



ADVENTURE TRAVEL
TRADE ASSOCIATION



Adventure Travel Industry Snapshot

May 2022

Data from 2021



ABOUT THIS REPORT

Welcome to the 2022 Industry Snapshot report, in which the Adventure Travel Trade Association (ATTA) invited adventure industry businesses to share information about their company's wellbeing; their 2021 guest profile; and trending consumer motivations, activities, and destinations for 2022. Many of the same questions were asked in last year's Industry Snapshot report; we have included the data for comparison in some pages of this document, and the full 2021 Industry Snapshot report can be downloaded at no cost from the [ATTA website at this link](#).

This year's survey results show that COVID-19 is still a concern for travelers and is having an impact on adventure travel businesses, but the industry is generally recovering. The top trending destinations are places with higher vaccination rates, and socially distanced itineraries and activities remain popular.

It is also clear that sustainability is being treated as a priority for the adventure tourism industry, which is not surprising. Last year's Industry Snapshot report found that 40% of respondents were working toward a sustainability certification, and the number has increased to 45% this year. Maintaining community livelihoods has also increased in importance in the past year, showing a dedication to social and economic sustainability.

We are grateful to all of our respondents for taking the time to share your struggles and outlook with us, and thank you to all of our readers for your interest in the adventure travel community and its recovery.

- Heather Kelly, Director of Research & Sustainability, ATTA

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KEY FINDINGS

The Impact of COVID-19

- On average, trips were 52% full (up from 36% in 2020), and 9% of respondents had zero guests in 2021 (down from 16% in 2020)
- The average number of travelers served by respondents was 1,355, a 142% increase from 560 in 2020
- Staffing in various departments has remained relatively stable over the past year
- 81% of respondents had some reduction in revenue compared to 2020, but it was much less extreme than the 2019-2020 decrease. 30% had a 2021 gross annual revenue of less than \$50,000, down from 45% in 2020.
- Operators have primarily responded to COVID-19 by modifying and creating products, reducing business size/capacity, and customizing offerings
- 79% of respondents have created new cancellation policies, and 21% have revised their partner agreements

Popular Trip Itineraries, Destinations and Activities

- Respondents' most popular itinerary is priced at \$2,900 (for 8 nights), 70% of which (\$2,030 on average) is spent with local suppliers
- The most popular consumer motivations for traveling were new experiences, to go off the beaten track, and to travel like a local
- The hottest trending destinations were the Mediterranean, Western Europe, the United States, Scandinavia, and the Caribbean

Sustainability and Safety and Risk Management Practices

- 45% have or are working toward a sustainability certification
- 77% have a documented safety and risk management plan, up slightly from 2020

Future Outlook

- Globally, 82% of respondents expect their 2022 net profit to be equal to or better than 2021
- 73% of respondents are seeing an improvement in domestic travel demand for 2022
- 62% of respondents are seeing an improvement in international travel demand for 2022

Marketing Trends

- Globally, approximately two-thirds (62%) of bookings are made directly with the service provider
- 62% of respondents have an online reservation system that takes credit cards, up from 50% in previous years



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Part I:

Introduction





METHODOLOGY

- Every year since 2006 the ATTA has surveyed its growing database of tour operators. Each year adventure travel tour operators are invited to share information about their business operations as well as trends they are experiencing with respect to traveler demographics, destinations, and activities.
- A survey was sent to members of the ATTA community in February 2022, asking for data from 2021. Data was collected through March 2022. The survey asked operators about their business operations, 2021 sales, 2022 booking expectations, travel trends, and consumer motivations.
- 142 respondents completed the survey and 82 partially completed the survey.



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Part II:

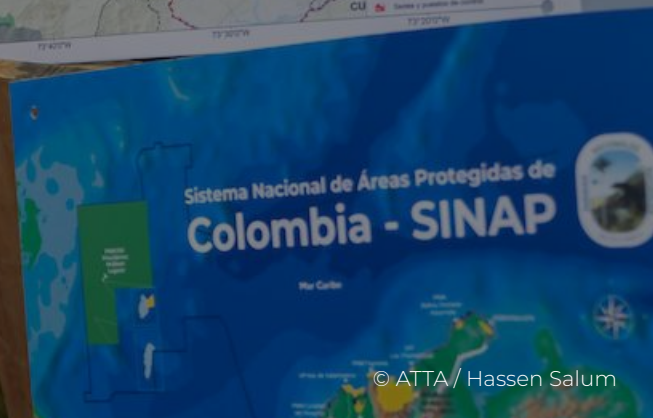
Adventure Tour Operator Profile + Staffing, 2021 Guests



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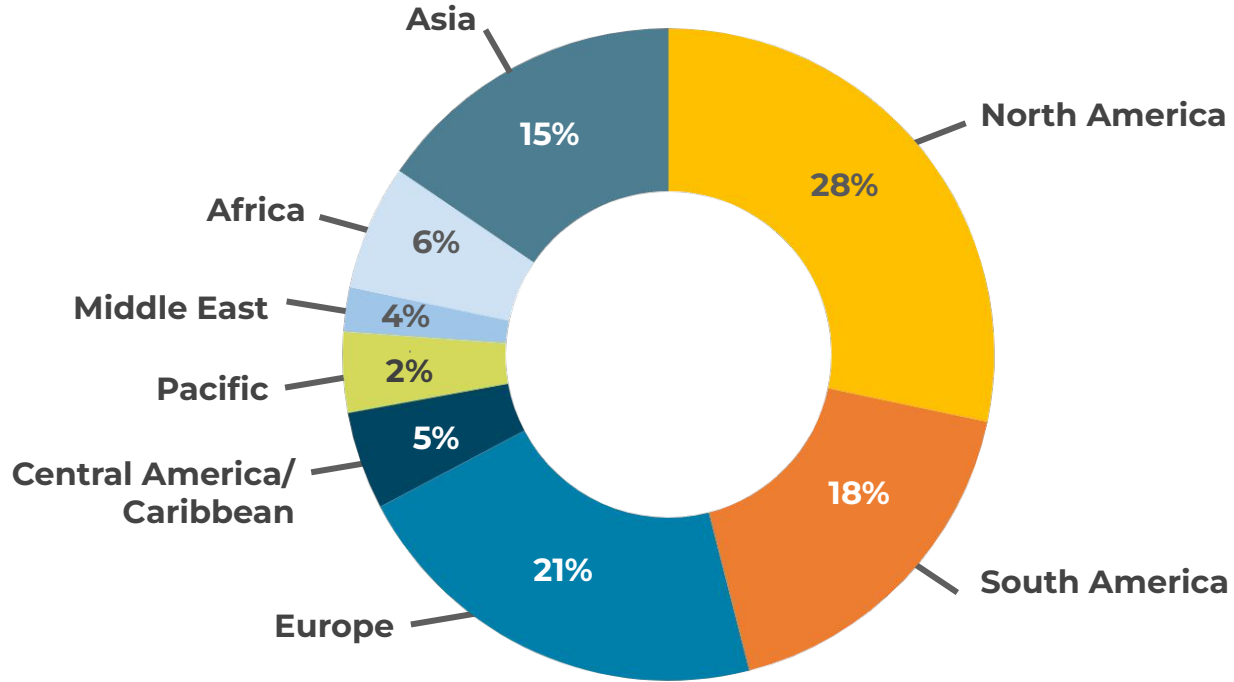
2a.

Profile + Staffing





ORGANIZATION HEADQUARTERS



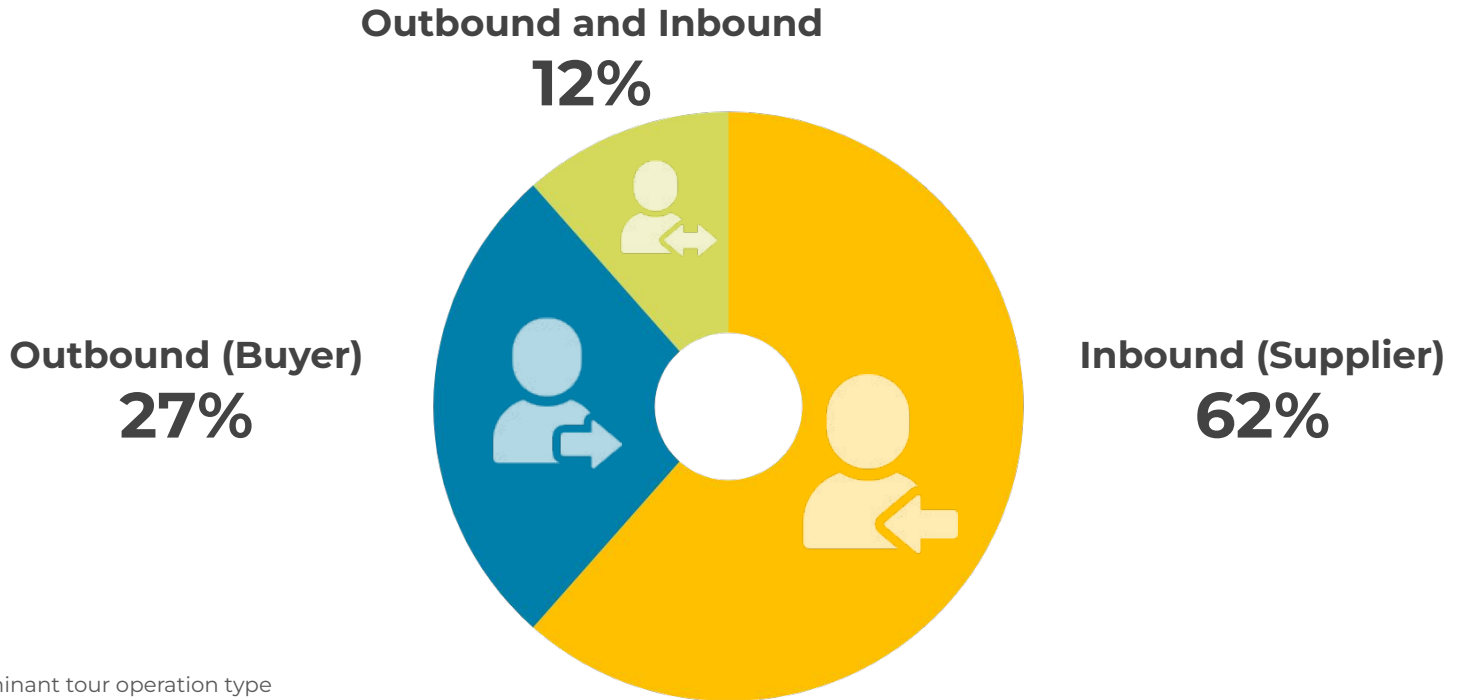
Q1: In what country is your organization headquartered?

Base: All respondents (n=226)

Source: 2022 Adventure Tour Operator Snapshot Survey

note: totals may not equal 100 due to rounding

TOUR OPERATION TYPE



Q2: Please select your dominant tour operation type

Base: All respondents (n=226)

Source: 2022 Adventure Tour Operator Snapshot Survey

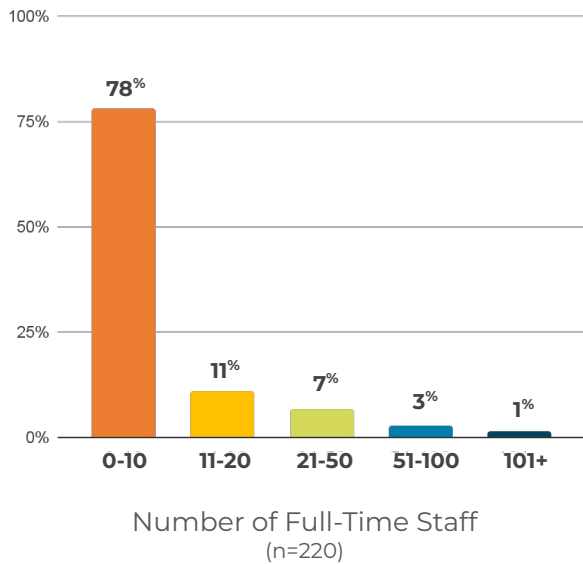
note: totals may not equal 100 due to rounding



2021 STAFFING

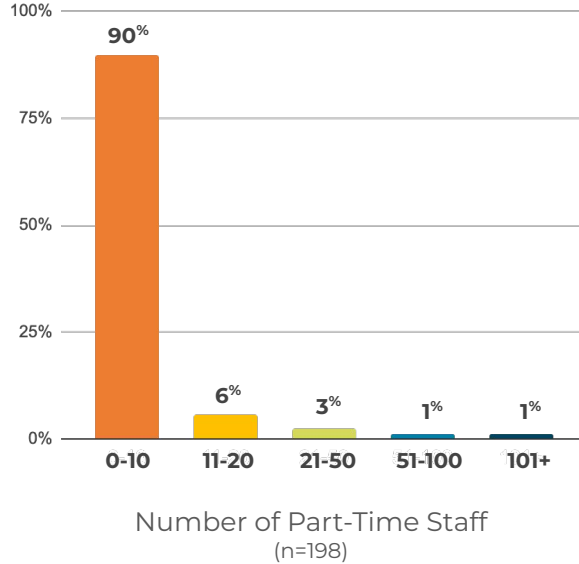
Full-Time Staff

(approx. 40 hrs/wk)



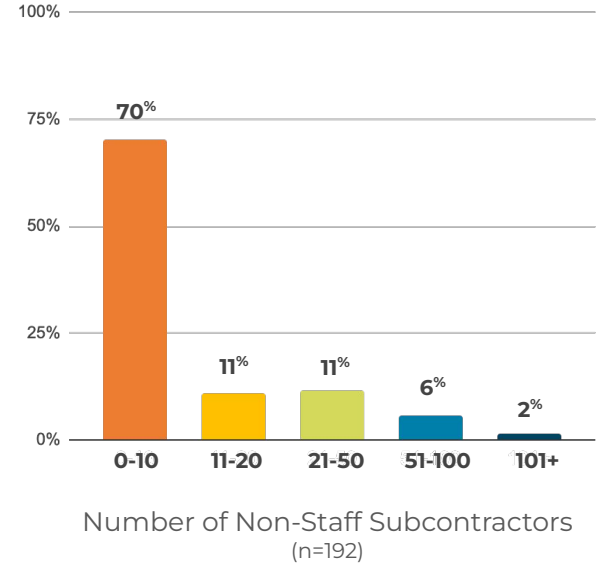
Part-Time Staff

(approx. 20 hrs/wk)



Non-Staff Subcontractors

(guides, drivers, consultants, etc.)



