



2020 Outcome for Active Travel Results

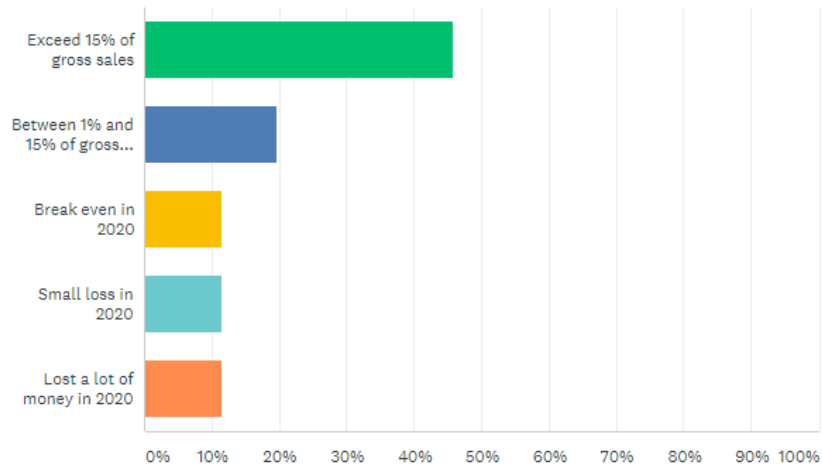
Each year in the fall, America Outdoors asks the members of the community to share their results for the year to allow us to see big picture trends over time. 2020 was certainly unique in many ways, but the results you will see below are quite varied. For most there was a silver lining in the interest level of outdoor activities during the pandemic and for their profitability. For about 12% of members, however, it was a very bad year.

Thank you for contributing to the survey. Your participation helps us map the future of the industry; we also use the results to advocate for you in Washington D.C. We hope the results will be useful to you as you evaluate your 2020 year and make plans for 2021.

As always, thank you for your loyalty. It is a pleasure to serve the outfitter industry.

Estimate the outcome of your 2020 season for your business. Profits will be:

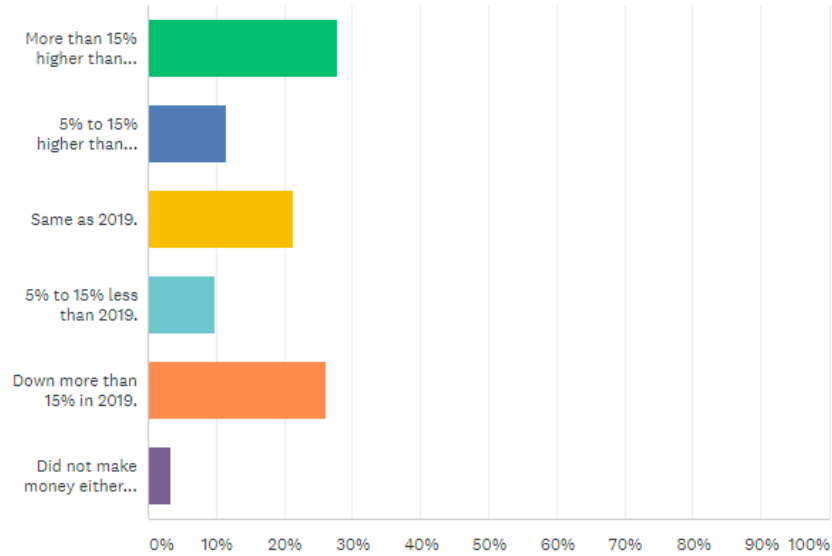
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ANSWER CHOICES	RESPONSES	
▼ Exceed 15% of gross sales	45.90%	28
▼ Between 1% and 15% of gross sales	19.67%	12
▼ Break even in 2020	11.48%	7
▼ Small loss in 2020	11.48%	7
▼ Lost a lot of money in 2020	11.48%	7
TOTAL		61

Compared to 2019 how would you characterize the projected outcome for your business in 2020. Profits will be:

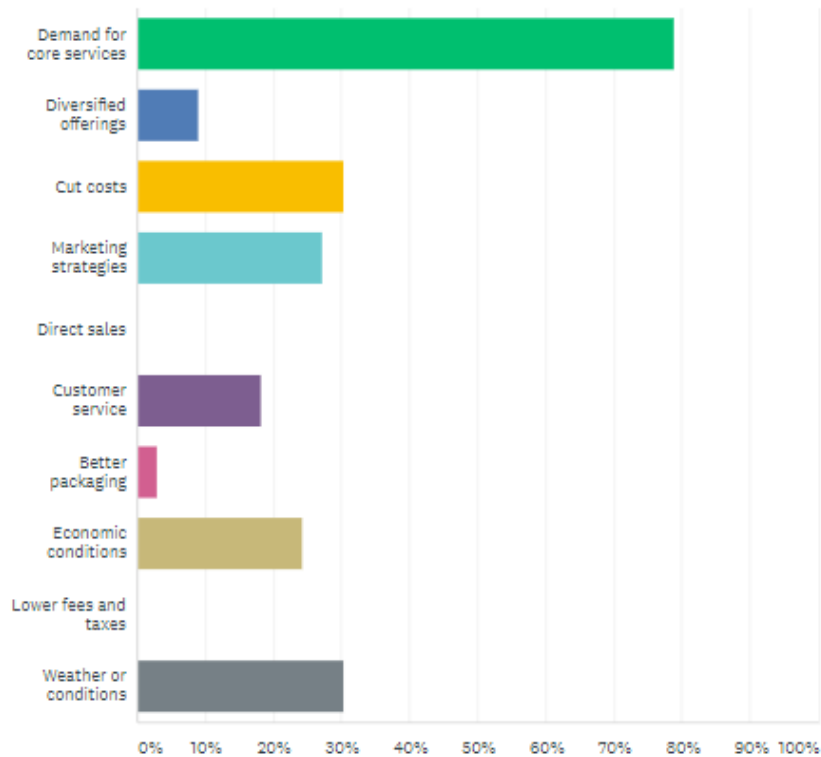
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ANSWER CHOICES	RESPONSES
More than 15% higher than 2019.	27.87% 17
5% to 15% higher than 2019.	11.48% 7
Same as 2019.	21.31% 13
5% to 15% less than 2019.	9.84% 6
Down more than 15% in 2019.	26.23% 16
Did not make money either year.	3.28% 2
TOTAL	61

If your profits were up in 2020, to what do you attribute the improvement?

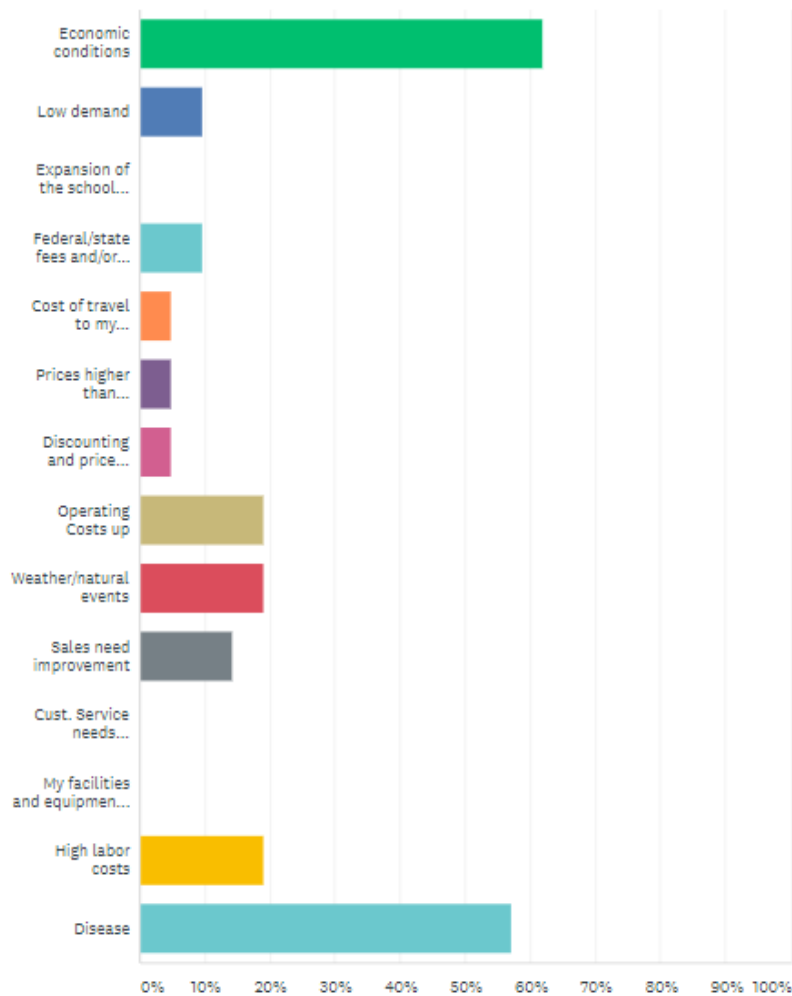
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ANSWER CHOICES	RESPONSES
▼ Demand for core services	78.79% 26
▼ Diversified offerings	9.09% 3
▼ Cut costs	30.30% 10
▼ Marketing strategies	27.27% 9
▼ Direct sales	0.00% 0
▼ Customer service	18.18% 6
▼ Better packaging	3.03% 1
▼ Economic conditions	24.24% 8
▼ Lower fees and taxes	0.00% 0
▼ Weather or conditions	30.30% 10

