

Segmenting the Adventure Travel Market by Activities: An Extension of Sung, Morrison, and O’Leary

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Abstract:

The growth of the adventure travel industry is matched by the increased variety and types of activities available to consumers. Empirical research specific to adventure tourism and, more directly, on consumers (adventure travelers) has been limited. This study attempts to segment the adventure travel market based on activities as key products. Data were collected from adventure travel consumers (N=1037) through on-site surveys at adventure travel tradeshow in three major metropolitan locations. The test statistics suggest the inclusion of twenty seven activities in the adventure travel category. Factor analysis identified four distinctive groupings of adventure travel activities labeled as: soft nature, cerebral pursuits, question marks, and expedition discovery. These research findings provide an analysis based on a consumer perspective, complementing a supply side perspective.

Introduction:

Tourism is already recognized as a powerful industry, one with the influence to transform economies around the world (Goeldner & Ritchie, 2003; Gartner, 1996; WTO, 2004). Within the tourism industry, adventure tourism has been acknowledged as a growing sector (TIA, 1997; Loverseed, 1997; Ewert, 1989; Sung, Morrison, & O'Leary, 1997). Determining the size and scope of the adventure travel market has eluded both the industry and academics due to lack of empirical research and a general consensus regarding a definition of adventure tourism. Although no one definition of adventure tourism rises above the rest, there are certain activities that clearly fit within the adventure travel category (Ewert & Hollenhorst, 1989; Sung, Morrison, & O'Leary, 1997; Specialty Travel Index, 2005).

However, two concerns arise from the existing activities proposed to be associated with the adventure travel category. First, activities said to be typical of adventure travel have been developed from the outdoor adventure recreation literature (Carpenter & Priest, 1989; Darst & Armstrong, 1980; Mitchell, 1983; Sung, Morrison, & O'Leary, 1997) where physical risk is frequently identified as a defining characteristic of adventure (Ewert & Hollenhorst, 1997; Martin & Priest, 1986). Second, empirical tests of these activities have focused on the supply-side (i.e., providers of adventure travel products and services) perspective, with suppliers determining which activities belong in the adventure travel category (Sung et al., 2000).

Adventure does involve risk, however, the adventure literature has been limited to studies that primarily focus on physical risk, neglecting the subjective nature of adventure. Recognizing that risk has psychological and social dimensions (Brooker 1983; Cheron & Ritchie 1982; Jacoby & Kaplan, 1972) is important to understanding adventure travel consumers. Weber (2001) argued adventure tourism is a function of a person's exposure to the unknown that poses risk and challenge. Although, adventure tourism is fundamentally about active recreation participation, the individual's perception of the situation and of themselves highlights the fact that adventure is subjective and individually unique (Walle, 1997; Cater, 2000).

This subjectivity should be given consideration in referring to adventure travel products. Considering the number of types of adventure tourism experiences available beyond those solely related to physical risk, is important to understand the perspective of adventure travel consumers. Providers of adventure travel products could benefit in recognizing there are different classes of adventure tourists, from those that seek activities that offer physical challenge and risk to those looking for adventures that are intellectual, spiritual, or emotional. Adventure travel is associated with specific activities as a primary motive for trips (Hall & Weiler, 1992; Sung et al., 1997). Therefore, using adventure travel activities as a segmentation base to investigating the individual traveler perspective should allow suppliers of adventure travel products and services to be focused in marketing, sales, and product development efforts, as well as offer the ability to recognize market opportunities and identify potential clients. Combined, these efforts offer a definite competitive advantage.

Market Segmentation Overview:

Segmentation is predicted on the premise that every market consists of groups or segments with somewhat different wants and needs (Kotler, 1999). In the tourism literature, market segmentation has been shown to be a useful tool (Bryant & Morrison, 1980; Cha, McCleary, & Uysal, 1995; Jurowski, Uysal, and Noe, 1993; Loker & Perdue, 1992; Mo, Havitz,

& Howard, 1994; Mudambi & Baum, 1997; Sung, Morrison, & O’Leary, 2000). According to Kotler (2000), segmentation is at the heart of modern marketing and traditionally divides the market according to demographics (age, sex, race, etc.), geography (where tourists come from), and psychographics (personality and lifestyle) (Table 1). There are three basic ideas behind market segmentation. First, market segmentation assumes segment heterogeneity. Second, business can introduce new products, modify existing ones, or change the product mix to capture product heterogeneity. Last, business will do so if the expected return exceeds the cost of any shift in production modification.