Q4: Please share the size of your 2021 workforce

Base: All respondents (n=226) excluding those left blank as indicated by the totals above

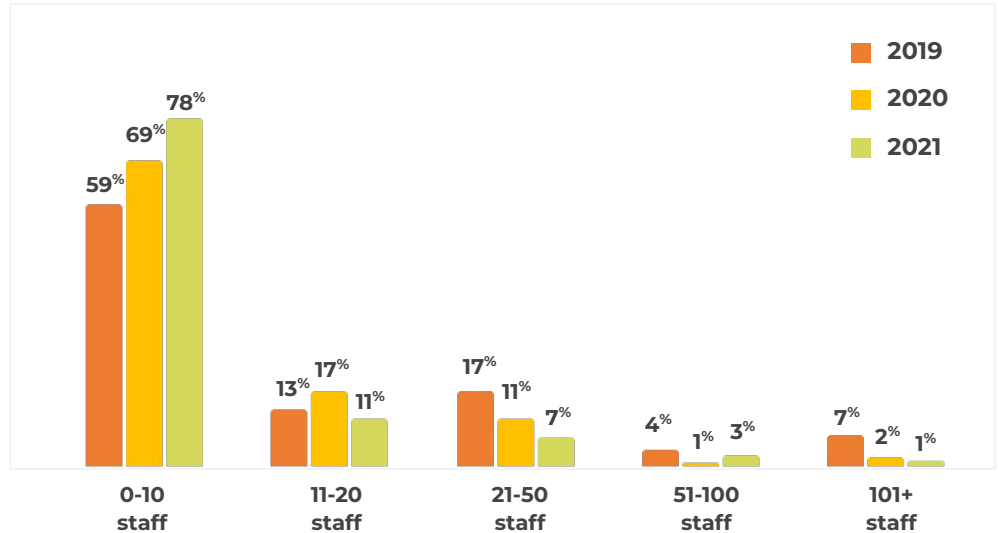
Source: 2022 Adventure Tour Operator Snapshot Survey

note: totals may not equal 100 due to rounding



FULL-TIME STAFF SINCE 2019

Over the past three years (2019-2021), respondents have consistently operated using fewer full-time staff.



Q4: Please share the size of your [previous year] workforce

Base: All respondents excluding those left blank (2020 n=123, 2021 n=209, 2022 n=220)

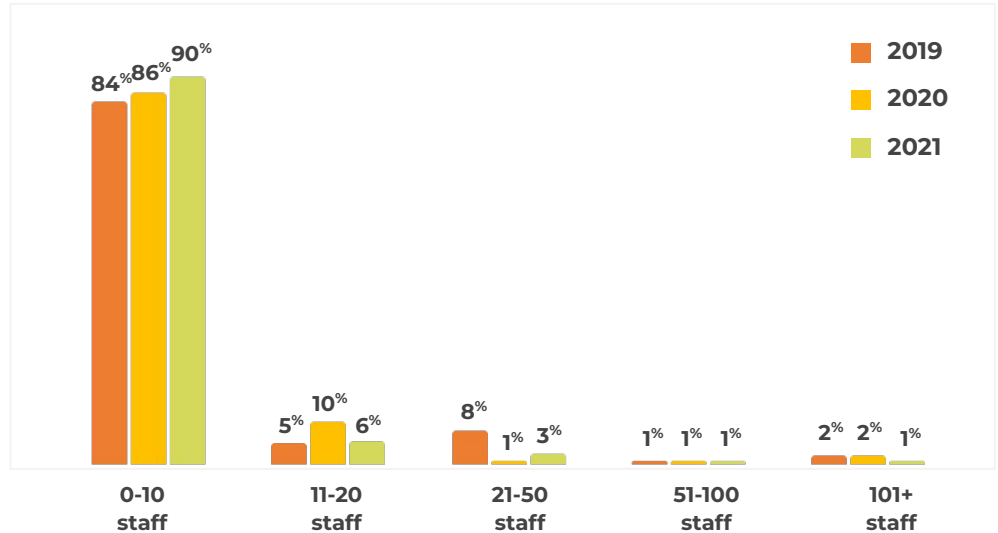
Source: 2020, 2021, and 2022 Adventure Tour Operator Snapshot Surveys

note: totals may not equal 100 due to rounding



PART-TIME STAFF SINCE 2019

The number of part-time staff did not change much from 2019 to 2021, although there was a slight trend toward having fewer staff.



Q4: Please share the size of your [previous year] workforce

Base: All respondents excluding those left blank (2020 n=114, 2021 n=187, 2022 n=198)

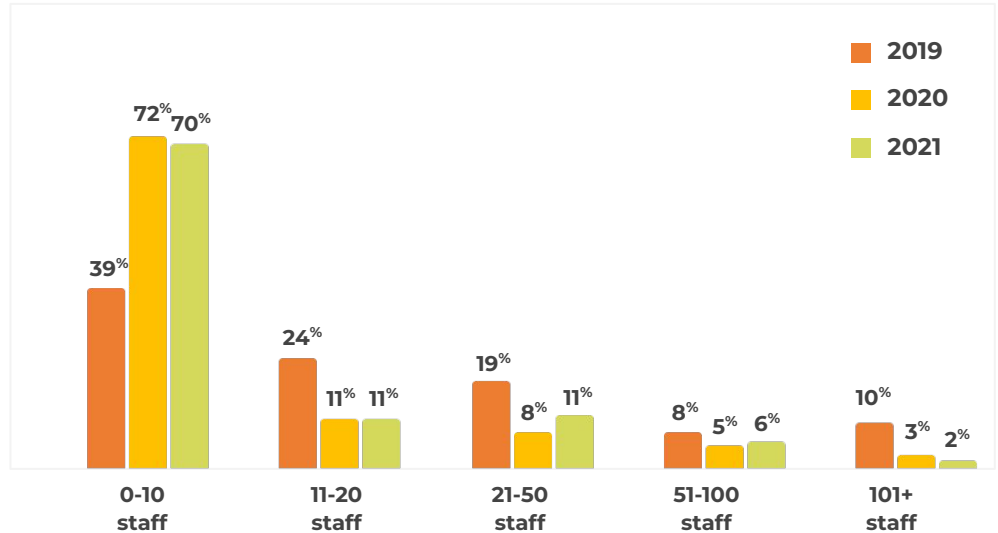
Source: 2020, 2021, and 2022 Adventure Tour Operator Snapshot Surveys

note: totals may not equal 100 due to rounding



SUBCONTRACTORS SINCE 2019

Respondents operated using fewer subcontractors in 2020 and 2021 than in 2019. This has been the staffing category most affected by COVID-19.



Q4: Please share the size of your [previous year] workforce

Base: All respondents excluding those left blank (2020 n=117, 2021 n=184, 2022 n=192)

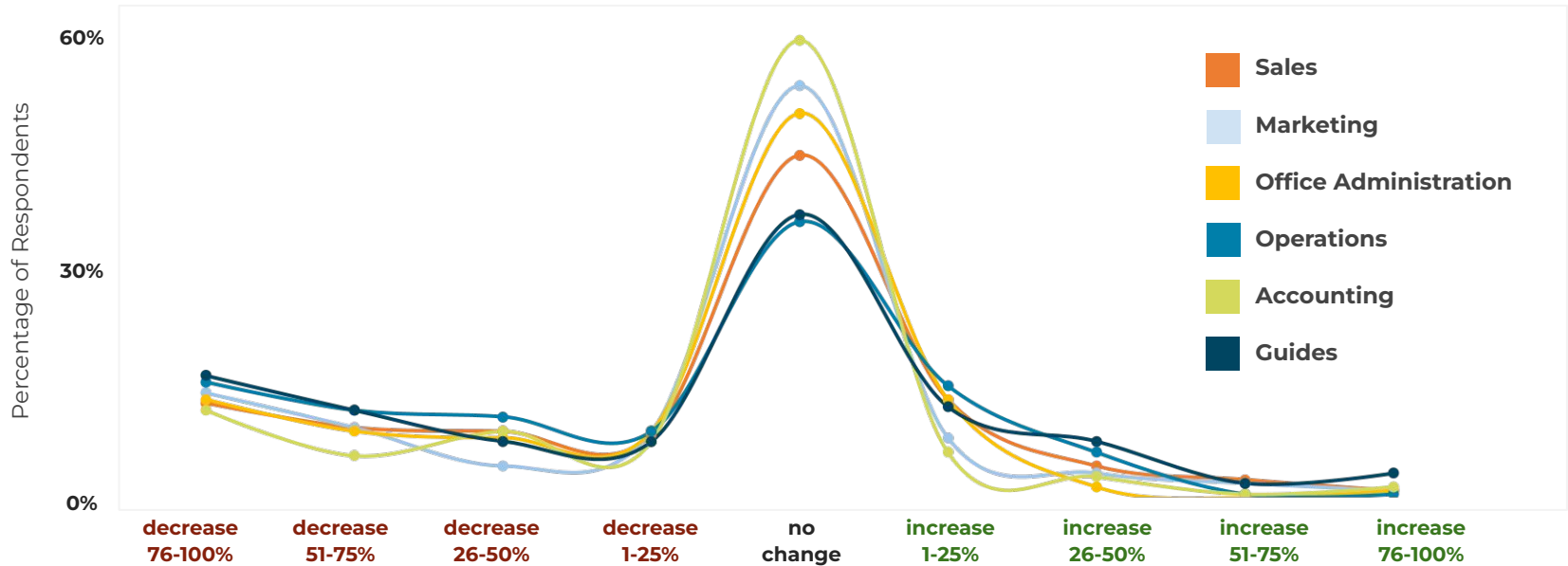
Source: 2020, 2021, and 2022 Adventure Tour Operator Snapshot Surveys

note: totals may not equal 100 due to rounding



STAFFING CHANGE 2021 TO 2022

Staffing in various departments has remained relatively stable over the past year.



Q5: How did your staffing change in 2021?

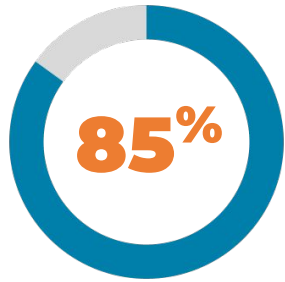
Base: All respondents (n=226)

Source: 2022 Adventure Tour Operator Snapshot Survey

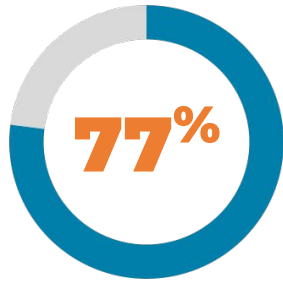


WOMEN IN LEADERSHIP POSITIONS

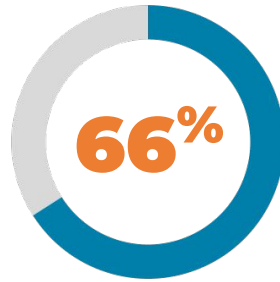
As the level of power in an organization increases, the percentage of women decreases. While 85% of respondents have *at least* one women on their current management team, that means 15% have no women on their team. Of the respondents with a board of directors, 36% do not have a women on the board. We hope to see this trend shift in time as more women gain and hold executive level positions.



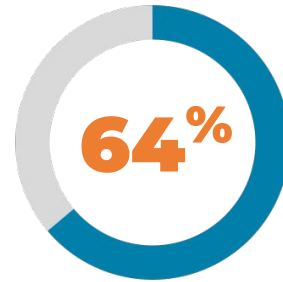
Current
Management Team



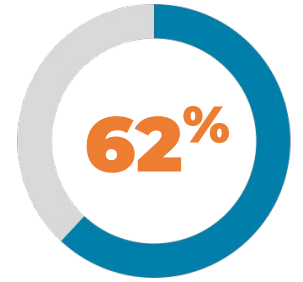
Current
Executive Team



Current
Ownership



Current
Board



Founding
Team

It is important to note that smaller companies are more likely than larger companies to be run by women, and smaller companies make up the majority of this survey's respondents. See the ATTA report [The Influence & Impact of Women in Adventure Travel](#) to learn more.

Q6: As part of ATTA's Women in Leadership initiative, we would like to know more about your team. Do you have at least one woman as part of your:

Base: All respondents (n=226)

Source: 2022 Adventure Tour Operator Snapshot Survey



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2b.

2021 Guests

GUESTS SERVED IN 2021

All regions served more guests on average in 2021 than 2020, but none returned to pre-COVID-19 levels, and overall respondents saw 66% fewer guests than in 2019. Nine percent of respondents had zero guests in 2021, down from 16% in 2020.

Company Headquarters	Average # of Travelers (2021)	Average # of Travelers (2020)	Average # of Travelers (2019)
All Regions* (n=226)	1,355	560	3,974
North America (n=64)	992	672	1,708
Central America/Caribbean (n=11)	1,455	636	2,327
South America (n=40)	959	298	2,317
Africa (n=14)	69	158	950
Europe (n=48)	3,539	1,138	10,023
Asia (n=35)	241	169	3,263

9%

of respondents
had **zero** guests
in 2021

(down from
16% in 2020)

*Regions not containing sufficient sample size (Pacific & Middle East) are included in the All Regions calculation but are otherwise excluded from this chart.

