



FLORIDA ADVENTURE TRAVEL NETWORK

STAKEHOLDER ANALYSIS AND NETWORK MAPPING REPORT

OCTOBER 2022

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ADVENTURE TRAVEL
TRADE ASSOCIATION

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FLORIDA ADVENTURE TRAVEL NETWORK

Stakeholder Analysis and Network Mapping Report October 2022

This report presents the findings from the Stakeholder Analysis and Network Mapping conducted by Future iQ through August and September 2022. Future iQ was contracted by Adventure Travel Trade Association (ATTA) to conduct Stakeholder Analysis and Network Mapping to examine the current Outside Adventure Travel network in Florida and to identify candidates to contribute to and lead the Florida Adventure Travel Network.

More information on this project and the network mapping results can be viewed on the project portal:
<https://lab2.future-iq.com/florida-adventure-travel-network-survey/>

REPORT PREPARED BY:

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1.0 | INTRODUCTION

Becoming a Leading Adventure Travel Destination

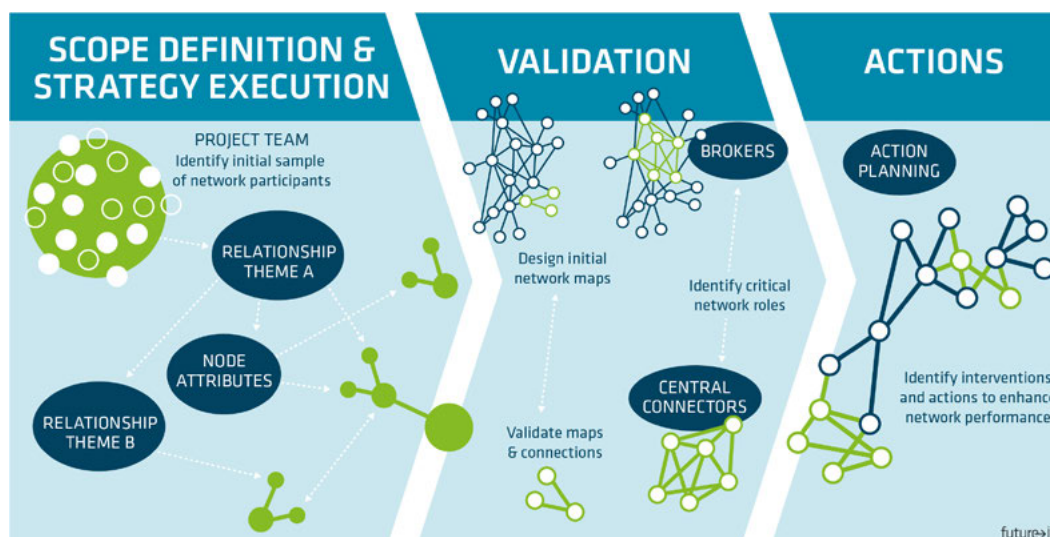
VISIT FLORIDA is on a journey to become recognized as a leading Adventure Travel destination through the development of the Florida Adventure Travel Network. The goal is for VISIT FLORIDA to develop a clear path for positioning and recognition in the global Outdoor and Adventure travel sector. VISIT FLORIDA is working with Adventure Travel Trade Association (ATTA) to organize the industry-led Florida Adventure Travel Network.

Future iQ were contracted by ATTA to provide a situational analysis on the current Outdoor and Adventure travel network in Florida, and to identify opportunities and gaps for the network through [Stakeholder Analysis](#) and [Network Mapping](#).

The Florida Adventure Travel Network Survey ran through August 2022 and was emailed to VISIT FLORIDA's contact list of Outdoor and Adventure Travel organizations. The survey consisted of profiling questions such as name, location, and size and type of organization. The Stakeholder Analysis section of the survey asked scalable questions to ascertain the perceived importance of the Florida Adventure Travel Network, in addition to demand, potential and preparedness for such a network. Finally, network mapping was used to establish current collaboration patterns and expertise knowledge in the existing network.

The survey was hosted on Future iQ's Florida Adventure Travel Network [portal](#). The portal was the 'go to' place for individuals to take the survey. During September 2022, the portal included the [results](#) from the survey.

This report outlines the findings from the survey before outlining recommendations to VISIT FLORIDA regarding the further development of the Florida Adventure Travel Network.



2.0 | PROFILE FINDINGS

2.1 | ORGANIZATION NAME

Below are the names of the organizations which took part in the survey.

THREE RESPONDENTS

DeSoto County
Fish Hawk Spirits
Putnam County Chamber
of Commerce

TWO RESPONDENTS

Skydive Sebastian
Columbia County TDC
Gilchrist County TDC
Gulf County Tourist
Development Council
LaPlaya Beach &
Golf Resort
Martin County Office of
Tourism & Marketing
Pura Vida Divers

Square 1 Shooting Range
Visit Suwannee County

SINGLE RESPONDENTS

American Ghost Adventures	Marineland Dolphin Adventure	Santa Rosa County Tourist Development Office
Anna Maria Island Wedding Association	Miami Herald / Society of American Travel Writers	SCA
Azalea City Brewing Co.	Nature's Resort	Self Employed
Connelly Outdoors Consulting	Ocean Key Resort	Shamrock Thistle & Crown Bed & Breakfast
Crystal River Watersports	Okeechobee Tourism Development Council	Slackers
Discover Crystal River	Pack & Adventure	SportsAbility Alliance
Dream Catcher Explorations	Pedalers	Steinhatchee River Inn and Marina
Florida's Adventure Coast Visitors Bureau	Plantation On Crystal River	Sun Outdoors
Franklin County Tourist Development Council	Private Scuba & Snorkel	Sweet Liberty Catamaran
Get Up And Go Kayaking	Punta Gorda / Englewood Beach Visitor & Convention Bureau	Tallahassee Museum
GSA	Putnam Blueways & Trails	Travel Media Group
Gulf County Chamber of Commerce	Sanibel Community Association	Visit Indian River
iOutdoors		Visit Palm Beach
LOKA Travel		

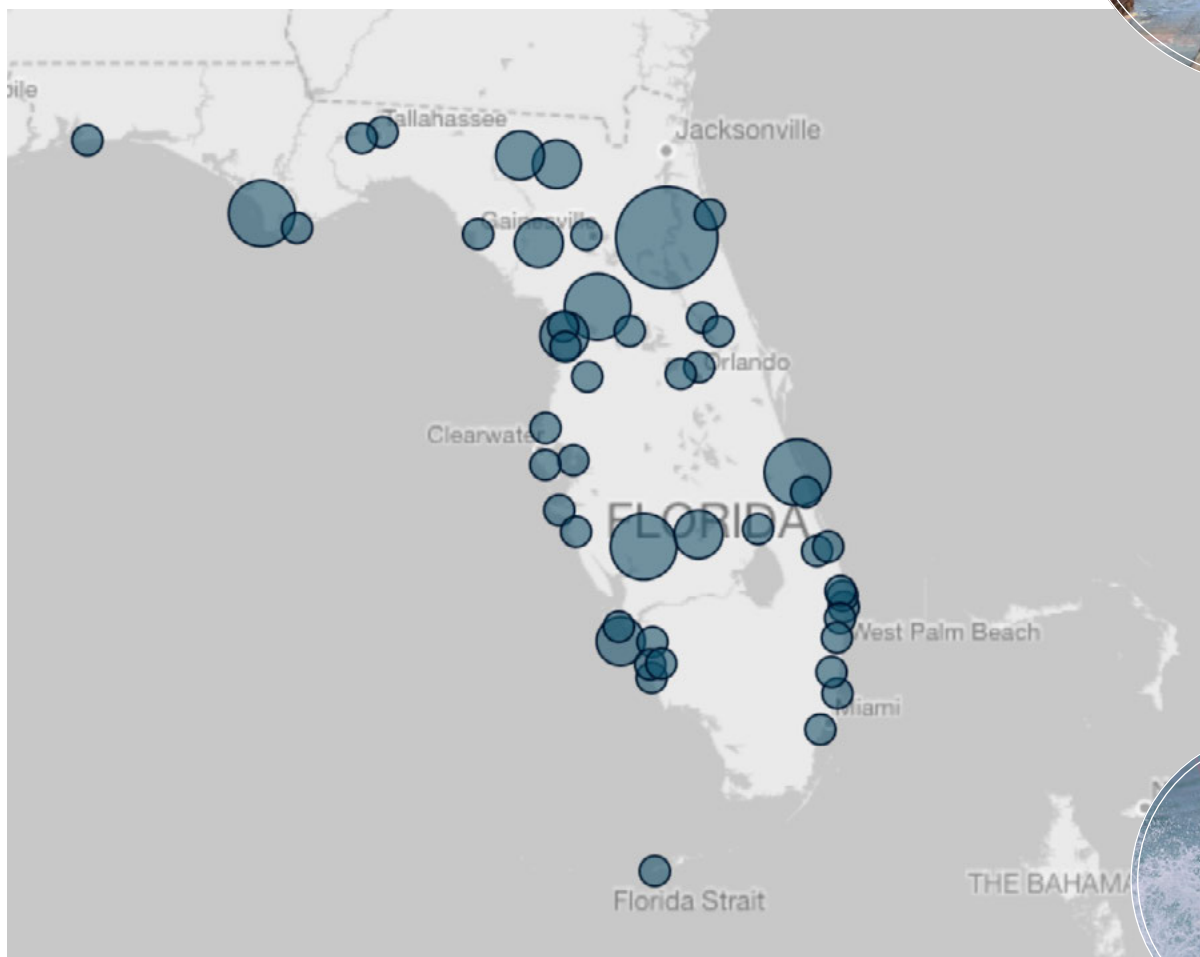


DataInsight

- 55 organizations were represented in the survey.
- 4 organizations had 3 individuals from the organization take part in the survey.
- The remaining 41 organizations had up to 2 individuals from the organization take part in the survey.

