

Comparison Research of Mongolian Adventure Travel's Products

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Abstract. The effect of income from tourism, especially adventure travel, on the world economy is increasing as the years go by. Tourists' interests are changing over time, with a growing preference for professional and adventurous travel. This research paper was conducted to determine the development opportunities for Mongolian adventure tour product services and research tour products organized by Mongolian tour operators. A total of 332 tour programs from 28 organizations were researched, revealing that 96.3 percent of the tours in Mongolia are land-based, 3.9 percent are water-based, and 0.3 percent are air-based. The study identified 27 varieties of soft adventure tours, including photo safari, bird watching, ecotourism, trekking, cycling, camel, and horse travel. Additionally, 14 tour operations offer four types of hard adventure tours with varying costs and durations.

Keywords: Inbound tourism; hard adventure; soft adventure; average duration of trip; average price of trip.

1. Introduction

In recent years, tourism has rapidly developed alongside hospitality, with various adventure travel products emerging as a popular choice. Adventure travel, based on sports, culture, and nature, is considered a new type of tourism, though it has been continually evolving due to changing customer interests and preferences. As a result, adventure travel has become one of the most popular and demanding types of tourism.

Tourism has a significant impact on the economy of Mongolia. In 2019, before the COVID-19 pandemic, the number of arrivals in Mongolia reached 577,000, representing a significant increase from previous years. However, tourism has been inactive for the past two years due to the pandemic. Efforts have been made to improve and develop the industry, including creating new products and services in the international market. To create and develop new products, analysis, and research are necessary, which is the purpose of this study.

The purpose of this research is to compare and study the products and services of inbound adventure travel in Mongolia and to determine the current situation of this industry.

2. Literature review

To date, the United Nations World Tourism Organization (UNWTO) has not defined adventure tourism yet. However, the Adventure Travel Trade Association (ATTA) has defined adventure tourism as a trip that incorporates at least two of the following three elements: physical activity, exposure to the natural environment, and cultural immersion (Fig 1) [1].

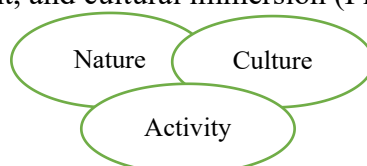


Fig. 1 Components of an adventure trip [2]

According to other definitions, adventure travel is considered one of the types of travel that involves danger, risk, and physical ability, as well as exploration.

International organizations and researchers in this field have described adventure travel using the following concepts:

- Interaction with nature and culture
- Active participation in events
- Requirement of certain skills
- Involvement of risk, with varying levels of risk
- Often requiring special equipment
- Consisting of a low number of attendees
- Providing great security of the environment
- Focusing on developing exploring skills and gaining experiences

The advantages and disadvantages of adventure travel can be identified as shown in Table 1.

Table 1 The advantages and disadvantages of adventure trips

Advantages	Disadvantages
Special interest tours consist of groups based on your interests	Detailed research and high organization are needed
These include people with relatively high incomes, education, and travel experience	Travelers need to know about travel
Travel is usually planned for a long time	Security must be ensured
It is slow where you are going	
Not limited by season	
Special interest tourism has been developing rapidly in recent years	

Travelers and tourists attend adventure tourism for the following reasons:

- To study
- To understand culture
- To gain experience while attending the event
- To seek risk
- To experience certain feelings [3].

Adventure tourism can be classified into land-based, water-based, and air-based niche markets. Additionally, classification based on culture and technology is possible.