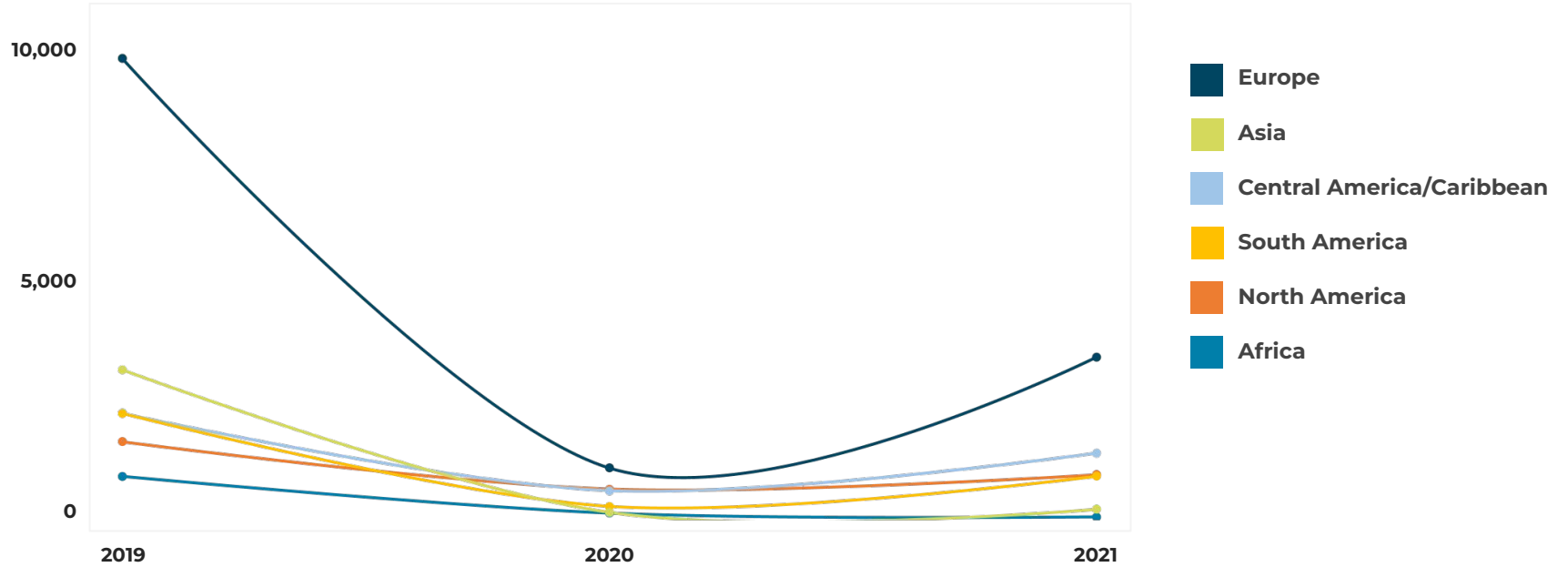
Q3: How many customers did your organization serve in [previous year]?

Base: All respondents (2021 n=226, 2020 n=222, 2019 n=126)

Source: 2020, 2021, and 2022 Adventure Tour Operator Snapshot Surveys



GUESTS SERVED FROM 2019 - 2021



Q3: How many customers did your organization serve in [previous year]?

Base: All respondents (2021 n=226, 2020 n=222, 2019 n=126)

Source: 2020, 2021, and 2022 Adventure Tour Operator Snapshot Surveys



AVERAGE GUIDE-TO-GUEST RATIO

On average, there were 7 guests per guide on trips globally, the same as in 2020. However, Central America/Caribbean was the only region to have *fewer* guests per guide in 2021; the remaining regions had slightly *more* guests per guide than in 2020.

Company Headquarters	Ratio 2021	Ratio 2020
All Regions* (n=203, 1 outlier omitted)**	1:7	1:7
North America (n=56)	1:8	1:6
Central America/Caribbean (n=11)	1:6	1:11
South America (n=40)	1:7	1:6
Africa (n=13)	1:8	1:6
Europe (n=42)	1:8	1:7
Asia (n=28)	1:6	1:6



**global average
guide-to-guest
ratio**

*Regions not containing sufficient sample size (Pacific & Middle East) are included in the All Regions calculation but are otherwise excluded from this chart.

**One total outlying value was labeled and omitted from calculations using a 2.2 multiplier (Hoaglin & Iglewicz, 1987)

Q7: On average, what was your typical guest-to-guide ratio in [previous year]?

Base: All respondents with a value greater than zero, excluding one outlier as described (n=203)

Source: 2022 Adventure Tour Operator Snapshot Survey



AVERAGE TRIP FILL RATE

Globally and within most regions the average trip fill rate increased from 2020 to 2021, while Central America/Caribbean and Asia decreased slightly.

Company Headquarters	Trip Fill Rate 2021	Trip Fill Rate 2020
All Regions* (n=206)	52%	43%
North America (n=57)	63%	50%
Central America/Caribbean (n=11)	44%	47%
South America (n=39)	49%	40%
Africa (n=13)	36%	21%
Europe (n=46)	58%	53%
Asia (n=27)	33%	36%

52%

global average
trip fill rate

*Regions not containing sufficient sample size (Pacific & Middle East) are included in the All Regions calculation but are otherwise excluded from this chart.

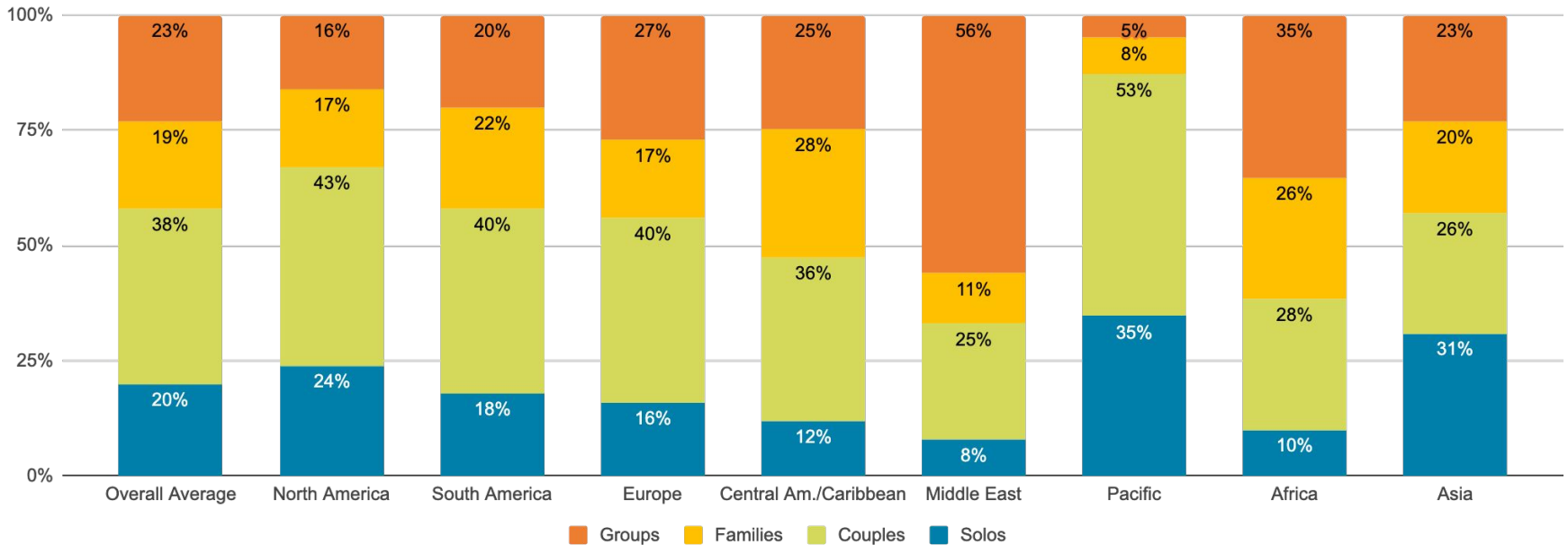
Q8: What was the average fill rate for your trips in [previous year]?

Base: All respondents with a value greater than zero (2022 n=206, 2021 n=183)

Source: 2022 and 2021 Adventure Tour Operator Snapshot Surveys

2021 GUEST TYPE

Most 2021 guests were couples, although Europe saw more solos, and the Middle East and Africa regions were popular for groups.



Q9: Please estimate the percentage of your 2021 guests in each of the following categories

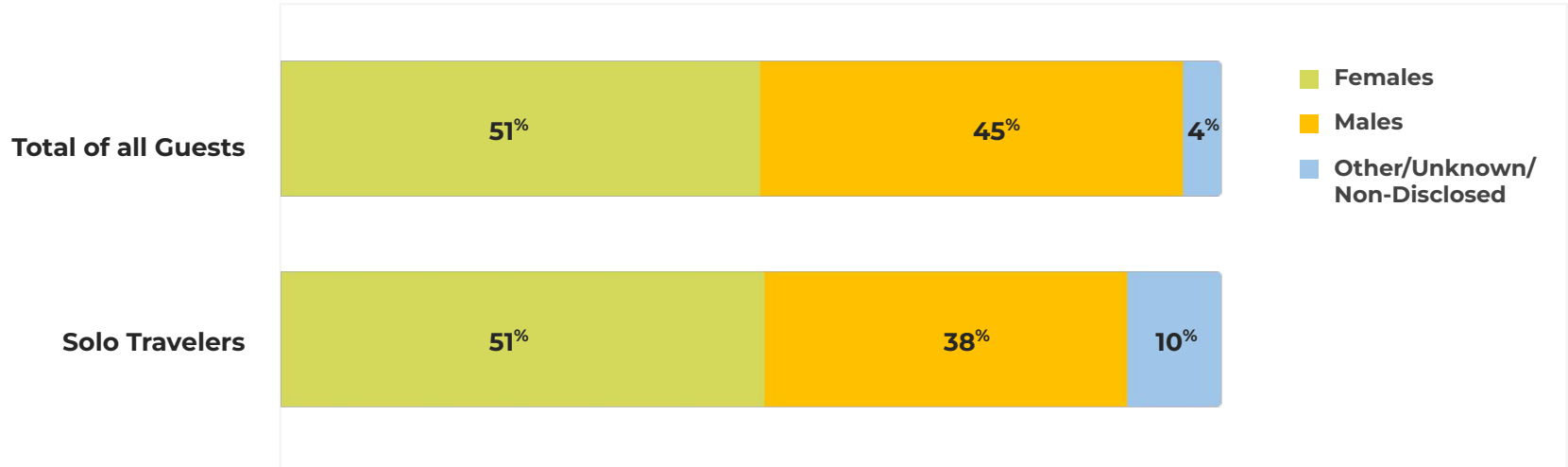
Base: All respondents that had more than zero guests in 2021 (n=166)

Source: 2022 Adventure Tour Operator Snapshot Survey

note: totals may not equal 100 due to rounding

2021 GUEST GENDER MIX

Adventure travelers in 2021 were slightly more female than male.



Q10: Please estimate the breakdown of your 2021 guests by gender

Q11: Please estimate the breakdown of your 2021 solo guests by gender

Base: All respondents excluding those left blank (Q10 n=169, Q11 n=169)

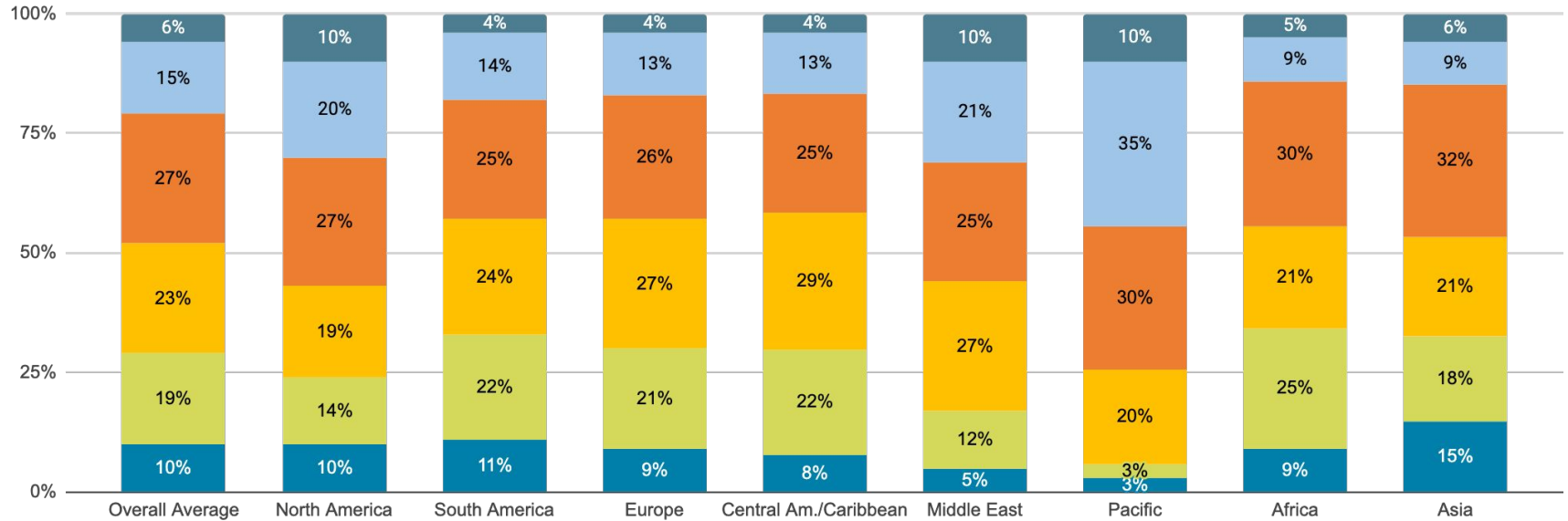
Source: 2022 Adventure Tour Operator Snapshot Survey

note: totals may not equal 100 due to rounding



2021 GUEST AGE MIX

As in previous years, most 2021 adventure travelers were between the ages of 29 and 60, although countries in North America, the Middle East, and the Pacific attracted a slightly older clientele.