2.2 | ORGANIZATION LOCATION

This chart shows where the organizations are located in the State of Florida.



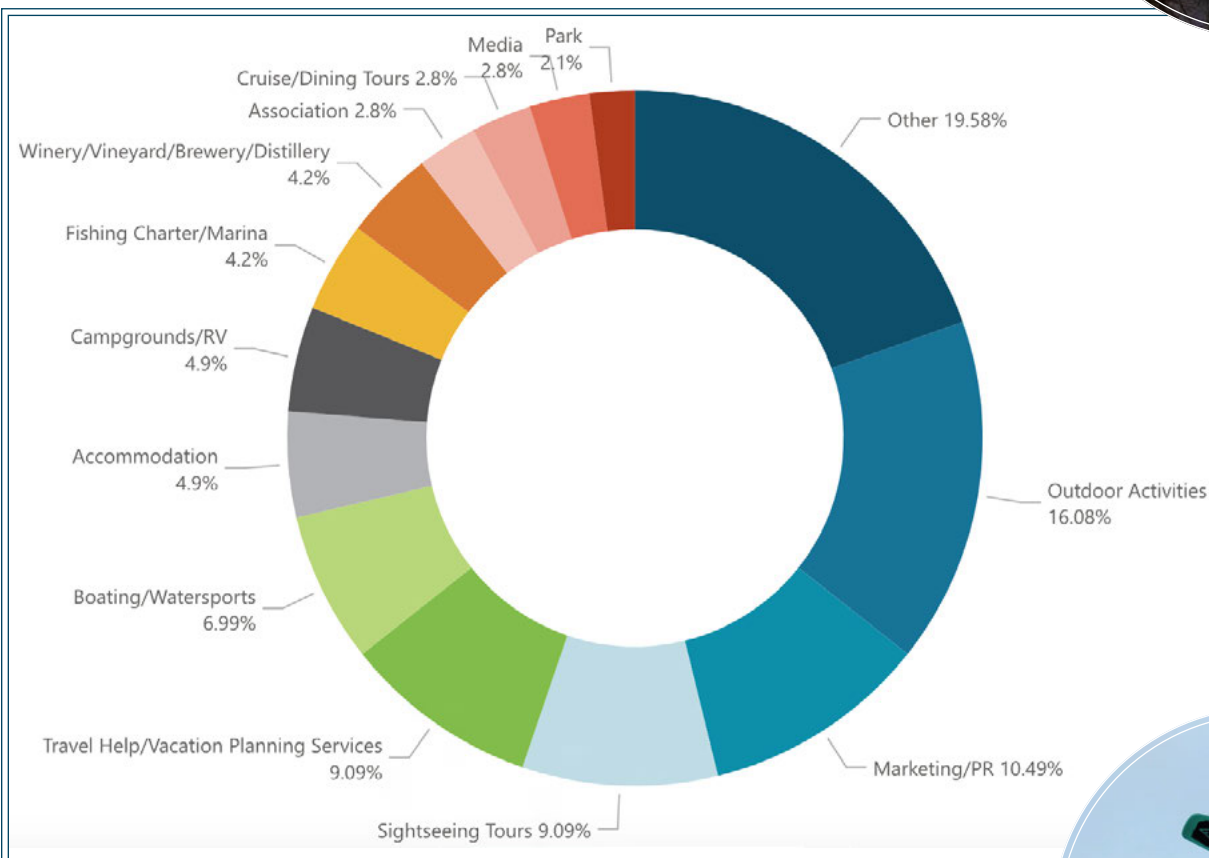
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- The larger circles represent those locations with the most responses to the survey.
- Palatka (32177) was the location with the most responses, followed by, 32958, 32456, and 34266.
- The organizations were then evenly spread across the State of Florida.



2.3 | TYPE OF ORGANIZATION

The survey respondents were asked how they would describe their organization – this chart shows the types of organizations represented.



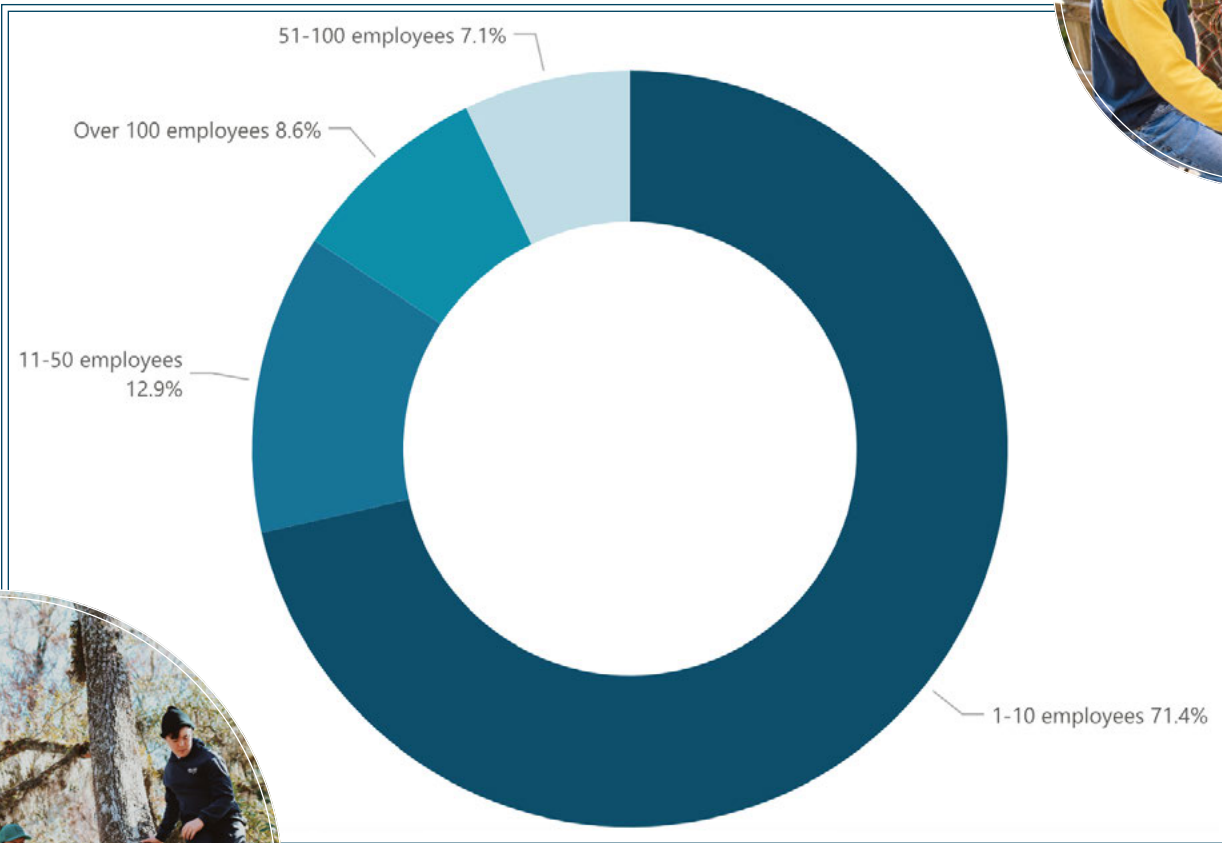
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- Most of the organizations were in the Outdoor Activities category, followed by Marketing, Sightseeing Tours, Travel Help/Vacation Planning Services and Boating/Watersports.



»»»» 2.4 | SIZE OF ORGANIZATION

This chart shows the sizes of the organizations which were represented.



DataInsight

- Over 71% of organizations had 1-10 employees
- This was followed by organizations of 11-50 employees – almost 13%.
- Larger organizations between 51 and 100 employees and over 100 employees were least represented.

»»»»» 2.5 | SUMMARY OF PROFILING RESULTS



68 Survey Respondents

55 Organizations Represented

1-10 Employees - 71% of Respondents

Next Highest Response - 11-50 Employees



Highest Response - 32177 Palatka County

Next Highest Response -

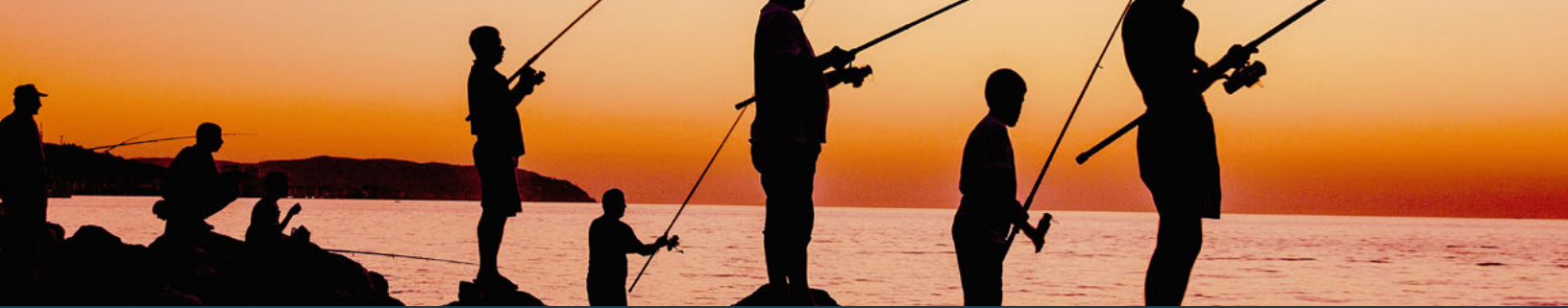
Zip Codes: 32958, 32456, & 34266



Organization Type by Highest Response:

- Outdoor Activities
- Marketing
- Sightseeing Tours
- Travel Help / Vacation Planning Services
- Boating / Watersports



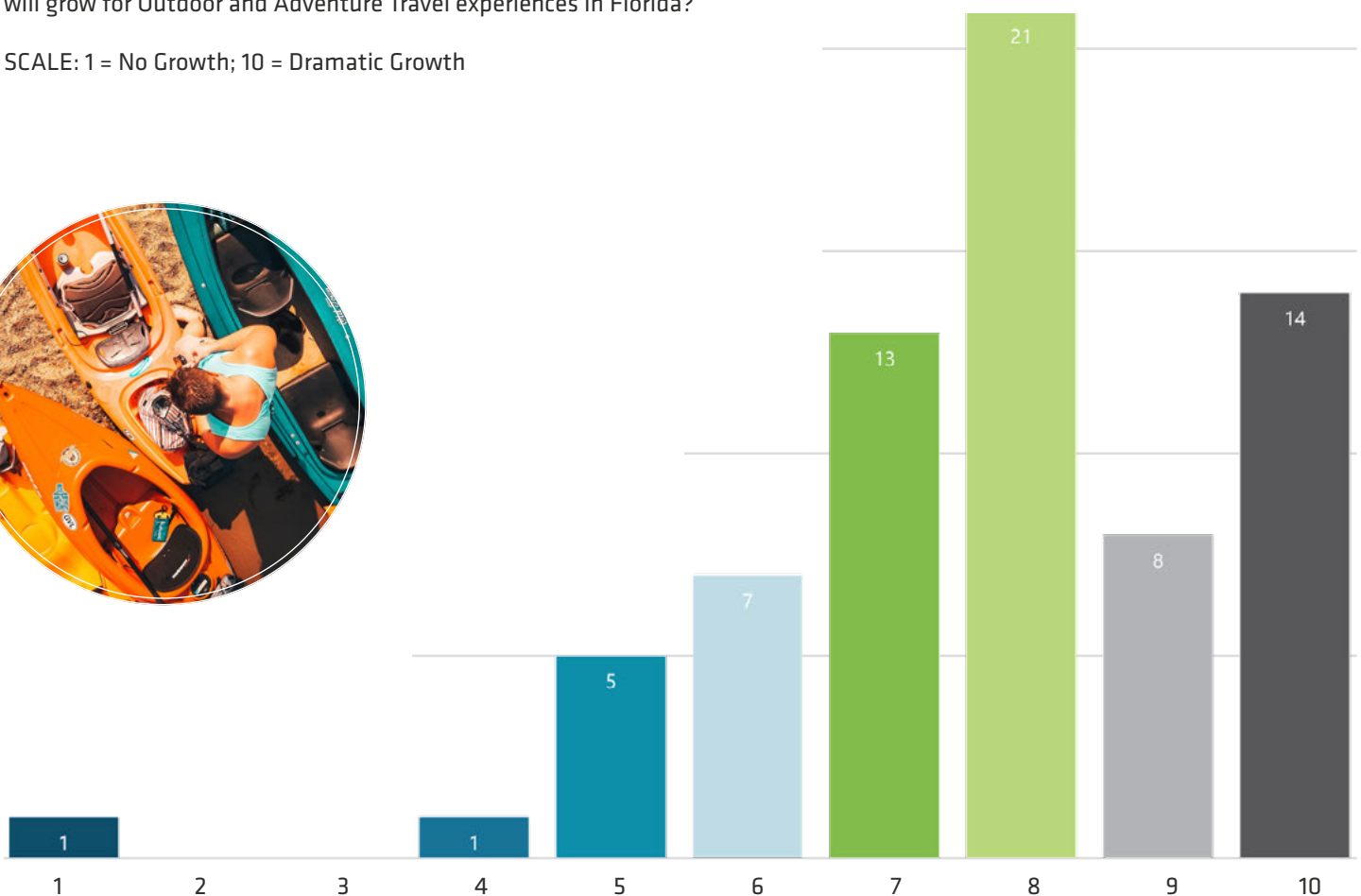


3.0 | STAKEHOLDER ANALYSIS

3.1 | DEMAND FOR OUTDOOR AND ADVENTURE TRAVEL EXPERIENCES IN FLORIDA

Respondents were asked: Over the next 5 years, how much do you think demand will grow for Outdoor and Adventure Travel experiences in Florida?

SCALE: 1 = No Growth; 10 = Dramatic Growth



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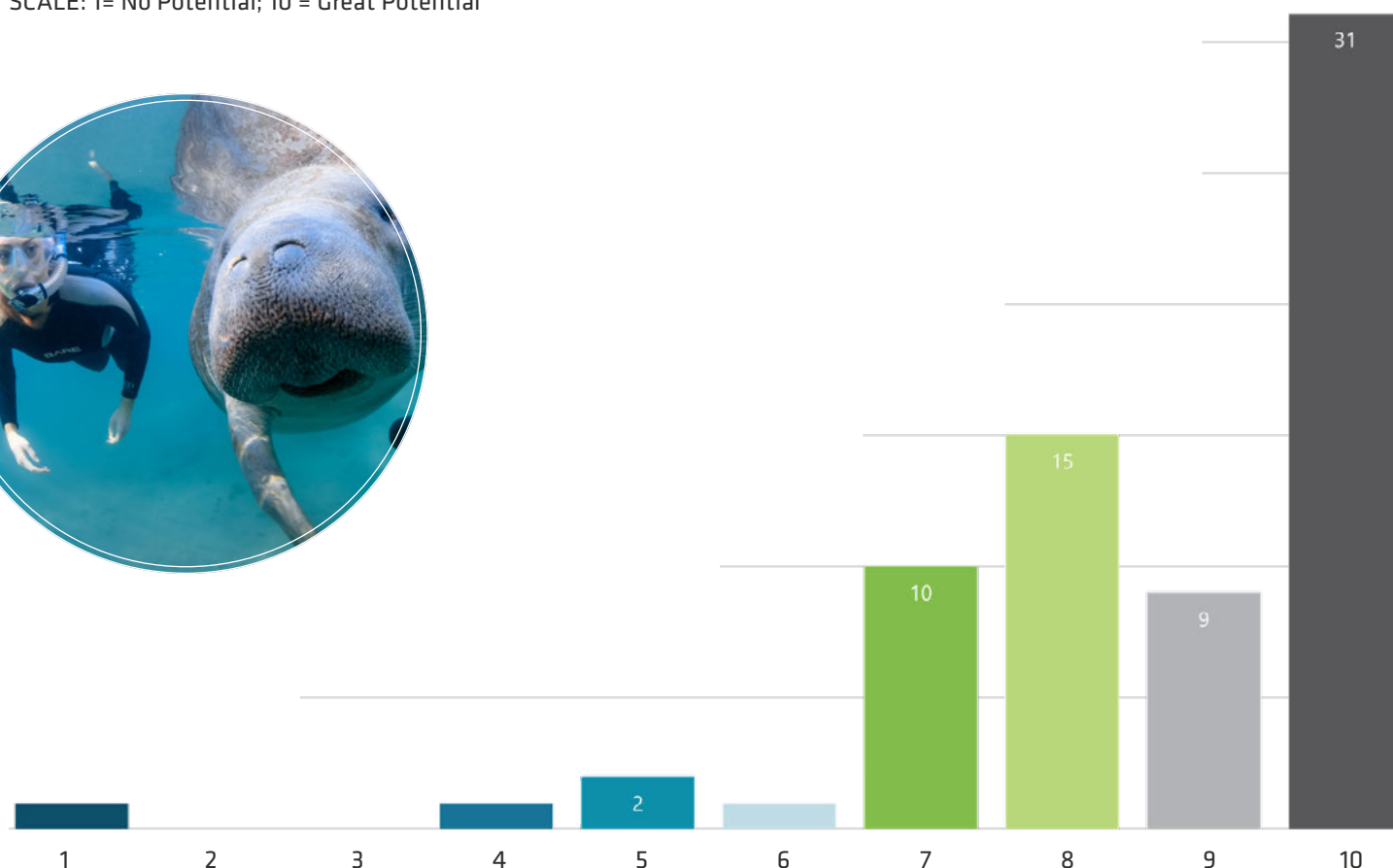
- The majority of respondents felt that there would be growth in demand for Outdoor and Adventure Travel Experiences in Florida, with many feeling that this would represent 'Dramatic Growth.'
- This is encouraging for VISIT FLORIDA as it develops the Florida Adventure Travel network.



3.2 | 5-YEAR POTENTIAL FOR FLORIDA TO BECOME LEADING OUTDOOR AND ADVENTURE TRAVEL INDUSTRY

Respondents were asked: How much potential is there for Florida to become a leading Outdoor and Adventure Travel destination within the next 5 years?

