ADVENTURE TRAVEL
TRADE ASSOCIATION

flywire

The State of Adventure Accommodations

June 2021

ABOUT THIS REPORT

It comes as no surprise to any reader that in the wake of COVID-19, travel has changed forever. Although some in the industry were damaged beyond repair, many others are emerging from a type of cocoon, ready to accept the new reality, incorporate the lessons learned during the crisis, and move forward in a more authentic and sustainable way.

As the subject of this research report, adventure accommodations shared their current state and their outlook on the upcoming recovery. One thing that became apparent during this process was that adventure accommodations encompass a unique blend of lodging, food and beverage, and activities. This diversity means they face special challenges, especially when it comes to technology.

The Adventure Travel Trade Association (ATTA) has therefore partnered with Flywire, a strong supporter of our industry that focuses on reducing payment costs and improving guest experience, to learn more about what adventure accommodations need at this time and how they fit into the broader adventure travel community.

- Heather Kelly, Sr. Research Manager, ATTA

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ADVENTURE TRAVEL
TRADE ASSOCIATION

KEY FINDINGS

1. 40% of respondents expect their 2021 room revenue to be similar to or higher than their pre-COVID 2019 revenue.

2. Approximately two-thirds of respondents' revenue came from their rooms, with 15% from food and beverage, and 13% from activities.

3. On average, half of all guests do the free and unguided activities offered by an adventure accommodation. Almost half also enjoy the guided activities. However, participation in paid and unguided activities (e.g., where equipment rental is required) is not very popular.

4. Almost half of respondents' guests book their complete activity itinerary before arriving. The next most popular method is to book on-demand after arrival.

5. Tripadvisor, Expedia, Hotels.com, Airbnb, and Booking.com are the most popular OTAs used by adventure accommodations.

6. To schedule and manage their on-property activities, 39% of adventure accommodations are still using word processing or spreadsheet software. One-third use a specialty software, and 14% still use pencil and paper.

INTRODUCTION

INTRODUCTION: METHODOLOGY

- From February through April 2021, the Adventure Travel Trade Association (ATTA) surveyed adventure accommodations around the globe to learn more about their current business status and outlook as the industry begins to recover from the COVID-19 pandemic.

- Through emails to current and former adventure accommodation ATTA members, as well as personal outreach, 31 responses were obtained. They represented lodges, boutique hotels, cabins/villas, glamping accommodations, resorts/retreats, hotels, and ranches from 17 different countries.

- Questions were asked about respondents' location, history, occupancy, rates and revenue, food and beverage, guests, activities, technology, and sustainability efforts.

- While this is not to be considered a statistically representative sample of adventure accommodations, the respondents shared valuable feedback that can give insight into the needs and future of this industry segment.

INTRODUCTION: INDUSTRY NEEDS

It soon emerged that the unique needs of adventure accommodations and their guests are not being met. For example, to schedule and manage their on-property activities, over half of the survey respondents are still using word processing or spreadsheet software, or pencil and paper. Similarly, 20% of respondents use a paper calendar or a spreadsheet software for rate and inventory management.

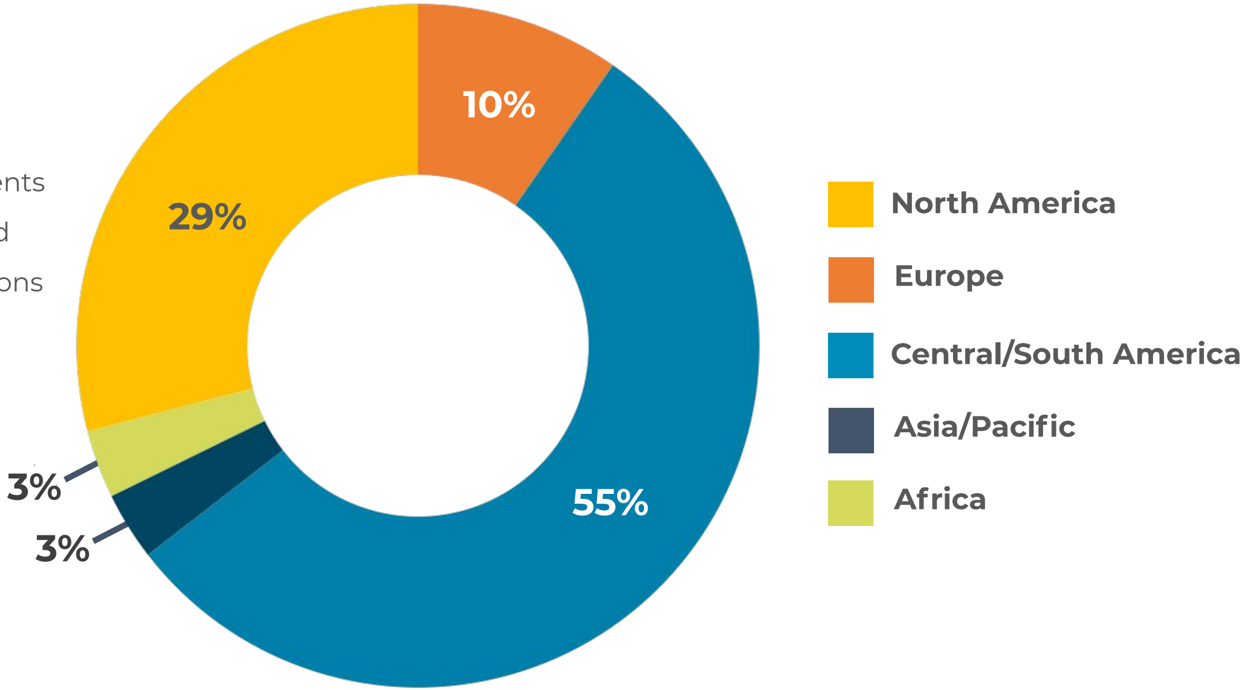
Since today's travelers are looking for streamlined and automated booking solutions, new technological solutions that are user-friendly and effective need to be developed in a way that is affordable and accessible. This is represented in the survey results and anecdotal evidence that we at ATTA often hear from accommodations and other members of our industry.

Based on this and other findings of this research, we think the next steps for adventure accommodations and the business-to-business providers looking to serve them, are to focus on building and implementing technological solutions that work for both accommodations and their guests.