Q12: Please estimate your 2021 client age mix

Base: All respondents that had more than zero guests in 2021 excluding those left blank (n=166)

Source: 2022 Adventure Tour Operator Snapshot Survey

71 and over 61-70 51-60 41-50 29-40 28 and under

note: totals may not equal 100 due to rounding





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Part III:

Financial Health + Response to COVID-19



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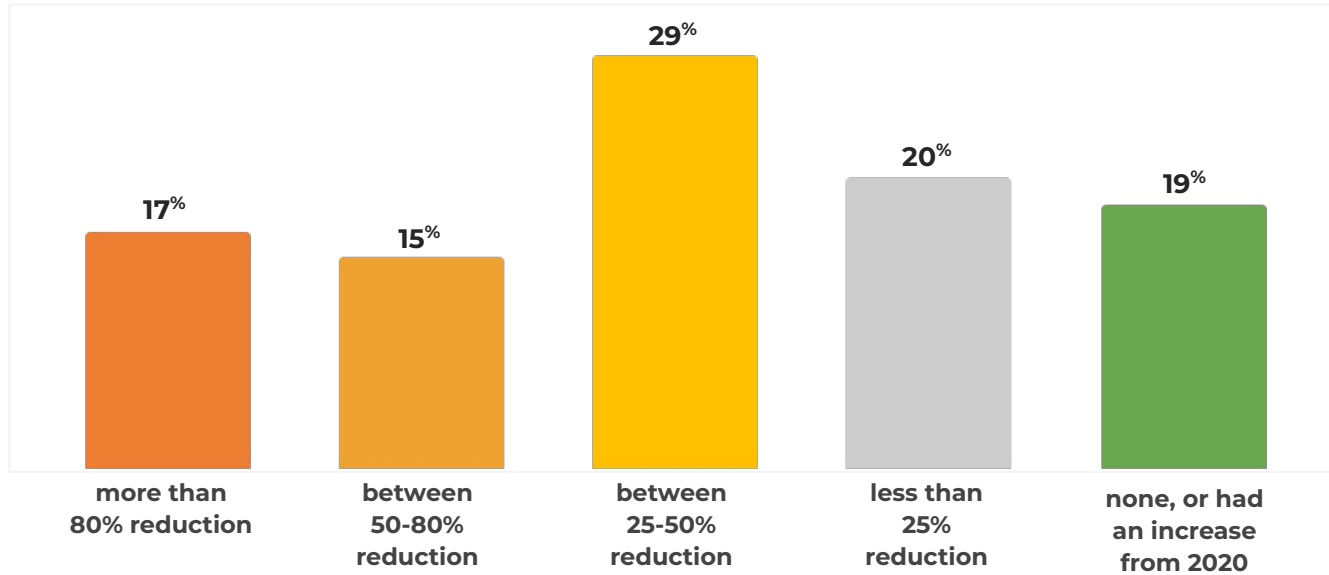
3a.

Annual Revenue



2021 REVENUE REDUCTION

81% of respondents had some reduction in revenue compared to 2020, but it was much less extreme than the previous year's decrease from 2019 to 2020.



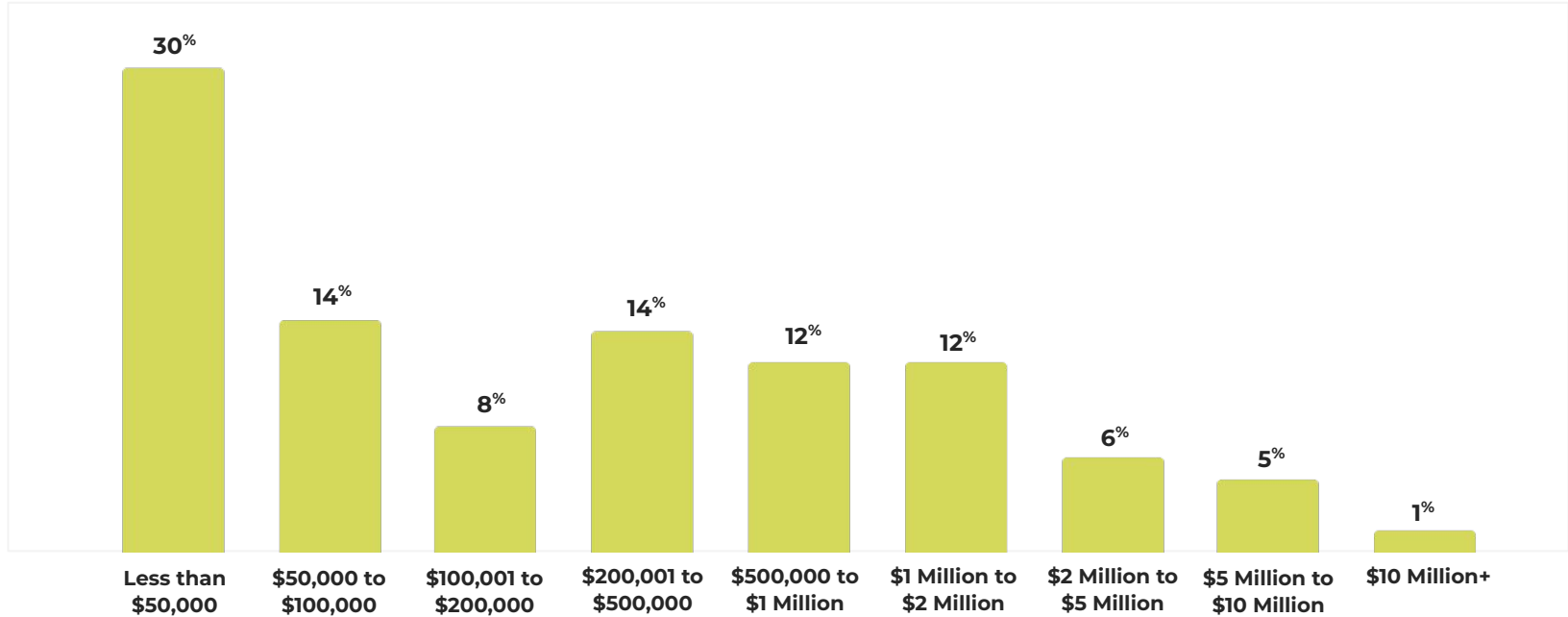
Q14: In 2021, how much of an increase in revenue did you experience from 2020?

Base: All respondents excluding those left blank (n=161)

Source: 2022 Adventure Tour Operator Snapshot Survey



2021 ANNUAL REVENUE



Q27: Please share your organization's annual gross revenues in 2021 in US Dollars:

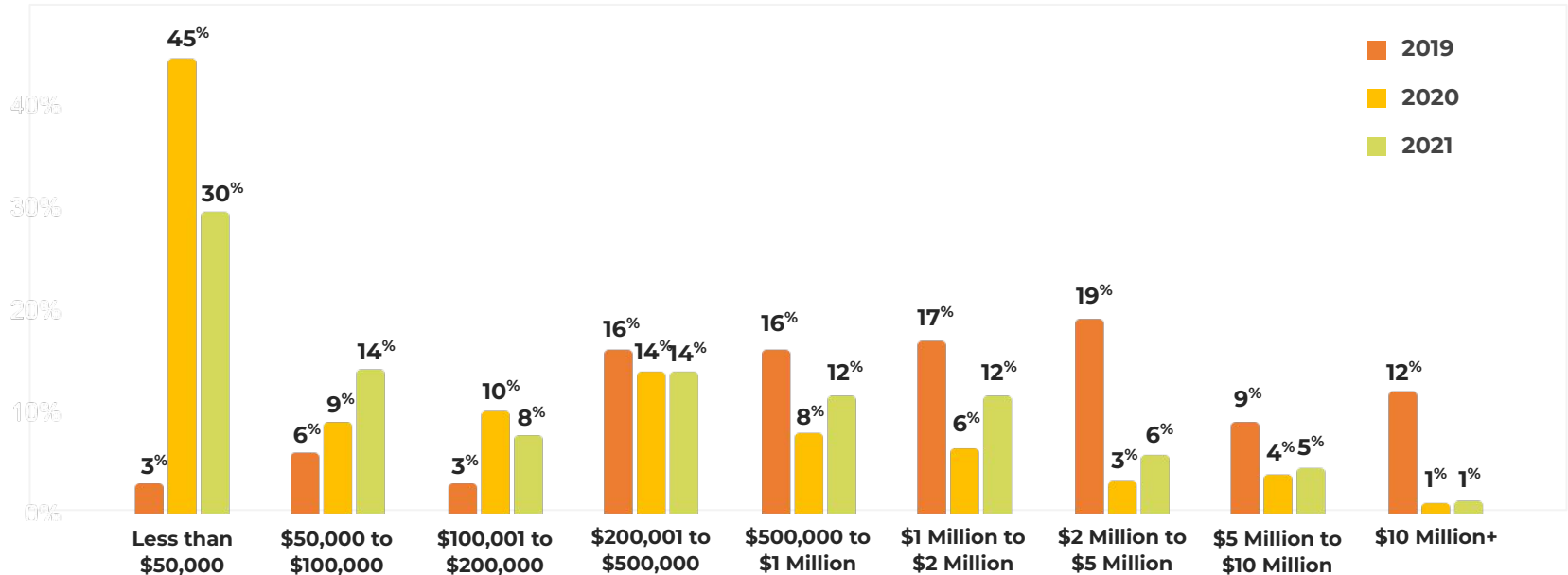
Base: All respondents excluding those left blank (n=155)

Source: 2022 Adventure Tour Operator Snapshot Survey



2021 ANNUAL REVENUE COMPARED TO 2020 & 2019

While many companies are still struggling, numbers in general are trending in a positive direction from 2020 to 2021.



Q26: Please share your organization's annual gross revenues in [previous year] in US Dollars

Base: All respondents excluding those left blank (2021 n = 155, 2020 n=188, 2019 n=69)

Source: 2020, 2021, and 2022 Adventure Tour Operator Snapshot Surveys



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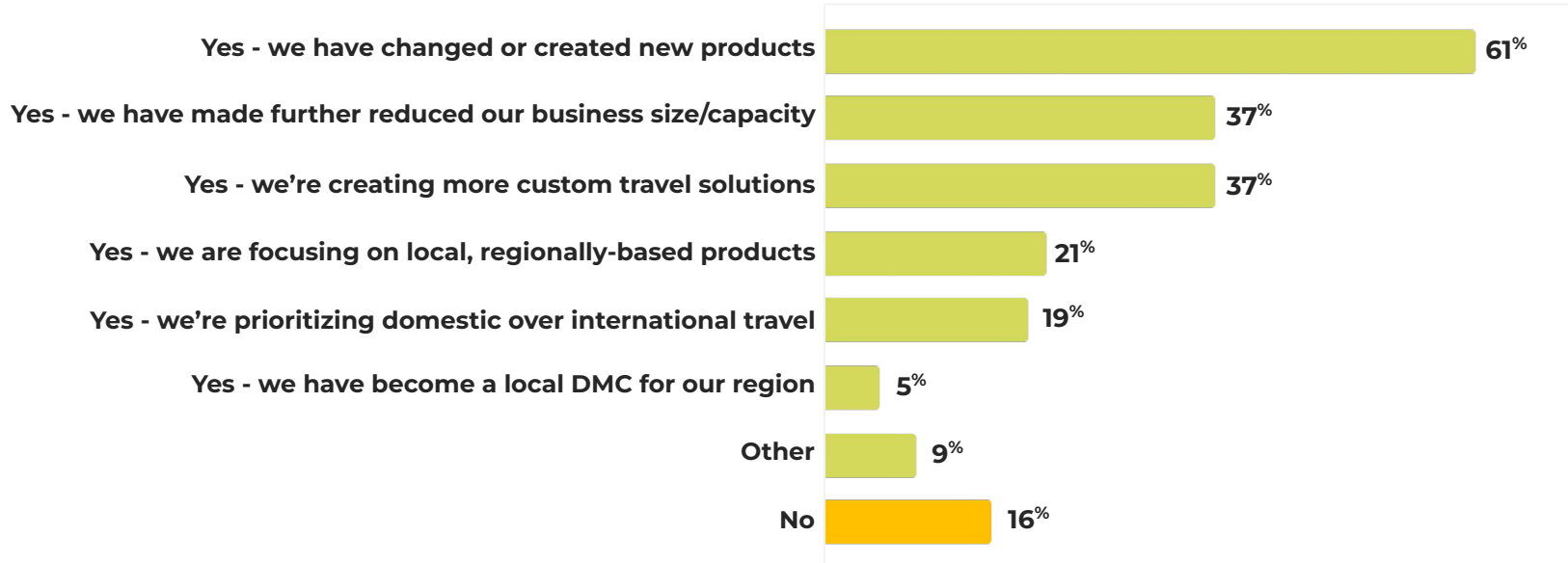
3b.

Response to COVID-19



OUTBOUND BUSINESS MODEL CHANGES

Outbound operators have primarily responded to COVID-19 by modifying existing products and creating new ones, reducing their business size/capacity, and customizing their offerings. This is very similar to 2020.



Q23: Have you changed your business model because of COVID? (check all that apply.)

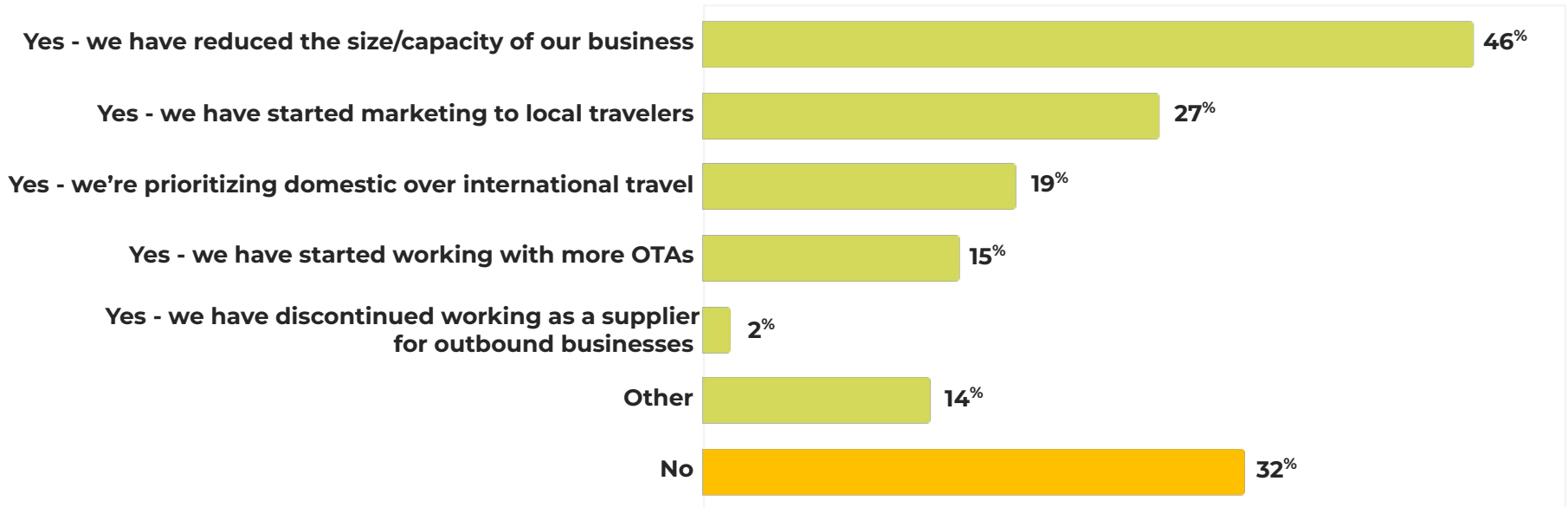
Base: All *outbound* respondents excluding those left blank (n=57)

Source: 2022 Adventure Tour Operator Snapshot Survey



INBOUND BUSINESS MODEL CHANGES

Continuing the trend from 2020, inbound operators have primarily responded to COVID-19 by reducing their business size/capacity, and prioritizing local and domestic travelers.