SCALE: 1= No Potential; 10 = Great Potential



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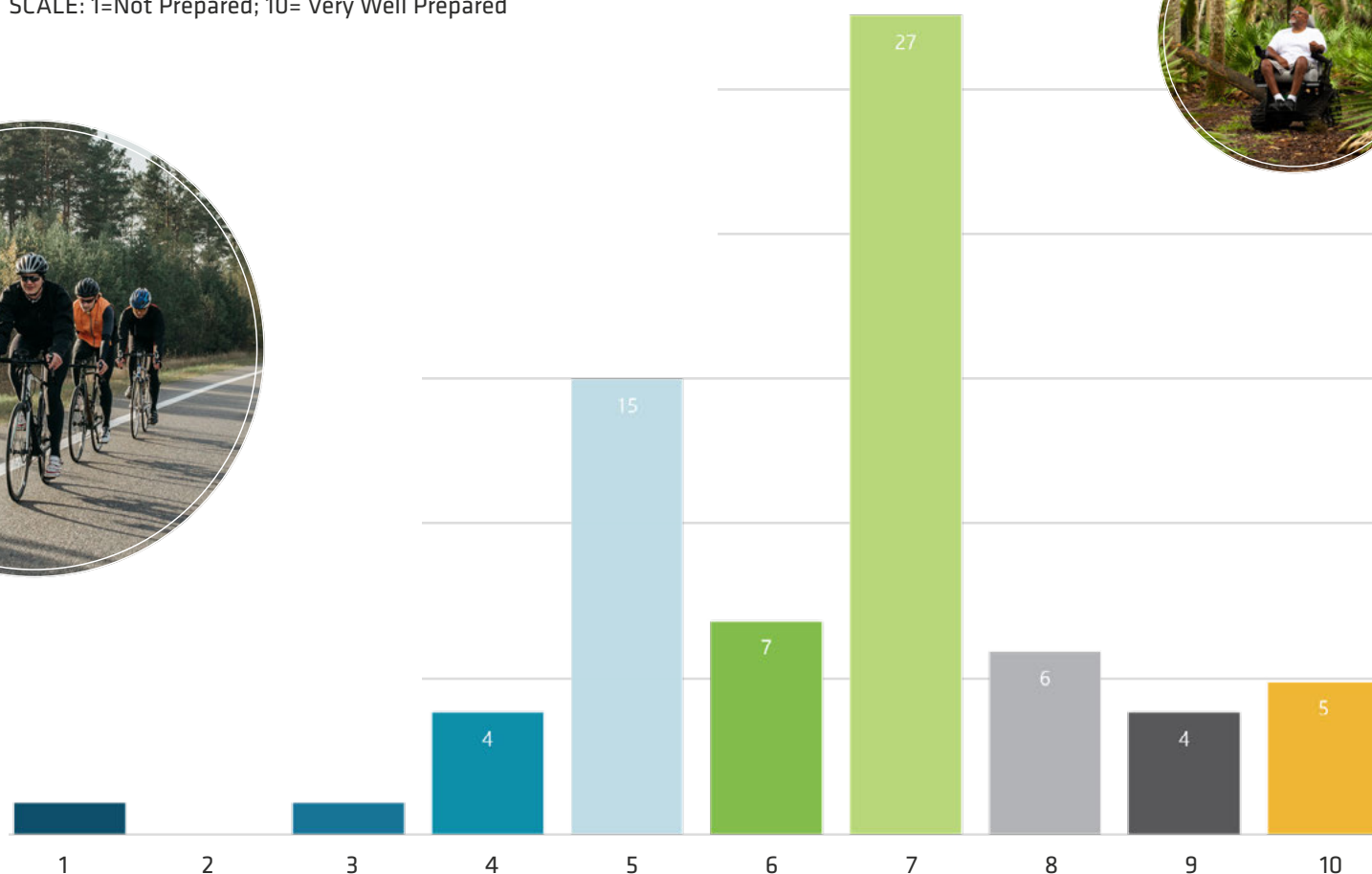
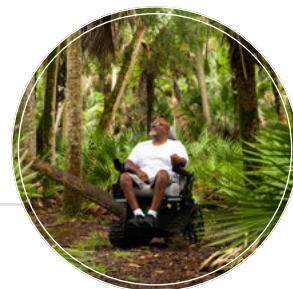
- The vast majority of respondents felt that there was 'Great Potential' for Florida to become a leading Outdoor and Adventure Travel destination within the next 5 years.
- Generally, respondents were enthusiastic about the potential for Florida to become that leading destination.
- It seems that now is the time to develop the Florida Adventure Travel Network as there is clearly widespread acknowledgment that Florida has the potential to become a leading Outdoor and Adventure Travel destination.



3.3 | 15-YEAR PREPAREDNESS TO CREATE STRONG OUTDOOR AND ADVENTURE TRAVEL EXPERIENCES IN FLORIDA

Respondents were asked: Currently, how well prepared is Florida to create a strong Outdoor and Adventure Travel Industry in the next 15 years?

SCALE: 1=Not Prepared; 10= Very Well Prepared



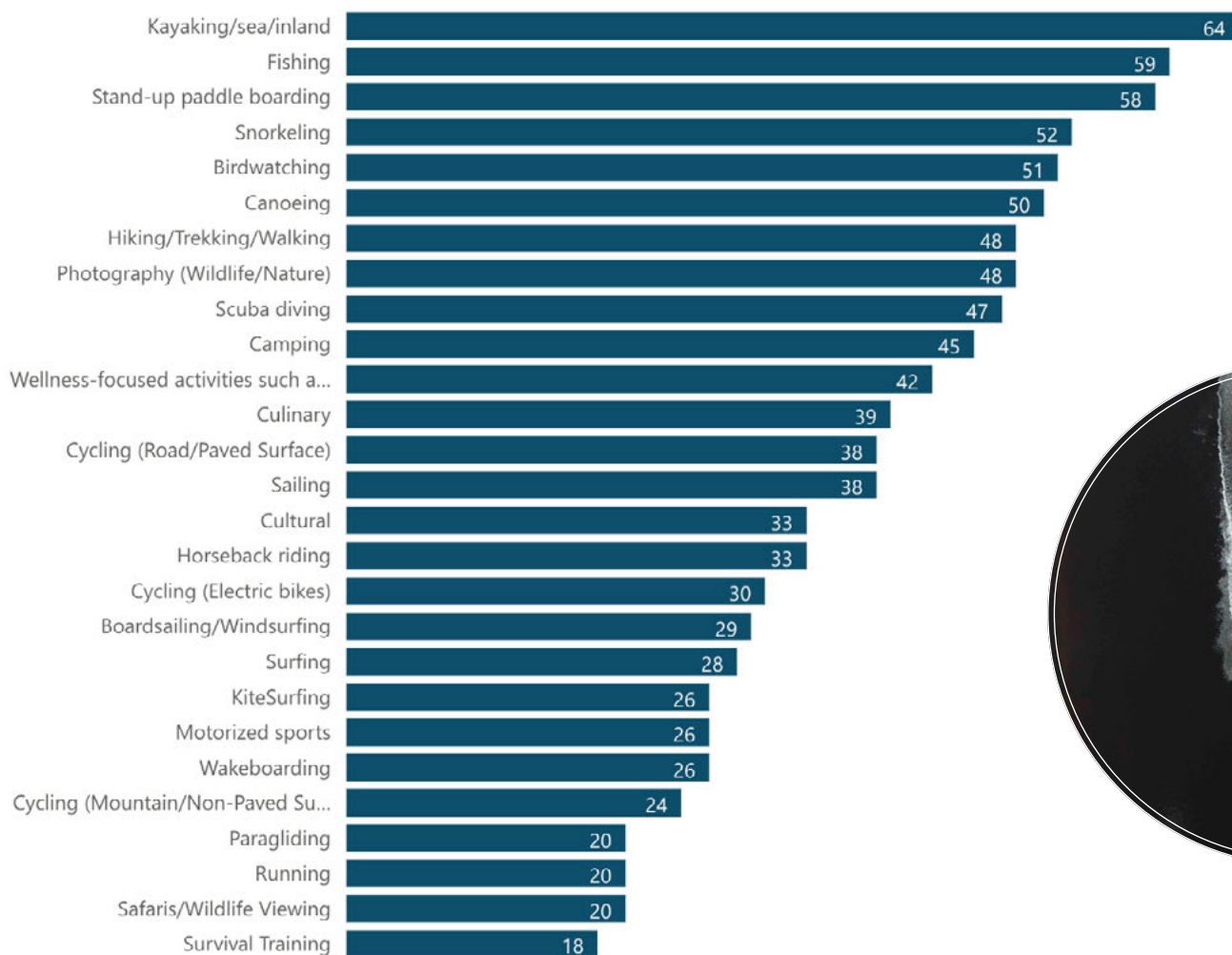
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- There was a spread of responses generally, with the majority of respondents opting for 5 and 7 on the scale.
- A smaller percentage of respondents felt that Florida was 'Very Well Prepared.'
- This gives a clear indication to VISIT FLORIDA that there is a need to continue with the development of the Florida Adventure Travel Network and that there needs to be some urgency in this effort.



3.4 | HIGHEST POTENTIAL OUTDOOR AND ADVENTURE TRAVEL EXPERIENCES

Respondents were asked to select the Outdoor and Adventure Tourism activities with the highest potential in Florida. They were able to select more than one activity from an extensive list of Outdoor and Adventure Activities, provided by ATTA.



