



Adventure Tourism Development Index 2008 REPORT

Adventure Travel Trade Association / The George Washington University / Xola Consulting, Inc.



**WELCOME,
and thank you for reading the
2008 Adventure Tourism Development Index Report.**

The Adventure Tourism Development Index (“ATDI”) and Feature Adventure Destinations program is a joint initiative of the Adventure Travel Trade Association (ATTA), The George Washington University (GW), and Xola Consulting, Inc. (Xola). The initiative was created to support entrepreneurs and governments who want to develop and market sustainable adventure tourism products and services for the benefit of communities and the environment.

2008 marked the launch of the ATDI, and the ATDI team looks forward to refining and evolving this method in collaboration with the industry in the coming years.

As a new standard for adventure market development, the ATDI’s 10 Pillars of Adventure Tourism Market Competitiveness are guiding destinations in creating sustainable adventure tourism markets, and also helping to reshape the global perception and understanding of adventure as a means of social and environmental development and stewardship.

Destinations applying the 10 Pillars will be better able to attract investment and the attention of responsible travelers and tour companies who cater to them.

This report was prepared by GW and Xola. It provides a complete discussion of the 2008 ATDI country rankings, the ATDI ranking methodology and information on the 2008 ATDI Feature Adventure Destinations, Assam, India and Peru.

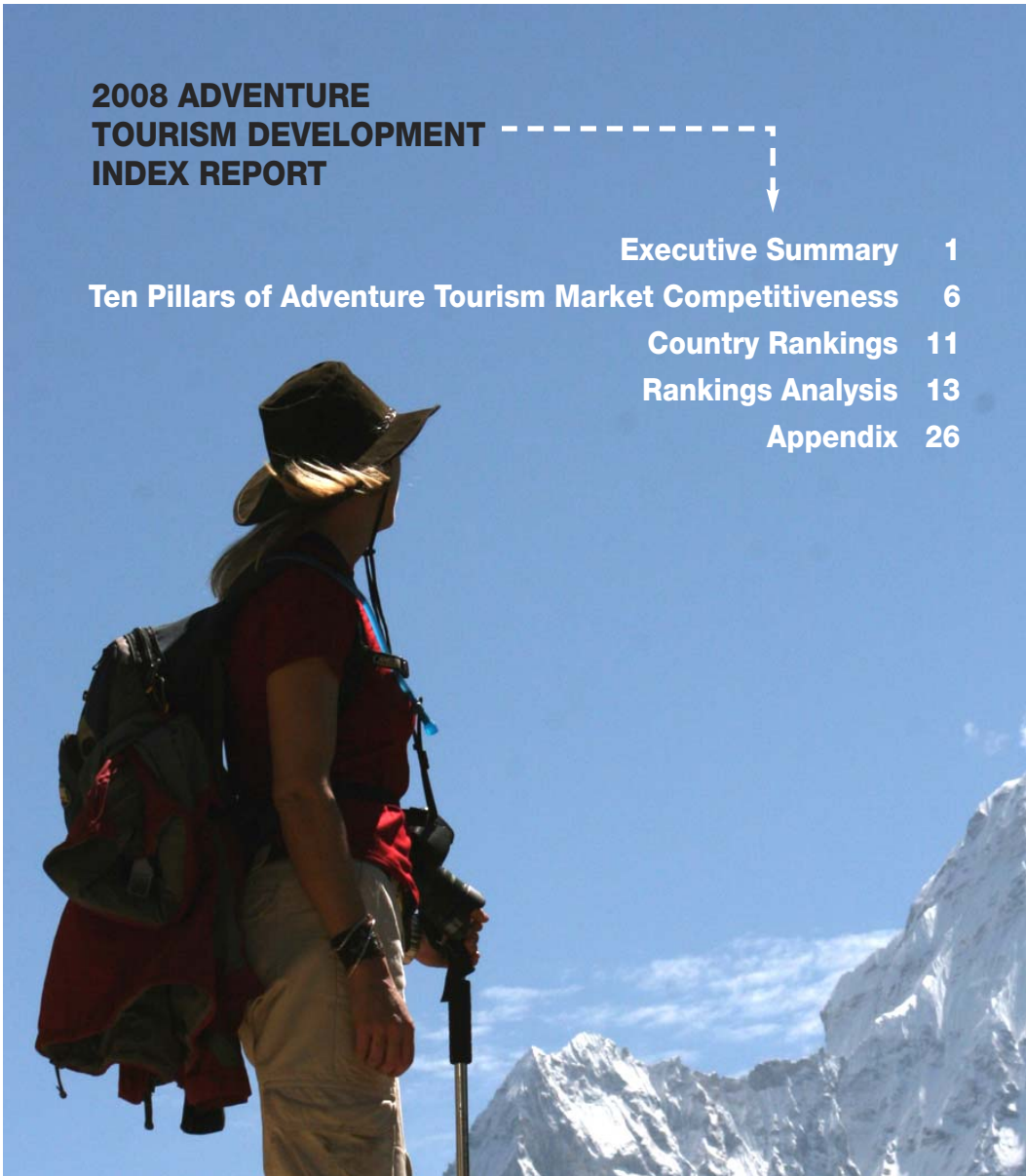
It will be useful to:

- ▶ Tourism management organizations and government agencies by providing a means of gauging and measuring adventure travel market development year to year;
- ▶ Tourism industry professionals seeking to develop and promote adventure travel with information to support development initiatives at the local level and guide marketing planning;
- ▶ Adventure travel operators by providing information useful for setting strategy relative to new destinations, itineraries, and partners; and
- ▶ Conscientious travelers by providing unbiased information about unusual opportunities for adventure in new destinations.