PROFILE OF RESPONDENTS

ORIGIN

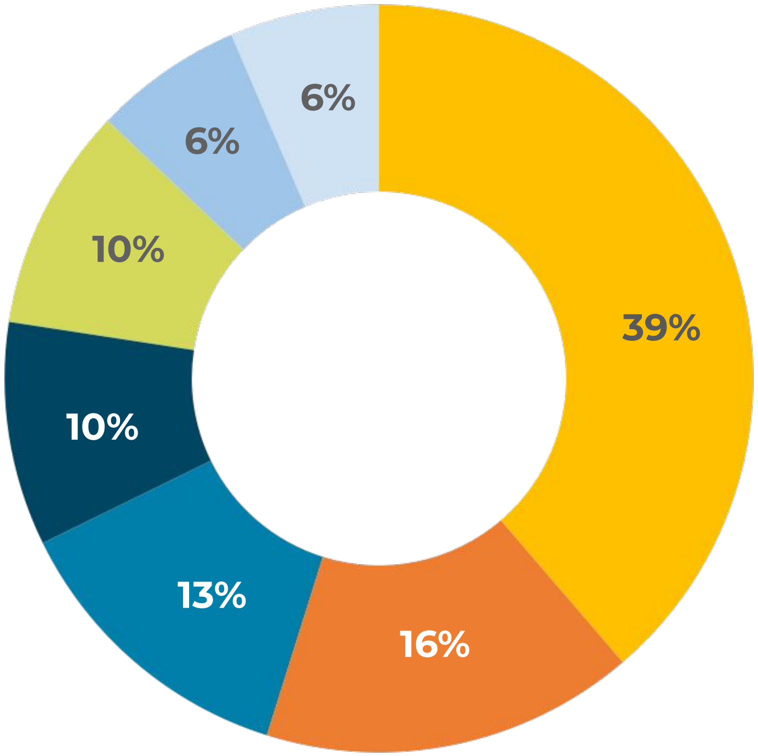
The majority of the survey respondents are from Central/South America and North America, although other regions of the world are represented.



Q1: What is the location of your property?
Base: All respondents (n=31)
Source: 2021 Global Adventure Accommodation Survey

ACCOMMODATION TYPE

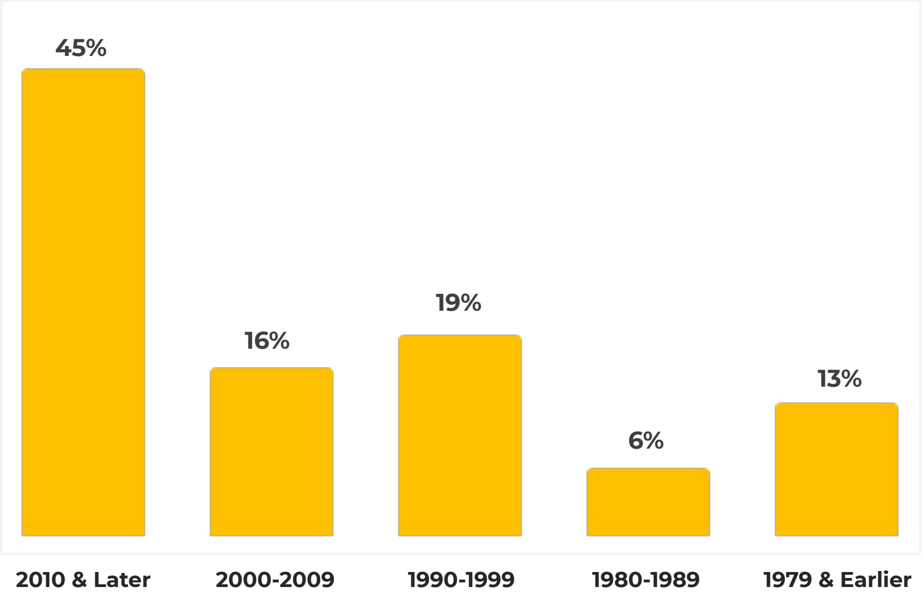
- **Lodge** (rustic hotel in a remote setting with abundant outdoor conservation areas, block rooms)
- **Boutique Hotel** (upscale, personalized)
- **Cabins/Villas** (stand-alone structures, rented as single units)
- **Glamping** (semi-permanent with infrastructure)
- **Resort/Retreat** (significant leisure infrastructure)
- **Hotel** (typically interior hallways, block rooms)
- **Ranch** (with farming, horse and/or cattle operations)



Q3: Please select the accommodation type that most closely represents your property:
Base: All respondents (n=31)
Source: 2021 Global Adventure Accommodation Survey

LENGTH OF TIME IN OPERATION

Almost half of all respondents have been in operation for 11 years or less.

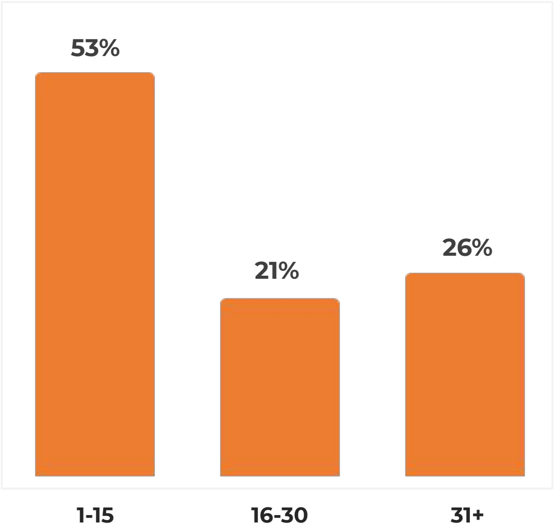


note: total does not equal 100 due to rounding

Q2: What year did your property and business begin operation in its current form and name?
Base: All respondents (n=31)
Source: 2021 Global Adventure Accommodation Survey

GUEST OCCUPANCY

NUMBER OF ROOMS/UNITS



note: total does not equal 100 due to rounding

MAXIMUM GUEST OCCUPANCY

6-1,450

guests can stay at one time*

*One value was omitted due to a suspected data entry error

71

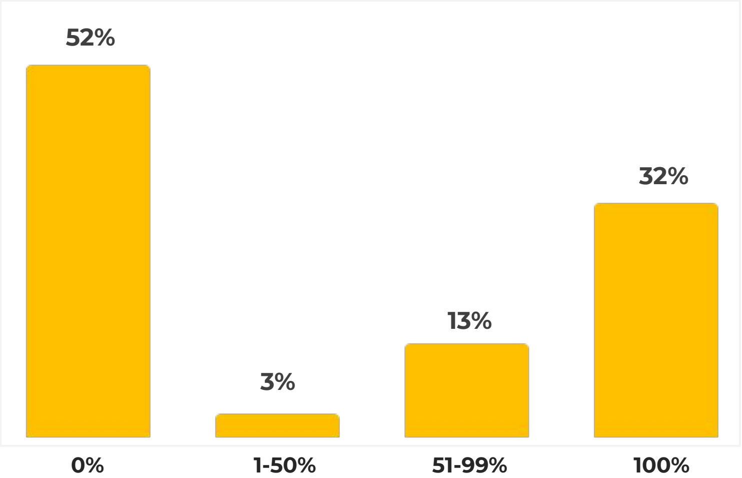
guests stay each night on average**

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

Q4: What is the total room/accommodation count of your property, including rooms, cabins, houses, glamping tents, and other unit types?
Q10: What is the maximum guest occupancy of your property during your high season?
Base: All respondents (n=31)
Source: 2021 Global Adventure Accommodation Survey

PERCENTAGE OF ROOMS CLOSED IN OFF-SEASON

About half of all respondents are open year-round, while a third fully close during their off-season.



