



The State of Gear Purchasing in the Adventure Travel Industry

JANUARY 2020



About the ATTA

Established in 1990, the Adventure Travel Trade Association (ATTA) serves over 1,300 members in 100 countries worldwide. Members predominantly include tour operators, tourism boards, specialty agents and accommodations with a vested interest in the sustainable development of adventure tourism. The ATTA delivers solutions and connections that propel members towards their business goals and the industry toward a responsible and profitable future. Through its regional AdventureConnect and AdventureNEXT events and annual Adventure Travel World Summit and AdventureELEVATE trade conference, the ATTA excels in professional learning, networking and partnering services. With expertise in research, education, adventure travel industry news and promotion, members of the ATTA receive competitive opportunities that help establish them as leaders in adventure tourism.

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 www.adventuretravel.biz



ADVENTURE
Travel News

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



ADVENTURE
.TRAVEL

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



ADVENTURE
HUB

ATTA's Online Members
Community at
<http://members.adventuretravel.biz>



About This Report

This report shares highlights of findings from a survey of adventure tour operators to establish a baseline understanding of their current use of outdoor gear and apparel, factors influencing purchasing decisions and future interest in working with gear suppliers.





Respondent Profile

- Complete survey responses were collected from **102 unique businesses**, the majority (68%) of which are ATTA members.
- The dataset largely reflects the views of organizations with headquarters in **North America** (42%) and **Europe** (21%).
- Respondents were primarily **Inbound Tour Operators** (40%) and **Outbound Tour Operators** (21%).
- The majority of respondents (83%) speak from the perspective of **small companies** with less than 50 employees. **Medium companies** (50-249 employees) comprise 15% of respondents.
- The **most frequent adventure activities** offered by responding companies are hiking/trekking/walking (84%); cultural (68%); culinary (48%); safaris/wildlife viewing (44%); kayaking (43%); birdwatching (41%); and road cycling (40%).

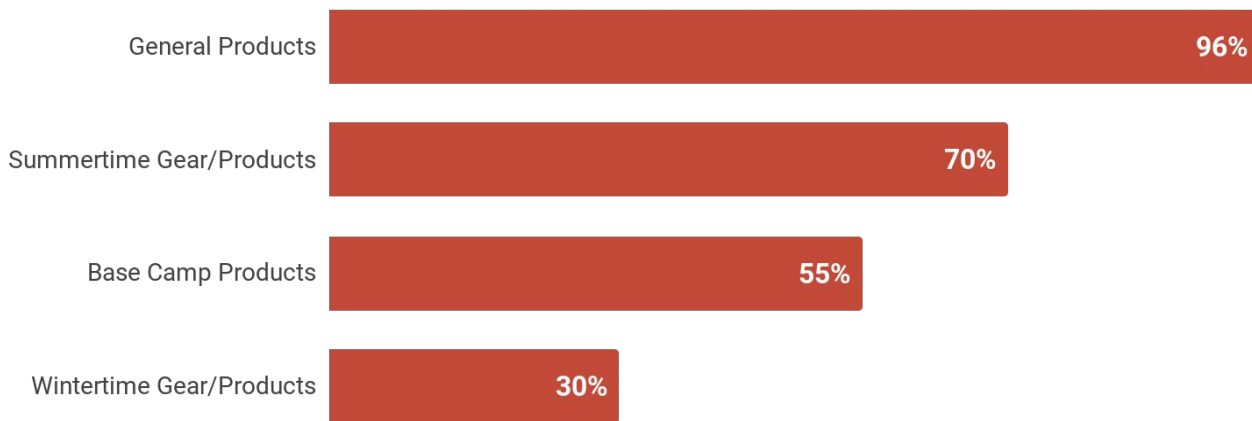


Key Findings



96% of companies surveyed primarily purchase gear for internal use

For a detailed breakdown of gear purchases by product type, purchase frequency & purchase volume, please refer to **Appendix I & II** on **pages 25 & 30**.