If your profits were down in 2020, to what do you attribute the decline?

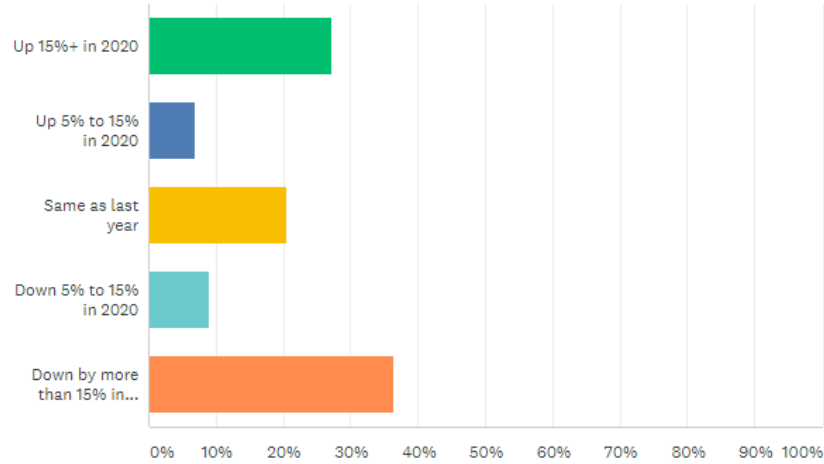
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ANSWER CHOICES	RESPONSES
▼ Economic conditions	61.90% 13
▼ Low demand	9.52% 2
▼ Expansion of the school calendar results in an abbreviated season	0.00% 0
▼ Federal/state fees and/or regulations	9.52% 2
▼ Cost of travel to my destination (air fares or gas prices)	4.76% 1
▼ Prices higher than competition or other leisure activities	4.76% 1
▼ Discounting and price competition	4.76% 1
▼ Operating Costs up	19.05% 4
▼ Weather/natural events	19.05% 4
▼ Sales need improvement	14.29% 3
▼ Cust. Service needs improvement	0.00% 0
▼ My facilities and equipment need updating	0.00% 0
▼ High labor costs	19.05% 4
▼ Disease	57.14% 12

[Whitewater rafting or paddling day trips] Compared to 2019 what is projected outcome for this segment of business in 2020, in revenue?