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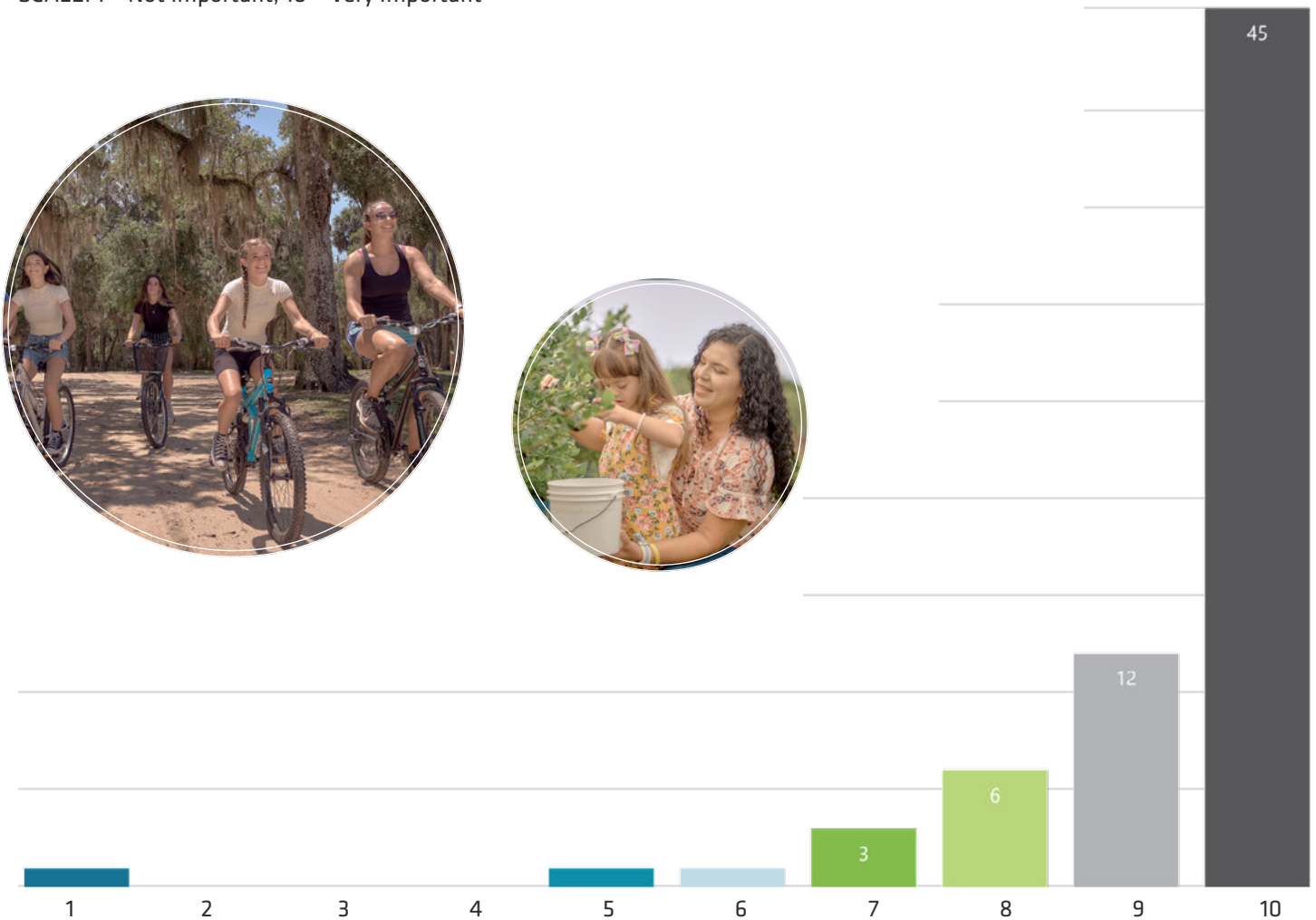
- Kayaking/Sea/Inland was seen as the activity which had the most potential in Florida, followed by Fishing and Stand-up paddle boarding.
- The respondents had a wide choice of activities to consider and felt that there was potential for most of the activities, however it was felt that there was little potential in Canyoneering, Overland 4x4, Orienteering, Archaeological Activities and Caving.
- The ranking of activities which have the most potential in Florida will be useful for VISIT FLORIDA to prioritize activities while developing the Florida Adventure Travel Network.



3.5 | IMPORTANCE OF DEVELOPING YEAR-ROUND OUTDOOR AND ADVENTURE TRAVEL PRODUCTS AND EXPERIENCES

Respondents were asked: How important is it to develop year-round Outdoor and Adventure Travel products and experiences?

SCALE: 1 = Not Important; 10 = Very Important



DataInsight

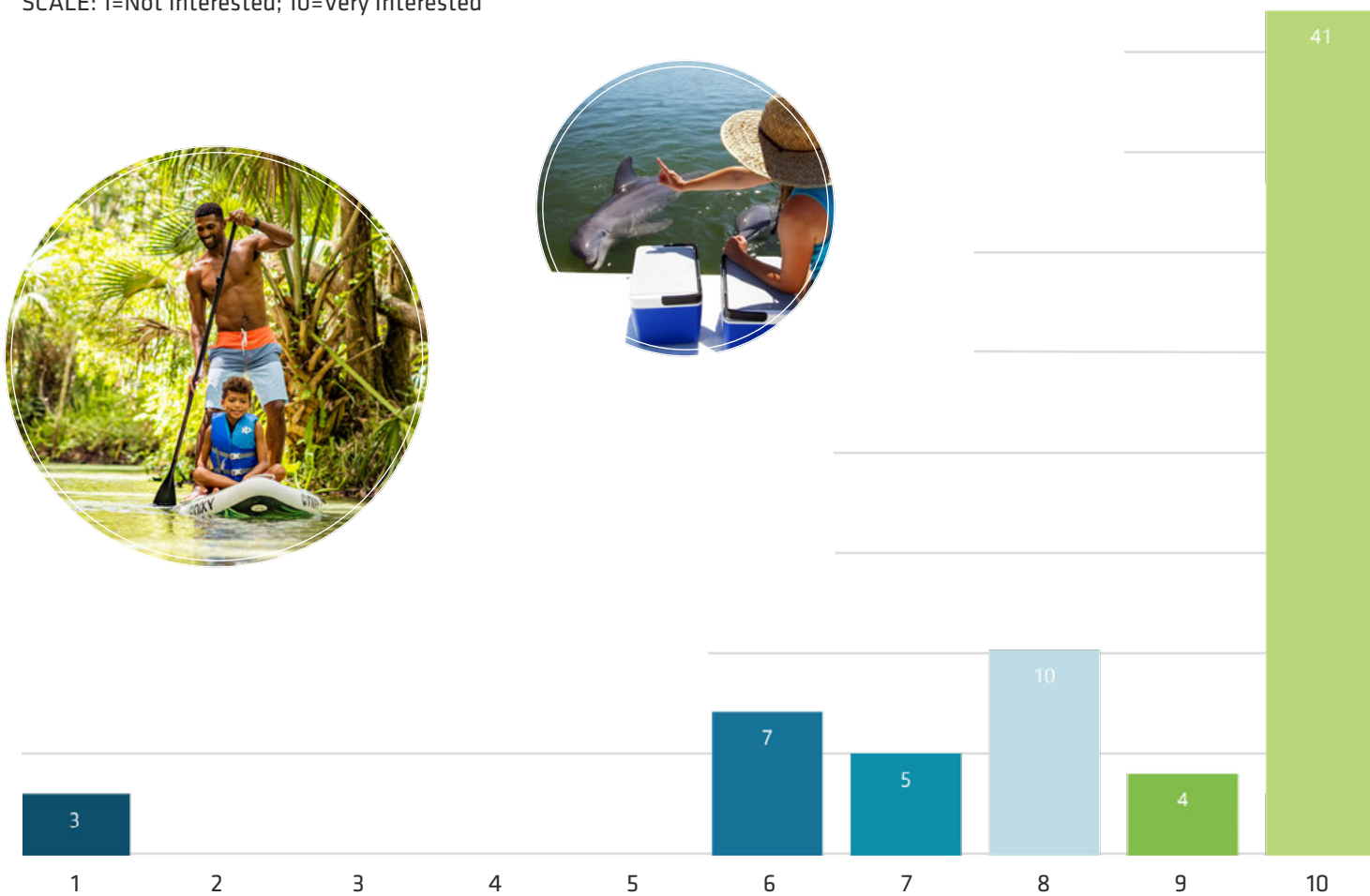
- An overwhelming majority of respondents felt that it was 'Very Important' to develop year-round Outdoor and Adventure Travel products and experiences.
- This gives VISIT FLORIDA the stakeholder perspective on producing year-round Outdoor and Adventure Travel Experiences when developing the Florida Adventure Travel Network and ultimately for Florida to be recognized as a leading destination in this area.



3.6 | INTEREST IN JOINING FLORIDA OUTDOOR AND ADVENTURE TRAVEL NETWORK

Respondents were asked: How interested would you be in joining the Outdoor and Adventure Travel Network in Florida?

SCALE: 1=Not Interested; 10=Very Interested



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- An overwhelming majority of respondents were interested in joining the Outdoor and Adventure Travel Network in Florida.
- This is encouraging for VISIT FLORIDA as it develops the Florida Adventure Travel Network, as there is huge interest by stakeholders to be part of this network.

3.7 | IDEAS ON CREATING OUTDOOR AND ADVENTURE TRAVEL INDUSTRY IN FLORIDA

Respondents were asked an open ended question: What do you think Florida needs to do, to create a stronger Outdoor and Adventure Travel industry? Below is a sample of their responses.