% = percentage of respondents

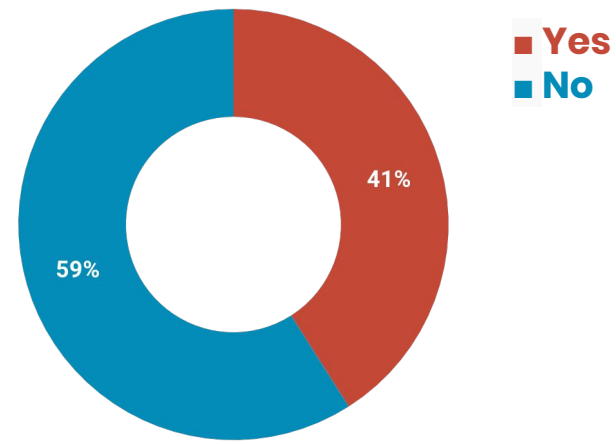
Q22-25: Do you purchase the following _____ for your organization (staff, guides, and other internal needs)?

Base: Adventure tour operators and activity providers, all respondents (n=102)



Two-fifths (41%) of responding inbound¹ operators also make fleet gear² purchases

For a detailed breakdown of inbound operators' fleet gear purchases by product type, purchase frequency & purchase volume, please refer to **Appendix II** on **page 30**.



% = percentage of respondents

- 1. **Inbound tour operators** host international and domestic travelers for experiences and activities. For the purposes of this report, **Destination Management Companies (DMCs)** are excluded from our definition of inbound operators as they are a travel intermediary and do not deliver the end experience.
- 2. **Fleet Gear** is gear purchased to rent or lend to guests.

Q13: Does your company make fleet gear (gear to rent/lend for your guests) purchases?

Base: Adventure tour operators and activity providers with some form of inbound tour operations - DMCs excluded (n=74)



Most respondents' gear purchases for their organization are in quantities of < 50 units

For a detailed breakdown of organizational use gear purchases by product type, purchase frequency & purchase volume, please refer to **Appendix I** on **page 25**.

Product Category / Most Popular Product	% of Businesses Purchasing	Average Purchase Frequency	Average Purchase Volume
General Products			
Rescue & First Aid	78%	Every year	< 50 units
Basecamp Products			
Cooking Equipment	49%	Every two years	< 50 units
Summertime Products			
Footwear	45%	Every two years	< 50 units
Wintertime Products			
Footwear	23%	Every two years	< 50 units

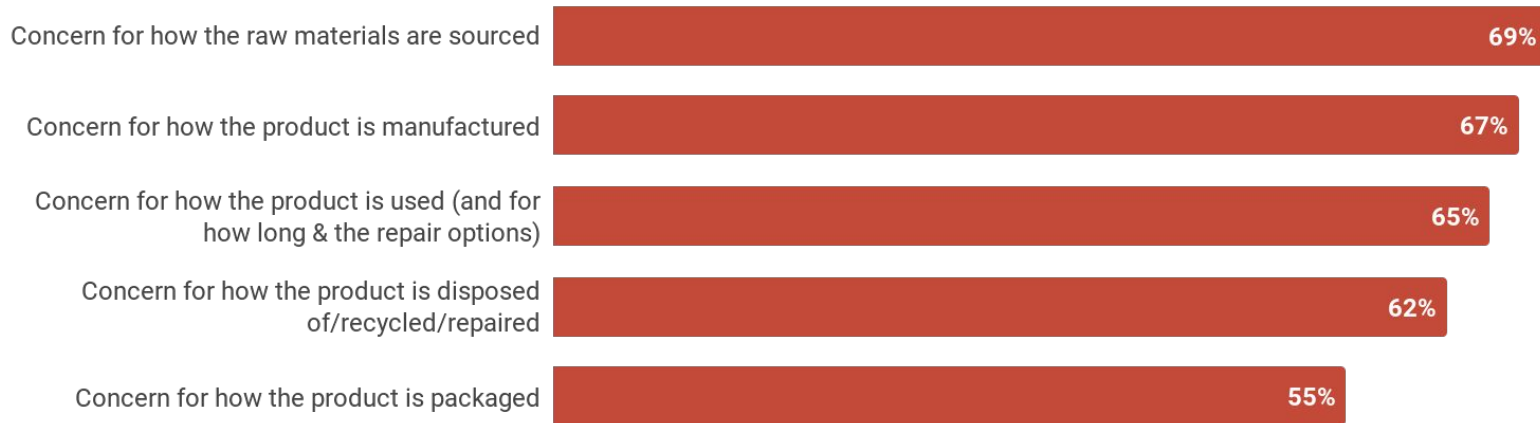
Q22-25: How often, and in what volume, do you purchase the following ____ products for your organization (staff, guides, and other internal needs)?