Q5: Of your total room/accommodation count, how many units are taken out of service during your off-season? *(converted to percentage)*
Base: All respondents (n=31)
Source: 2021 Global Adventure Accommodation Survey

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AVERAGE ROOM OCCUPANCY

SUMMER

66%

FALL

51%

WINTER

45%

SPRING

43%

note: the seasons represent what is appropriate for the area of the world in which the responding accommodation is located.

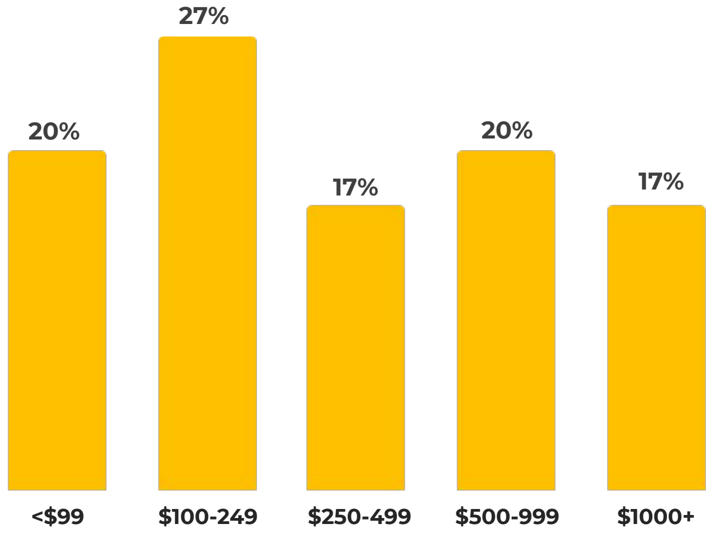
Q6-9: What is your summer/fall/winter/spring average room occupancy?
Base: All respondents (n=31)
Source: 2021 Global Adventure Accommodation Survey

RATES + REVENUE

AVERAGE DAILY RATE (ADR) IN 2019 (PRE-COVID), $USD

AVERAGE

$426



note: total does not equal 100 due to rounding

Q11: What was the annual ADR (Average Daily Rate) of your property in 2019 (pre-COVID)?
Base: All respondents excluding those left blank (n=30)
Source: 2021 Global Adventure Accommodation Survey

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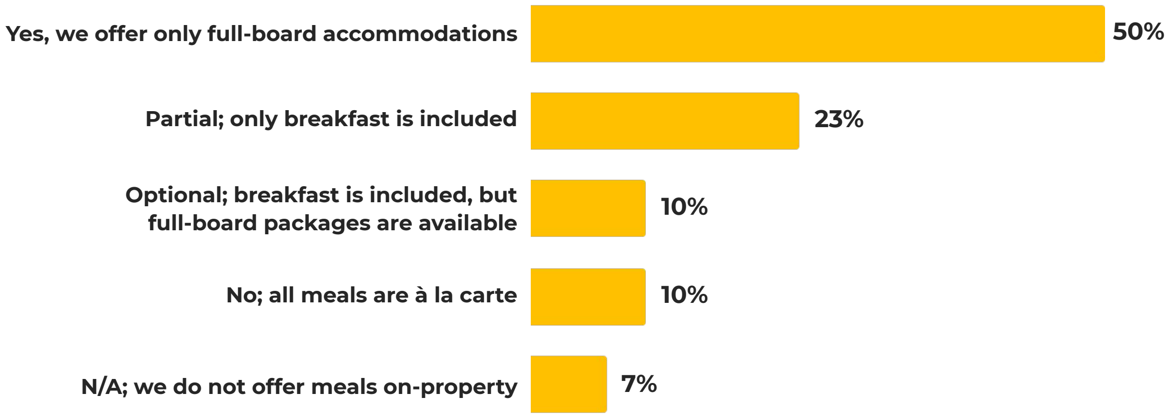
NIGHTLY RATE INCLUSIVITY

Half of respondents only offer rates inclusive of three meals a day, and another 43% have F&B available on-property. Only 7% of respondents do not have any F&B facilities available.



Q16: Is your nightly room rate inclusive of breakfast, lunch, and dinner?
Base: All respondents excluding those left blank (n=30)
Source: 2021 Global Adventure Accommodation Survey

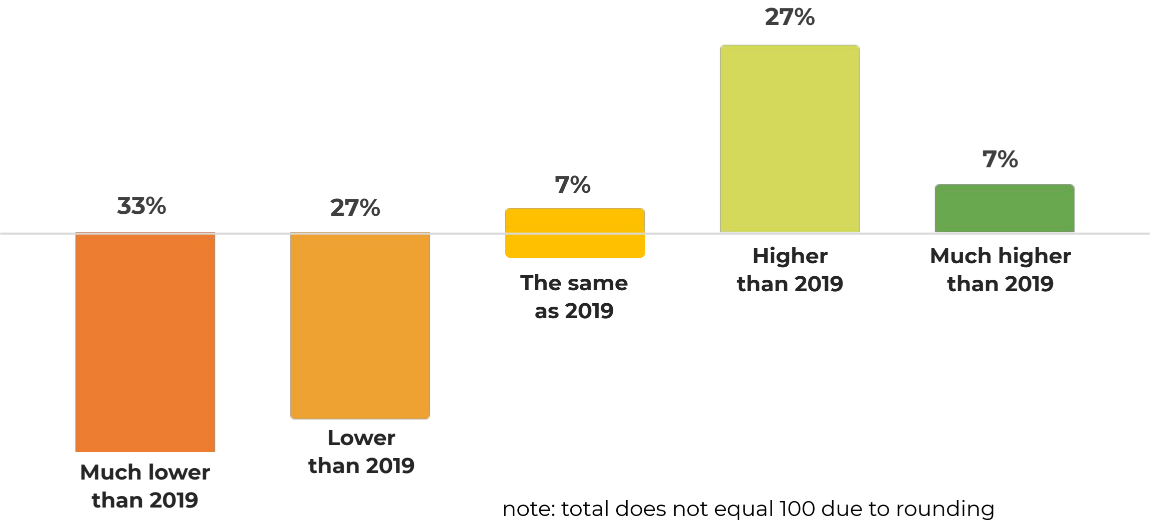
NIGHTLY RATE INCLUSIVITY

At least some activities are included in 59% of respondents' rates. Another 21% charge a fee for all activities, 14% only offer self-guided activities, and the remaining 7% charge only for partner-provided activities.

