



**AMERICA**OUTDOORS

# **2022 OUTFITTER TRENDS REPORT**





# EXECUTIVE DIRECTOR'S STATEMENT



Outfitters are used to navigating complex obstacles, and 2022 turned out to have many. Some were easy to anticipate, such as continuing delays in the supply chain. Most were macro developments that outfitters had limited control over, such as rampant inflation, staffing shortages, or adverse operating area conditions from fire or drought. Nevertheless, the results of the America Outdoors 2022 outfitter trends survey show mostly positive outcomes for the 2022 season, with 82% of members reporting profits.

The America Outdoors team compiled responses from 141 outfitter companies, including 82 America Outdoors members and 59 non-member companies. The results show a dip in profits compared to 2021, but overall, 2022 was more profitable than the recent years before the pandemic.

As you peruse the following charts to learn how different sectors performed in 2022, you will find the results bifurcated with a focus on AO member responses. Blue charts are AO members' answers, and green charts are non-member answers.



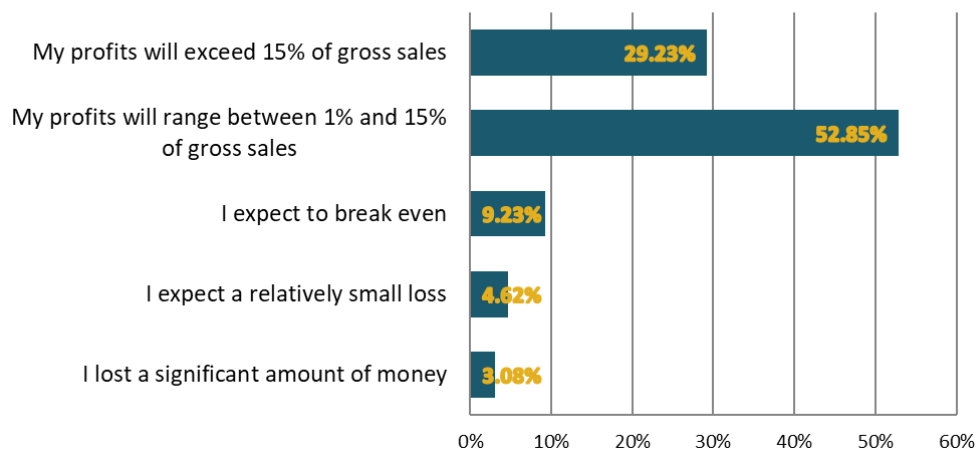
**AARON BANNON**

Executive Director  
America Outdoors

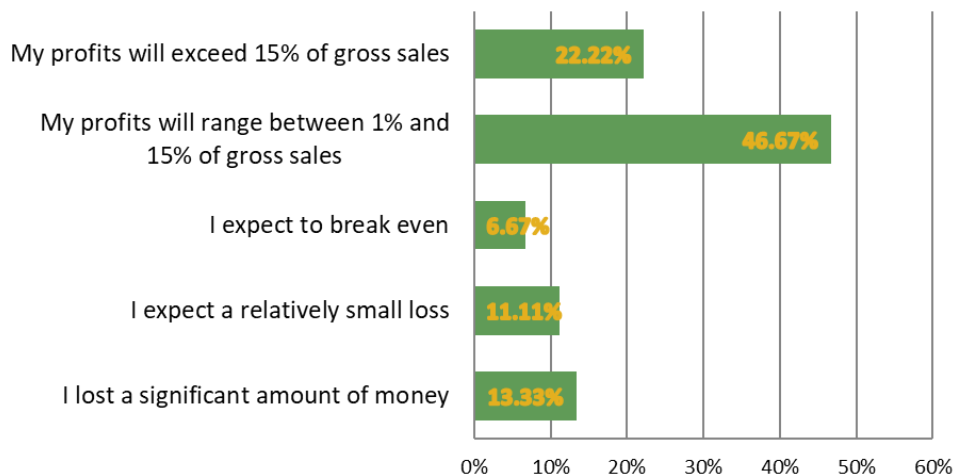
# INDUSTRY OVERVIEW



Estimate the outcome of your 2022 season for your business.