Base: Adventure tour operators and activity providers, all respondents (n=102)



Sustainability influences product purchasing decisions for almost all respondents (94%)

Survey respondents reported the following top concerns driving sustainable purchasing decisions:



% = percentage of respondents, n=96

Q35: Does sustainability influence your product-purchasing decisions?

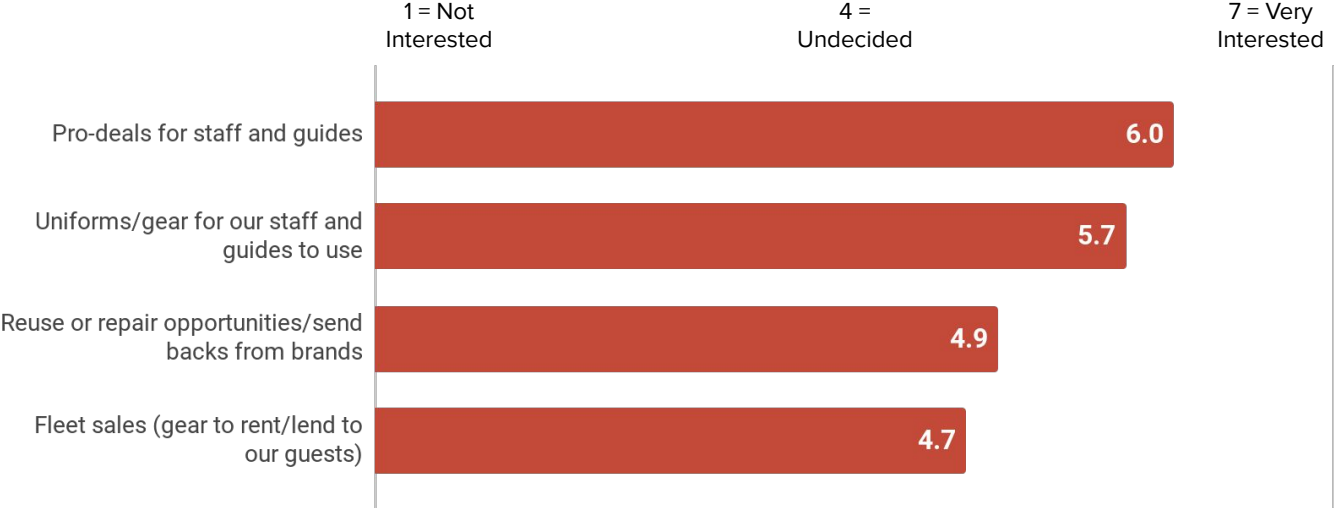
Q36: Please share the reasons why sustainability influences your product-purchasing decisions. Choose all that apply. (n=96)

Base: Adventure tour operators and activity providers, all respondents (n=102)



For their staff and guides, top interests are pro-deals, uniforms and gear

72% of responding operators are “mostly” or “very interested” in pro-deals for their staff and guides, and two-thirds (67%) of respondents are strongly interested in uniforms and gear for their operations.



For a detailed breakdown of gear purchases by product type, purchase frequency & purchase volume, please refer to [Appendix I & II](#) on [pages 25 & 30](#).