Table 2 Classification of adventure trip

Land-based	Air-based	Water-based	Culture-based	Technology-based
Soft: Hiking, cycling, tour with tent, backpacking, horse travel, ecotourism, hunting tourism	Soft: Air ballooning, helicopter flight, Biplane ride, gyrocopter flight	Soft: Fishing, rafting, scuba diving, surfing	Soft: Learning a new language, local exhibition, attend festivals and cultural events	Soft: Hikers, cyclers, climbers, sailors, skiers and other people find their community on online.
Hard: Rock climbing, mountaineering, sandboarding, caving, mountain biking	Hard: Base jumping, sky diving, wing suiting, bungee jumping, hang-gliding, paragliding, micro lighting	Hard: snow biking, snow kiting, heli-skiing, glacier tour, skiing, dog sledding		

Adventure travel can be divided into two classes: soft and hard. The classification depends on factors such as required equipment, space, and level of risk. Soft adventure travel is relatively safe and does not require much skill or experience. Examples include backpacking, birdwatching, camping, canoeing, fishing, hiking, horseback riding, kayaking, safaris, sailing, and surfing.

On the other hand, hard adventure travel is riskier and requires more skill and experience than the soft adventure travel. Examples include caving, rock climbing, and trekking. Sometimes soft adventure activities can turn into hard adventure activities, such as kayaking in a wild river or hiking in extreme weather conditions or at high altitudes. It is important to note that danger and skill are not fixed concepts so that they can vary greatly depending on the tourists' perception [4].

While some people consider kayaking a soft adventure, others consider it hard adventure travel. For tourism companies, offering soft adventure tourism services is easier for tourism companies, but it also involves greater competition. Soft adventure tourism services require less expertise and involve less risk, so fewer precautions must be taken. Finally, soft adventure travel typically requires less expensive equipment [4].

Hard adventure travel requires experience and a high level of knowledge and involves certain risks that necessitate risk prevention. Depending on the scenery, it can be categorized as a mountain adventure tour, coastal adventure tour, animal adventure tour, and so on [5]. A mountain tour may include mountaineering, rock climbing, trekking, downhill skiing, and paragliding. A coastal tour may include wave riding, various types of diving, fishing, and sail boating. An animal adventure tour may include safari tours, bird watching, and watching jungle animals. The categories of adventure tours are countless and evolving rapidly, with new types of tours being added due to the enthusiasm of adventure-loving tourists to explore new places [4].

According to the Adventure Tourism Market Study 2013, 57% of adventure travelers were male, and 43% were female. However, the 2014 annual global trade study, which is specific to tour operations, reflected that 53% of their travelers were female, and 47% were male, indicating that the ratio of sexes is relatively consistent. The 2013 study further revealed that 37% of adventure travelers have at least a four-year degree, 11% have a professional degree, and the average individual income of an adventure traveler is USD 46,800 per year [1].

Adventure travelers prioritize international travel, as evidenced by the fact that 71% of all adventure travelers, including 79% of hard adventure travelers, hold valid passports. While a small number of adventure travelers embark on solo trips, 21% prefer to travel with friends, 37% with their spouse or partner, and 30% with their families, including children. When choosing a destination, adventure travelers prioritize areas of natural beauty above all else, followed by the available activities and climate. In contrast, non-adventure travelers tend to prioritize having friends and family at the destination, followed by natural beauty and climate. Motivations for engaging in adventure travel are diverse, but the most common cited reasons include relaxation, exploring new places, spending time with family, and learning about different cultures [1].

Unlike non-adventure travelers, adventure travelers tend to use more professional services such as guides, tour operations, and boutique service providers. In 2010, the first global adventure tourism market sizing study was conducted by ATTA, George Washington University, and Xola Consulting conducted the first global adventure tourism market sizing study. The study found that the global value of adventure tourism was USD 89 billion. A repeat of the study in 2013 found that 42% of travelers went on adventure trips, making the sector worth USD 263 billion, a 195% increase in just two years [1].

This significant growth was attributed to:

- an increase in international departures
- an increase in the number of travelers going on adventure trips,
- an increase in average spending [1].