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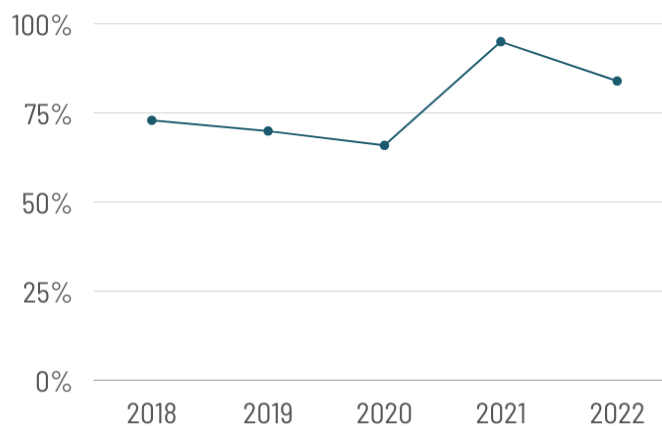




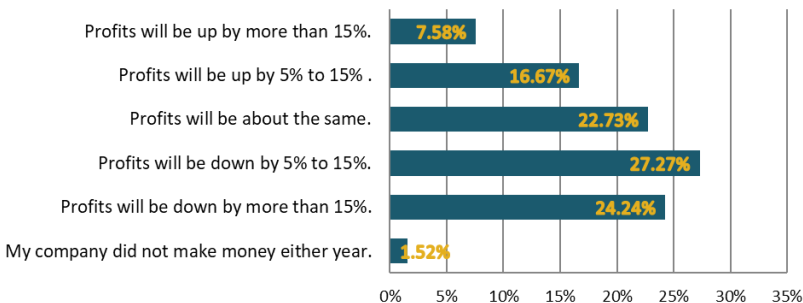
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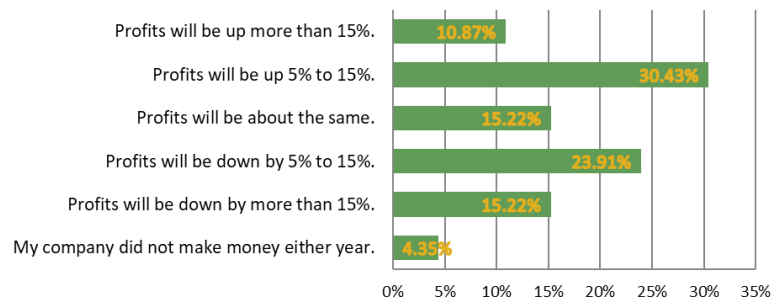
Chart shows % of members that reported profits.  
YOY Comparison 2018-2022



Compared to 2021 how would you characterize the projected outcome for your business in 2022?



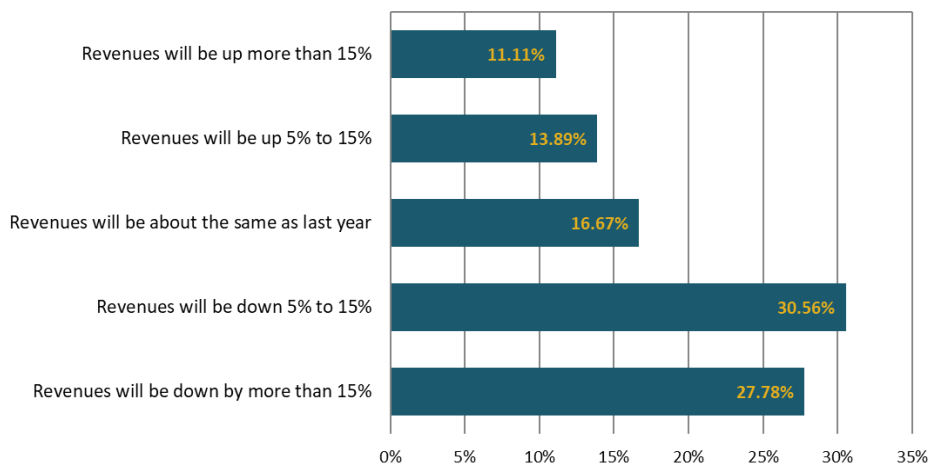
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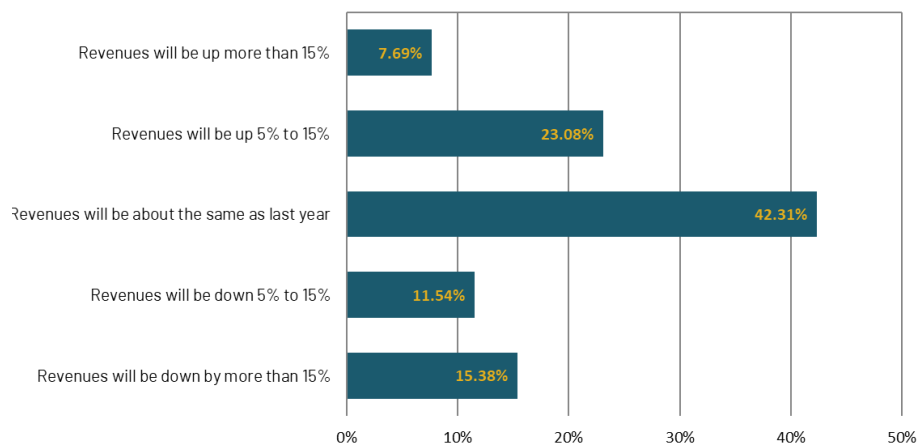


# LINE OF SERVICE REPORTS

If you offer whitewater rafting or paddling day trips, compared to 2021 what is the projected outcome for this segment of your outfitting business in 2022?