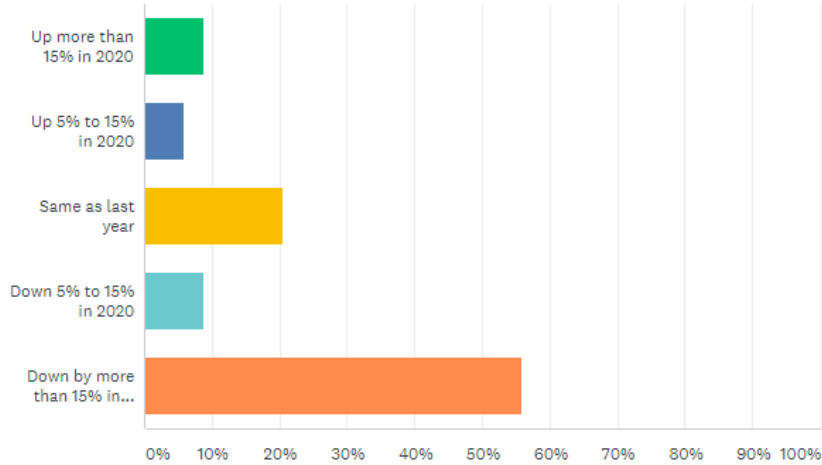
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ANSWER CHOICES	RESPONSES
▼ Up 15%+ in 2020	27.27% 12
▼ Up 5% to 15% in 2020	6.82% 3
▼ Same as last year	20.45% 9
▼ Down 5% to 15% in 2020	9.09% 4
▼ Down by more than 15% in 2020	36.36% 16
TOTAL	44

[Whitewater rafting /paddling overnight trip] Compared to 2019 what is the outcome for this segment of your business in 2020, in revenue?

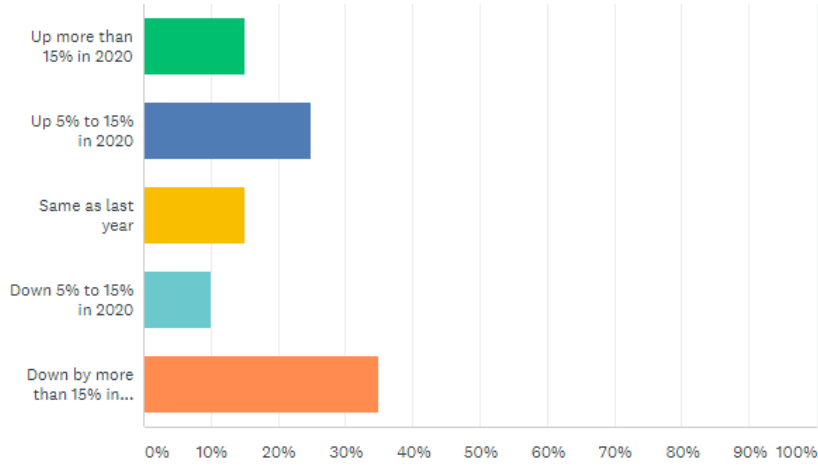
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ANSWER CHOICES	RESPONSES
▼ Up more than 15% in 2020	8.82% 3
▼ Up 5% to 15% in 2020	5.88% 2
▼ Same as last year	20.59% 7
▼ Down 5% to 15% in 2020	8.82% 3
▼ Down by more than 15% in 2020	55.88% 19
TOTAL	34

[Land-based adventure tours] Compared to 2019 what is the outcome for this segment of your business in 2020, in revenue?