Q29: Is your nightly room rate inclusive of guided activities and excursions offered by your property?
Base: All respondents excluding those left blank (n=29)
Source: 2021 Global Adventure Accommodation Survey

2021 (POST-COVID) ROOM REVENUE

Although 60% of respondents expect their 2021 room revenue to be lower than 2019, the remaining 40% are looking forward to a similar or higher revenue amount compared to 2019.



note: total does not equal 100 due to rounding

Q12: Post-COVID, what is your current expectation for total room revenue in 2021?
Base: All respondents excluding those left blank (n=30)
Source: 2021 Global Adventure Accommodation Survey

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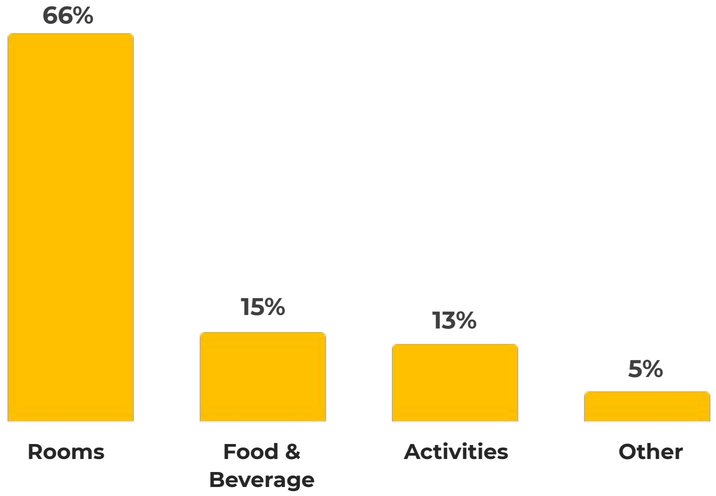
REVENUE DIVISION

Approximately two-thirds of respondents' revenue came from their rooms, with 15% from food and beverage, and 13% from activities. The remaining revenue came from other sources such as transportation or a spa.

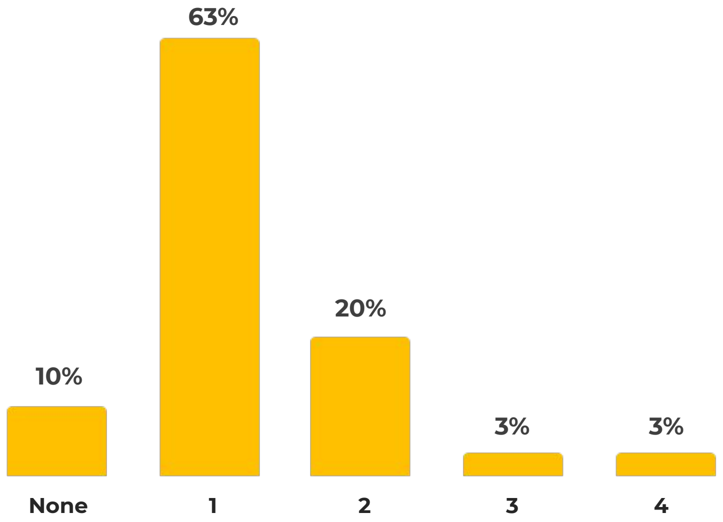


note: total does not equal 100 due to rounding

Q14: Approximately what percentage of your property's total revenue in 2019 was derived from rooms vs. F&B vs. Activities vs. Other?
Base: All respondents excluding those left blank (n=30)
Source: 2021 Global Adventure Accommodation Survey

ON-PROPERTY FOOD & BEVERAGE OUTLETS

Most respondents have one or two food and beverage outlets (such as a restaurant or cafe) on their property.



note: total does not equal 100 due to rounding

Q15: How many food and beverage outlets are located on your property?
Base: All respondents excluding those left blank (n=30)
Source: 2021 Global Adventure Accommodation Survey

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LENGTH OF STAY IN 2019 (PRE-COVID)

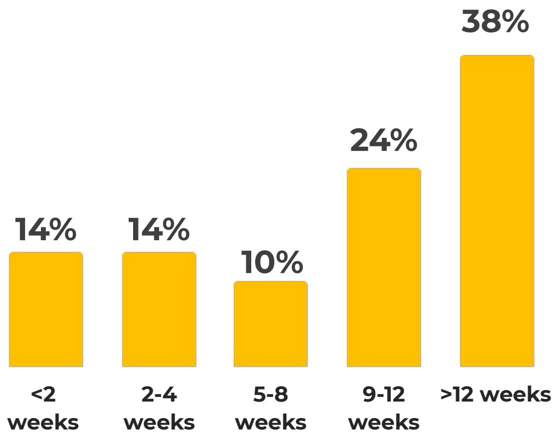
In 2019, respondents' guests stayed for an average of 3.3 nights.

AVERAGE

3.3

AVERAGE BOOKING LEAD TIME (2021)

Accommodations reported that guests typically book their room 9 or more weeks in advance of their stay.