Segmentation is only useful if it serves some tactical or strategic purpose that assists an organization to better match its products with its target markets (Mitchell & Wilson, 1998). It is proposed that combining the provider and consumer perspectives will allow suppliers of adventure travel products and services to tailor their offerings the match consumer needs. Activities-based segmentation adopts a phenomenological approach to segmenting a market and has proved useful in a number of studies of tourist market segments including; culture tourists (McKercher, Ho, du Cros, & So-Ming, 2002), nature tourists (Lang, & O’Leary, 1997), ecotourists (Wight, 1996), adventure tourists (Sung, Morrison, & O’Leary, 1997), and the visiting friends and relatives (VFR) tourist market (Moscardo, Pearce, Morrison, Green, & O’Leary, 2000) (Table 2). Activity-based segmentation is predicted based on the assumption that different tourism products appeal to different types of tourists and defines groups of tourists by their activity preferences, behavior, or visitation patterns. Important differences among travelers may unnoticed unless a conscious effort is made to separate groups by key variables. As is the case with any consumer group, much is to be learned if the group is considered in segments rather than as being homogeneous. Thus, it is predicted that the adventure tourism market is not homogeneous and that different types of activities will appeal to different types of adventure tourists.

<insert Table 1>

<insert Table 2>

Study Purpose:

Activity is a key product in adventure travel experiences. Therefore, analyzing activities associated with the adventure travel category should offer more direct marketing efforts. Linking activity segments to the wide range of tourism products available allows consumers to be more effectively targeted. The objective of this research was to extend the research of the supply side research (Sung, Morrison, & O’Leary, 2000) to include consumers’. Thus, this study attempted to identify group characteristics or activity sets based on the consumers’ perspectives and then to explain the factors associated with these characteristics. The following questions were addressed:

- Do consumers associate a specific group of activities with adventure travel?
- Are there sub-groupings of these activities or activity sets, which may have practical value for segmenting the adventure travel market?

In addition, it is expected that these different activity sets could represent different market segments. As Loverseed (1997) suggested the profile of adventure travelers varies according to the activities pursued. Finally, this research seeks to enhance the literature and the state of current thought within the area of adventure tourism research by including a consumer's perspective.

Methods:

The data collected for this study were collected in January 2005 – April 2005. Self-administered surveys of consumers attending adventure travel trade shows held in three major cities: Chicago, New York, and Washington, D.C. Attendees or “consumers” provided information for this analysis (N=1,037). The instrument consisted of 27 questions developed from previous adventure travel research with additional scales added to measure changes in the adventure travel industry. The survey instrument was reviewed by the survey co-sponsor, Adventure Travel Trade Association (ATTA), and comments and changes were incorporated.

Two sampling techniques were employed, systematic and convenience. A randomized sample was collected at the Chicago adventure show using an intercept survey collection method. During the weekend, the pre-allotted survey supply was exhausted yielding 229 useable responses, a number sufficiently large to support the statistical methods employed in this research. A convenience sample was collected four other shows, at all other trade shows, where participants were selected based on their availability and/or accessibility. At the Chicago show, participants were approached by a researcher and asked to complete a survey. The consumer samplings were limited to trade show attendees, which the team viewed as strength, in that it drew from a sample of people qualified as those interested in adventure or a sample reflective of those likely to participate in adventure travel. Comparisons of the two sampling group types, random and convenience appear to be similar enough to make generalizations.

Developed from the literature (Ewert, 1989; Hall, 1992; Specialty Travel Index, 1992), Sung et al. suggested 48 adventure travel activities are included in the adventure travel category (Table 3). Emerging trends and changes in the travel industry were identified in a content analysis of current adventure travel literature and adventure industry publications (The Travel Institute, 2005, Specialty Travel Index, 2005). As a result of the content analysis, the list of activities proposed by Sung et al. (2000) was modified (Table 4), resulting in 27 activities proposed to fit within the adventure travel concept.

<insert table 3>

<insert table 4>

Results:

The validity of the modifications to the activities included in the adventure travel category was tested and inclusion of all 27 revised activities was supported. Level of agreement with the inclusion of each activities in the adventure travel concept was measured using a five-point scale of level of agreement (1=strongly agree to 5=strongly disagree). Mean scores and standard deviations of the activities in terms of level of agreement with their inclusion in adventure travel suggest some activities were more strongly linked to adventure travel than others (Table 5). Mountain climbing showed the highest (Mean=1.65, SD .728) and hunting the lowest level of agreement (Mean=2.75, SD 1.32). The result of a one sample t-test on the lowest

rated activity, hunting, was significantly less than 3, the mid-point of the agreement scale ($t(956) = -5.8; p < .001$) (Sirkin, 1995). This shows that all activities were rated as belonging to the adventure travel category by consumers.