- Infrastructure in a lot of your outdoor adventure areas (a.k.a. rural and unexplored areas) is poor to non-existent. Before promoting these areas, an analysis of roads, utilities, waterways, connectors, etc. needs to take place to ensure the attractions and nearby areas can handle the influx of traffic. These areas of concern are currently troublesome for residents. If you add to the user capacity, it could backfire as an unpleasant experience for the visitor and incense residents more.
- The Outdoor Adventure Travel product is rich in Florida. Visit Florida just needs to incorporate these segments/attractions into their marketing plan more. As many of these products are in destinations with very limited financial resources and they will rely on Visit Florida to push at a national level.
- Allocate and focus more time and resources on the effort. Build your coalition, which you are starting. Find the influencers that fit the industry. Continue the editorial efforts.
- Better infrastructure to make Florida's adventure travel experiences more accessible to visitors.
- Create a coordinated focus. People mostly think of Florida for theme parks and partying because product development and marketing of natural experiences lag. Real estate development in natural areas also impact opportunities.
- Create adventure travel tourism destination regions within Florida that are distinctively different from one another to showcase Florida's diversity of ecosystems, activities and unique experiences. Work with providers who want to partner to cultivate this tourism segment. Create packaged experiences and activity menus that appeal to adventure travelers and market them to this customer.
- Don't know what is already being done so difficult to answer. It would probably be helpful to get more involvement from The local, state and national entities which control so much of the land and historic sites in Florida. I tried to get a forest ranger to provide a 2 hour guided walk in the Ocala National Forest for a FAM tour many years ago and was turned down. There are a plethora of small adventures that few have ever heard of. To name a few Pioneer Florida Museum and Village in Dade City <https://www.pioneerfloridamuseum.org/>, Heritage Village Largo <http://www.pinellascounty.org/Heritage/>, Florida International Teaching Zoo Bushnell <http://www.floridazooschool.com/>, Orange Blossom Opry Weirsdale www.obopry.com and a bunch more I would be glad to provide if it would help. Everyone knows Florida has beaches and theme parks, but not sure how much else they know.
- Expand marketing to include interior counties and their assets - rivers, state & national parks, etc.
- Find the visitors that match the different intensity levels of adventure offered in FL
- Focus more on experiences and hotel stays with a strong FLORIDIAN sense of place. Protect our beautiful environments, and not just the beaches.
- Get away from the kitschy. Focus on authentic experiences, not touristy.
- Help the smaller developing businesses
- I think it is essential to stress Respectful & Responsible Visitation. Adventure travelers want to go to a place that is well taken care of and clean. We must ensure all visitors understand that, and we work together to keep Florida natural and beautiful throughout the whole state.
- Identify, communicate, and collaborate with outdoor recreation providers and advocates
- Increase ad spend and engage adventure travelers on social media and review sites.
- Leverage our State's strengths in a unified message to potential adventurers.
- Make people more aware of the amazing wildlife and water opportunities there are to explore.
- Marketing, video, photography, coop options, free resources from small businesses
- More safe trails through rural and semi-rural areas
- Pick your adventure tools, create trails or themes around the adventures, great imagery
- Promote Florida Companies that offer outdoor adventure
- Promotion of year-round, undiscovered Florida travel with a focus on soft adventure. The focus of water sports, cycling and wellness as well as the dynamic market for outdoor and beach destination weddings that brings a group of all ages looking for more than just a beach.
- Provide more marketing opportunities about Florida as an Adventure destination, develop a press release list of media for Florida Adventure companies to mail to.
- Put more of a focus on nature and the outdoors, many areas only think of Theme Parks when coming to Florida. There is a lack of knowledge on the landscape Florida provides.
- Recognize the state and local parks. Study the freshwater launch points around the state.
- Redefine the terminology, and enlarge the scope. Many still believe that the terms "outdoor and adventure" apply only to the incredibly fit, highly ambitious outdoorsmen.
- Synergy... pull adventures together... communicate what we have
- Tourists are usually funneled to specific locations in Florida, like Miami and Orlando. It would be beneficial to market Florida as a multi-location destination, where visitors can make day trips to interesting places from one central location.
- Wider range of accommodations both in offering and pricing. Meet regular with sections of the adventure travel industry for on the ground metrics and feedback.
- Work closely with rural partners to ensure we're ready to offer these experiences and market to the right audience



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- Respondents gave their in-depth responses to this question and put forward a wide range of ideas which will assist VISIT FLORIDA in the development of the Florida Adventure Travel Network.
- These initial ideas will assist VISIT FLORIDA in the goal to be recognized as a leading Outdoor and Adventure Travel destination.

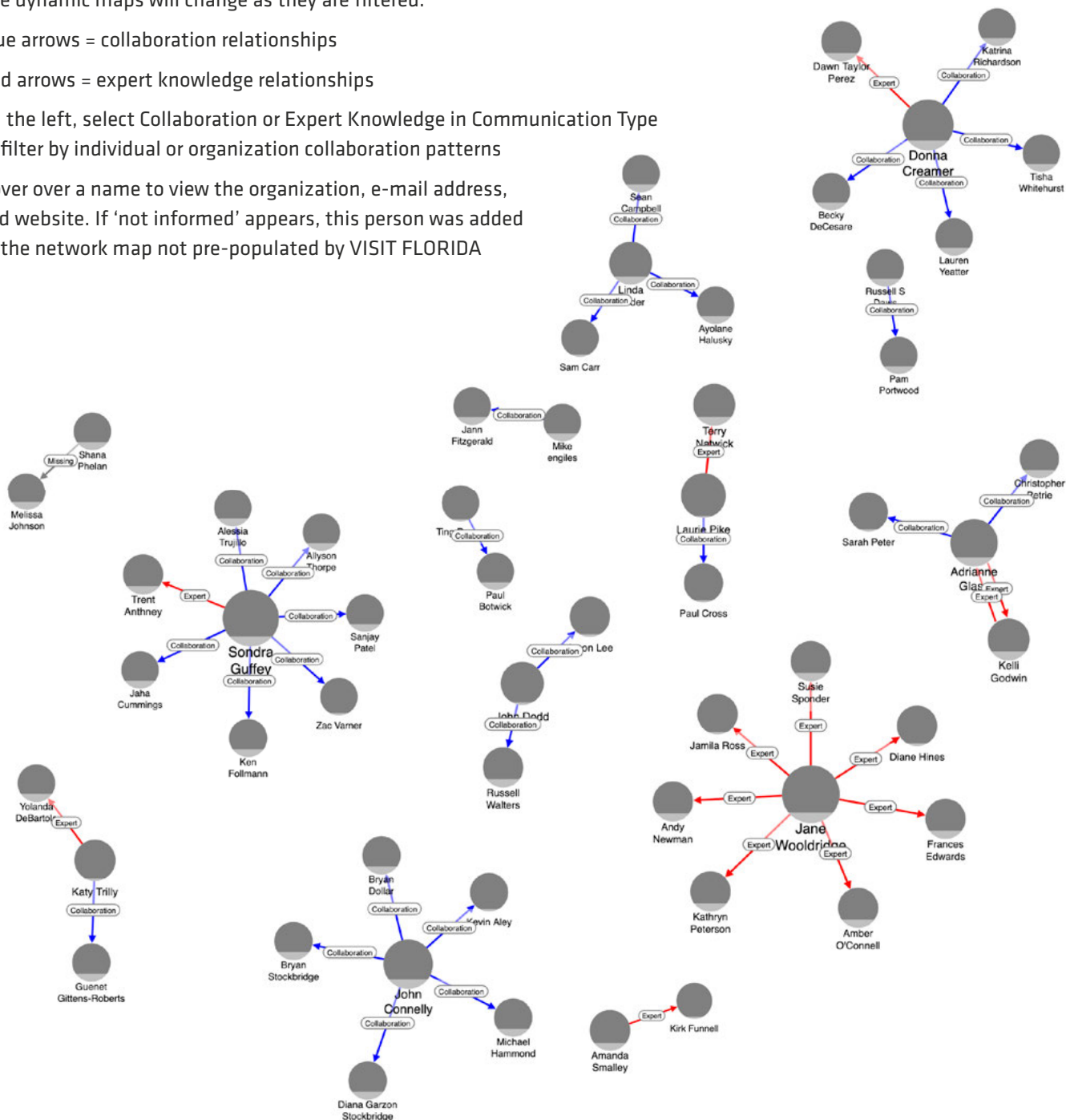


4.0 | ECO-SYSTEM NETWORK MAPS

View these maps at: <https://lab2.future-iq.com/florida-adventure-travel-network-survey/about-the-survey/current-collaboration/> and <https://lab2.future-iq.com/florida-adventure-travel-network-survey/about-the-survey/expert-knowledge/>.

These dynamic maps will change as they are filtered.

- Blue arrows = collaboration relationships
- Red arrows = expert knowledge relationships
- On the left, select Collaboration or Expert Knowledge in Communication Type to filter by individual or organization collaboration patterns
- Hover over a name to view the organization, e-mail address, and website. If 'not informed' appears, this person was added to the network map not pre-populated by VISIT FLORIDA

