking for more of the unusual
- More adventure
- More adventurous and nature travel as well as cultural interests
- More eco-travel
- More ecological oriented
- More multi-sport
- More opportunities for adventure travel
- More outdoor activities
- More personal involvement
- More safaris
- Outdoor oriented activities
- Rainforest-eco-adventures
- Vacations have more activity

Survey question 9:

“In reviewing the above list (referring to information sources), please name the three that are most important or effective for your business/organization.”

- Brochures, TV, news
- Direct contact with potential clients - published articles, neo-community alliances
- Electronic distribution
- Guidebooks, publicity, travel agent
- Guidebooks, TV, newspapers
- Internet advertising-search engine manipulation-word of mouth
- Internet advertising - online keyword buying - magazine ads
- Internet advertising, magazine ads, newspaper
- Internet advertising, search engine optimization, word of mouth
- Internet and direct mail
- Internet and word of mouth
- Internet, brochures and past client word of mouth
- Internet, educational programs, phone
- Internet, internet, internet
- Internet, magazine ads, TV
- Internet, PR, word of mouth
- Internet, publicity, agents
- Internet, search engine opt, word of mouth
- Internet, TV, word of mouth
- Internet, word of mouth, buying keywords
- Internet/website, word of mouth, brochures
- Magazine ads, newspaper, internet
- Magazines, word of mouth, brochures
- New start-up business - do not know
- Newspaper, magazine ads, magazine classifieds
- Newspaper, travel agent
- Person to person selling
- Publicity, word of mouth, brochures
- Publicity, TV, newspaper, and travel agent
- Search engine and direct mail
- Search engine optimization, internet advertising, and word of mouth
- Search engine optimization, online keyword buying, PR
- Search engine optimization, travel agent, word of mouth
- Search engine, newspaper, magazine
- Search engine, word of mouth, publicity
- Search engine optimization and sponsored links on Internet, PR in newspapers, magazines, TV and radio, and travel agents
- Tradeshows, word of mouth, publicity
- Travel agent, word of mouth, publicity
- Travel agent, search engine optimization, word of mouth
- Travel agents, brochures, and internet
- Trekking-walking tours-search engine
- TV, internet, travel agent
- Web-PR
- Word of mouth-direct phone calls-publicity
- Word of mouth-internet-on line keyword buying
- Word of mouth
- Word of mouth, brochures and internet
- Word of mouth, brochures, direct phone
- Word of mouth, internet, camaraderie
- Word of mouth, internet, magazine ads
- Word of mouth, internet, online key word
- Word of mouth, internet, publicity
- Word of mouth, newspaper, magazine ads
- Word of mouth, online, travel agent
- Word of mouth, publicity, direct phone calls
- Word of mouth, publicity, travel agent
- Word of mouth, trade shows, newspaper ads
- Word of mouth, travel agent, advertising
- Word of mouth, travel agent, publicity
- Word of mouth/consumer trade shows, existing clients (repeat business)

Survey question 10:

“Do you feel experiencing a new cultures plays a big role in a person’s participation in adventure travel?”

- A major reason people go someplace new
- Component of raw exposure to wildlife and nature; we attempt to provide new cultural experiences as well
- Discovery
- Experimental adventures
- Exposure to different people, environment
- Exposure to new cultures is always exciting
- Growth
- Helps to better identify with the destination
- I think one of the top priorities for people
- Important for some people
- Its exciting
- Makes people feel like they learned something new/experienced a new thing
- Makes the trip unique
- Many adventures are outside the "resorts"
- New cultures are one of the main reasons to explore
- Not as much as it should, we're trying to change that
- Open-minded people like adventure travel and new places
- Open to new ideas - challenges
- Outside of relevant comfort zone, habits, food, music
- Part of the learning experience
- Part of the total experience
- People wanting to experience new cultures might plan adventure travel in those locations
- Seems more adventurous
- Sometimes
- Sure - adds to the allure
- To explore the people especially Maasai
- Travelers want to learn from the experience
- We travel to learn

Survey questions 11:

Do you consider ecotourism a major element of adventure travel vacations?"