According to a report by Allied Market Research in 2021, the adventure tourism market size was valued at \$112,227 million in 2020 and is estimated to reach \$1,169,095 million by 2028, with a CAGR of 20.1% from 2021 to 2028. Among the different types, the soft segment was the most prominent, accounting for \$37,595 million in 2020, and is expected to reach a market size of \$380,687 million by 2028, growing at a CAGR of 20.1% throughout the forecast period. In terms of activity, the land-based activity segment was the most prominent in 2020 and is expected to remain dominant throughout the forecast period [6].

The main marketplace of adventure tours consists of these countries:

- North America (U.S, Canada, Mexico)
- Europe (Germany, Switzerland, Norway, Italy, and Rest of Europe)
- Asia-Pacific (India, China, New Zealand, Australia, Japan, Kazakhstan, Kyrgyzstan, Rest of Asia-Pacific)
- LAMEA (Latin America, Middle East, Africa)

3. Methodology

The document collection and summarizing method was used in this study to compare and research adventure travel products in Mongolia. A total of 332 travel products' itineraries, prices, attractions, transportation, accommodations, and other relevant information from 28 different tour operations were collected and analyzed. The tour operations were selected based on two main criteria: first, searching on Google using the keyword "adventure travel in Mongolia," and second, being a member of The Mongolian Tourism Association [7].

4. Research Results

The study found that 96.3% of adventure travel in Mongolia is land-based, 0.3% is air-based, and 3.9% is water-based, as shown in Table 3.

Table 3 Adventure travel suggested by tour operations (by underlying factors)

№	Travel type		Number of travels	Number of organizations	Percentage
1	Land-based	Hard	19	17	5.7
		Soft	299	25	90.06
2	Air-based	Hard	Not Available now	None	
		Soft	1	1	0.3
3	Water-based	Hard	1	1	0.3
		Soft	12	11	3.6
Total			332	28	100.0

There are a total of 27 soft adventure activities in Mongolia, including safaris, birdwatching, nature-based travels with a less negative impact on the environment, ecotourism, horse riding, camel riding, trekking, biking, and cultural interactions with local citizens. Given Mongolia's beautiful scenery and landscapes, it is not surprising that the most in-demand travel activity is ecotourism. Trekking and horse travel are also popular, likely due to a large number of ecotourism options available (see Table 4).

Table 4 Soft adventure travels suggested by tour operations

№	Type of travel		Total events	Suggested tour operations	Percentage	Ranking
1	Safari		26	11	8.4%	IV
2	Birdwatching		15	6	4.8%	V
3	Fishing		5	5	1.6%	
4	Ecotourism		118	26	37.8%	I
5	Walking tours	Trekking	23	17	7.3%	V
		Horse riding	47	18	15.1%	II
		Hiking	14	11	4.5%	VI
6	Driving		29	13	9.3%	III
7	Cycle tour	Biking	3	2	0.96%	
		Cycle touring	11	8	3.6%	
8	Community-based tourism		13	4	4.2%	VII

9	Water sports	Kayaking	2	2	0.64%
		Rafting	3	2	0.96%
10	Air ballooning		1	1	0.32%
11	Sailing		1	1	0.32%
12	Religious tourism		2	2	0.64%
	Total	314	119	100%	

On the other hand, there are four types of hard adventure travel suggested by 14 tour operations. It proves that hard adventure travels require the safety of tourists and have high risks. Therefore, the numbers are lower than soft adventure travel (Table 5).

Table 5 Hard adventure travels that are suggested by tour operations

No	Type of travel		Total events	Number of organizations	Percent age
1	Climbing	Rock climbing	1	2	3.5%
		Ice climbing	1	1	3.5%
		Mountaineering	3	3	10.7%
2	Moto	ATV off road-4	5	3	18%
		Motorbiking	3	3	10.7%
3		Dog sledding	11	9	39.3%
	Others				
4	1.	Trans-Siberian adventure (stopover in Mongolia)			
	2.	Trans-Siberian rail trip (Mongolia stopover)	4	3	14.3%
	3.	Self-driving adventure & fundraiser.			
	4.	Trans-Mongolian Adventure (stopover in Mongolia)			
		Total	28		100

The tour operations that offer hard adventure travel are relatively fewer. The following tour operations provide dog sledding: Ayan Travel, Goyo Travel, and Selena Tour. Tour Mongolia Company offers rafting, while Juulchin and Mongolia Expedition Companies offer mountaineering.