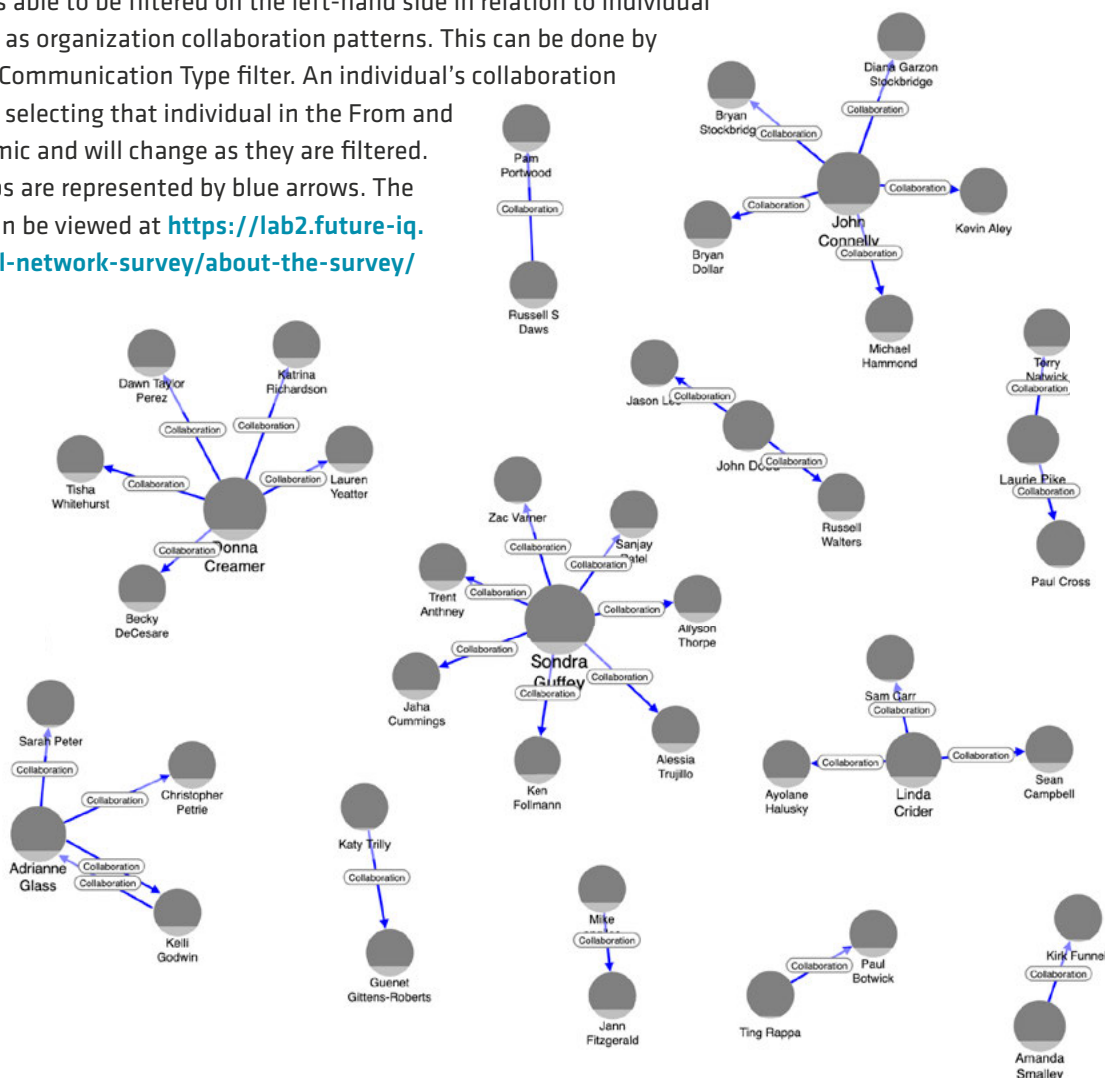


4.1 | CURRENT COLLABORATION

Respondents were asked: Who do you currently collaborate with to develop Outdoor and Adventure Travel products and experiences?

Respondents were able to select from a pre-populated list of individuals/organizations provided by VISIT FLORIDA. They were also invited to add the names and e-mail addresses of individuals who they collaborate with, but who were not on the list.

This network mapping chart is able to be filtered on the left-hand side in relation to individual collaboration patterns as well as organization collaboration patterns. This can be done by selecting collaboration in the Communication Type filter. An individual's collaboration pattern can also be viewed by selecting that individual in the From and To filters. The maps are dynamic and will change as they are filtered. The collaboration relationships are represented by blue arrows. The Collaboration network map can be viewed at <https://lab2.future-iq.com/florida-adventure-travel-network-survey/about-the-survey/current-collaboration/>.



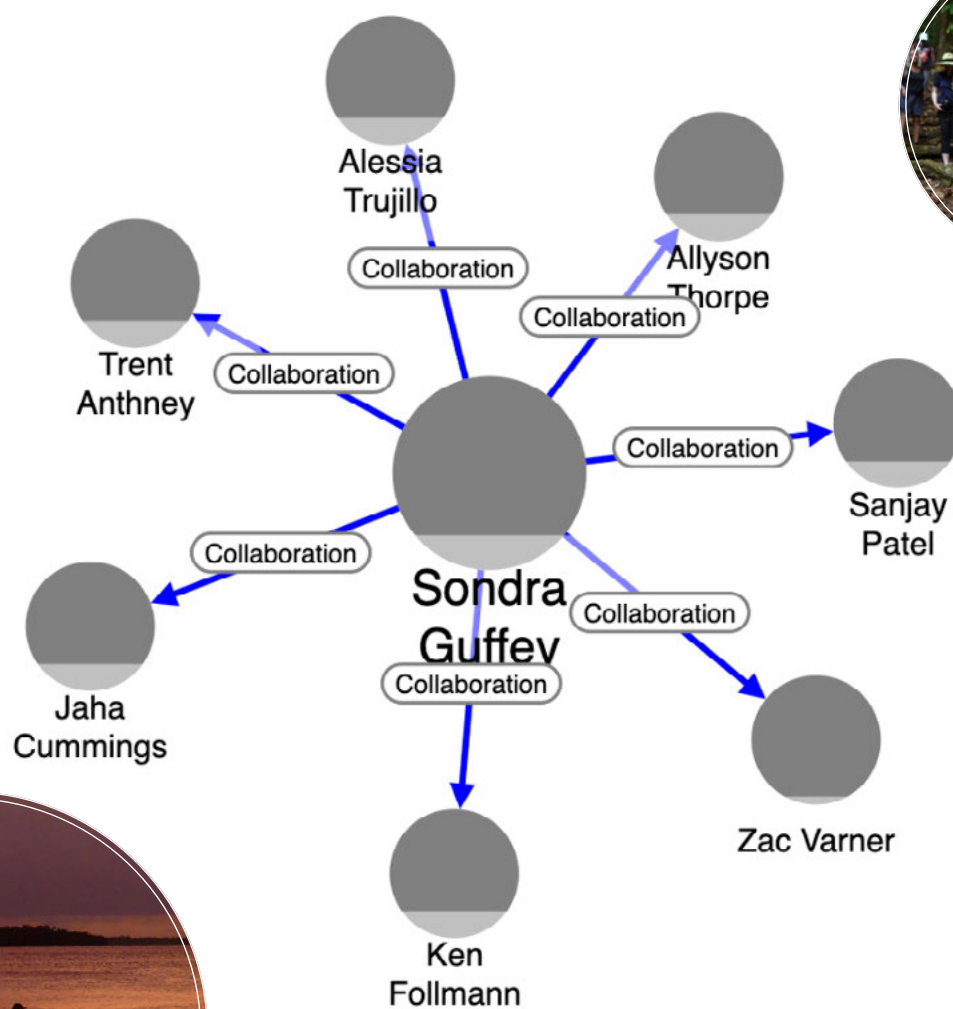
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- Regional collaboration to develop Outdoor and Adventure Travel products and experiences seems weak.
- It is important to note that a relatively small number of people took the survey, and many did not respond to this question.
- The map shows individuals collaborating with one, two, or up to six people. These pockets of collaboration do not connect with each other.
- There were no patterns of mutual collaboration (people selecting each other).
- VISIT FLORIDA will need to work further to connect individual collaborations to each other in order to form a strong Florida Adventure Travel Network. This will involve active participation from future Florida Adventure Travel Network members.



»»»»» 4.1.1 | SUCCESSFUL COLLABORATION EXAMPLE

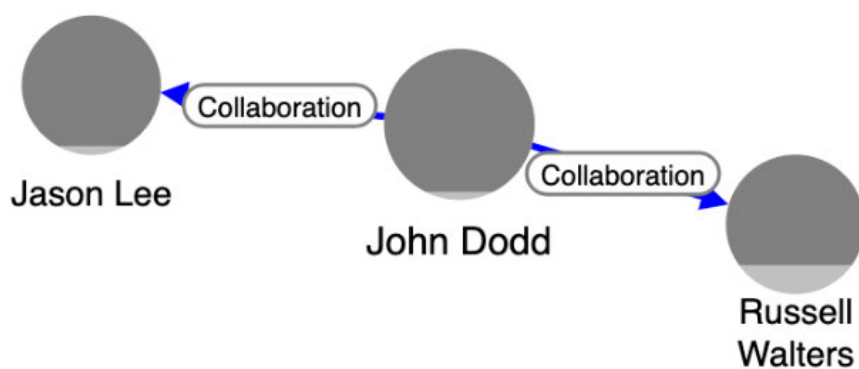
One participant showed a degree of collaboration with others, however there was no mutual collaboration between herself and those she collaborates with.





4.1.2 | TYPICAL COLLABORATION PATTERN

The chart below shows the typical individual collaboration pattern within the network. One person collaborating with one or two others. There were no patterns of mutual collaboration.