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INDEX REPORT**

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Executive Summary

This report provides detailed discussion about the mission behind the Adventure Tourism Development Index and Feature Adventure Destination program, the 2008 ATDI country scores, and how they were derived.

ATDI Mission

As more destinations and businesses enter the adventure tourism industry, there is a need for guidelines to support responsible development. Through the ATDI's 10 Pillars, ATTA, GW and Xola offer a set of principles to structure the adventure industry's growth, ensuring that new markets created will be sustainable, delivering benefits into the future for the local environment and people.

ATDI 10 Pillars of Adventure Tourism Market Competitiveness

The 10 Pillars of adventure tourism market competitiveness were developed through field analysis and work in communities where adventure tourism markets have been observed to bring significant positive change.

This set of principles was further supported and enhanced by the lessons learned from studies in rural and eco- tourism development. The 10 Pillars are rooted in a consumer-driven philosophy of market development and designed to encourage adventure tourism market development that offers products and services consumers want to buy.

The 10 Pillars are:

1. Sustainable Development Policy
2. Safety and Security
3. Tourism Infrastructure
4. Natural Resources
5. Cultural Resources
6. Adventure Activity Resources (cycling, climbing, hiking, rafting, etc.)
7. Entrepreneurship
8. Humanitarian
9. Health
10. Image



ATDI Country Rankings

ATDI country rankings are calculated using economic and environmental data from institutions such as the World Bank, the World Economic Forum, UNESCO, and Transparency International, among others, and adventure tourism industry survey data. The 2008 benchmarks feature 27 developed countries and 164 developing countries. Below, the top scoring countries from the developed and developing country tables:

Top 10 Developing Countries

1. Estonia
2. Chile
3. Slovak Republic
4. Czech Republic
5. Hungary
6. Botswana
7. Bulgaria
8. Jordan
9. Latvia
10. Uruguay

Top 10 Developed Countries

1. Switzerland
2. Sweden
3. New Zealand
4. United Kingdom
5. Spain
6. United States
7. Norway
8. Germany
9. Iceland
10. France

About the Partners



ADVENTURE TRAVEL
TRADE ASSOCIATION
www.adventuretravel.biz

Established in 1990, the Seattle-based ATTA (www.adventuretravel.biz) is a global membership organization dedicated to unifying, professionalizing, promoting and responsibly growing the adventure travel market worldwide. ATTA Members include tour operators, destination marketing organizations, tourism boards, travel agents/agencies, guides, lodges/resorts/attractions, media, and service providers. Host of the Adventure Travel World Summits, the ATTA provides professional support, development, education, research, marketing, career building, networking and cost saving resources to its members.



THE GEORGE WASHINGTON UNIVERSITY
SCHOOL OF
BUSINESS

The George Washington University's International Institute of Tourism Studies (IITS) has held a leadership role in tourism and hospitality education for over 30 years, building a global reputation for tourism research and academic programs. Today, IITS, located within GW's School of Business, offers academic opportunities in tourism administration, event management, sport management, and sustainable destination management for undergraduate, master's, and professional students.



Xola Consulting, Inc. (www.xolaconsulting.com) provides technical assistance to individual adventure tour company operators and tourism boards interested in adventure tourism development for the benefit of rural communities and the environment. Xola also specializes in supporting organizations seeking to blend adventure tourism and volunteer service. Xola consultants have in-depth experience in emerging markets around the world including Central and South America, North Africa and Asia, including Cambodia, Myanmar (Burma), India, Nepal, Mongolia and China.

Introduction

Why Focus on Adventure?

Adventure tourism in all its forms holds special promise for a global population facing significant environmental and social challenges.

Climate change, poverty, cultural intolerance and misunderstanding — all are issues adventure tourism companies and destinations find themselves confronting and managing firsthand.

For example:

- ▶ Adventure businesses feel the impacts of climate change more rapidly than other businesses because they work frequently in sensitive environments most drastically and immediately affected;
- ▶ Adventure businesses are often based in, or frequently send travelers to, communities where the pressures of globalization and social inequality are reaching crisis points; and
- ▶ Adventure companies are often the first to introduce travelers from the developed world to new cultures and new environments, providing them with transformative experiences that have lasting and meaningful effects on the attitudes that govern their daily lives.

In addition, adventure tourism businesses provide significant business opportunities for people in regions of the world where rural economic development programs are often challenged by lack of investment, education, and access to markets. These issues can be as relevant in communities located in developed countries as they are in many developing countries of the world.

Pursuing an adventure tourism development strategy can provide new options for economic growth, and encourage both travelers and local people to adopt sustainable behaviors toward the environment.

Adventure tourism as an industry is making important contributions for people at local levels already, and can have an even greater impact when considered in a global context. It can transform our perceptions of our world and our place within it as a global citizenry — paving the way for peace in our expanding global culture, and a reshaping of the policies by which we govern and manage our environment and our interactions with one another.

Given its significance and potential, creating reliable tools for guiding the industry's growth and monitoring its impact is important, and this is why the ATDI program was initiated.

Defining Adventure Tourism

The Adventure Tourism Development Index uses a broad definition of adventure travel to assess a country's resources for use in the provision of any trip which includes two out the following three aspects: physical activity, interaction with nature, and cultural learning or exchange.