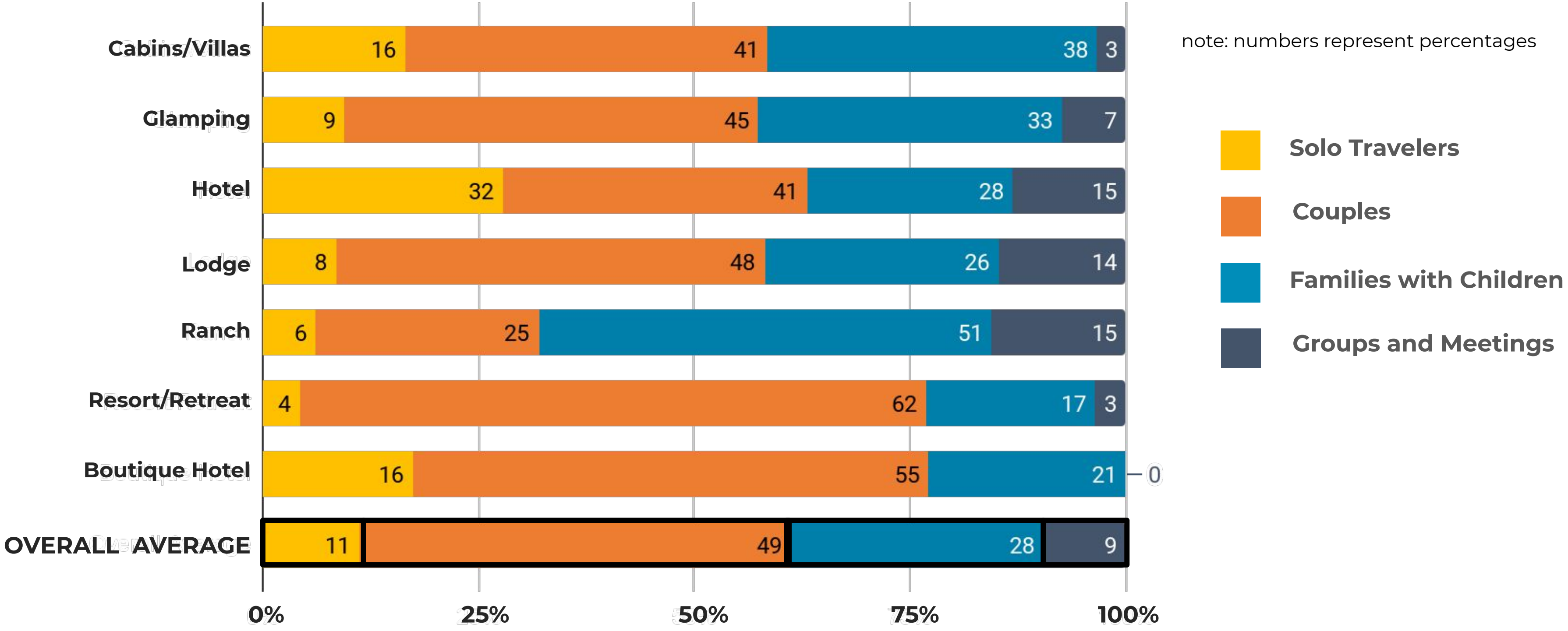


Q17: What was your average length of stay in 2019?
Base: All respondents excluding those left blank (n=29)
Source: 2021 Global Adventure Accommodation Survey

Q18: What is your average booking lead time for accommodations in 2021?
Base: All respondents excluding those left blank (n=29)
Source: 2021 Global Adventure Accommodation Survey

GUESTS

TRAVEL COMPANIONS



Q19-Q22: Approximately what percentage of your guests fall into the following categories?
Base: All respondents excluding those left blank (n=28)
Source: 2021 Global Adventure Accommodation Survey

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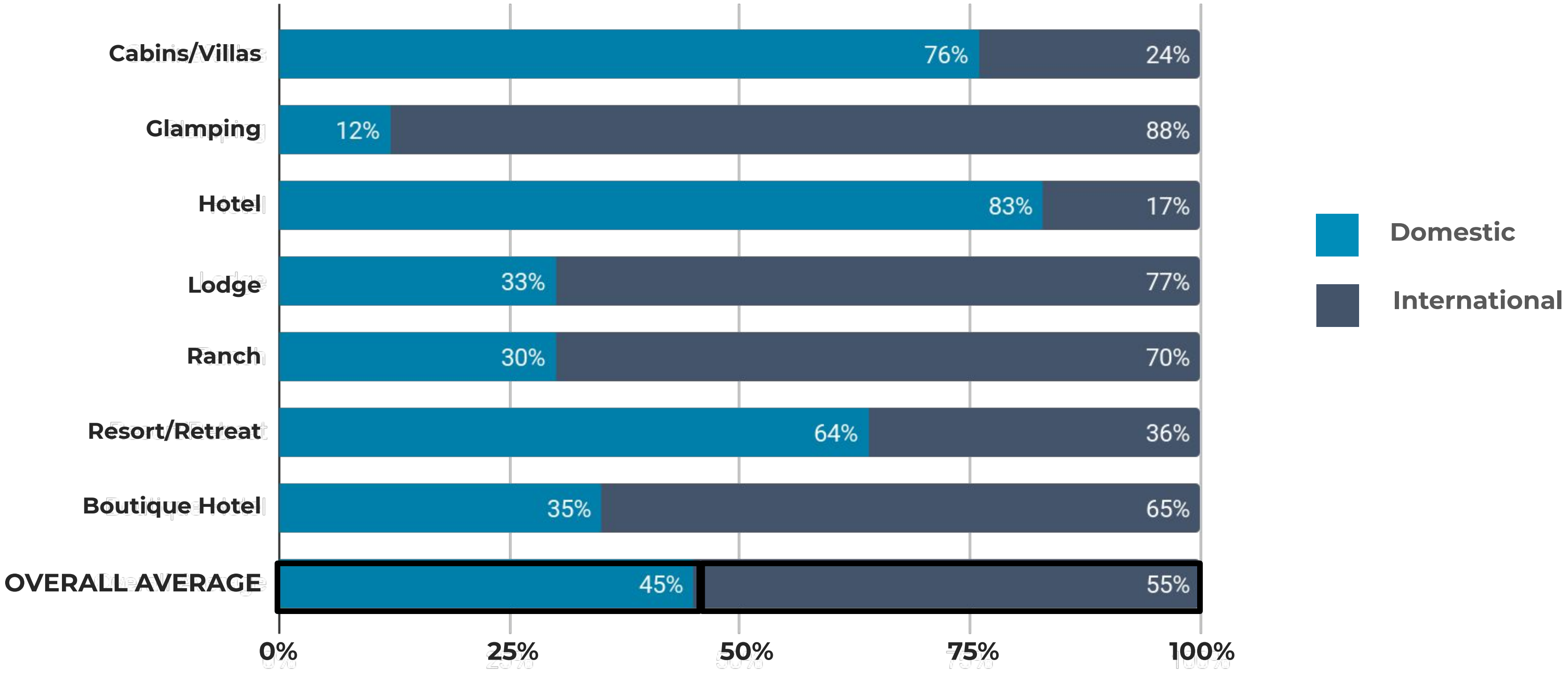
GUEST ORIGIN



Q23: What percentage of your guests are domestic?
Base: All respondents excluding those left blank (n=29)
Source: 2021 Global Adventure Accommodation Survey

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GUEST TYPE

Q31: How would you characterize your lodging guest mix over the course of one year?
Base: All respondents excluding those left blank (n=28)
Source: 2021 Global Adventure Accommodation Survey

ACTIVITIES

TOP PROPERTY-DEFINING ACTIVITIES

HIKING/ TREKKING/ WALKING

SAFARIS/ WILDLIFE VIEWING

BIRDWATCHING

CULTURAL

HORSEBACK RIDING

CYCLING (MOUNTAIN/ NON-PAVED)