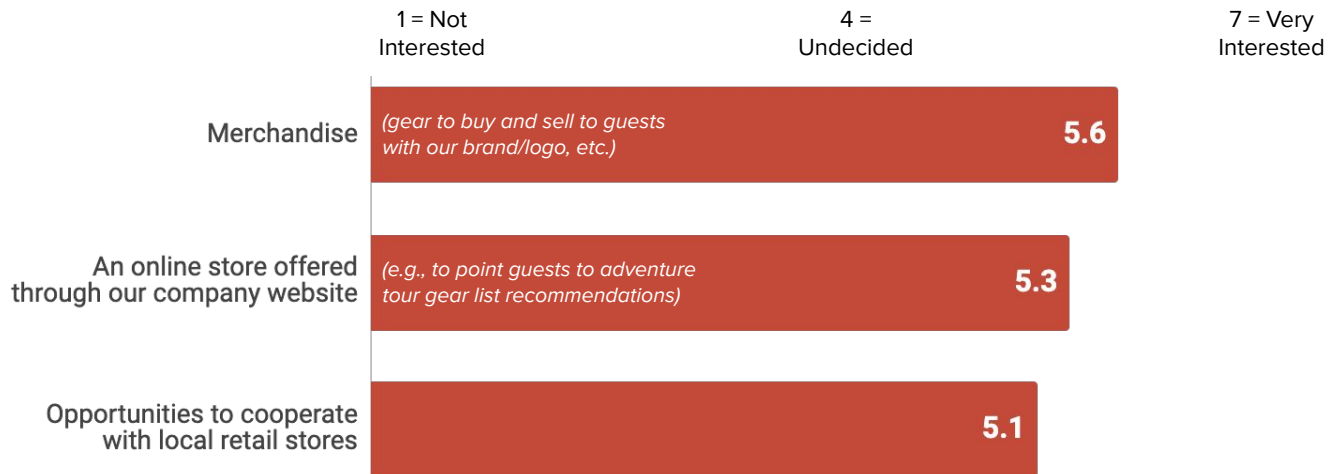
Q12: Please indicate your organization’s future interest (within the next two years) in the following:

Base: Adventure tour operators and activity providers, all respondents (n=102)



For their guests, operators' top interests are merchandise and an online store

55% of responding businesses are “mostly” or “very interested” in both merchandise and an online store through their company website for their guests.



For a detailed breakdown of gear purchases by product type, purchase frequency & purchase volume, please refer to [Appendix I & II](#) on [pages 25 & 30](#).

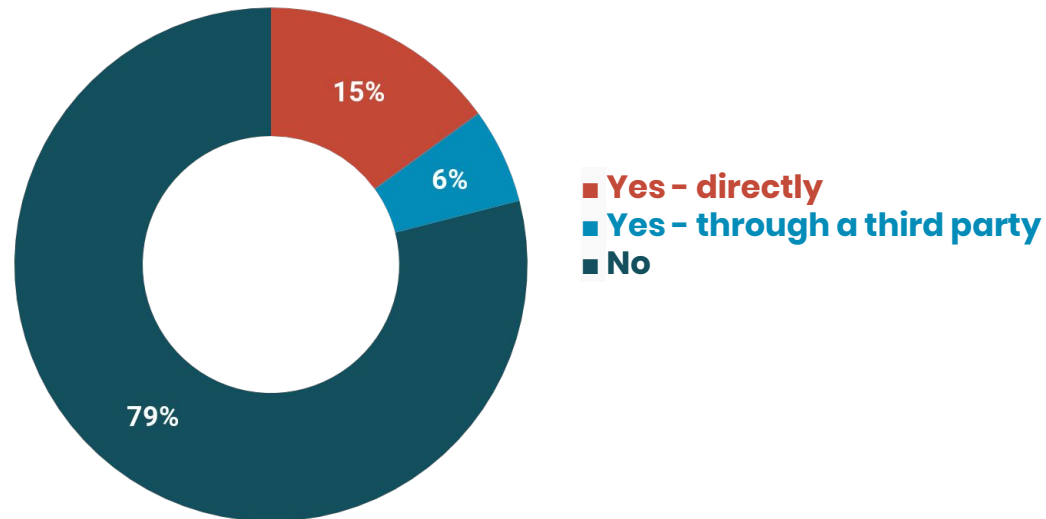
Q12: Please indicate your organization's future interest (within the next two years) in the following for your guests:

Base: Adventure tour operators and activity providers, all respondents (n=102)



Only 21% of operators sell gear to their customers

This represents a major opportunity for an additional revenue stream.