Within this framework, it is possible to further segment adventure travel experiences along the familiar vectors of "hard" and "soft" adventure. This definition, although it has its foundation in the traditional academic literature on adventure, was reached through primary research and



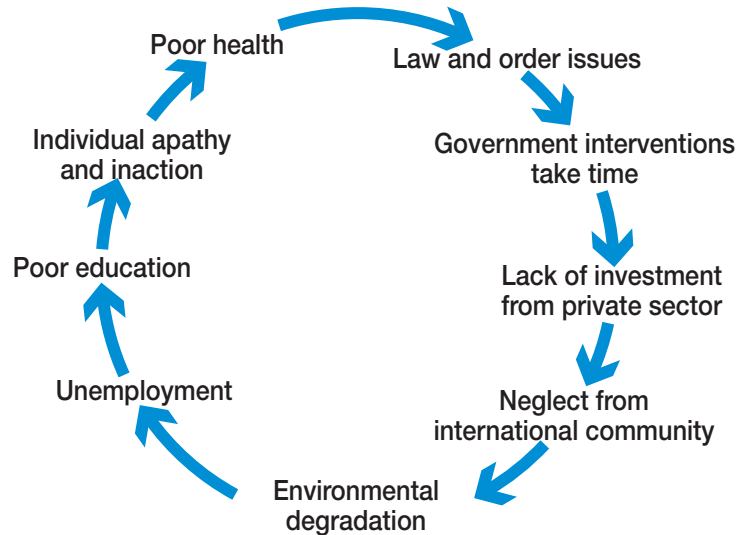
analysis conducted in a series of consumer survey results administered by ATTA and Xola.

Advantages and Challenges to Pursuing an Adventure Market Development Strategy

As it grows, adventure tourism has the potential to positively transform people, environments and economies. Adventure tourism can be a catalyst, sparking economic growth across multiple industries in destinations where it is given strategic focus.

The charts below illustrate the specific issues holding poor regions back economically and socially, and how adventure tourism market development can contribute to solving these issues.

Common Issues Holding Poor Regions Back



Specific Ways Adventure Tourism Can Reverse the Cycle



Building competitive adventure markets requires a different approach than that used to develop mainstream tourism markets, however. For example, adventure markets have different requirements when it comes to infrastructure and place a different premium on the leadership brought by entrepreneurs to industry growth.

The Adventure Tourism Development Index's 10 Pillars described in the following section of this report form the basis of the ATDI country rankings and can also be used as a framework for development based on a philosophy of sustainable growth, which honors the environment and people.



A view of the Himalayas from a tea plantation in Assam, India. Photo by Christina Heyniger

10 Pillars of Adventure Tourism

Market Competitiveness

This section describes the 10 Pillars in detail and provides information on how the quantitative score for countries were derived for each Pillar. For most of the Pillars data was gathered from publicly available databases and scores were assigned. In some cases survey data was used and values assigned based on respondents' answers. To discuss in detail the methodology join the ATDI online forum by sending an email to info@xolaconsulting.com or to ATDI@gwu.edu.

1. Sustainable Development Policy

Government policies which support and foster sustainable and rural tourism development are crucial to adventure tourism market competitiveness because they safeguard the destination's natural, heritage and cultural resources and provide a positive investment climate for the private sector.

When public and private sector actions are coordinated, the private sector flourishes, attracting investment and development to a region. To assign a quantitative value to government policies supportive of sustainable tourism, the team used the following two indicators:

1. The Environmental Performance Index
2. Unemployment per country
(as a % of total labor force)



Rationale: High environmental performance and low unemployment create a favorable climate for sustainable development, and government policies are an important factor in driving country performance in these areas.

2. Safety and Security

With respect to safety, the ATDI numerical benchmarks gauge how safe it is to travel in a country.

The Safety Pillar is made up of two indicators:

1. The Transparency Index
2. Foreign and Commonwealth Travel Warnings

Rationale: Countries with high levels of transparency and low or no travel warnings issued are safer for adventure travelers.

When the 10 Pillars are applied diagnostically in destinations this Pillar also assesses the degree to which adventure operators provide for the safety of travelers, and also whether facilities exist to cope with travel-related injuries. For example, in destinations where scuba diving is a popular draw, do hyperbaric chamber facilities for decompression exist? In destinations where mountaineering is prevalent, are rescue operations available? Do guides have first aid training? Generally, does the level of client safety offered meet internationally accepted standards?

3. Tourism Infrastructure

Adventure travelers, unlike mainstream package tourists, are frequently less sensitive to deficiencies in hard tourism infrastructure, but perhaps more sensitive than other travelers when it comes to soft tourism infrastructure. While hard infrastructure may take substantial capital investment and years to develop, often soft infrastructure required by adventure travelers can be developed with comparatively little capital outlay.



Adventure tourism infrastructure includes:

1. Hard infrastructure such as roads, airports, lodging facilities, and trails;
2. Soft infrastructure such as:
 - a. Trail maps
 - b. Accessible information on heritage and culture
 - c. Ground operators/ outfitters
 - d. Training programs for adventure tourism providers including guides/interpreters, ecolodges, etc

Data for the Infrastructure Pillar come from surveys of adventure and development industry experts.

At least three experts rated each country on elements measuring the extent to which the country had appropriate infrastructure to welcome adventure-seeking travelers.

Example Question: “Your perception of the availability of appropriate infrastructure for adventure travel in this destination is: very poor to very good”. The scale provided spanned from -3 (very poor) to +3 (very good)

To highlight the fact that the infrastructure required for adventure tourism is often much less extensive than that required for mainstream tourism, the phrase “appropriate for adventure travel” was used.

When the ATDI’s Ten Pillars are used diagnostically in countries or destinations, the team examines both hard and soft infrastructure as it pertains to adventure travelers.



4. Natural Resources

Adventure travelers want untrammelled and well-managed natural resources. Destinations with unusual or rare natural resources, which are well-managed and not exploited, will earn high praise from adventure travelers and sustained market competitiveness.

The Natural Resources Pillar is made up of two components:

1. Urban Population
2. Population Density

Rationale: Places with more unpopulated open space are likely to have greater natural resources for adventure tourism.

When the ATDI is applied diagnostically, emphasis is placed on discovering and valuing with fresh eyes natural resources that local populations may have overlooked as having a market value in the adventure tourism context.