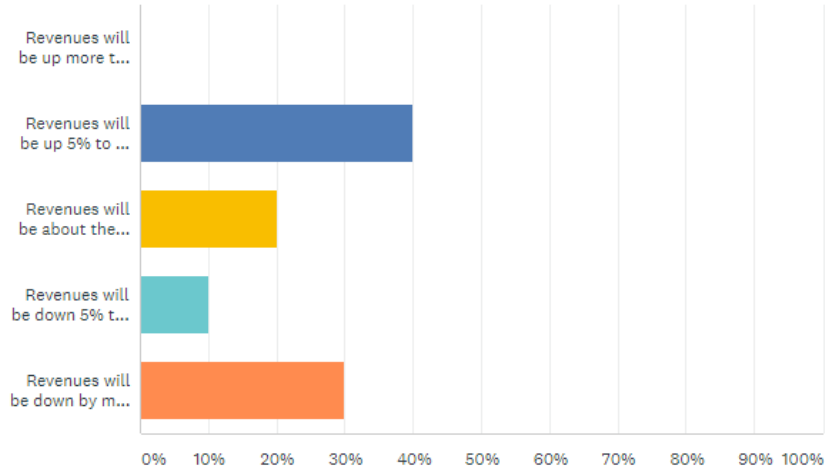
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ANSWER CHOICES	RESPONSES
▼ Up more than 15% in 2020	15.00% 3
▼ Up 5% to 15% in 2020	25.00% 5
▼ Same as last year	15.00% 3
▼ Down 5% to 15% in 2020	10.00% 2
▼ Down by more than 15% in 2020	35.00% 7
TOTAL	20

[Guest Ranch] Compared to 2019 what is the outcome for this segment of your business in 2020, in revenue?

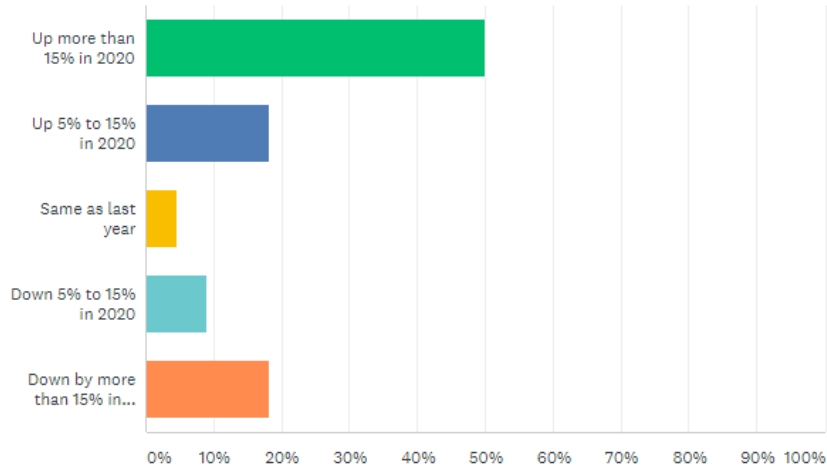
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ANSWER CHOICES	RESPONSES
Revenues will be up more than 15% in 2020	0.00% 0
Revenues will be up 5% to 15% in 2020	40.00% 4
Revenues will be about the same as last year	20.00% 2
Revenues will be down 5% to 15% in 2020	10.00% 1
Revenues will be down by more than 15% in 2020	30.00% 3
TOTAL	10

[Cabin Rentals & Lodging] Compared to 2019 what is the outcome for this segment of your business in 2020, in revenue?

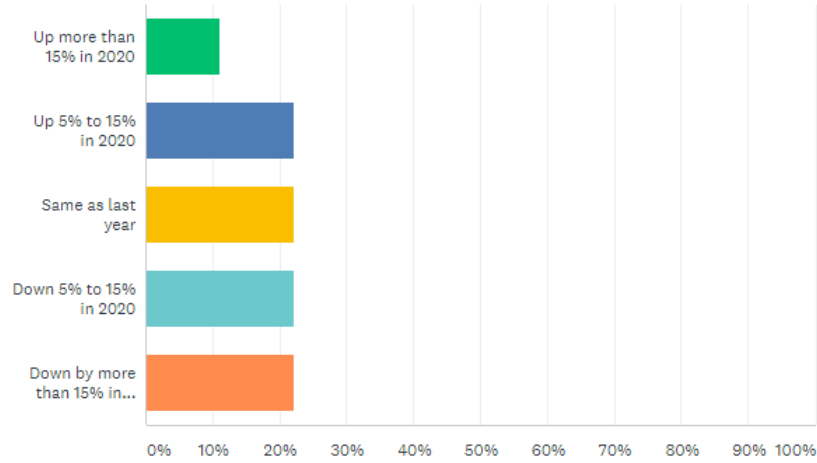
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ANSWER CHOICES	RESPONSES
▼ Up more than 15% in 2020	50.00% 11
▼ Up 5% to 15% in 2020	18.18% 4
▼ Same as last year	4.55% 1
▼ Down 5% to 15% in 2020	9.09% 2
▼ Down by more than 15% in 2020	18.18% 4
TOTAL	22

[Canopy tours, zip lines or other aerial adventures] how were your revenues in 2020 compared to 2019?