% = percentage of respondents

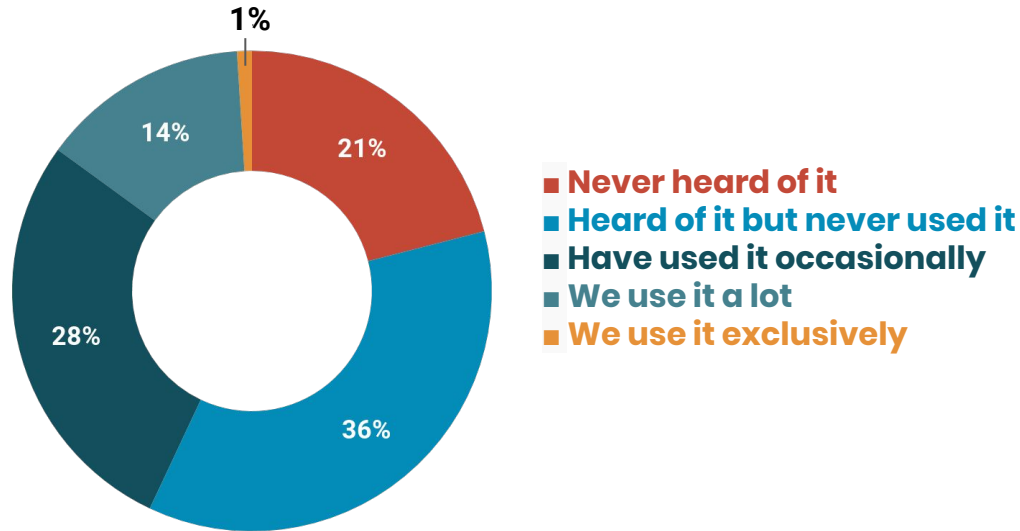
Q33: Do you currently have an arrangement to sell products to your customers?

Base: Adventure tour operators and activity providers, all respondents (n=102)



Gear brands are rarely used exclusively, leaving room for new entrants

Respondents were asked how widely they used popular brands in their operations. The resulting range for the “We use it exclusively” option is 0%-4%.



% = percentage of respondents

Brands assessed:

- The North Face
- Arc'teryx
- Columbia
- Eagle Creek
- ExOfficio
- GRAYL
- Kuhl
- Kathmandu
- Patagonia
- Marmot
- Osprey
- Outdoor Research
- Icebreaker
- Garmin

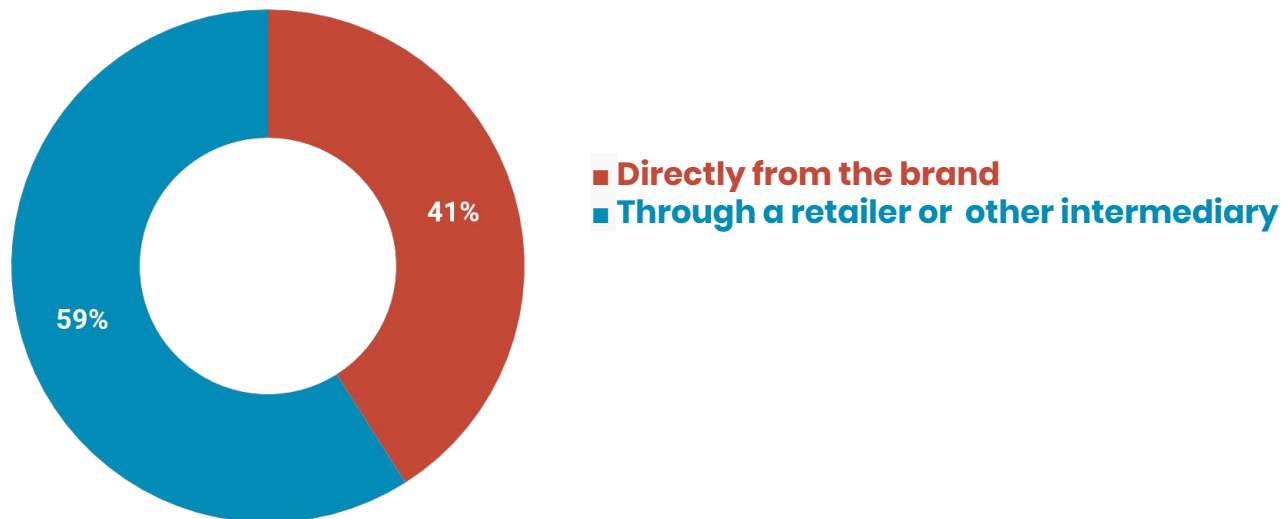
Q39: Do you use the following brands in your operations?