5. Cultural Resources

Adventure travelers are as keen to learn about new cultures as they are to explore nature. For the adventure traveler, being able to experience local culture in an authentic way is a sought-after outcome of the travel investment.

Destinations which encourage local people to preserve their culture — even as modern influences continue to shape and evolve local customs — fare well with adventure travelers.

In valuing cultural resources the ATDI seeks not to encourage local people to become living museums to the past or actors staging outdated customs, but to acknowledge and honor their customs, recognizing their unique contribution to the world stage.

The Cultural Resources Pillar is made up of two indicators:

1. UNESCO World Heritage Sites
2. Protected Area as a % of Total Land

Rationale: High number of World Heritage sites and a high number of protected areas indicate a high number of cultural resources.

6. Adventure Activity Resources (cycling, climbing, hiking, rafting, etc.)

In this category the ATDI recognizes a destination's competitiveness relative to its ability to support specific adventure sports such as cycling, climbing, hiking, rafting, etc. With obvious connection to the Natural Resources Pillar, the Adventure Activity Resources Pillar identifies specific opportunities for specialized adventure sports. Adventure sports span a range of outdoor, nature-based activities — from bird watching to mountaineering; whitewater rafting to rock climbing; caving to paragliding.

Destinations with resources lending themselves to the development of a particular sport, for example, cliffs excellent for ice climbing, or forests with a wealth of bird species, may find themselves with a market opportunity and sustained competitive advantage.



The Adventure Activities Resources Pillar is made up of two indicators:

1. Protected Species
2. Forests, Grasslands, Drylands

Rationale: High number of endangered species and presence and growth of forests, grasslands and drylands indicates resources for adventure activities.

7. Entrepreneurship

In our experience, adventure travel's vitality and strength originates from the so-called "fringe" — those pioneering businesses with unusual offerings that would seem to appeal only to a small subset of niche enthusiasts. Those activities which begin outside the mainstream, or which seem too eccentric to appeal to a broader adventure travel market, reliably seem to end up as mainstream activities: the surging popularity of snowboarding is a case in point.



Given this reality, we look for and acknowledge destinations in which entrepreneurship in the business sector is thriving — any destination in which young businesses can start up and gain traction is likely to be fertile ground for adventure tourism entrepreneurs with innovative ideas and therefore more likely to become competitive in the adventure travel market.

The Entrepreneurship Pillar is made up of one component:

1. 2008 Index of Economic Freedom

Rationale: This indicator assesses 10 economic freedoms: Business Freedom, Trade Freedom, Fiscal Freedom, Government size, Monetary Freedom, Investment Freedom, Financial Freedom, Property Rights, Freedom from Corruption and Labor Freedom — which combined indicate the level of the barriers to entry for new entrepreneurs.



8. Humanitarian

The Humanitarian Pillar is concerned with human development in a country — the presence of basic services such as sanitation, for example, and with the potential for blended adventure and volunteering trips.

In their quest for authentic, unscripted experiences, adventure travelers also frequently seek out opportunities to volunteer in the destinations they visit. Tour operators find themselves looking for non-governmental organization (NGO) and aid organization partners through which they offer their visitors a short-term opportunity to contribute to relevant causes and also have the chance to see real people in un-manufactured situations.

We see this trend toward volunteer tourism and its appeal to adventure travelers as continuing to build and find destinations in which volunteering is available to adventure travelers as competitive in the larger market for adventure tourism.

The Humanitarian Pillar is made up of three indicators:

1. Happy Planet Index (HPI)
2. NGO Density
3. NGO Presence

Rationale: The factors measured by the HPI (life expectancy, life expectation and ecological footprint), combined with the density of NGOs and NGO presence indicate organizations working in humanitarian development and the level of a country's human development.

9. Health

The Health Pillar attempts to gauge the level of healthcare available in a country. This is important for two reasons:

1. A healthy local population is more likely to be able to foster and nurture new businesses, and to care for its resources responsibly.
2. Countries where healthcare is readily available are better able to support adventure travelers.

The Health Pillar is made up of two indicators:

1. Hospital beds (per 1000 people)
2. Physicians (per 1000 people)

Rationale: High number of beds and physicians per 1,000 people suggest higher levels of healthcare.

10. Image

A country's image can be one of the most malleable aspects of market competitiveness, but it is also frequently mismanaged as a way of guiding sustainable market development. A country's image for sustainability and adventure opportunity will attract travelers who value these aspects. Through their visitation and expenditures, these people will support the country's ongoing sustainable development strategies.

The ATDI examines a destination's adventure travel image; technical assistance using the Ten Pillars can go further to identify ways in which it could be strengthened and branded to attract visitors.

Data for the Adventure Image Pillar come from surveys of adventure and development industry experts.

At least three experts rated each country on elements measuring the extent to which the country has the perception of an adventure destination.

Example Question: *"Your perception of this destination as an adventure tourism destination is: very poor — very good."* The scaled provided spanned from -3 (very poor) to +3 (very good)

Country Rankings

The 2008 ATDI Country Rankings included 28 developed countries and 163 developing/emerging countries (as recognized by the U.N.).

The calculation method used in the ATDI has been adjusted to weight more heavily Pillars with specific importance to adventure travel market competitiveness:

- ▶ Entrepreneurship
- ▶ Adventure Activity Resources

Pillars such as Infrastructure, which are less crucial to competitive adventure tourism markets, were weighted equally with other factors.

Limitations

As with any benchmarking system, quantitative measurements have limitations posed by data availability and consistency of measurement across countries.