Next, assessing the relationships among items using factor analysis allowed items to be grouped together into coherent and meaningful categories (Gartner, 1996). The goal of research using factor analysis is to reduce a large number of variables to a smaller number of factors, to concisely describe and understand the relationships among observed variables, or to test a theory about underlying processes. Considering research specific to adventure tourism is still in its infancy, exploratory factor analysis was applied to describe and summarize data by grouping together items into variables. Exploratory factor analysis is usually performed in the early stages of research, when it provides a tool for consolidating variables and for generating hypotheses about underlying processes (Tabachnick & Fidell, 1989).

The first step of the factor analysis was to determine the appropriate number of factors by looking at the scree plot showing the eigenvalues of all possible factors (SPSS, 2001; Vogt, 1993). Four factors emerged that had an eigenvalue of 1.0 or above. In order to replicate Sung et al. (1997), the varimax rotation method was used in an effort to maximize the variance among factors (Table 6). Following Sung et al. (1997), the decision rule for items to load on a particular factor was .4 or above on a particular factor with a maximum loading of .981 on the other factors.

The previous study of *providers'* of adventure travel products and services (Sung, et al., 2000) uncovered six distinctive activity set factors; *soft nature, risk equipped, questions marks, hard challenge, rugged nature, and winter snow*. In contrast, *consumers* here identified four distinctive activity set factors, two which duplicated Sung, et al., (2000), *soft nature* and *question marks*; and two new activity sets, termed *expedition-discovery* and *cerebral pursuit*. A summary of the results of the factor analysis with the eigenvalues for the four rotated factor patterns and internal reliability of the factors represented by Cronbach's Alpha coefficients ($0 < \text{coefficient} < 1$) is presented in Table 7.

<insert table 5>

<insert table 6>

<insert table 7>

Implications and Conclusion

Gartner (1998) offers an excellent analogy to describe marketing as “the process of forming a bridge between product and consumer” (pg. 238). Market segmentation involves identifying and profiling distinct groups of buyers who differ in their needs and preferences. Segmenting adventure travel activities allows adventure travel providers to successfully bridge consumers and the product of interest. An effective market strategy will determine the target markets will develop strategies to reach those markets.

Industry estimates suggest the majority of adventure travel providers are small to medium-sized businesses, making focused and effective marketing strategies should provide a more effective use of their marketing resources. Therefore, a comprehensive understanding of activity sets allows adventure travel marketers to develop messages and communicate effectively to the groups most interested in the product. Adventure tourism organizations should recognize

that there are different types of adventure tourists, from occasional participant in a certain activity to those that seek adventure in every movement.

Traditionally, marketing and communication in the adventure tourism industry has emphasized physically challenging activities in natural settings. As indicated in the activity set *soft nature* this study confirmed consumers agree with providers (Sung et al., 2000) on the activities that fit in this classification. Marketing programs have already been developed for this target group and have proven successful.

Based on the evolution of the new activity set *expedition-discovery* it is clear that programs like The Amazing Race, Survivor and National Geographic Channel have played a role in creating a market for this category. Therefore, adventure tourism providers need to be cognizant of this and utilize it to their advantage from a marketing perspective. Promotional partnerships capitalizing on the popularity of adventure and discovery media would benefit organizations seeking to enhance or expand this segment of the market.

The most significant finding in this study was the emergence of the *cerebral pursuit* activity set. This newly identified group consists of areas of adventure that don't necessarily involve high levels of risk, challenge, and physical fitness typically associated with adventure tourism, and it is not identified under the traditional definition (Sung, et al., 1997; Addison, 1999; Muller & Cleaver, 2000; Smith & Jenner, 1999; Priest & Gass, 2005; Millington, Locke & Locke, 2001; Grant, 2001). Emergence of adventure activities such as visiting historical sites, educational programs, cultural and environmentally sustainable activities broadens the scope of what is associated with adventure. This new scope includes an entirely new group of potential consumers that had previously been excluded.