Base: Adventure tour operators and activity providers, all respondents (n=102)



41% of adventure operators surveyed purchase gear directly from the brand

46% receive wholesale pricing on gear purchases, 28% pay retail price minus a discount, 25% pay full retail price.



% = percentage of respondents

Q30: How do you currently buy most of your gear?

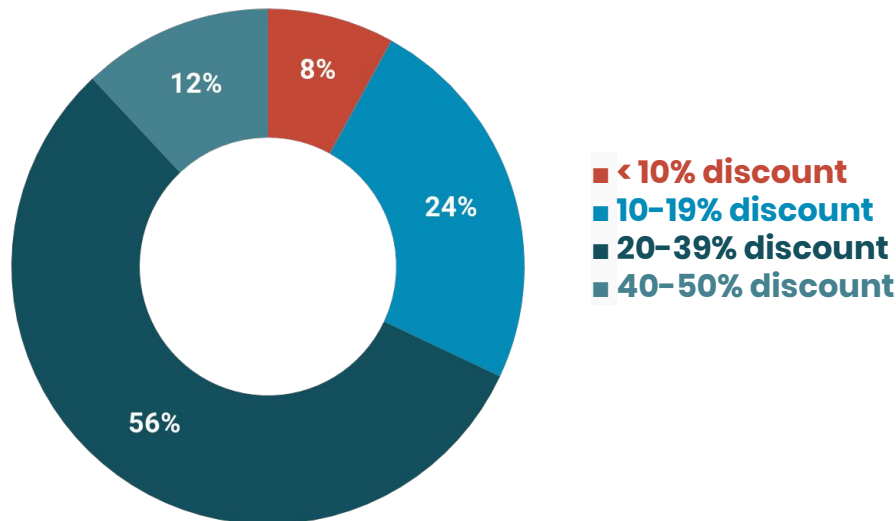
Q31: What type of pricing do you usually receive?

Base: Adventure tour operators and activity providers, all respondents (n=102)



The most common discount received for retail purchases is 20–39%

28% of respondents receive "retail minus a discount" pricing on their gear purchases.



% = percentage of respondents

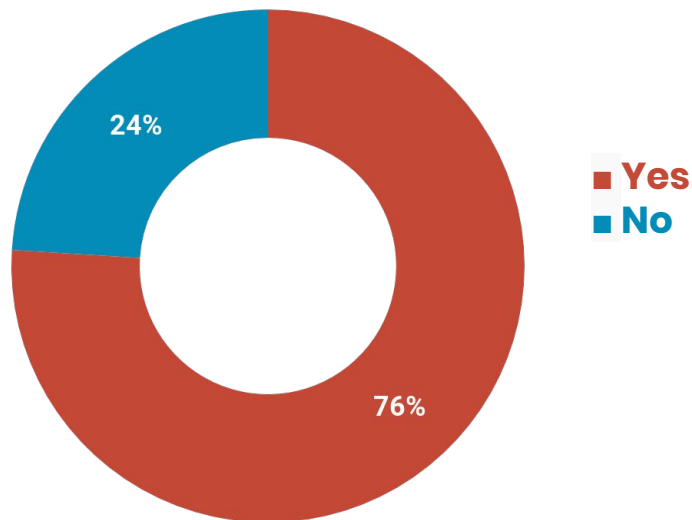
Q31: What type of pricing do you usually receive?

Base: Adventure tour operators and activity providers, all respondents (n=102)



Responding businesses primarily purchase their gear in-country

For those who selected “no,” USA (40%) and Germany (8%) topped the list.