Key limitations of the ATDI's benchmarking data include:

- ▶ Not all countries of the world could be benchmarked due to lack of data; some countries with missing data were scored based on a regional average.
- ▶ The level of analysis in countries as defined by the U.N. and not the destination, i.e., Scotland is captured as part of Great Britain; destinations such as the Grand Canyon or Patagonia are covered in the ratings of their respective countries.
- ▶ Scores for some Pillars rely on data available via World Bank.
- ▶ Some data points cannot capture qualitative aspects — for example, in the Health Pillar the score is based on the number of hospital beds or physicians per 1,000 people, but information is not available to factor in helicopter availability or the ease of access to health professionals.

Developed Country Rankings

The countries ranked in the developed countries tables routinely score well in tourism and other lifestyle indices, and so it is unsurprising they also place well in the ATDI.

The table below provides the ATDI scores for developed countries.

Countries by Score	ATDI Benchmark	Countries by Score	ATDI Benchmark
Switzerland	1	Portugal	15
Sweden	2	Netherlands	16
New Zealand	3	Australia	17
United Kingdom	4	Japan	18
Spain	5	Belgium	19
United States	6	Canada	20
Norway	7	Malta	21
Germany	8	Denmark	22
Iceland	9	Ireland	23
France	10	Greece	24
Finland	11	Liechtenstein	25
Italy	12	Monaco	26
Luxembourg	13	Cyprus	27
Austria	14	Andorra	28

Developing Country Rankings

The scores here offer a fresh perspective on market potential, because clearly in some cases countries receiving high rankings are not currently perceived by adventure travelers or adventure tour companies as “top” or popular destinations.

The table below provides the ATDI rankings for developing countries.

Country	ATDI Benchmark	Country	ATDI Benchmark	Country	ATDI Benchmark	Country	ATDI Benchmark
Estonia	1	Venezuela, RB	42	Zambia	83	Mauritania	123
Chile	2	Dominican Republic	43	Tajikistan	84	Yemen, Rep.	124
Slovak Republic	3	Saudi Arabia	44	Mauritius	85	Equatorial Guinea	125
Czech Republic	4	United Arab Emirates	45	Iran, Islamic Rep.	86	Cape Verde	126
Hungary	5	Qatar	46	Swaziland	87	Togo	127
Botswana	6	Kuwait	47	Honduras	88	Burkina Faso	128
Bulgaria	7	Jamaica	48	Madagascar	89	Cote d'Ivoire	129
Jordan	8	Cuba	49	Uganda	90	Guinea	130
Latvia	9	Bahrain	50	Bermuda	91	Grenada	131
Uruguay	10	Macedonia, FYR	51	Sri Lanka	92	Cameroon	132
Israel	11	Colombia	52	Lao PDR	93	Comoros	133
Lithuania	12	Namibia	53	Guyana	94	Serbia	134
Costa Rica	13	Azerbaijan	54	Ghana	95	Congo, Rep.	135
Barbados	14	Albania	55	Syrian Arab Republic	96	Tonga	136
Slovenia	15	Trinidad and Tobago	56	St. Vincent and the Grenadines	97	Zimbabwe	137
Poland	16	Algeria	57	Vietnam	98	Bangladesh	138
Belize	17	Korea, Dem. Rep.	58	India	99	Papua New Guinea	139
Argentina	18	China	59	Mozambique	100	Montenegro	140
Turkey	19	St. Lucia	60	Malawi	101	Angola	141
Croatia	20	Suriname	61	Palau	102	Central African Republic	142
Romania	21	Tanzania	62	Turkmenistan	103	Sao Tome and Principe	143
Oman	22	Rwanda	63	Ethiopia	104	Marshall Islands	144
Russian Federation	23	Gabon	64	Indonesia	105	Niger	145
Singapore	24	Bolivia	65	Libya	106	Sierra Leone	146
Bahamas, The	25	Ecuador	66	Cambodia	107	Chad	147
Mongolia	26	Nepal	67	Vanuatu	108	Guinea-Bissau	148
Armenia	27	Belarus	68	Pakistan	109	Haiti	149
Panama	28	Senegal	69	Lesotho	110	Djibouti	150
Fiji	29	Nicaragua	70	Korea, Rep.	111	Nigeria	151
Ukraine	30	Guatemala	71	Samoa	112	Liberia	152
South Africa	31	Thailand	72	Mali	113	Iraq	153
Peru	32	Brunei Darussalam	73	Gambia, The	114	Sudan	154
Mexico	33	Philippines	74	St. Kitts and Nevis	115	Afghanistan	155
Egypt, Arab Rep.	34	Bosnia and Herzegovina	75	Seychelles	116	Timor-Leste	156
Kyrgyz Republic	35	Dominica	76	Benin	117	Eritrea	157
Brazil	36	El Salvador	77	Myanmar	118	Kiribati	158
Morocco	37	Bhutan	78	Malaysia	119	Maldives	159
Lebanon	38	Kenya	79	Solomon Islands	120	Burundi	160
Georgia	39	Moldova	80	San Marino	121	Somalia	161
Kazakhstan	40	Uzbekistan	81	Antigua and Barbuda	122	West Bank and Gaza	162
Tunisia	41	Paraguay	82			Congo, Dem. Rep.	163

Rankings Analysis

This section discusses the scores for the top eight countries ranked among the developed and developing countries in the 2008 ATDI. Country briefs have been compiled with data from the ATDI ranking scores and background information from CIA World Factbook.

Developing Countries Analysis

The ATDI team was surprised to find so many countries from Central Europe represented among the top developing countries, given the overall lack of adventure market development in these regions. The findings in this study indicate these countries have interesting potential as a result of strong sustainable development policies and an abundance of resources. Furthermore, we found many have very high Image scores and likely could develop both products and brands more completely to build themselves into strong, sustainable adventure travel destinations.