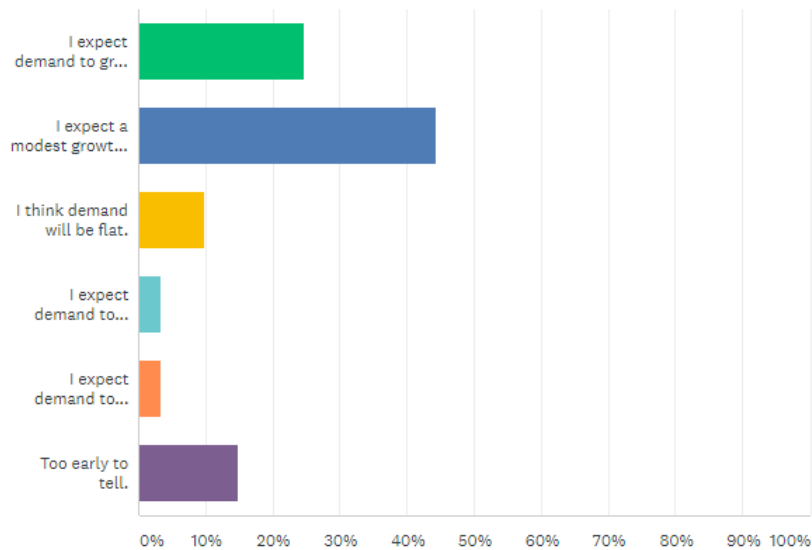
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ANSWER CHOICES	RESPONSES
▼ Up more than 15% in 2020	11.11% 1
▼ Up 5% to 15% in 2020	22.22% 2
▼ Same as last year	22.22% 2
▼ Down 5% to 15% in 2020	22.22% 2
▼ Down by more than 15% in 2020	22.22% 2
TOTAL	9

How would you characterize future demand for your outfitting services or active travel business for 2021?

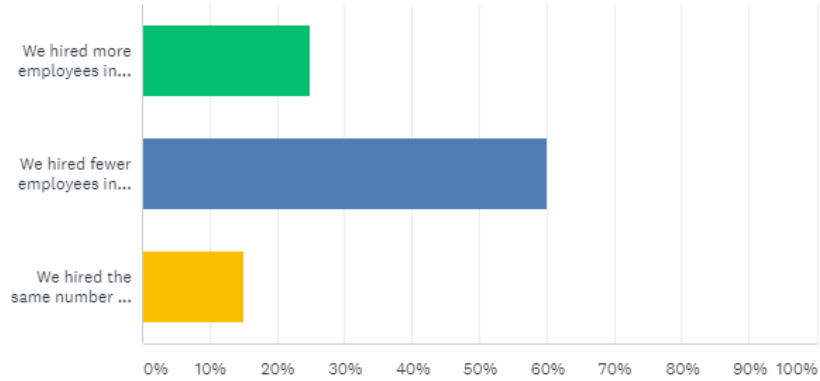
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ANSWER CHOICES	RESPONSES	
▼ I expect demand to grow significantly.	24.59%	15
▼ I expect a modest growth in demand.	44.26%	27
▼ I think demand will be flat.	9.84%	6
▼ I expect demand to decline slightly.	3.28%	2
▼ I expect demand to decline significantly.	3.28%	2
▼ Too early to tell.	14.75%	9
TOTAL		61

How did your hiring compare to the previous year?

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ANSWER CHOICES	RESPONSES
▼ We hired more employees in 2020	25.00% 15
▼ We hired fewer employees in 2020	60.00% 36
▼ We hired the same number of employees in 2020	15.00% 9
TOTAL	60