Q24: Have you changed your business model because of COVID? (check all that apply.)

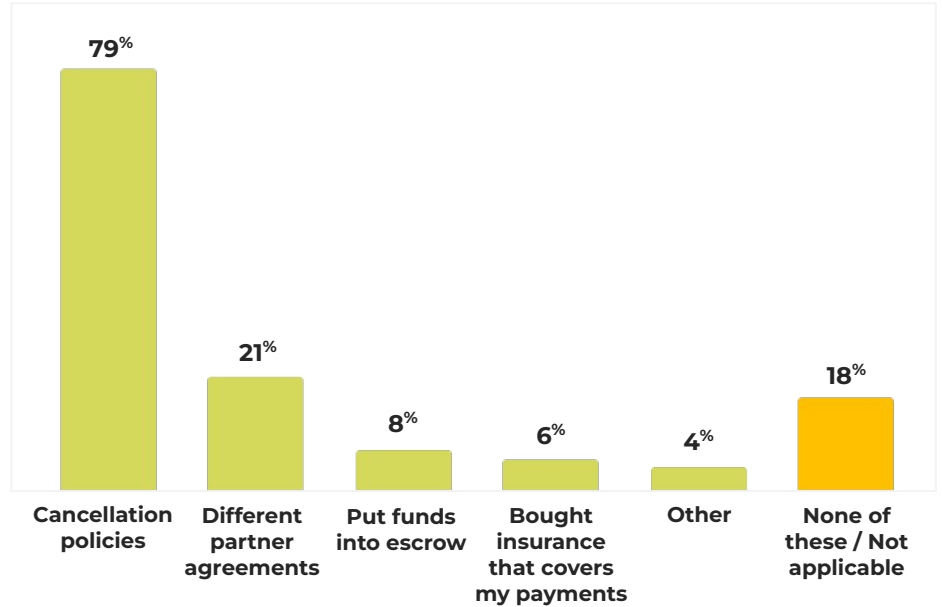
Base: All inbound respondents excluding those left blank (n=118)

Source: 2022 Adventure Tour Operator Snapshot Survey



NEW POLICIES TO PROTECT BUSINESS + TRAVELER FUNDS

Most (79%) of the survey respondents have created new cancellation policies in response to COVID-19. Many also revised their partner agreements as a way to adapt to the current situation. This is relatively unchanged from 2020.



Q25: Have you created new policies in your tour planning in order to protect your business or travelers' funds? If so, what? (check all that apply.)

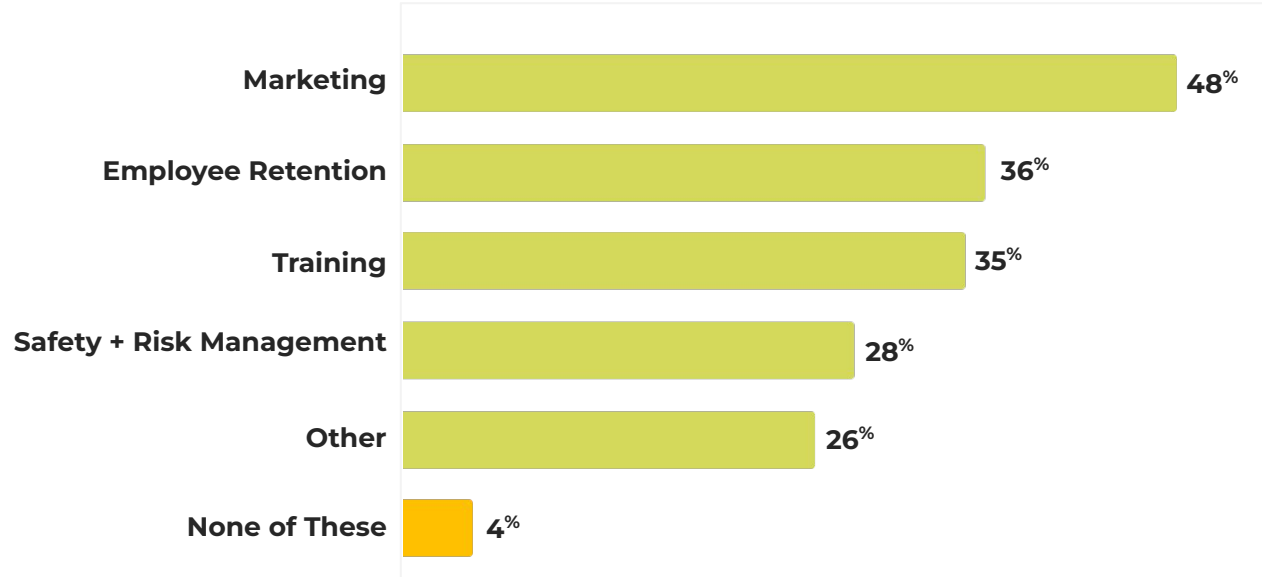
Base: All respondents excluding those left blank (n=159)

Source: 2022 Adventure Tour Operator Snapshot Survey



INCREASING SPENDING AS A RESULT OF COVID-19

Almost half of respondents have increased their marketing spending as a result of COVID-19; approximately a third have also ramped up their employee retention and training programs.



Q26: Are you considering increasing expenditures in any of the following areas as a result of COVID-19? If so, what? (check all that apply.)

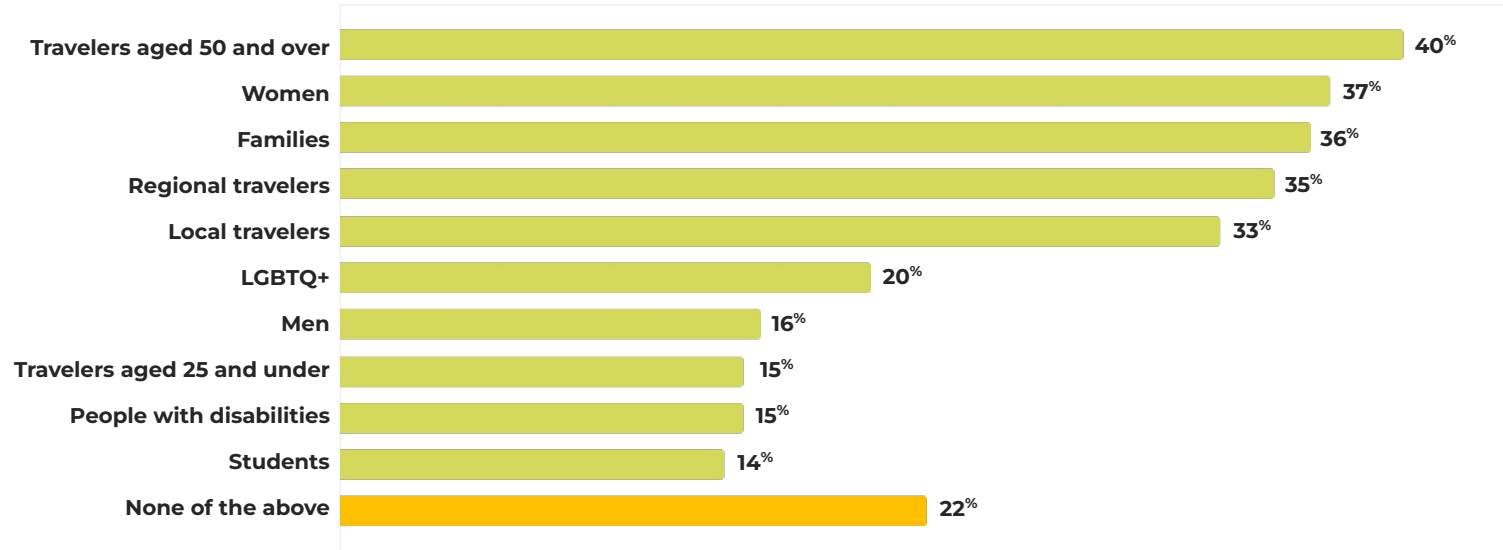
Base: All respondents excluding those left blank (n=159)

Source: 2022 Adventure Tour Operator Snapshot Survey



DIVERSIFYING MARKET AS A RESULT OF COVID-19

Respondents are diversifying their market base primarily by increasing their focus on travelers aged 50 and over, women, families, and local and regional travelers.



Q50: If your organization has considered or taken steps towards diversifying your target market consumer base, which of the following have been identified as considerations?
(Select all that apply)

Base: All respondents excluding those left blank (n=146)

Source: 2022 Adventure Tour Operator Snapshot Survey



FUTURE BUSINESS PLANS

19%

interested in being acquired by another company or taking investment

34%

interested in receiving financial assistance through loans or grants

8%

possibly closing down

11%

interested in merging with another company

9%

interested in acquiring or investing in another company

<1%

definitely closing down

52% are staying the course, continuing along without changes

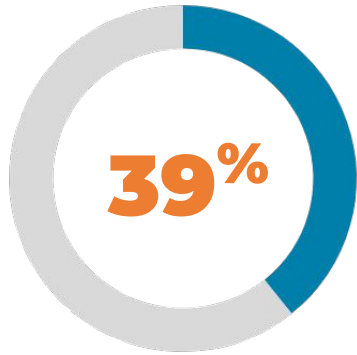
Q17: As you navigate through the pandemic are you considering any of the following options? (Choose all options that apply.)

Base: All respondents excluding those left blank (n=161)

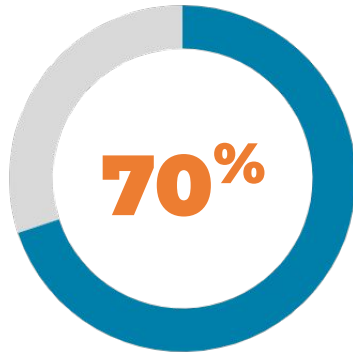
Source: 2022 Adventure Tour Operator Snapshot Survey



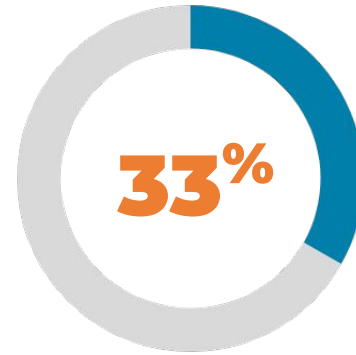
MOTIVATIONS FOR BEING ACQUIRED OR MERGING WITH ANOTHER COMPANY



Retiring and financially gaining from building the company



Continuing the brand I built, giving team and travelers the opportunity to continue on



Current financial situation requires this for the brand to survive

Q18: My interest in being acquired or invested in, or merging with another company, stems from my interest in: (Choose all that apply).

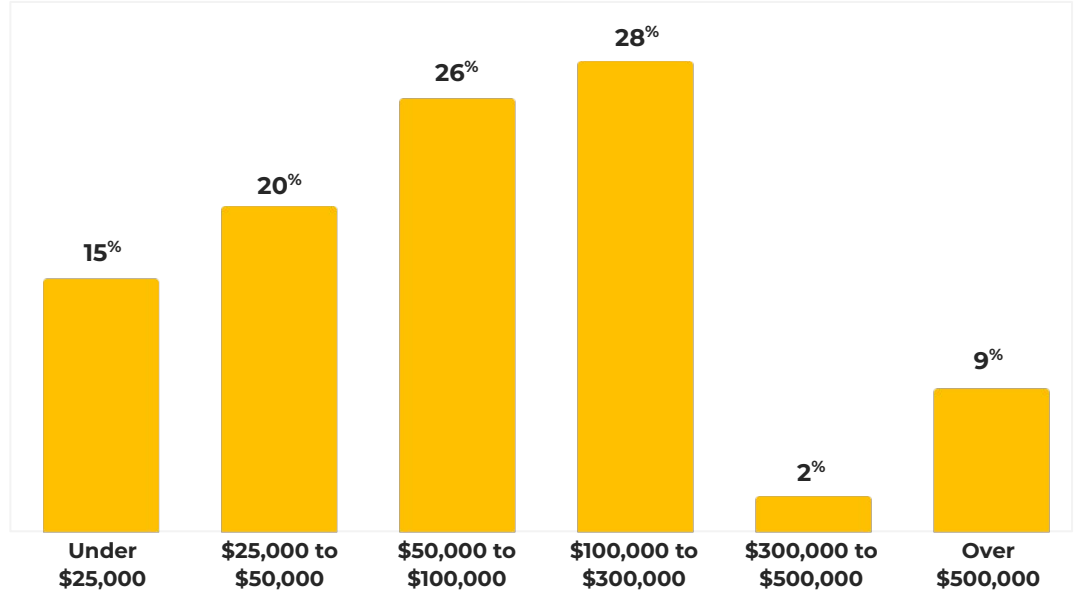
Base: All respondents who indicated they are interested in being acquired or merging with another company (n=33)

Source: 2022 Adventure Tour Operator Snapshot Survey



LOAN AMOUNTS COMPANIES ARE LOOKING FOR

Those interested in receiving a loan are looking for amounts in the \$50,000 – \$300,000 range.