The potential for adventure market creation in these countries is thought to be high based on this analysis, and indicates that these countries may reap benefits in areas of health and conservation by pursuing adventure tourism market development strategies. In the paragraphs below a short summary of the top eight countries is provided. To discuss in detail any of the information provided in the following sections join the ATDI online forum by sending an email to info@xolaconsulting.com or to ATDI@gwu.edu.

1. Estonia

Estonia is located in Eastern Europe, where it borders the Baltic Sea and Gulf of Finland, between Latvia and Russia. The 1991 collapse of the Soviet Union into which it had been forcibly incorporated in 1940 allowed Estonia to regain its freedom.

Estonia has a maritime, wet climate with moderate winters and cool summers.

Although it has had problems with pollution, it has taken aggressive steps to curb emissions, and emissions in 2000 were 80% less than in 1980, for example.

The table below provides the detailed scores Estonia received in each of the 10 Pillar categories.

Sustainable Development	8.36
Safety	6.70
Health	6.24
Natural Resources	8.49
Cultural Resources	5.69
Adventure Resources	7.56
Entrepreneurship	8.76
Humanitarian	3.28
Infrastructure	8.57
Image	8.10



2. Chile

Chile is located in Southern South America where it borders the South Pacific Ocean, between Argentina and Peru.

Chile was historically ruled by the Incas, with the Mapuche Indians inhabiting the central and southern regions. Sound economic policies, maintained consistently since the 1980s, have contributed to steady growth, reduced poverty rates by over half, and have helped secure the country's commitment to democratic and representative government.

Sustainable Development	8.46
Safety	7.30
Health	2.59
Natural Resources	9.37
Cultural Resources	2.02
Adventure Resources	7.20
Entrepreneurship	8.96
Humanitarian	4.31
Infrastructure	8.87
Image	9.55

Chile has a temperate climate. There are high daytime temperatures and cold nights found in the desert region in the north, a Mediterranean climate in the central region and a cool and damp climate in the south. The terrain includes low coastal mountains; a fertile central valley and the rugged Andes in the east.



Deforestation and mining constitute important threats to Chile's natural and adventure resources; however, it received relatively high scores in these categories.

In the Infrastructure and Image categories Chile scored very well. Since this information is captured from surveys, we can see that the tourism community is already alert to the market potential of this country.

3. Slovak Republic

The Slovak Republic is located in Central Europe, south of Poland. After decades of linkage with the Czech Republic, the Slovak Republic was peacefully established in 1993.

Sustainable Development	8.63
Safety	4.70
Health	5.59
Natural Resources	7.61
Cultural Resources	3.68
Adventure Resources	7.40
Entrepreneurship	7.86
Humanitarian	3.74
Infrastructure	8.10
Image	9.05

The Slovak Republic is a landlocked country with a temperate climate that includes cool summers and cold, cloudy, humid winters. Its terrain is rugged and much of the country is mountainous; the Tatra Mountains offer excellent adventure resources in the north and are interspersed with many scenic lakes and valleys.

An important environmental issue in Slovakia as well as in Czech, however, is the presence of acid rain which is damaging forests.



4. Czech Republic

The Czech Republic is located in Central Europe, southeast of Germany. After decades of linkage with the Slovak Republic, the Czech Republic was peacefully established in 1993.



Its terrain includes plains and hills with low mountains. Bohemia in the west consists of rolling plains, hills, and plateaus surrounded by low mountains; Moravia in the east consists of very hilly country.

The climate is similar to that of the Slovak Republic, with cool summers and cold, cloudy, humid winters.

Sustainable Development	8.97
Safety	4.80
Health	6.32
Natural Resources	8.31
Cultural Resources	4.37
Adventure Resources	7.40
Entrepreneurship	7.83
Humanitarian	4.29
Infrastructure	7.43
Image	7.14

5. Hungary

Hungary is located in Central Europe, northwest of Romania. After World War II, Hungary became a Communist country; in 1990 it held its first multiparty elections and initiated a free market economy.

The terrain is mostly flat with rolling plains; hills and low mountains exist on the Slovakian border.

Similar to other Central European countries represented in the ATDI's top rankings for Developing countries, Hungary scored low for cultural resources, but was able to balance this score out with its high score for entrepreneurship and sustainable development policy.

Sustainable Development	8.69
Safety	5.20
Health	6.02
Natural Resources	8.08
Cultural Resources	2.71
Adventure Resources	7.62
Entrepreneurship	7.71
Humanitarian	4.42
Infrastructure	7.14
Image	7.50



6. Botswana

Botswana is located in Southern Africa, north of South Africa. It has a semiarid climate with warm winters and hot summers. The terrain is predominantly flat, including some gently rolling tableland; the Kalahari Desert is found in the southwest.

Mineral extraction, principally diamond mining, dominates economic activity, though tourism is a growing sector due to the country's conservation practices and extensive nature preserves.

Sustainable Development	7.34
Safety	5.60
Health	2.00
Natural Resources	8.10
Cultural Resources	3.85
Adventure Resources	7.02
Entrepreneurship	7.84
Humanitarian	2.61
Infrastructure	9.29
Image	9.86

Botswana, with one of the world's highest known rates of HIV/AIDS infection, obviously scored very low in the Health Pillar but is also regarded as having one of Africa's most progressive and comprehensive programs for dealing with the disease.

Its high score for Image may be the result of the marketing international adventure tour companies have put into promoting the country as a safari destination.



7. Bulgaria

Bulgaria is located in Southeastern Europe; it borders the Black Sea, between Romania and Turkey.

In 1990 Communist domination ended in Bulgaria and the country held its first multiparty election since World War II. It then began the contentious process of moving toward political democracy and a market economy while combating inflation, unemployment, corruption, and crime.