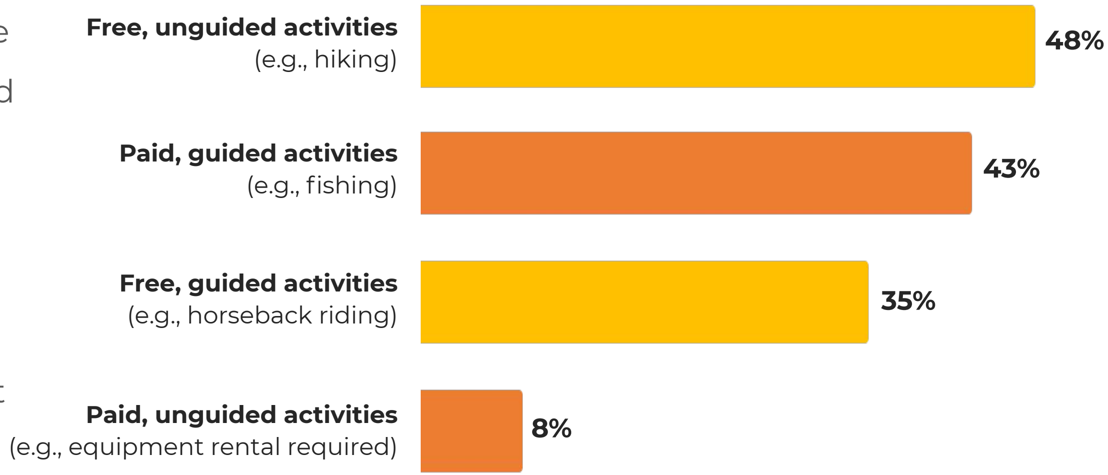
Q24: Please select the top three, property-defining activities of your business. These are the most popular activities and/or have the highest influence on the consumer's decision to stay with you.

Base: All respondents excluding those left blank (n=28)

Source: 2021 Global Adventure Accommodation Survey

ON-PROPERTY ACTIVITY PARTICIPATION

On average, half of all guests do the *free and unguided* activities offered by an accommodation. Almost half also enjoy the *guided* activities. However, participation in *paid and unguided* activities (e.g., where equipment rental is required) is not very popular.



Q25-28: Please estimate the percent of guests that participate in on-property activities during a typical stay?
Base: All respondents excluding those left blank (n=29)
Source: 2021 Global Adventure Accommodation Survey

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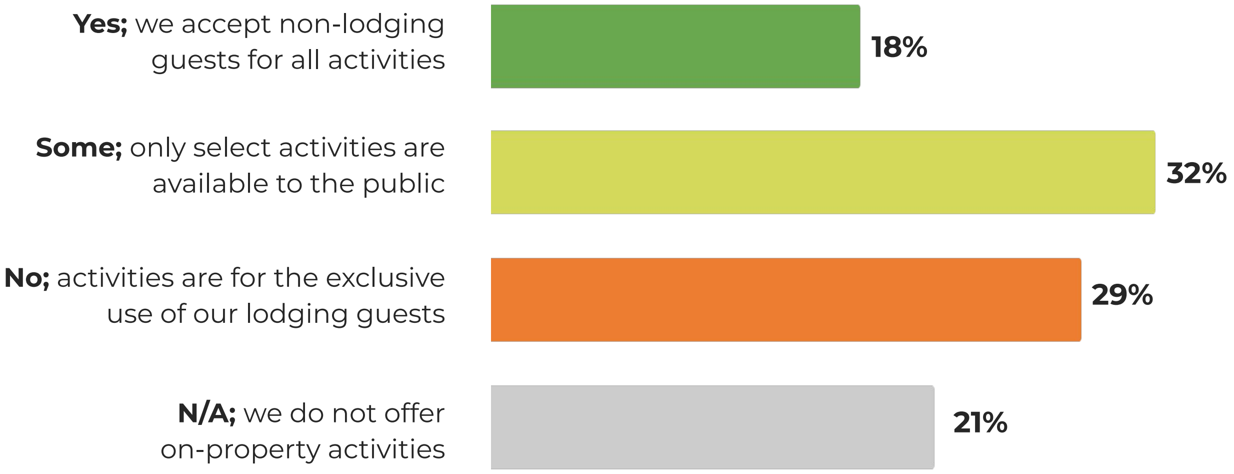
ACTIVITY SALES



79%

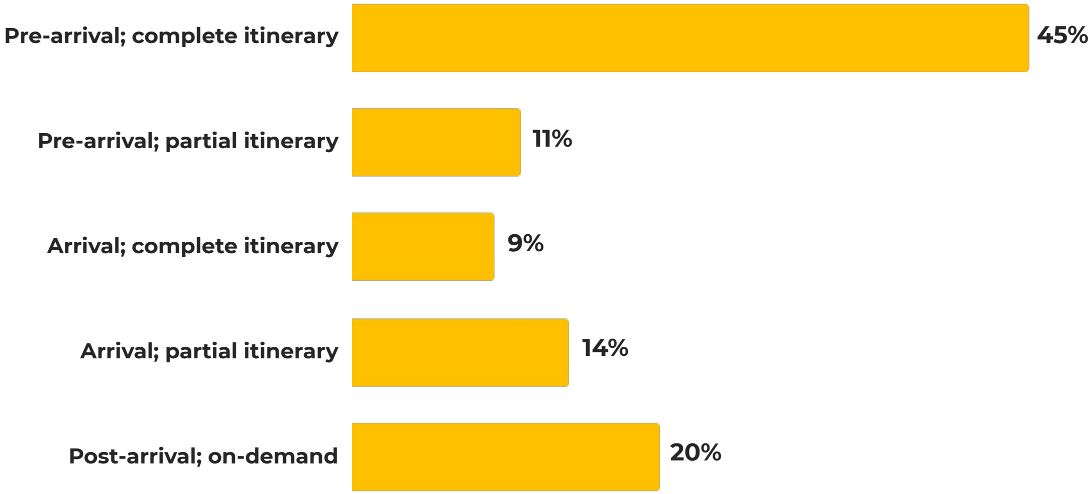
of respondents offer on-property activities

Of those 79%, most only offer select activities to the public or reserve their activities only for their guests.

Q32: Do you allow paid access to activities for non-lodging guests?`
Base: All respondents excluding those left blank (n=28)
Source: 2021 Global Adventure Accommodation Survey

ACTIVITY BOOKING

Almost half of respondents' guests book their complete activity itinerary before arriving. The next most popular method is to book on-demand after arrival.



note: total does not equal 100 due to rounding

Q30: Please estimate the percent of lodging guests who book on-property activities during each stage of the guest journey:

Base: All respondents excluding those left blank and those that do not offer on-property activities (n=22)

Source: 2021 Global Adventure Accommodation Survey

SUBCONTRACTING ACTIVITIES

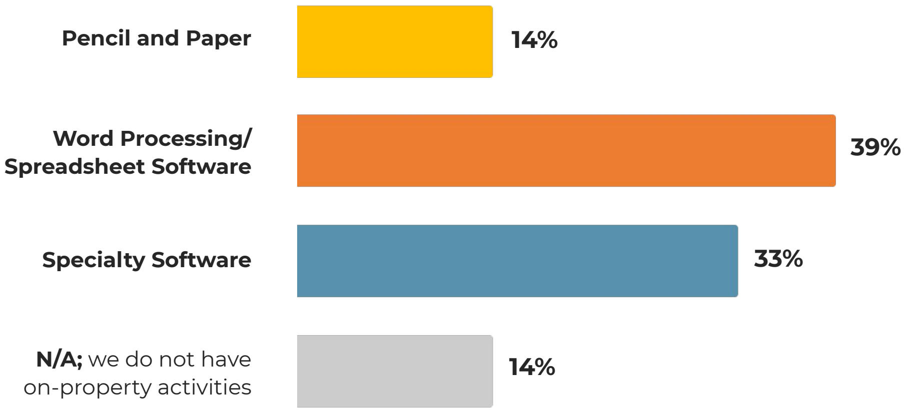
On average, **18%** of total guest revenue (including lodging and non-lodging),

is generated from sub-contractors as compared to in-house staff.