Q19: If financial assistance became available to me as a loan that would need to be paid back within 3 years, the amount (in \$USD) that would be helpful would be: (Choose one).

Base: All respondents who indicated they are interested in receiving a loan (n=46)

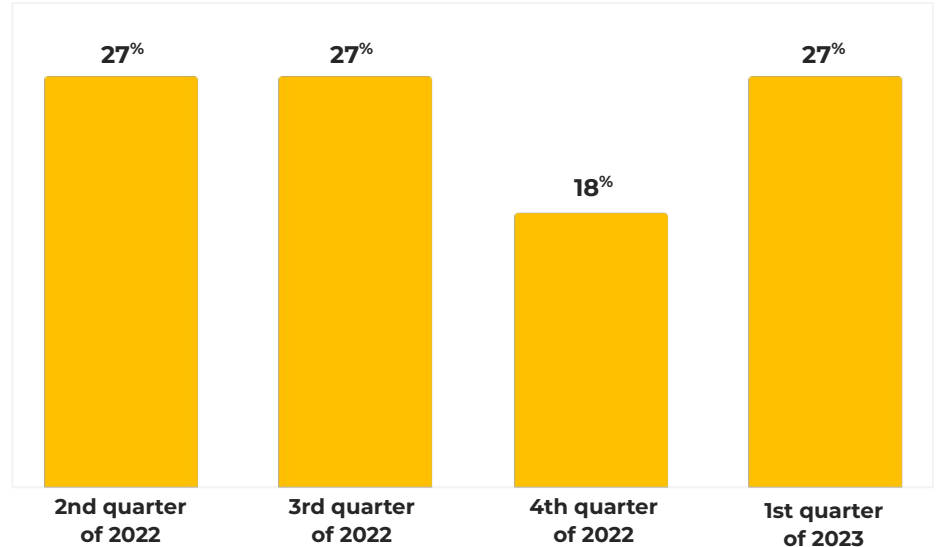
Source: 2022 Adventure Tour Operator Snapshot Survey



FORECAST FOR THOSE THAT MAY CLOSE DOWN

Seventy-two percent of those who indicated they may have to close down plan on doing so in 2022, with another 27% possibly lasting through the 1st quarter of 2023. If they do close their doors, **8%** hope to hibernate and return someday, **17%** expect to close for good, and **75%** do not know.

note: totals may not equal 100 due to rounding



Q21: If the viability of your business is in jeopardy, how long might you be able to last before closing given the current environment? (Choose one.)

Q22: If you do close your doors, do you intend to ...

Base: All respondents who indicated they may need to close down (Q21 n=11); all respondents who indicated their future plans if they do close (Q22 n=12)

Source: 2022 Adventure Tour Operator Snapshot Survey



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Part IV:

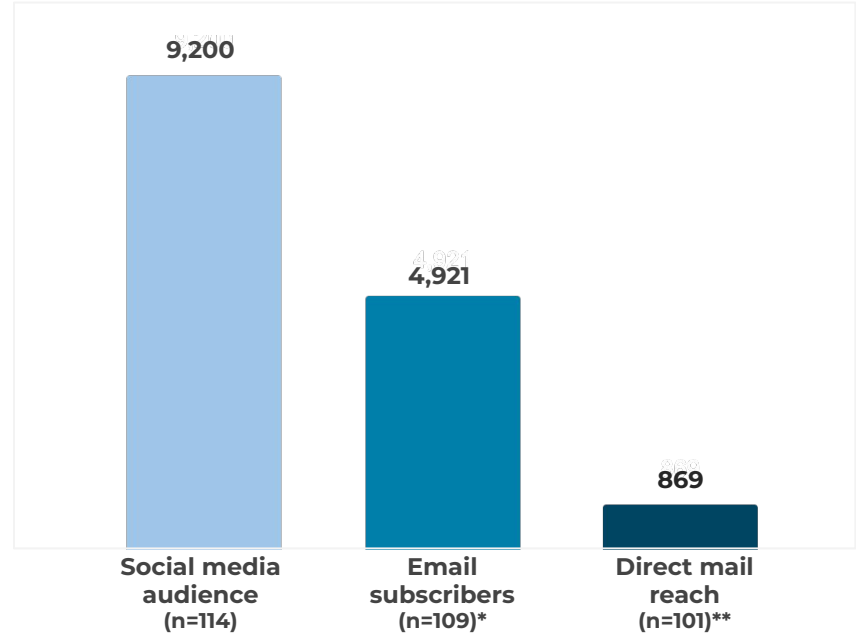
Marketing + Sales: Channels + Tactics





DIRECT MARKETING AVERAGE CUSTOMER REACH

As with previous years, social media is the most popular way to reach customers, followed by email.



*One outlying value was labeled and omitted from calculations using a 2.2 multiplier (Hoaglin & Iglewicz, 1987)

**Six outlying values were labeled and omitted from calculations using a 2.2 multiplier (Hoaglin & Iglewicz, 1987)

Q45: Please share your organization's consumer reach as of the end of 2021 through proprietary marketing channels.

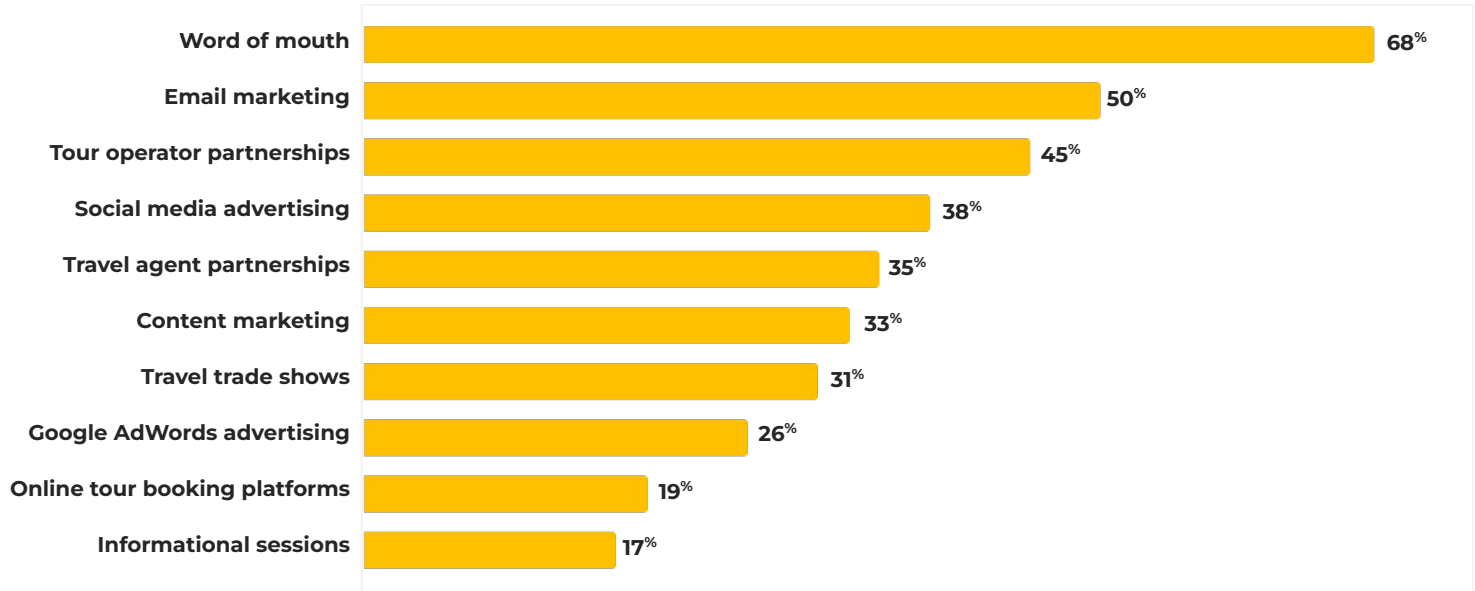
Base: All respondents excluding those left blank as indicated by the totals above

Source: 2022 Adventure Tour Operator Snapshot Survey



HELPFUL MARKETING + SALES TACTICS (TOP 10)

Like previous years, word of mouth was the most helpful marketing tactic. The remaining top 10 were also similar to previous years, with the exception of “informational sessions” replacing “other travel trade partnerships” as #10 this year.



Q46: Please select at most five marketing and sales tactics that are the most helpful in acquiring new guests for your business.

Base: All respondents excluding those left blank (n=146)

Source: 2022 Adventure Tour Operator Snapshot Survey



IMPORTANCE OF SOCIAL MEDIA

Instagram, Facebook, WhatsApp, and YouTube are ranked as the most important social media platforms by respondents. “Other” platforms mentioned included Strava and Viber.

Platform	Average out of 5
Instagram	3.77
Facebook	3.51
WhatsApp	3.17
YouTube	3.04
LinkedIn	2.78
Twitter	1.90
WeChat (China/Asia)	1.45
TikTok	1.41
Snapchat	1.30
QQ (China)	1.29

Q52: Please indicate the level of importance of the following social media channels to your business:

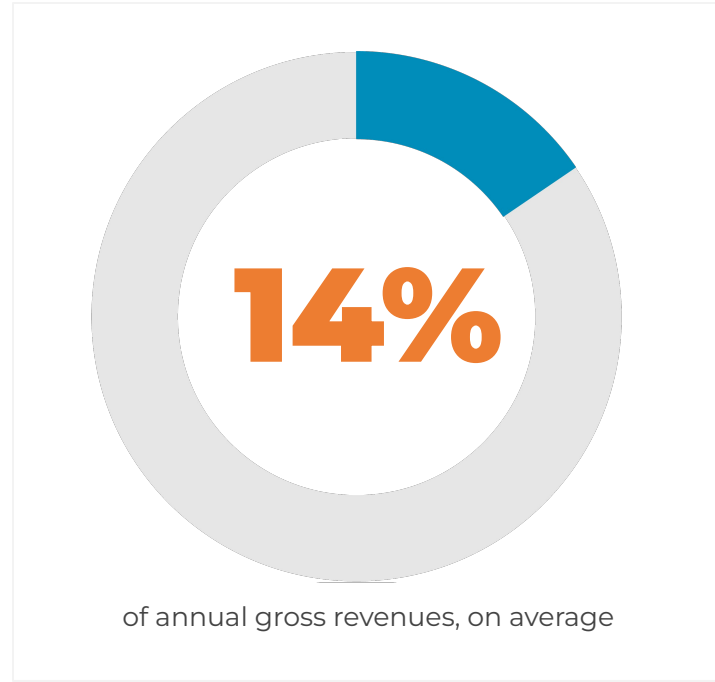
Base: All respondents excluding those left blank (n=145)

Source: 2022 Adventure Tour Operator Snapshot Survey



2021 MARKETING BUDGET

Respondents' marketing budget was an average of 14% of their 2021 annual gross revenue, relatively unchanged from 2019 and 2020.



Q44: What percent of your organization's annual gross revenues make up your organization's annual marketing budget (as of the end of 2021)?

Base: All respondents excluding those left blank (n=146)

Source: 2022 Adventure Tour Operator Snapshot Survey



DISTRIBUTION CHANNELS SHARE OF BOOKINGS

Company Headquarters	Direct Through Website	Direct Through Phone/ Email/Social Media	Group/ Partner	Travel Agent	OTAs	Other
All Regions* (n=146)	35%	27%	22%	22%	9%	8%
North America (n=41)	53%	40%	7%	11%	3%	11%
Central America/Caribbean (n=9)	14%	32%	24%	13%	23%	22%
South America (n=28)	17%	17%	37%	38%	8%	1%
Africa (n=8)	31%	16%	32%	24%	12%	3%
Europe (n=35)	47%	24%	17%	19%	6%	7%
Asia (n=16)	22%	18%	19%	27%	21%	9%

*Regions not containing sufficient sample size (Pacific & Middle East) are included in the All Regions calculation but are otherwise excluded from this chart.

Q47: Out of 100%, please indicate the share of your 2021 guests who booked through each of the following channels:

Base: All respondents excluding those left blank (n=146)

Source: 2022 Adventure Tour Operator Snapshot Survey

note: totals may not equal 100 due to rounding



ONLINE BOOKING PLATFORM PARTNERSHIPS

Facebook, Tripadvisor, Viator, and TourRadar are the most popular online booking platforms for respondents to partner with. This is consistent with previous years.

Platform	% of Respondents
Facebook	24%
Tripadvisor	20%
Viator	16%
TourRadar	13%
Booking.com	9%
Expedia	8%
Responsible Travel	7%
Airbnb	5%
Evaneos	2%
Togezer	1%
None of the above	40%

Q48: Which online booking/payment platforms did you partner with in 2021? (check all that apply.)

Base: All respondents excluding those left blank (n=146)

Source: 2022 Adventure Tour Operator Snapshot Survey



ONLINE PAYMENT CAPABILITIES



have an online reservation system that takes credit cards, up from 50% in previous years.

Q49: Does your organization have an online reservation system that accepts credit cards?