% = percentage of respondents

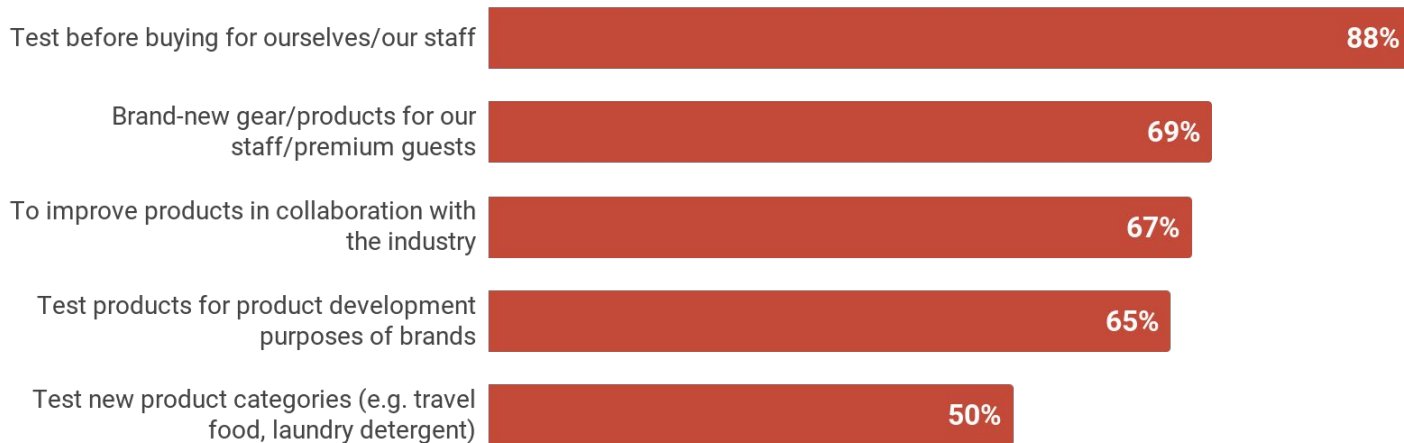
Q32: Do you purchase your gear primarily in-country?

Base: Adventure tour operators and activity providers, all respondents (n=102)



97% are interested in testing new gear and apparel products

When the interested respondents (97%) were asked to share why, they shared the following top reasons for their interest in testing new gear and apparel products:



% = percentage of respondents, n=99

Q37: Are you interested in testing new products?

Q38: Please share all the reasons that would interest you in the testing of new gear and apparel products. Choose all that apply. (n=99)

Base: Adventure tour operators and activity providers, all respondents (n=102)



General Products Purchased For Staff, Guide or Organization Use

GENERAL PRODUCTS	% OF BUSINESSES PURCHASING	AVERAGE PURCHASE FREQUENCY	AVERAGE PURCHASE VOLUME
RESCUE & FIRST AID	78%	Every year	< 50 units
STAFF UNIFORMS	77%	Every year	< 50 units
OUTDOOR APPAREL	72%	Every 2 years	< 50 units
PACKS & BAGS	69%	Every 2 years	< 50 units
WATER FILTRATION/DRINKING	61%	Every 2 years	< 50 units
COMMUNICATION	58%	Every 2 years	< 50 units
NAVIGATION	57%	Every 3-4 years	< 50 units
TOOLS	46%	Every 2 years	< 50 units
HEADLAMPS/LIGHTING	45%	Every 2 years	< 50 units
TREKKING POLES	42%	Every 2 years	< 50 units
PERSONAL FLOTATION DEVICES (PFDs)	34%	Every 2 years	< 50 units
EYEWEAR	28%	Every 2 years	< 50 units



Basecamp Products Purchased For Staff, Guide or Organization Use

BASECAMP PRODUCTS	% OF BUSINESSES PURCHASING	AVERAGE PURCHASE FREQUENCY	AVERAGE PURCHASE VOLUME
COOKING EQUIPMENT	49%	Every 2 years	< 50 units
SLEEPING BAGS & PADS	48%	Every 2 years	< 50 units
SANITARY PRODUCTS	46%	Every year	< 50 units
TENTS	44%	Every 2 years	< 50 units