Q33: What percentage of total guest activity revenue (lodging and non-lodging) is generated from sub-contracted partners, as compared to directly managed staff/services?
Base: All respondents excluding those left blank (n=28)
Source: 2021 Global Adventure Accommodation Survey

ACTIVITY SCHEDULING TOOLS/SOFTWARE

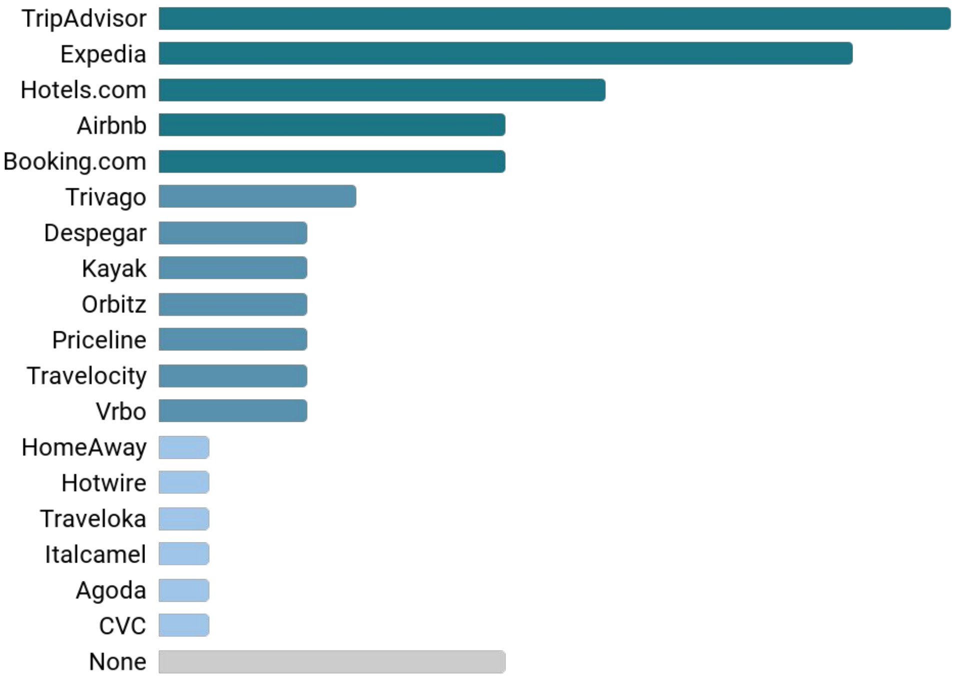
To schedule and manage their on-property activities, 39% of adventure accommodations are using word processing or spreadsheet software. One-third use a specialty software, and 14% still use pencil and paper.



Q34: What tools or software do you use to schedule or manage on-property activities?
Base: All respondents excluding those left blank (n=28)
Source: 2021 Global Adventure Accommodation Survey

TECHNOLOGY

ONLINE TRAVEL AGENCY PARTNERSHIPS



Q35: What OTA/Metasearch providers do you partner with today? Please select all that apply.
Base: All respondents excluding those left blank (n=28)
Source: 2021 Global Adventure Accommodation Survey

RATE + INVENTORY MANAGEMENT

67% Use off-the-shelf software

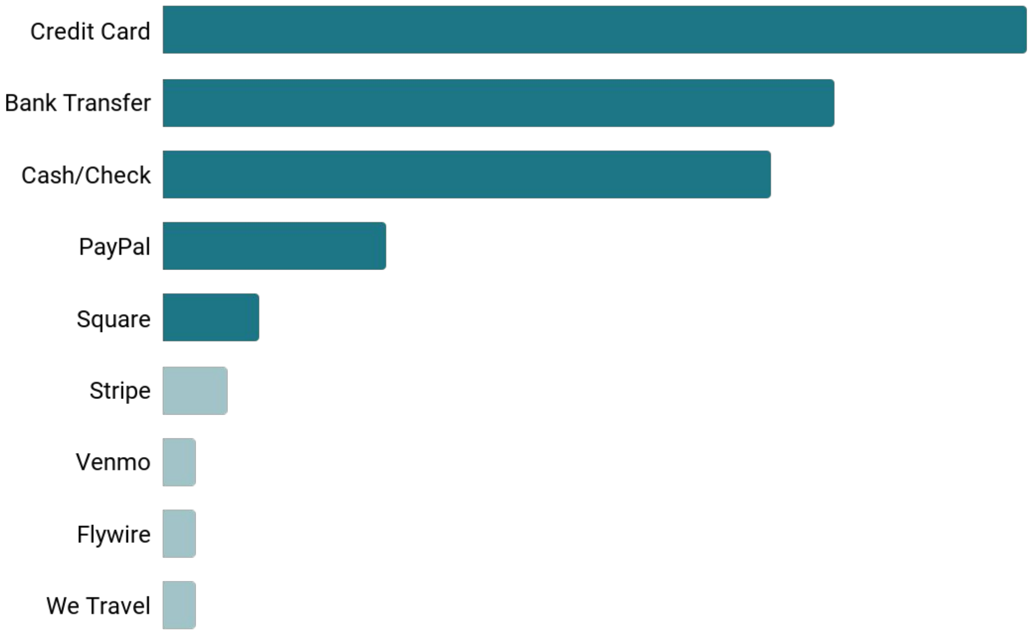
10% Use a paper calendar

13% Use custom software

10% Use MS Excel

Q36: How do you manage your room rate and inventory information?
Base: All respondents excluding those left blank (n=28)
Source: 2021 Global Adventure Accommodation Survey