Base: All respondents excluding those left blank (n=146)

Source: 2022 Adventure Tour Operator Snapshot Survey



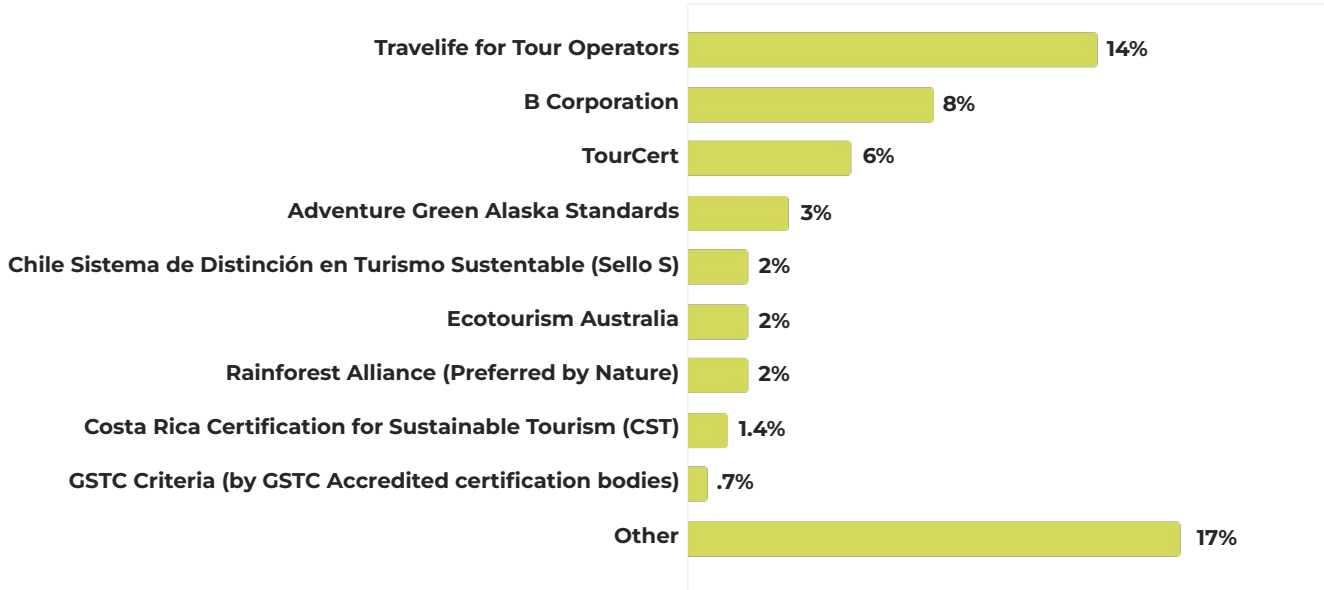
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Part V:

Sustainability, Safety, Risk Management



SUSTAINABILITY CERTIFICATION



45%

have or are
working toward
a sustainability
certification

(55% are not)

Q53: Does your business currently hold (or are you working to acquire) any kind of sustainability certification? (check all that apply.)

Base: All respondents excluding those left blank (n=145)

Source: 2022 Adventure Tour Operator Snapshot Survey

TOURISM + CONSERVATION ISSUES



Q55: What tourism and conservation issues do you believe deserve the most attention?

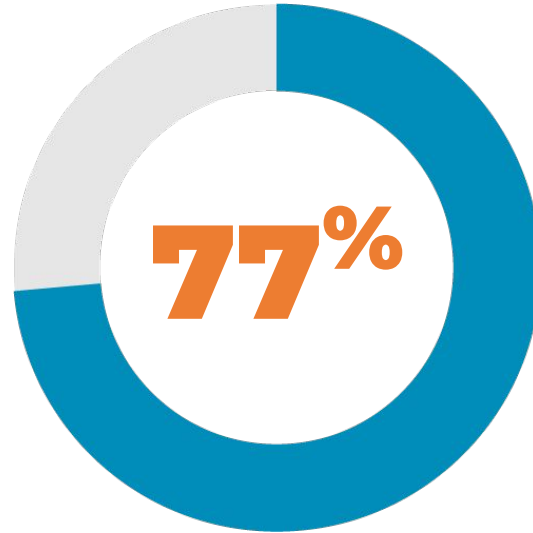
Base: All respondents excluding those left blank (n=145)

Source: 2022 Adventure Tour Operator Snapshot Survey



SAFETY + RISK MANAGEMENT PLANNING

77% of respondents have a documented safety and risk management plan, up slightly from 2020 (72%).



Q54: Does your company have a documented safety and risk management plan?

Base: All respondents excluding those left blank (n=145)

Source: 2022 Adventure Tour Operator Snapshot Survey



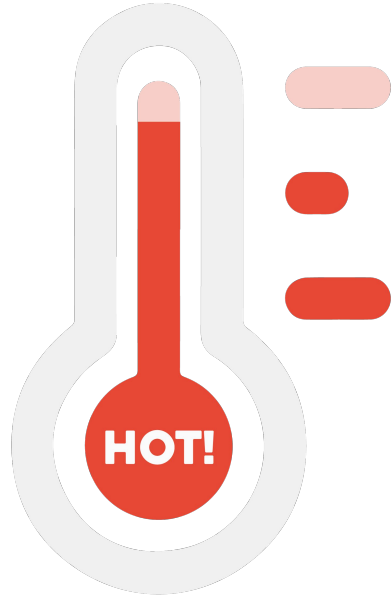
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Part VI:

Consumer + Itinerary Trends



“HOT” TRENDING HIGH-DEMAND TRIPS



1. Custom Itineraries



2. Greener/Sustainable/
Low Impact Itineraries



3. Slow Travel Itineraries



4. Domestic/Regional
Travel



5. Expert or Specialist-
Guided Trips



6. Remote Destinations/Trails



7. Wellness and Mindfulness
Itineraries



8. Diversity-Equity-Inclusion/
Cultural Heritage Tours



9. Electric Bike Itineraries



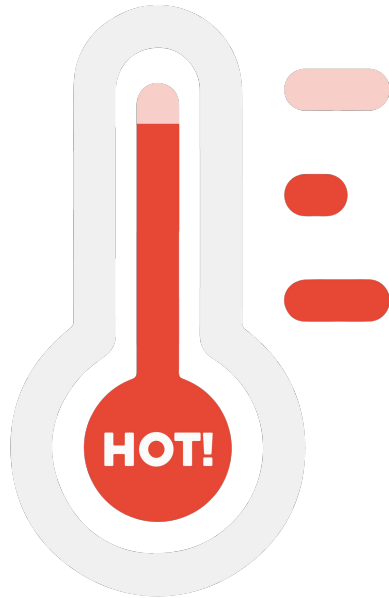
10. Family/Multi-Generation

Q13: What is your organization's perception of the following itinerary trends based on consumer demand and bookings throughout 2021?

Base: All respondents excluding those left blank (n=163)

Source: 2022 Adventure Tour Operator Snapshot Survey

“HOT” TRENDING **MOTIVATIONS** FOR ADVENTURE TRAVEL



1. New Experiences



2. Go Off the Beaten Track



3. To Travel Like a Local



4. Cultural Encounters



5. Wellness/Betterment Goals



6. Cultural



7. Adventure Travel as a Status Symbol



8. Pampering and Luxury



9. Digital Detox (Unplug)



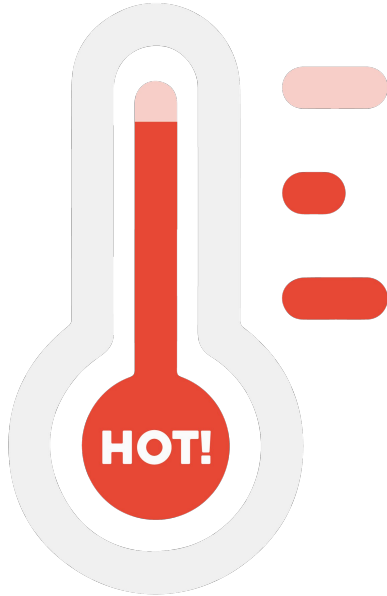
10. Bleisure/Workcation

Q40: What is your organization's perception of the following consumer motivations, based on consumer demand and bookings in 2021 and going into 2022?

Base: All respondents excluding those left blank (n=156)

Source: 2022 Adventure Tour Operator Snapshot Survey

“HOT” TRENDING ADVENTURE ACTIVITIES



1. Cycling (electric bikes)



2. Hiking/Trekking/Walking



3. Safaris/wildlife viewing



4. Culinary/Gastronomy



5. Wellness-focused activities



6. Cultural



7. Cycling (mountain/
non-paved surface)



8. Photography (wildlife/nature)



9. Cycling (road/paved surface)



10. Snowshoeing

Q41: What is your organization's perception of adventure travel activity trends, based on consumer demand and bookings in 2021 and going into 2022?

Base: All respondents excluding those left blank (n=152)

Source: 2022 Adventure Tour Operator Snapshot Survey

TOP TRENDING ACTIVITIES BY REGION

Company Headquarters	#1	#2	#3	#4	#5
North America	Cycling (Electric bikes)	Safaris/Wildlife Viewing	Hiking/Trekking/ Walking	Cycling (Road/Paved Surface)	Kayaking/sea/ whitewater
Central America /Caribbean	Culinary	Photography (Wildlife/Nature)	Safaris/Wildlife Viewing	Cultural	Wellness-Focused Activities
South America	Hiking/Trekking /Walking	Culinary	Cycling (Electric bikes)	Safaris/Wildlife Viewing	Wellness-Focused Activities
Africa	Archeological	Survival Training	Rafting	Cultural	Hiking/Trekking/ Walking
Europe	Cycling (Electric Bikes)	Culinary	Hiking/Trekking /Walking	Cycling (Mountain/ Non-Paved Surface)	Snowshoeing
Asia	Cultural	Hiking/Trekking /Walking	Cycling (Electric bikes)	Rafting	Fishing

*Regions not containing sufficient sample size (Pacific & Middle East) are excluded from this chart.

Q41: What is your organization's perception of adventure travel activity trends, based on consumer demand and bookings in 2021 and going into 2022?

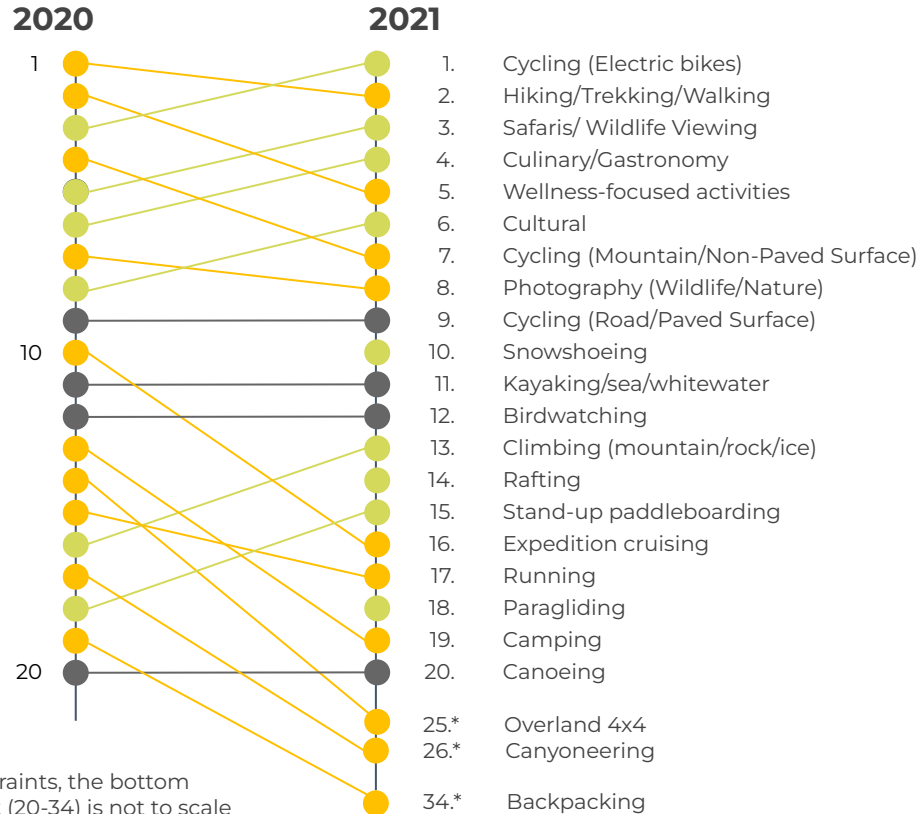
Base: All respondents excluding those left blank (n=152)

Source: 2022 Adventure Tour Operator Snapshot Survey

ACTIVITIES: COMPARING 2020 AND 2021

- Decrease in popularity
- Increase in popularity
- No change

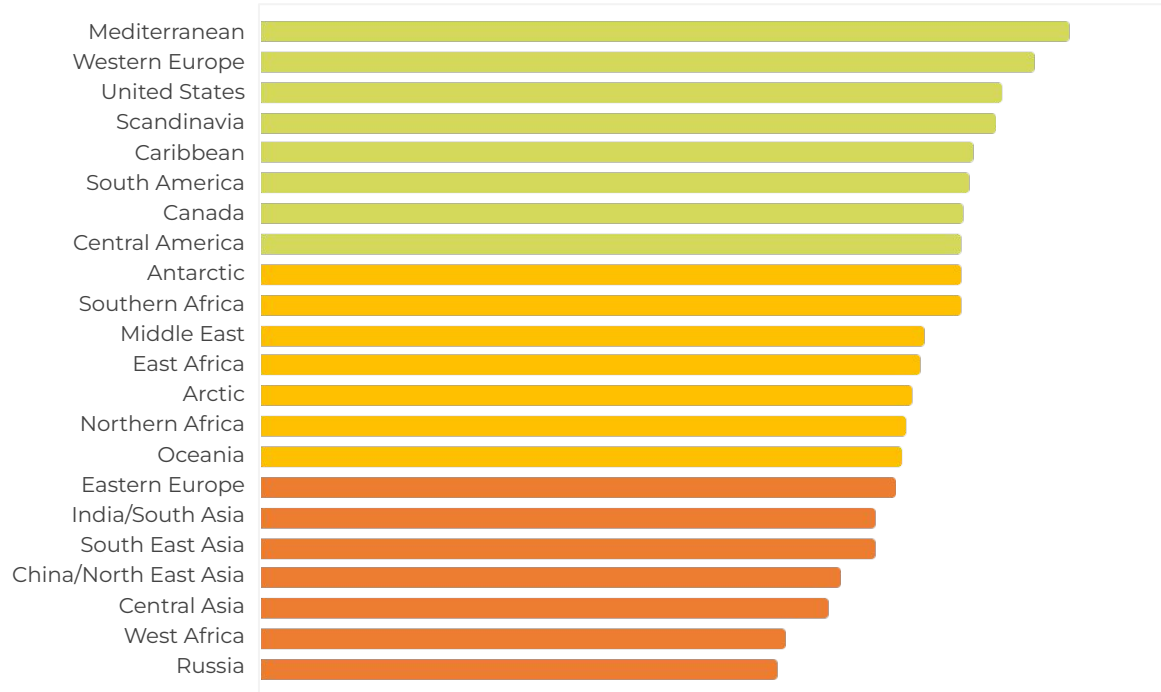
This year, cycling with electric bikes has displaced hiking/trekking/walking as the top trending activity. Culinary activities have also become more popular. The most notable increases are snowshoeing, rafting, and paragliding, #10, #14, and #18 in 2021 and not even on the list in 2020. Backpacking and camping have both decreased in popularity.