If you offer whitewater rafting or paddling overnight trips, compared to 2021 what is the projected outcome for this segment of your outfitting business in 2022?

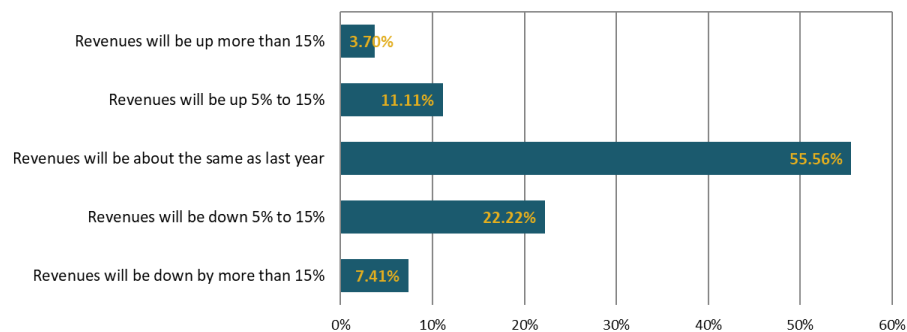




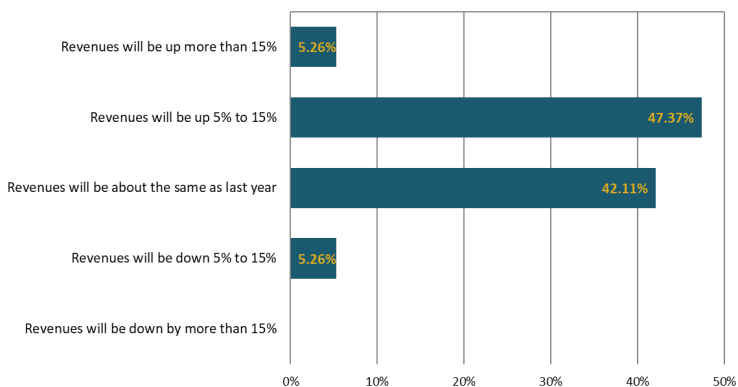
# LINES OF SERVICE REPORTS



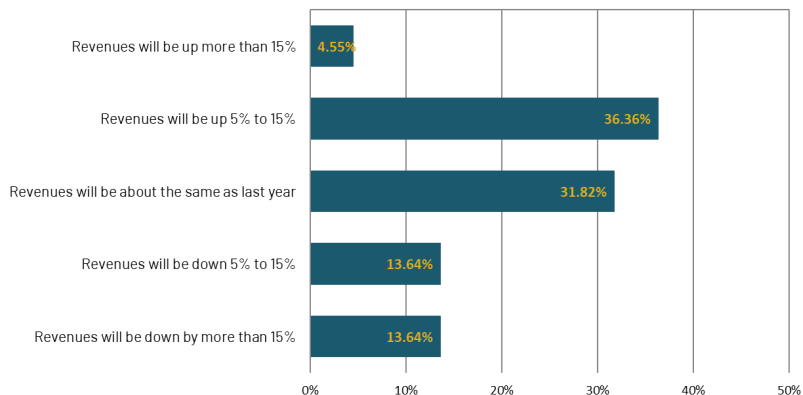
If you offer land-based adventure tours (other than aerial, rafting or paddling), compared to 2021 what is the projected outcome for this segment of your outfitting business in 2022?



If you offer guest ranch vacations, what is the projected outcome of your 2022 season compared to 2021?



If you offer cabin rentals or other lodging (other than guest ranch), what is the projected outcome of your 2022 season compared to 2021?





A photograph of two people riding bicycles away from the camera on a dirt path through a forest. The person on the left is wearing a green backpack and a black beanie. The person on the right is wearing a blue backpack and a red beanie. The trees are tall and thin, and the ground is covered in dry leaves and ferns.

# INDUSTRY COMMENTS

**What are the most important trends or issues you see in the industry that will grow or restrain business over the next five years?**

"Increasing climate pressures are a huge concern for rafting businesses with less water, and more frequent fires."

"Wage pressures will push many medium-sized outfitters to either downsize significantly to a more manageable family-sized business or to consolidate with other medium sized outfitters."

"Employee housing is a big problem."

"If we don't have a recession, it will continue to be staffing. If we do have a recession, it will be gaining clients with enough discretionary income."

"The uncertainty over the federal minimum wage is hampering our ability to make a larger profit."

"Cost of living and food costs rising seem to be posing a challenge."