Certain settings and activities are strongly associated with adventure experiences because they facilitate emotions, thoughts, and sensations inherently linked to adventure, however, the range of activities and settings that facilitate or encompass the adventure tourism experience are infinite due to the subjective nature of adventure. Consumers are becoming savvier and better able to identify their needs and seek activities that achieve their goals. Adventure industry providers' seeking a competitive edge, will create and market a board range of products and services to attract a variety of tourists. Refining current products based on consumers' perceptions will allow for more effective target marketing.

The implications discussed in this study are intended to be illustrative rather than exhaustive; specific strategic implications appropriate to a particular destination will vary according to how the destination is perceived ad what its market offering are. Travelers have more and more choices available to select from, and are more sophisticated in their behaviors. Therefore it is becoming imperative to continually explore the preferences of the target market to gain a competitive edge.

Table 1
Bases for Market Segmentation

Geographic	Demographic	Socioeconomic	Psychographic	Behavior Patterns	Consumption Patterns	Consumer Predispositions
Political boundaries	Sex	Occupation	Lifestyle	Type of store shopped	Frequency of use-heavy vs. light usage, unit size	Product knowledge
Climate	Age	Education	Activities	Time of purchases, impulse or brand request	Occasion	Benefits sought
Population boundaries	Marital Status	Income		Number of units purchased	Loyalty to brand	Consumer problems
	Family size	Social class		Shopping frequency	Ownership of other products	
	Family life cycle			Media habits		

Adapted from Kotler, P. (2003). Marketing Management 11th Edition: Prentice-Hall: New York.

Table 2
Activity Segmentation Literature

Author (date)	Date	Sample	Segmentation variable	Name of Segment
McKercher, Ho, du Cros, & So-Ming	2002	Cultural tourists from six major source markets who were departing Hong Kong	Activities-based - cultural market	<ul style="list-style-type: none"> ▪ Cultural Generalists ▪ Icon Culturalist ▪ Chinese Heritage Culturalist ▪ Tsim Sha Tsui Nodal Culturist ▪ Colonial Culturist ▪ Sino-Colonial Culturalist
Sung, Morrison, & O'Leary	2000	North American adventure travel providers	Activities-based - adventure travel market	<ul style="list-style-type: none"> ▪ Soft nature ▪ Risk equipped ▪ Question Marks ▪ Hard challenge ▪ Rugged nature ▪ Winter snow
Moscardo, Pearce, Morrison, Green, & O'Leary	2000	VFR tourists visiting Queensland Australia	Activities based - visiting friends and relatives (VFR) market	<ul style="list-style-type: none"> ▪ Beach relaxation ▪ Active nature lovers ▪ Inactive ▪ Active beach resort
Lang, & O'Leary	1997	Australian international nature travelers	Motivation/activity participation/destination preference	<ul style="list-style-type: none"> ▪ Physical challenge seekers ▪ Family vacationers ▪ Culture and entertainment seekers ▪ Nature tourists ▪ Escape and relax vacationers ▪ Indifferent travelers
Wight	1996	North American Ecotourists	Motivation/activity preferences/trip characteristics	<ul style="list-style-type: none"> ▪ Experienced ecotourism travelers ▪ General consumers interested in ecotourism
Jeffrey & Xie	1995	United Kingdom based visitors to China	Holiday activities	<ul style="list-style-type: none"> ▪ Eight clusters

Table 3
Outdoor Adventure Travel Activities¹

Arctic Trips	Backpacking
Ballooning	Bicycling
Bird-watching	Bungy Jumping
Camping	Canoeing
Diving	Dogsledding
Fishing	Four Wheel Drive Trips
Hang-gliding	Hiking
Horseback Riding	Hunting
Jungle Exploring	Kayaking
Motorcycling	Mountain Biking
Mountain Climbing	Nature Trips
Orienteering	Paragliding
Rafting	Rappelling
Rogaining	Safaris
Sailing	Snorkeling
Skiing	Skydiving
Soaring	Snowmobiling
Survival and Wilderness Training	Snowshoeing
Spelunking	Trekking
Walking Tours	Windsurfing

¹Sung et al. (1997)

Table 4
Outdoor Adventure Travel Activities¹

Archaeological expeditions	Hiking
Backpacking	Horseback riding
Bicycling	Hunting
Bird watching	Kayaking
Camping	Orienteering
Canoeing	Rafting
Climbing - Mountain-Rock	Research expeditions
Cultural activities	Safaris
Diving-scuba	Sailing
Ecotourism	Skiing
Educational Programs	Snorkeling
Environmentally sustainable activities	Visiting historical sites
Fishing-fly-fishing	Trekking
	Walking tours