Table 6 compares the tour operations that are highly ranked in Table 4 based on their product prices and average durations.

Table 6 Comparison of the products

Type of travel	Tour operation	Average duration (day)	Average cost (US\$)
Horse travel	Ayan travel, View Mongolia, Juulchin tours, Discover Mongolia, Goyo travel, Let's travel, Nomadic tours Asia, Nomadic journey, Selena tour, Zendmen travel, Mongolia expedition, Tour Mongolia, Responsible travel, Off road adventure, Ger to Ger	11.6	2028
Hiking	View Mongolia, Juulchin Tours, Goyo Travel, Selena Tour, Mongolia expedition, Ayan travel	11	2482
Motorbiking	Off road adventure, Ger to ger, Ponaramic journey, Mongolia expedition, Nomadic Tours Asia, Goyo travel, Discover Mongolia, Juulchin tours	11	3146
Safari	Ayan Travel, Goyo travel	15	4980-5395
Bird watching	Juulchin tours, Zendmen travel, Selena tour, Ger to ger	3-17	1602
Dog sledding	View Mongolia, Goyo travel, Selena Tour	8-9	1317-2520

According to the table above, the duration of adventure travels organized in Mongolia varies depending on the region. Pricing mainly depends on the travel duration and destinations, as longer trips often include more destinations, increasing the chance to discover new cultures. Some tour

operations offer varying prices, which may be due to differences in accommodations and transportation. For example, staying in a tourist camp or a tent can be less expensive than staying in a hotel. Additionally, tour programs that include special events can significantly increase the price.

Religious and shaman tours are also organized, along with photo tours, skiing, and rafting, which have been developing in recent years. However, these types of tours are not as frequently offered, and the number of tour operations providing them is lower.

5. Conclusion

A total of 332 products and services launched by 28 tour operations in Mongolia were compared, and it was found that horse travel, hiking, safari, birdwatching, moto tour, and dog sledding travels are common among these tour operations. The pricing of these tours depends on the duration and falls under three price ranges. For 1-3 days of travel, the cost ranges from \$147 to \$395, for 4-9 days of travel, the cost ranges from \$1405 to \$9905, and for 9 days or more, the cost ranges from \$1900 to \$11000. The pricing generally covers transportation, accommodation, dinner, fuel, and employees' salaries. The most common used vehicles are 4x4, minibuses, and vans. In Ulaanbaatar, tourists stay in hotels such as Tuushin, Bayangol, Kempinski, and Shangri-La Ulaanbaatar, while in the countryside, they stay in tourist camps and tents. It was observed that the majority of tourists choose to visit the Gobi, western, and central regions, while the eastern region has the lowest number of arrivals.

The travel products and services offered by tour operators are quite similar to each other in terms of destination. However, they all include beautiful scenery and landmarks, with most of them featuring horse and camel travel. This makes the type of travel somewhat unspecified. Some organizations specialize in adventure travel, such as Mongolian Expedition, Off-Road Adventure, and Ger to Ger.

A few travel itineraries are repeated among different operators, such as the Falcon Festival, the Tour of Altai Tavan Bogd, horse travel of Orkhon Valley, fishing on the Onon River, and Gobi off-road travel. One specific travel program from a tour operator may have four or five different itineraries.

To summarize, adventure travel in Mongolia is relatively mild. However, one disadvantage is the lack of new and unique travel products. On the other hand, adding traditional culture to every tour makes it more advantageous. Therefore, it is appropriate to continue developing adventure travel by focusing more on safety and comfort to offer a world-class product.

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