- Again we all want to learn more
- Because the true ecotourism model fits a broad based sector of adventuring and soft adventure travel
- But ecotourism is too broad today
- Choices to participate shows interest in variety and skills
- Diversity
- Helps make the world a better place by not damaging where you've been
- It has purpose
- Learn to protect environment while having fun
- Most adventures require natural environment to enjoy their activity
- Not just looking at, but caring about it too
- Number of people that are interested in ecotourism is growing
- People like the idea that they are benefiting the area without damaging it
- People respect resource
- Seems to be growing interest
- Sense of caring
- Sometimes ecotourism is a major element and sometimes not. Should it be is a whole other question. I believe that since adventure tourism is nature based it should incorporate principles of eco-tourism
- Somewhat
- Usually adventure traveler's conscious of ecological issues
- Very "in vogue"
- We must tread lightly with minimal impact, our environment is so fragile, to this end, we must educate our guests as to why this is important

Survey question 14:

“In your option, what are the most important benefits your clients seek from adventure travel?”

- A new exciting experience
- A unique experience
- Achieving lifelong dreams
- Adrenaline rush-experiencing something new-accomplishing a goal
- An adrenaline rush, pictures to take home/to the office
- An enriching experience personally and within nature's environment
- An intimate interaction between themselves and nature and wildlife
- Bragging rights - "been there done that"
- Breaking away from regulated every day life
- Challenge/experience nature
- Closeness to nature
- Comradeship, friends with similar interests
- Cultural entertainment
- Cultural immersion
- Discovery, challenge (physical/mental/emotional)
- Doing something that few have
- Ecotourism, to be in contact with nature, back to basics
- Education about a unique environment
- Enjoy and feel the nature, being part of nature and have fun
- Enjoyment of the moment and lasting memories with an aura of awe
- Excitement
- Expanded awareness, relaxation
- Expanded horizons - mentally and physically
- Experience
- Experience, learning, transformation
- Experiential learning much like the eco-tourism model
- Experiencing foreign cultures
- Experiencing the unknown world and cultures
- Family friendly environment-safe environment-educated guides-authentic, full experience
- Fun
- Fun, knowledge
- If purchased from the zoo, expert leadership
- Learn something new
- Low cost experiences that they could not get anywhere else
- Low stress
- Meeting local people - being participants rather than observers
- Mental release
- Nature encounter
- New adventures, one with nature, peaceful
- Non-passive activity, group environment, expand horizons
- Personal challenge/growth thru new experiences
- Physical - mental enlightenment
- Physical fitness
- Safari and climbing-physical personal goal
- Safety-intimate settings
- Safety, fun, reliability, new experiences
- Satisfaction of product and destination
- Self-gratification
- Self-growth, a new experience, excitement
- Self satisfaction - overcoming fears and challenges
- Sense of adventure, variety
- To be part of an "expedition," unknown
- Uniqueness - unable to achieve on own
- Well-organized, fun, active vacation

Survey question 18:

“What benefit would be of most value to your business/organization that could be provided by a trade organization?”

- Ability to connect with other organizations to solicit membership in our organization
- Access to training infrastructure, group insurance program, marketing
- Advertisement
- Are you affiliated with adventure travel society (Jerry Mallet's business)?
- As a club we seek members, not business or bookings. Gaining public knowledge and interest is our largest benefit
- Bring the industry together
- Business sales leads and contacts
- Business training
- Client base info/consumer members
- Co-op ads, publicity
- Contacts, networking
- Discounted advertising opportunities, demographic research
- Education, networking, contact, support
- Exposure to public
- Exposure, networking
- Familiarity trips, visits
- Group purchasing power for insurance, P.R. assistance, members website designed to drive potential client traffic to members
- Help to educate people about the ADT
- I have no idea
- Image and recognition
- Increase overall awareness of our industry/products
- Increased travel
- Information, exposure to public
- Information, surveys
- International exposure, insurance
- Joint marketing, insurance
- Market research, research sharing, database
- Marketing
- Marketing research, insurance issues (how to deal etc)
- More information on how other zoo's market travel
- Networking
- New clients
- None
- Not sure
- Promotion
- Publicity
- Publicity to bring in new people to the industry
- Referrals
- Referrals and references
- Respectability-driving new business
- Safe/educational adventure travel through a "commercial outfitter"
- Save me money! Help advertise
- The research would be a huge benefit-contacts-leads in our industry and target market
- They add credibility
- Trade association
- Unknown
- We are the organization
- We have no interest in trade organization participation