¹Schneider (2005)

Table 5
Consumers Mean Scores in Levels of Agreement of
Activities Inclusion in Adventure Travel

Adventure Travel Activity	Consumers Schneider (2005) Mean Score	SD
Climbing - Mountain	1.65 ¹	.728
Rafting	1.70	.723
Kayaking	1.71	.777
Trekking	1.74	.698
Safaris	1.76	.779
Diving-scuba	1.77	.761
Hiking	1.78	.722
Backpacking	1.79	.738
Canoeing	1.80	.690
Camping	1.85	.728
Sailing	1.94	.818
Snorkeling	1.98	.850
Bicycling	2.00	.801
Orienteering	2.00	.856
Research expeditions	2.00 ²	.880
Ecotourism	2.03	.848
Skiing	2.04	.915
Archaeological expeditions	2.06	.891
Horseback riding	2.09	.887
Environmentally sustainable activities	2.17	.915
Cultural activities	2.26	.951
Walking tours	2.27	.983
Educational Programs	2.34	.923
Fishing-fly-fishing	2.45	1.02
Visiting historical sites	2.49	1.07
Bird watching	2.50	1.05
Hunting	2.75	1.32

¹1= strongly agree; 2= agree; 3=undecided; 4= disagree; and 5= strongly disagree

²New activities added to this study are highlighted

Table 6
Factor Analysis of Adventure Travel Activities

Principle Factor Analysis Using Varimax Rotation				
	Rotated Factor Pattern			
	<u>Factor 1</u>	<u>Factor 2</u>	<u>Factor 3</u>	<u>Factor 4</u>
	Soft Nature	Cerebral Pursuit	Question Marks	Expedition Discovery
Canoeing	.784			
Camping	.750			
Hiking	.719			
Climbing	.711			
Backpacking	.693			
Kayaking	.687			
Bicycling	.678			
Rafting	.672			
Trekking	.652			
Diving (scuba)	.585			
Orienteering	.467			
Visiting historical sites ¹			.761	
Educational Programs			.753	
Cultural activities			.740	
Walking tours			.722	
Bird watching			.695	
Environmentally sustainable Activities			.679	
Ecotourism			.600	
Skiing			.713	
Hunting			.671	
Snorkeling			.656	
Sailing			.633	
Research expeditions				.721
Safaris				.551
Cronbach's coefficient alpha	.91	.88	.83	.70
Eigenvalue	10.072	3.278	1.580	1.468

¹Activities added to this study are highlighted

Table 7
Adventure Travel Activity Segments

Activity Segments	
Soft Nature	<ul style="list-style-type: none"> ▪ Activities strongly associated with physical activity and challenge in the outdoors. Activities included were canoeing, camping, hiking, climbing, backpacking, kayaking, and bicycling. ▪ These types of require a certain level of physical fitness and skill requirement. Although there are exceptions, the majority of these activities take place in a natural environment or setting.
Cerebral Pursuit	<ul style="list-style-type: none"> ▪ Activities related to education, culture, and reduced physical challenge. Included were visiting historical sites, educational programs, cultural activities, walking tours, bird watching, environmentally sustainable activities, and ecotourism. ▪ Engagement in activities related to learning and education and less physical challenge. Activities included were visiting historical sites, educational programs, cultural activities, walking tours, bird watching, environmentally sustainable activities, and ecotourism. ▪ These activities appear to have less emphasis on physical involvement and rely more on learning and discovery. Although some are nature or environment focused (bird watching, ecotourism), some involve a variety of man made settings (visiting historical sites).
Question Marks	<ul style="list-style-type: none"> ▪ The activities identified in the third factor were also consistent with Sung et al. (2000) in that a most of these activities were questionable in terms of their belonging in the adventure travel category. ▪ Activities included were hunting, skiing, snorkeling, and sailing.
Expedition Discovery	<ul style="list-style-type: none"> ▪ The activities included in this set, research expeditions and safaris, are characteristically associated with adventure. Activities included research expeditions and safaris. ▪ Both research expeditions and safaris are activities that typically involve a greater than normal amount of time and distance. ▪ Remote or unique locations provide conditions where challenge, novelty, and discovery are a part of the experience simply by the nature of the location (e.g., Africa, Antarctica, etc.).

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