*due to space constraints, the bottom portion of this chart (20-34) is not to scale



HOTTEST TRENDING DESTINATIONS



Q43: What regions of the world are you seeing customer changes of interest in booking, based on consumer demand and bookings in 2021 and going into 2022?

Base: All respondents excluding those left blank (n=54)

Source: 2022 Adventure Travel Operator Snapshot Survey



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Part VII:

Most Popular Adventure Trip





PRIMARY HOST MARKET (TOP 11)

In 2021, the United States, Italy, and Tanzania were the top 3 destinations for tour operator respondents' clients.

Host Market (trip destination)*	% of Respondents
United States	18%
Italy	9%
Tanzania	7%
Ecuador	5%
Peru	5%
Brazil	4%
Germany	4%
Greece	4%
Kenya	4%
Netherlands	4%
United Kingdom	4%

*Other destinations received responses of 3% or fewer

Q30: Considering your most popular 2021 adventure itinerary, please select the primary host market for this trip?

Base: All respondents excluding those left blank (n=55)

Source: 2022 Adventure Tour Operator Snapshot Survey



PRIMARY SOURCE MARKET (TOP 7)

In 2021, respondents' traveler clientele were mostly from North America and Western Europe, with some coming from Brazil as well.

Source Market (client location)*	% of Respondents
United States	34%
Canada	6%
United Kingdom	6%
France	4%
Germany	4%
Sweden	4%
Brazil	4%

*Other source locations received responses of 3% or fewer

Q31: Still thinking about your most popular 2021 adventure itinerary, what is the primary source market for this trip?

Base: All respondents excluding those left blank (n=55)

Source: 2022 Adventure Tour Operator Snapshot Survey

PRIMARY ADVENTURE ACTIVITY (TOP 6)

operators' most popular adventure trip 2021



1. Hiking/Trekking/Walking



4. Cultural



2. (Cycling (road/paved surface)



5. Cycling (mountain/non-paved surface)



3. Safaris/wildlife viewing



6. Expedition Cruising

Q32: What is the primary adventure activity of your most popular 2021 adventure itinerary?

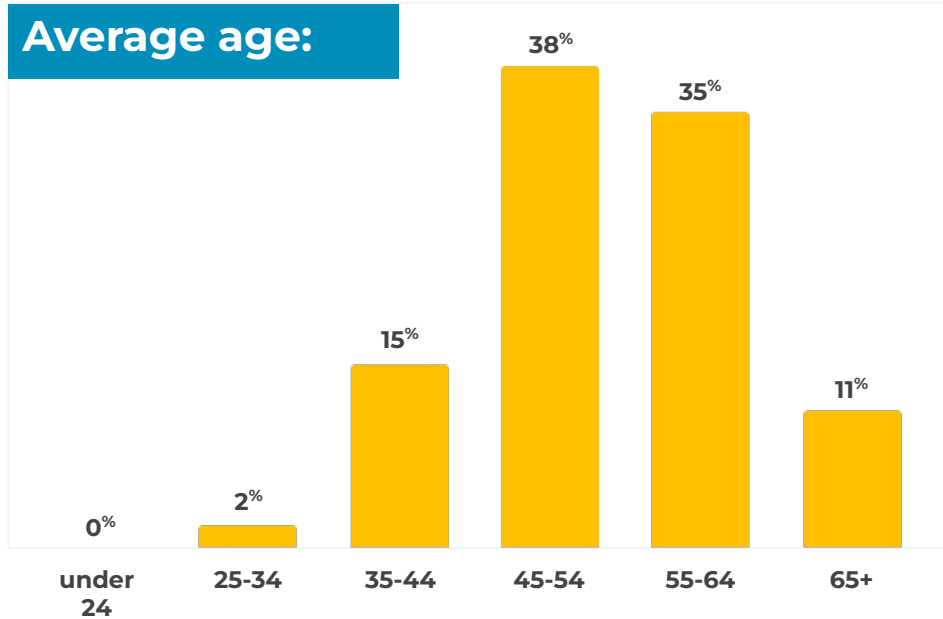
Base: All respondents excluding those left blank (n=55)

Source: 2022 Adventure Tour Operator Snapshot Survey



2021 MOST POPULAR ADVENTURE TRIP CLIENTS

Average age:



On average:

73%
book double occupancy

28%
book single occupancy

Q36: What is the average age of your clients on this trip?

Q37: Can you estimate the percentage of guests on this popular trip that book double occupancy and those that book individual (single) occupancy?

Base: All respondents excluding those left blank (n=55)

Source: 2022 Adventure Tour Operator Snapshot Survey



2021 MOST POPULAR ADVENTURE TRIP

\$2,900

median trip price (USD)
(does not include airfare)

8

average number of nights

25%

median trip markup

Q33: What is the average retail trip price, per person per trip (in US dollars), of this popular 2021 adventure itinerary (package) sold to your selected source market?
Please exclude airfare from the pricing.

Q34: What is the duration (in nights) of this popular itinerary?

Base: All respondents excluding those left blank (n=55)

Source: 2022 Adventure Tour Operator Snapshot Survey



2021 MOST POPULAR ADVENTURE TRIP

70%

of the \$2,900 total trip cost is spent with local suppliers

=

\$2,030

per trip is spent with local suppliers (USD)

+

\$238

average spend per guest on local handicrafts or souvenirs

Q38: Still thinking of this popular 2021 itinerary, please estimate the percentage of your trip cost spent with local suppliers based in the host market. Please only estimate your spend with suppliers from the host market, and exclude all trip expenditure with suppliers based in other nations, trip margin, and your trip operating costs.

Q39: If you can, please estimate what your average guest spends on local handicrafts or souvenirs on this popular trip in the host destination.

Base: All respondents excluding those left blank (Q38 n=55, Q39 n=42)

Source: 2022 Adventure Tour Operator Snapshot Survey



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Part VIII:

Future Outlook + Closing Comments

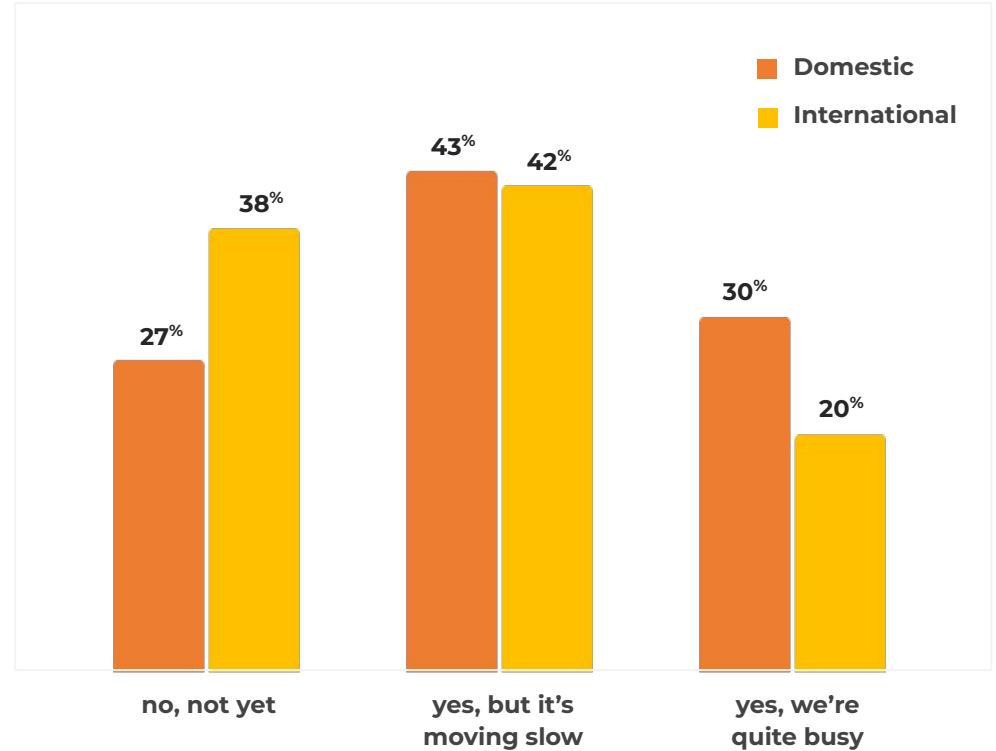




DOMESTIC + INTERNATIONAL TRAVEL IMPROVEMENT

Seventy-three percent of respondents are seeing an improvement in domestic travel demand for 2022, and 62% of respondents are seeing an improvement in international travel demand for 2022.

note: totals may not equal
100 due to rounding



Q15: Are you seeing an increase in bookings from travelers staying in their own country (domestic travel) for 2022?

Q16: Are you seeing an increase in bookings from travelers visiting a different country (international travel) for 2022?

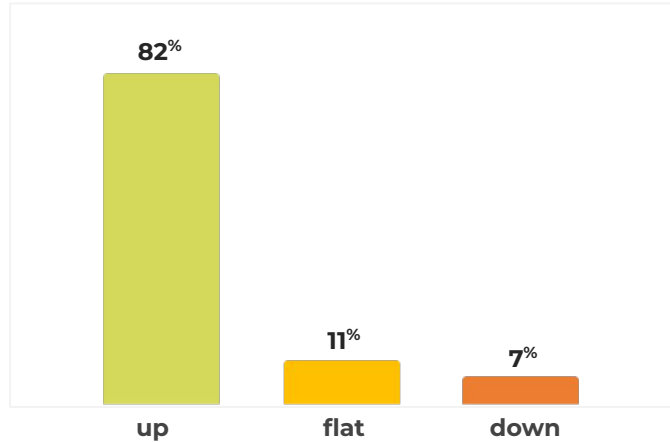
Base: All respondents excluding those left blank (n=161)

Source: 2022 Adventure Tour Operator Snapshot Survey

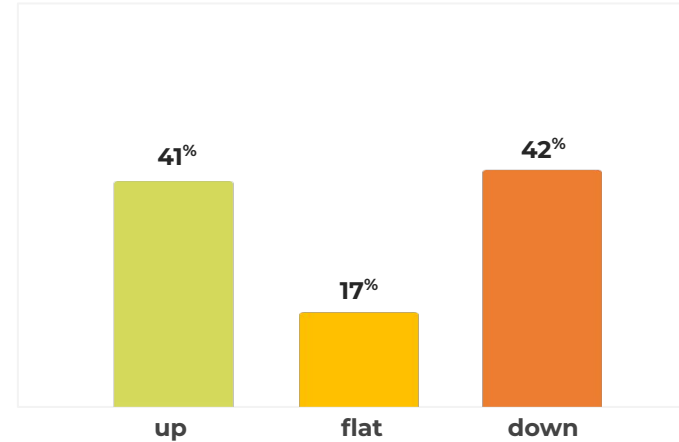


2022 NET PROFIT OUTLOOK COMPARISONS

2022 Outlook Compared to 2021 Actual



2022 Outlook Compared to 2019 Actual



Q28: What is your outlook on net profit for 2022 (Jan-Dec or fiscal equivalent), compared to your company's actual net profit in 2021?

Q29: What is your outlook on net profit for 2022 (Jan-Dec or fiscal equivalent), compared to your company's actual net profit in 2019 (pre-COVID)?

Base: All respondents excluding those left blank (n=158)

Source: 2022 Adventure Tour Operator Snapshot Survey



CLOSING COMMENTS

I've pretty much banned the phrase "The New Nor***" from my vocabulary starting somewhere in 2020—the year that felt like a decade. And after reviewing this report and thinking back over the incredible changes in the last two years, I feel even more strongly so. First off, there are some great signs. The data is headed in the right direction—more travelers and more bookings mean business is coming back to life.

What's still very unclear is *how* it's coming back. Recovery will be uneven globally and regionally based on a wide array of factors and we're dealing with an industry "Lego set" where some of the pieces are still missing and some are lost forever. So the rebuilt industry, as it comes together, will look differently today than two years ago. The shape, color and size won't resemble the old model. And it may look different 3 months from now than it does today.

For those of you whose reality is masked in this data by your colleagues whose businesses are doing well, we feel for you. I have recently been immersed in a very interesting project and company in Latin America focused on repair and regeneration of the land and sea and building up of beautiful local culture. I am deeply inspired by the hope, the spark and the determination by everyone there. The need for, and power of responsible adventure travel is higher than ever. All of you in the industry have been asked to stretch and hang in there longer than would have even been imaginable in 2019. Congratulations on finding the strength to continue!

We look forward to serving you another year and covet your ideas, inspiration and feedback. Years from now we'll look back and see how our community kept us safer and got stronger together. Because while COVID-19 bent us, we are not broken. Adventure on, friends.

- Shannon Stowell, CEO, ATTA

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About the ATTA

Established in 1990, the Adventure Travel Trade Association is the largest global network of adventure travel leaders. Our community is made up of ~30,000 individual guides, tour operators, lodges, travel advisors, tourism boards, destination marketing and management organizations, outdoor educators, gear companies and travel media who share a belief and commitment to sustainable tourism. The connections and creativity of this vibrant community come together both virtually and in person to create and deliver the solutions that propel our businesses and our communities toward a responsible and profitable future.

About our Research

The ATTA strives to produce regular reports that take the pulse of the industry through our membership as well as the global travel industry. In addition, consumer research studies lend insight into the fast paced and changing world of travel and travelers' perceptions of it. At adventuretravel.biz, our Research Reports can be located that dive deeply into the motivations of adventure travelers, the size of the industry, the landscape and health of the industry at large, as well as other targeted reports on subjects ranging from Travel Agents to adventure travel in specific destinations.

ATTA's Web Properties



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