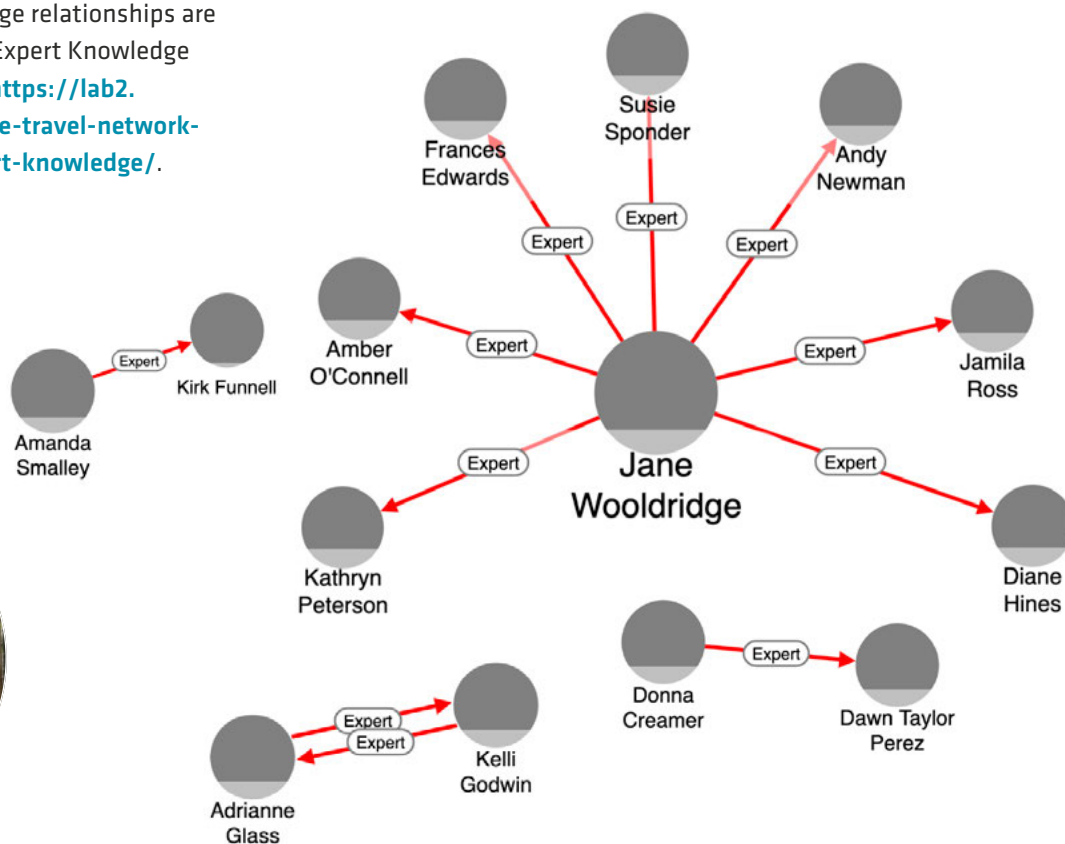


4.2 | EXPERT KNOWLEDGE

Respondents were asked: Who do you currently go to for expert advice and knowledge about the Outdoor and Adventure Travel sector?

Respondents were able to select from a pre-populated list of individuals/organizations that was provided by VISIT FLORIDA. They were also invited to add the names and e-mail addresses of individuals who they go to for expert advice and knowledge, but who were not on the list.

This network mapping chart can be filtered on the left-hand side of the network map in relation to expert advice and knowledge. This can be done by selecting expert in the Communication Type filter. Participants can also view an individual's expert advice and knowledge network by selecting that individual in the From and To filters. The maps are dynamic and will change as they are filtered. The Expert Knowledge relationships are represented by red arrows. The Expert Knowledge Network Map can be viewed at <https://lab2.future-iq.com/florida-adventure-travel-network-survey/about-the-survey/expert-knowledge/>.



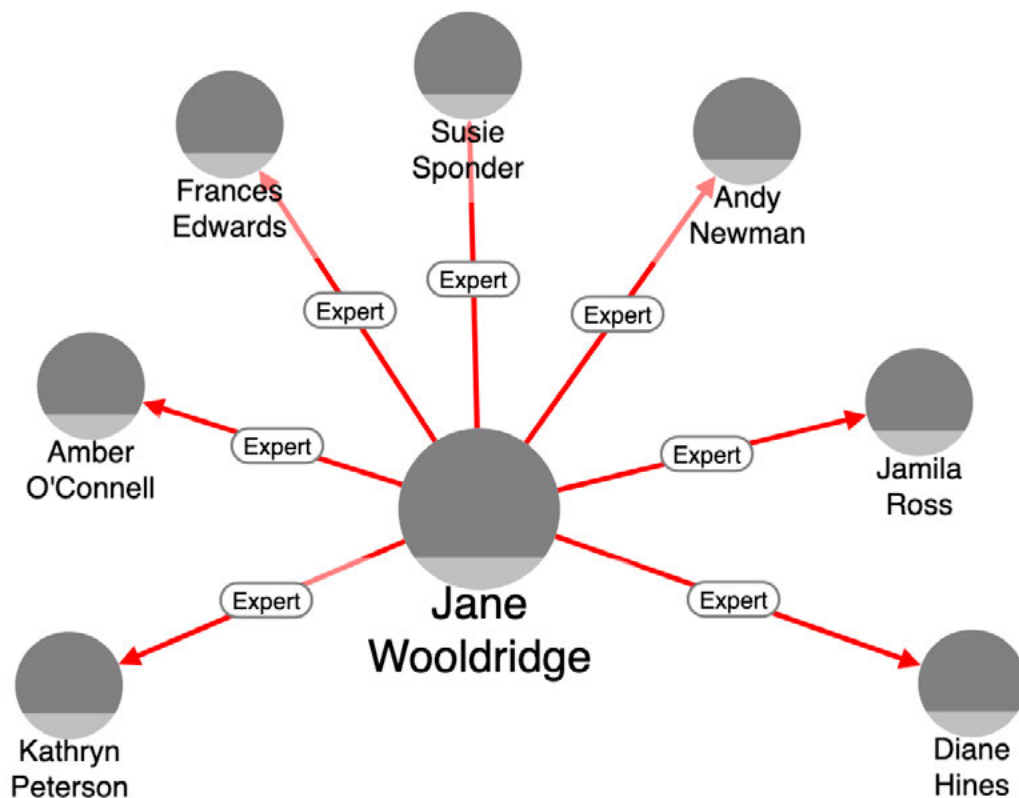
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- The map shows that individuals tend to go to one other person for expertise and knowledge, excepting one key node on the map going to six others
- It is again important to note that a relatively small number of people took the survey, and many did not respond to this question.
- Like the collaboration map, these relationships did not connect to other relationships on the map.
- There was one pattern of mutual collaboration, where two people selected each other.
- There will need to be intentional effort by VISIT FLORIDA, and from potential members of the Florida Adventure Travel Network to develop the relationships needed to form a strong network of collaboration, expertise and knowledge.
- VISIT FLORIDA will need to intentionally work further to develop relationships between those with expertise and knowledge in order to develop the network.



4.2.1 | SUCCESSFUL EXPERTISE KNOWLEDGE EXAMPLE

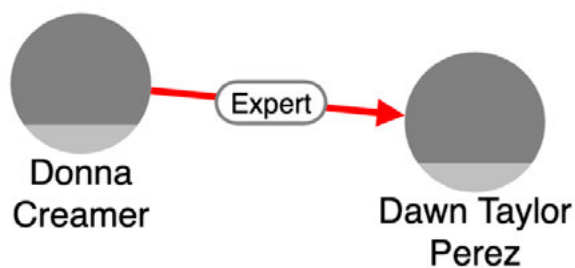
One participant showed a degree of exchanging expertise knowledge with others, however there was no mutual collaboration between herself and those she collaborates with.





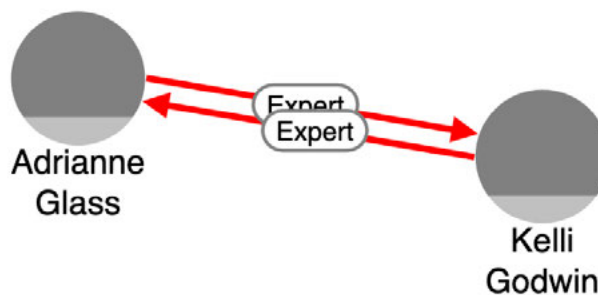
»»»» 4.2.2 | TYPICAL EXPERTISE KNOWLEDGE EXAMPLE

This shows the typical individual collaboration pattern within the network. One person sharing expert knowledge with one other person in the network. There were no patterns of mutual sharing of expert knowledge.



4.2.3 | ONE SUCCESSFUL EXAMPLE OF SHARING EXPERTISE KNOWLEDGE

There was one example of two people mutually sharing expertise knowledge in the network.



5.0 | CONCLUSION

This was an interesting process to evaluate the current Outdoor and Adventure Travel Network in Florida. To revisit this process will need to ensure more than 68 responses in order to provide deeper network analysis. However, the low level of responses and input into the network maps has been a result in itself regarding current levels of engagement, collaboration and sharing of expert knowledge across the network.

This process has ascertained:



There will be a growth in demand for Outdoor and Adventure Travel experiences in Florida over next five years



Florida has great potential for gaining recognition as an Outdoor and Adventure Travel destination



Florida is not prepared to create a strong Outdoor and Adventure Travel industry in five years



Kayaking (sea/inland), Fishing, and Stand-up Paddle Boarding are the activities with the highest potential



There is a strong need to develop year-round Outdoor and Adventure Travel products/experiences



Businesses and organizations are widely interested in joining the Florida Adventure Travel Network





There is a need for **greater participation / buy-in** from potential network members.



VISIT FLORIDA will need to develop intentional marketing and communication efforts.

- Incorporate Outdoor and Adventure Travel products within existing marketing plan
- Expand to include interior and less served counties and their rich assets – rivers, State and National Parks, etc.



There is a need for **analysis of existing infrastructure** - traffic, roads, water, impact, etc.



There is a real need to **create:**

- Outdoor and Adventure Travel destination regions to show ecosystem, activity and unique experience diversity
- Outdoor and Adventure Travel packages/itineraries
- Outdoor Trails



There is a need to **assist smaller businesses** with their individual marketing efforts to build on the overall marketing strategy for the Florida Adventure Travel Network.





7.0 | FOR MORE INFORMATION

For more information on the Visit Florida Adventure Travel Network, please contact:



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Regional Director, North America

Adventure Travel Trade Association (ATTA)

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For more information on the Visit Florida Adventure Travel Network Stakeholder Analysis and Network Mapping, please contact:



CELINE BEURLE

Chief Operating Officer

Future iQ

Email: celine@future-iq.com

To explore the Florida Adventure Travel Network Survey Results, please visit the project portal:

<https://lab2.future-iq.com/florida-adventure-travel-network-survey/>

8.0 | ABOUT FUTURE IQ

Future iQ specializes in applying innovative tools and approaches to assist municipalities, organizations, regions and industries shape their economic and community futures. With nearly two decades of experience, the company has a global clientele spanning three continents. To learn more about Future iQ, and our recent projects visit www.future-iq.com or by email at info@future-iq.com.





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TRADE ASSOCIATION

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