Summer Products Purchased For Staff, Guide or Organization Use

SUMMER PRODUCTS	% OF BUSINESSES PURCHASING	AVERAGE PURCHASE FREQUENCY	AVERAGE PURCHASE VOLUME
FOOTWEAR	45%	Every 2 years	< 50 units
BIKING GEAR	42%	Every 2 years	< 50 units
CLIMBING EQUIPMENT	26%	Every 2 years	< 50 units
KAYAKS, CANOES, SUPs	24%	Every 3-4 years	< 50 units
NEOPRENE/OUTDOOR BATHING SUITS	20%	Every 2 years	< 50 units
FLY FISHING GEAR	9%	Every 2 years	< 50 units
FOIL/HYDROFOIL	9%	Every 2 years	< 50 units



Winter Products Purchased For Staff, Guide or Organization Use

WINTER PRODUCTS	% OF BUSINESSES PURCHASING	AVERAGE PURCHASE FREQUENCY	AVERAGE PURCHASE VOLUME
FOOTWEAR	23%	Every 2 years	< 50 units
AVALANCHE SAFETY GEAR	17%	Every 2 years	< 50 units
SNOWSHOES	15%	Every 3-4 years	< 50 units
SKI FREERIDE/SKI TOURING	12%	Every 2 years	< 50 units
SNOWBOARD/SPLITBOARD	7%	Every 2 years	< 50 units



General Products Purchased by Inbound Operators to Rent or Lend to Guests (Fleet Gear)

GENERAL PRODUCTS	% OF INBOUND OPERATORS PURCHASING	AVERAGE PURCHASE FREQUENCY	AVERAGE PURCHASE VOLUME
PACKS & BAGS	30%	Every 2 years	< 50 units
TREKKING POLES	30%	Every 2 years	< 50 units
OUTDOOR APPAREL	27%	Every 2 years	< 50 units
RESCUE & FIRST AID	27%	Every year	< 50 units
COMMUNICATION	23%	Every 2 years	< 50 units
HEADLAMPS/LIGHTING	22%	Every 2 years	< 50 units
WATER FILTRATION/DRINKING	20%	Every year	< 50 units
PERSONAL FLOTATION DEVICES (PFDs)	20%	Every 2 years	< 50 units
NAVIGATION	20%	Every 2 years	< 50 units
TOOLS	20%	Every 2 years	< 50 units



Basecamp Products Purchased by Inbound Operators to Rent or Lend to Guests (Fleet Gear)

BASECAMP PRODUCTS	% OF INBOUND OPERATORS PURCHASING	AVERAGE PURCHASE FREQUENCY	AVERAGE PURCHASE VOLUME
TENTS	28%	Every 2 years	< 50 units
SLEEPING BAGS & PADS	27%	Every 2 years	< 50 units
COOKING EQUIPMENT	27%	Every 2 years	< 50 units
SANITARY PRODUCTS	24%	Every year	< 50 units



Summer Products Purchased by Inbound Operators to Rent or Lend to Guests (Fleet Gear)

SUMMER PRODUCTS	% OF INBOUND OPERATORS PURCHASING	AVERAGE PURCHASE FREQUENCY	AVERAGE PURCHASE VOLUME
BIKING GEAR	22%	Every 2 years	< 50 units
FOOTWEAR	22%	Every 2 years	< 50 units
CLIMBING EQUIPMENT	20%	Every 2 years	< 50 units
KAYAKS, CANOES, SUPs	18%	Every 2 years	< 50 units
NEOPRENE/OUTDOOR BATHING SUITS	15%	Every 2 years	< 50 units



Winter Products Purchased by Inbound Operators to Rent or Lend to Guests (Fleet Gear)

WINTER PRODUCTS	% OF INBOUND OPERATORS PURCHASING	AVERAGE PURCHASE FREQUENCY	AVERAGE PURCHASE VOLUME
FOOTWEAR	15%	Every 2 years	< 50 units
SNOWSHOES	15%	Every 3-4 years	< 50 units
AVALANCHE SAFETY GEAR	15%	Every 2 years	< 50 units
SKI FREERIDE/SKI TOURING	9%	Every year	< 50 units
SNOWBOARD/SPLITBOARD	8%	Every 2 years	< 50 units