Sustainable Development	8.27
Safety	4.00
Health	5.73
Natural Resources	8.40
Cultural Resources	3.25
Adventure Resources	7.87
Entrepreneurship	7.27
Humanitarian	3.52
Infrastructure	7.62
Image	8.10

Predominantly mountainous, there are lowlands in the north and southeast; the climate offers cold, damp winters and hot, dry summers.

Although Bulgaria scored well for natural resources, it faces serious threats from air pollution from industrial emissions; and some rivers are known to be polluted from raw sewage, heavy metals, and detergents.

Other significant threats to adventure tourism result from deforestation; forest damage from air pollution and resulting acid rain; soil contamination from heavy metals from metallurgical plants and industrial wastes.



8. Jordan

Jordan is located in the Middle East, northwest of Saudi Arabia.

Ruled by King Hussein from 1953 to 1999, and his son King Abdallah II since 1999, Jordan has undertaken aggressive economic reform actions in recent years. Jordan acceded to the World Trade Organization in 2000, and began to participate in the European Free Trade Association in 2001. Municipal elections were held in July 2007 under a system in which 20% of seats in all municipal councils were reserved by quota for women. In November 2007, King Abdallah instructed his new prime minister to focus on socioeconomic reform, developing a healthcare and housing network for civilians and military personnel, and improving the educational system.

Jordan is mostly desert plateau in east, with highland areas in the west; the Great Rift Valley separates the East and West Banks of the Jordan River. The climate is mostly arid desert with a rainy season in west from November to April.

Sustainable Development	8.27
Safety	4.00
Health	5.73
Natural Resources	8.40
Cultural Resources	3.25
Adventure Resources	7.87
Entrepreneurship	7.27
Humanitarian	3.52
Infrastructure	7.62
Image	8.10



Developed Countries Analysis

The majority of the highest scoring countries among the developed countries are found in Europe.

In analyzing the detailed scores for developed countries, two Pillars in which low scores were commonly found were in the Cultural Resources and the Humanitarian Pillar and ratings. In the Cultural Resources Pillar these countries' scores were affected by the presence of fewer World Heritage Sites and less protected land.

In the Humanitarian Pillar, they sometimes received lower scores because the Humanitarian score is a composite, which includes a measure of NGO density and presence, noticeably lower in developed countries where there is not a strong need for aid services or non-governmental assistance. Recognizing that in this case a low score is not a reflection on the human development of the country's population, it still has meaningful consequences for adventure tourism: fewer humanitarian organizations may mean fewer volunteer opportunities and less opportunity for community-based tourism. In the paragraphs below, a short summary of the top eight countries is provided.

To discuss in detail any of the information provided in the following sections join the ATDI online forum by sending an email to info@xolaconsulting.com or to ATDI@gwu.edu.

1. Switzerland

Switzerland is a landlocked country located in Central Europe, east of France and north of Italy. It is a mostly mountainous country with a central plateau of rolling hills, plains and large lakes. The climate varies with altitude with cold, cloudy, rainy/snowy winters, and cool to warm, cloudy, humid summers with occasional showers.

As with some of its less developed Central European neighbors, Switzerland also suffers from environmental issues which affect its adventure industry — air pollution from vehicle emissions and open-air burning; acid rain; water pollution from increased use of agricultural fertilizers; and loss of biodiversity.

Sustainable Development	8.52
Safety	9.10
Health	5.55
Natural Resources	8.20
Cultural Resources	4.58
Adventure Resources	7.53
Entrepreneurship	8.95
Humanitarian	5.84
Infrastructure	9.43
Image	8.86



2. Sweden

Sweden is located in Northern Europe, bordering the Baltic Sea, Gulf of Bothnia, Kattegat, and Skagerrak, between Finland and Norway.

It is known for maintaining one of the world's most advanced social welfare systems, based largely on legislation introduced in the early post-war period. The country became a member of the EU in 1995, but rejected adopting the single currency in a referendum in September 2003.

Its terrain is mostly flat or with gently rolling lowlands with mountains in the west. The climate is temperate in

the south with cold, cloudy winters and cool, partly cloudy summers; subarctic in the north.

Sustainable Development	8.84
Safety	9.20
Health	4.64
Natural Resources	9.21
Cultural Resources	4.41
Adventure Resources	7.37
Entrepreneurship	8.02
Humanitarian	5.36
Infrastructure	9.52
Image	8.57



3. New Zealand

New Zealand is located in Oceania, made up of islands in the South Pacific Ocean, southeast of Australia.

The Polynesian Maori reached New Zealand in about A.D. 800. In 1840, their chieftains entered into a compact with Britain, the Treaty of Waitangi, in which they ceded sovereignty to Queen Victoria while retaining territorial rights. The British colony of New Zealand became an

independent dominion in 1907 and supported the UK militarily in both World Wars. New Zealand's full participation in a number of defense alliances lapsed by the 1980s. In recent years, the government has sought to address longstanding Maori grievances.

Sustainable Development	8.89
Safety	9.60
Health	4.69
Natural Resources	9.33
Cultural Resources	3.62
Adventure Resources	7.17
Entrepreneurship	9.0
Humanitarian	4.34
Infrastructure	9.76
Image	10.0



It is predominantly mountainous with some large coastal plains. The climate is temperate with sharp regional contrasts.

4. United Kingdom

The United Kingdom is located in Western Europe, and is made up of islands including the northern one-sixth of the island of Ireland between the North Atlantic Ocean and the North Sea, northwest of France.

Its terrain is mostly rugged hills and low mountains with level to rolling plains in the east and the southeast.

Sustainable Development	8.73
Safety	8.60
Health	3.98
Natural Resources	8.60
Cultural Resources	6.69
Adventure Resources	7.45
Entrepreneurship	8.93
Humanitarian	5.71
Infrastructure	9.29
Image	8.75



5. Spain

Spain is located in Southwestern Europe, bordering the Bay of Biscay, the Mediterranean Sea, the North Atlantic Ocean, and the Pyrenees Mountains, southwest of France.