Survey question 21:

“Does your business/organization feel travel trade shows are a valuable investment of company time and resources?”

- A great way to really know how people feel about travel at the moment
- Actually the jury is still out
- Agent contacts, exposure
- Allows us reach to specific audience
- Based on budget and ROI
- Best way to get in front of new potential clients
- Booking tours
- But rapidly declining
- Chance to talk to clients
- Contacts-publicity
- Depends on attendance quality
- Direct consumer
- Exposure
- Exposure to the world
- Feel presence is valuable, but hard to evaluate number of qualified leads/contacts
- Good networking opportunity
- Good way to network and inform public of our programs
- Help to grow the industry
- However difficult to judge the impact...as a non-profit at ATE we are “comped” a lot (booth, electricity, phone) so investment is small for us
- If consumer and agent
- If promoted right
- Increases awareness of our product
- Lately we have found travel consumer shows to be more beneficial
- Lots of exposure
- Maybe
- Name out to public
- Networking
- Networking in like-minded people, build industry contacts
- Networking, advertising
- New contacts
- New contacts, members
- New customer base
- Opportunity to reach various markets easily
- People with an interest find us and often join
- Provides access to our website
- Ski show
- Slightly
- Some are better than others
- Some yes, usually no
- Sometimes
- TBD
- The best way to approach a new market
- They are getting too expensive for return on investment
- They are helpful to develop and enhance relationships
- To market my business
- Undecided-this is our first
- Visibility - contacts

Survey question 22:

“What research data would be most valuable to your business/organization if it were available?”

- Accurate info...Jerry's estimates of marketplace spending seemed unrealistically high
- Actual skiers and snowboarders
- Amount of adventure travel being booked online
- Consumer priorities
- Current vacation owners
- Data on dollars spent on specific activities in our region of interest
- Database of known travelers
- Demographics
- Demographics for skiers and snowmobilers to support our efforts in obtaining sponsors
- Demographics of major cities/regions
- Demographics of travelers - tour operators that specialize in adventure travel
- Demographics, what cities have the most adventurous travelers?
- Ecotourism certification projects and effects on communities
- Help define the customer
- How conservation minded are adventure travelers?
- Industry data
- Mailing list with demographics
- Market research, directory listing
- Marketing effectiveness trends data
- Not much applies to our goals
- Past travel future interest
- Psychographics of consumer
- Safety, training
- Search engines-newspaper
- Sponsorship options
- Stats on who travels to which destinations broken down by age, income, and travel dates
- Talking directly with the consumer
- Tell me where to promote our product to potential guests in order to receive the best return on our investment
- The next trend in adventure travel
- Tracking information on agents who are selling the destination
- Travel behaviors of visitors
- Travel trends-demographics of destination travelers
- Travel trends by income
- Trends in adventure travel, market segments
- Unknown
- What adventure travel companies are doing related to eco-tourism principles? To what degree they incorporate sustainable practices (claims vs. actual)? Do they need training in sustainability/ecotourism? What benefits would entice them to become members?
- Where do people go to look for vacations - web sites, travel agents, friends, magazine advertising?
- Where to get the best return on advertising investment
- Where young professionals and college students want to go...where they go to find information and book travel
- Why consumers go with competitor programs