PAYMENT METHODS



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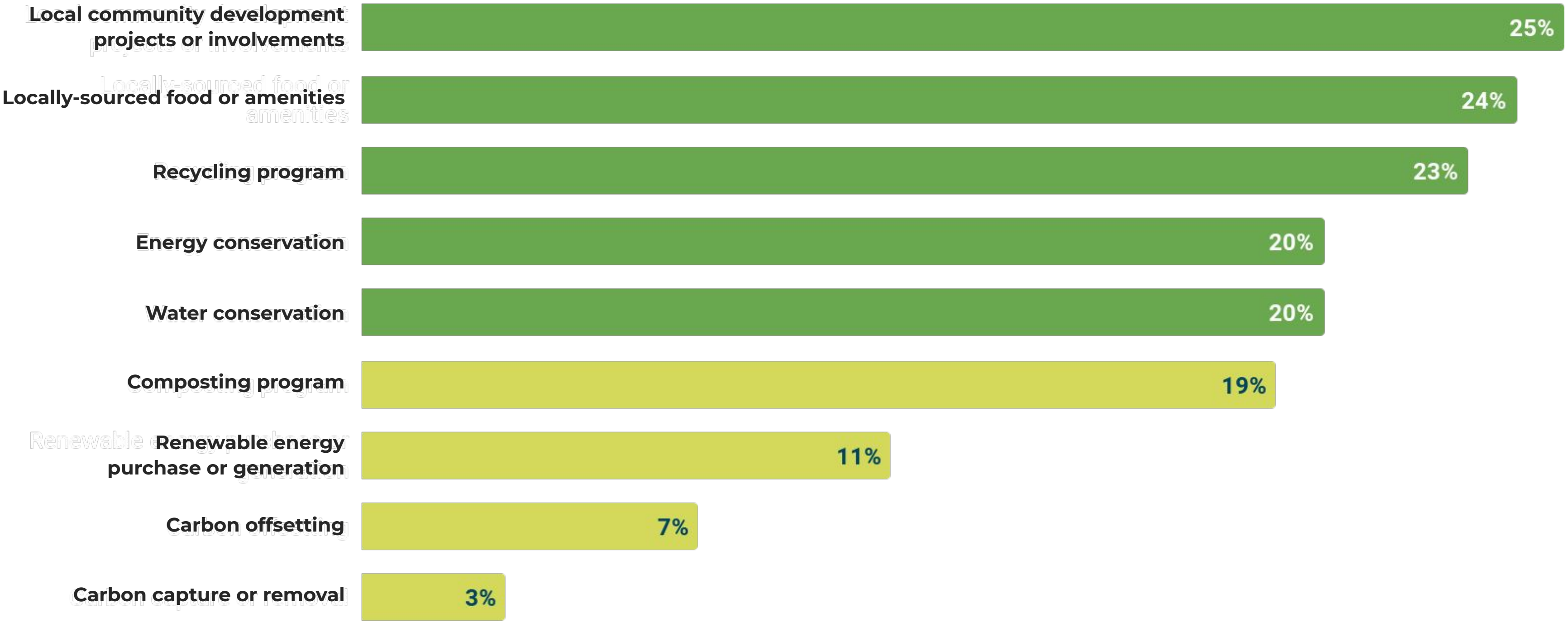
SUSTAINABILITY + CONSERVATION

ENVIRONMENTAL MEASURES



Q42: Does your property do any of the following sustainability and conservation measures? Please select all that apply.
Base: All respondents excluding those left blank (n=28)
Source: 2021 Global Adventure Accommodation Survey

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CONCLUSIONS

CONCLUSIONS + NEXT STEPS

The travel industry is in the early stages of a global recovery, and the adventure accommodation participants in this report have a relatively positive outlook for the rest of 2021 and going into 2022. With this move forward, now is the time for accommodations to embrace changes and advancements that will help them operate more efficiently and serve their guests more effectively.

Based on the findings from this report and anecdotal evidence from ATTA's community, technology is the primary area where this segment of the industry needs improvement. Guests are booking add-ons to their stay in advance, and many want to confirm and pay for activities online. With 53% of respondents using either word processing or spreadsheet software, or pencil and paper to schedule and manage their on-property activities, this leaves an opportunity for streamlining their operations and making their guests happy. Only one-third of respondents use a specialty software to schedule and manage their activities, which indicates that there is not currently a solution available that works for a wide range of adventure accommodations.

Similarly, respondents accept a wide variety of payment methods from their guests. For adventure accommodations and others that are interested in reducing their payment costs and improving their guest experience, Flywire is offering all ATTA members a free travel payments assessment—just click flywire.com/assessment.

CONCLUSIONS + NEXT STEPS

In addition to the need for improved technology, another key finding was that paid and unguided activities (e.g., where equipment rental is required) are not very popular with guests. Compared to around half of all guests that do the free unguided activities, a much lower 8% partake in the paid unguided activities. This can be a revenue-generating area that may need some additional marketing, on-property awareness, or expansion of tools like self-guided tours.

Additional comments in the survey responses and anecdotal feedback from the ATTA community also demonstrate a need for more networking and business development opportunities for adventure accommodations. This type of activity also is helpful for other organizations in the industry that can benefit from partnering with these accommodations. Look for more information and events from ATTA facilitating this type of networking opportunities in the second half of 2021.

Overall, the adventure travel market is beginning to rebound, and bookings are returning. Although this report includes responses from only a sampling of adventure accommodations around the world, the ATTA team has done our best to stay connected to our community over this very difficult past year, and the findings match what we have been hearing as well. Our hope is that technology providers will see this report and develop products that fit the varied needs of the diverse adventure accommodation market, and that our community will soon be thriving again.

- Heather Kelly, Sr. Research Manager, ATTA


Flywire, the Adventure Travel Trade Association's Preferred Global Payments Partner, is proud to support ATTA's work, including this report on the state of adventure accommodations.
As part of our continued support of the adventure travel community, Flywire is offering all ATTA members a free travel payments assessment. To learn how Flywire can reduce your payment costs and improve your guest experience, request an assessment by clicking the link below:
flywire.com/assessment

Propel Your Adventure Career Forward With the ATTA

Joining the ATTA as a member helps your business develop, introduces you to the best and brightest minds in the industry, and allows you to have a bigger impact by collaborating on a collective purpose.

Join ATTA as a Member and gain access to:

- Up to 40% savings on online courses
- Business resources, guides, and legal templates
- Free access to educational webinars
- Free access to industry research reports
- Virtual and in-person networking events
- Pro-deals on gear and equipment
- An industry-specific career center

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Limited time COVID-19 price:
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Learn More and Join Today

Members save big while growing their knowledge or business with expert led online courses covering:

- Safety and Risk Management
- Guide Training
- Business Development
- Adventure Mindset

Try one course or enroll in an entire track.
ATTA Members receive up to 40% off

Sample free course material today:

Request Sample Material

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.

The ATTA's Web Properties

ADVENTURE TRAVEL TRADE ASSOCIATION

The ATTA's homepage online at adventuretravel.biz

ADVENTURE Travel News

The adventure travel industry's source of trade news online at adventuretravelnews.com

ADVENTURE .TRAVEL

The traveler's guide to finding adventure at adventure.travel

ADVENTURE HUB

ATTA's Online Members Community at members.adventuretravel.biz

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