The climate includes clear, hot summers in the interior, more moderate and cloudy along coast. Winters are cloudy and cold in the interior, partly cloudy and cool along coast.

The terrain is made up of large, flat-to-dissected plateau surrounded by rugged hills with the Pyrenees in the north.

Significant environmental issues affecting adventure travel resources include pollution of the Mediterranean Sea from raw sewage and effluents from the offshore production of oil and gas; water quality and quantity nationwide; air pollution; deforestation; and desertification.

Sustainable Development	8.41
Safety	6.80
Health	4.61
Natural Resources	8.63
Cultural Resources	8.62
Adventure Resources	7.67
Entrepreneurship	7.95
Humanitarian	5.52
Infrastructure	8.98
Image	8.98



6. United States

The United States is located in North America, bordering both the North Atlantic Ocean and the North Pacific Ocean, between Canada and Mexico.

The climate is tropical in Hawaii and Florida, arctic in Alaska, semiarid in the great plains west of the Mississippi River, and arid in the Great Basin of the southwest. Low winter temperatures in the northwest are ameliorated occasionally in January and February by warm chinook winds from the eastern slopes of the Rocky Mountains.

The terrain includes a vast central plain, mountains in the west, hills and low mountains in the east; rugged mountains and broad river valleys in Alaska; and rugged, volcanic topography in Hawaii.

Sustainable Development	7.02
Safety	7.30
Health	3.99
Natural Resources	9.03
Cultural Resources	5.31
Adventure Resources	5.67
Entrepreneurship	9.03
Humanitarian	4.59
Infrastructure	9.71
Image	9.29



7. Norway

Norway is located Northern Europe, bordering the North Sea and the North Atlantic Ocean, west of Sweden.

The county's terrain is glaciated with mostly high plateaus and rugged mountains broken by fertile valleys, small, scattered plains and a coastline deeply indented by fjords and arctic t

Sustainable Development	8.59
Safety	8.80
Health	4.71
Natural Resources	8.93
Cultural Resources	3.10
Adventure Resources	7.37
Entrepreneurship	7.88
Humanitarian	5.17
Infrastructure	8.98
Image	9.18

undra in the north. It is about two-thirds mountains with about 50,000 islands off its much indented coastline. Its strategic location is adjacent to sea lanes and air routes in the North Atlantic and has one of most rugged and longest coastlines in the world.

Environmental issues include water pollution; acid rain damaging forests and adversely affecting lakes, and threatening fish stocks; air pollution from vehicle emissions.



8. Germany

Germany is located in Central Europe, bordering the Baltic Sea and the North Sea, between the Netherlands and Poland, south of Denmark.

Its terrain includes Lowlands in the north, uplands in the center, Bavarian Alps in the south.

Sustainable Development	8.71
Safety	8.00
Health	6.21
Natural Resources	8.00
Cultural Resources	7.63
Adventure Resources	7.30
Entrepreneurship	8.10
Humanitarian	5.92
Infrastructure	9.52
Image	8.10



Feature Adventure Destinations: Assam, India and Peru

The 2008 ATDI release includes two Feature Adventure Destinations — places using technical assistance provided by Xola Consulting, Inc. to refine their adventure tourism market development strategy. This section describes the ATDI's Feature Adventure Destination program and the 2008 Feature Adventure Destination.

Feature Adventure Destination Program Description

Feature Adventure Destination analyses can support government and businesses operating in markets at varying stages of development. Feature Adventure Destination analyses are conducted in person, in your country/state/region.

In 2008, the ATDI Feature Adventure Destinations Program had two countries participate: India and Peru.

In Peru, PromPeru, the agency responsible for marketing Peru tourism, recognized that the underdeveloped North and Central regions could play a larger role in the country's tourism industry but wanted to find ways to market and develop these areas with sensitivity. Three Hotspots — Trujillo, Huaraz, and Chachapoyas — were selected for their mix of resources to appeal to adventure travelers — each with a compelling mix of natural, cultural, and adventure sporting resources. Additionally, these Hotspots were found to have a good base level of infrastructure and community support for tourism development. Itineraries for each Hotspot were suggested, as well as a unifying marketing theme for the three regions.

In Assam, India, state policymakers saw the opportunity to capitalize on India's rapidly expanding tourism market to draw more visitors to Assam. The state's tourism department leaders requested not only recommendations for adventure



The turquoise lakes of Peru's Cordillera Huayhuash. Photo provided by PromPeru.

product development, but also wanted to ensure that new products would reach an audience of tour operators and travelers to begin operating trips in the region. In addition, the state's leaders were very concerned that any new market development initiatives encourage sustainable, responsible tourism. Seven adventure tourism zones or "Hotspots" were identified and itineraries suggested for each.

Excerpts of the report provided to state policymakers have been made available in the ATDI 2008 Feature Adventure Destination Report here: www.adventuretravelnews.com and www.gwu.edu/iits and www.xolaconsulting.com/atdi.php

Feature Adventure Destination analyses may provide specific guidance on how to improve benchmark scores, and enable industry and consumers to gain a more complete understanding of a region's adventure resources and market potential by virtue of the in-depth analysis and discussion they offer.

How It Works

Using the 10 Pillars as a guide for technical assistance, a team (made up of international consultants from the ATDI team as well as local consultants from the destination) examine a country/state/region and make recommendations for improvement. Recommendations span from the strategic (government policy and coordination) to the tactical (standards and training for local entrepreneurs) and can spark coordination and collaboration between government agencies and the private sector.

Governments and companies seeking to build strong adventure tourism markets are frequently challenged in their efforts by a range of social and political issues, many of which are out of their direct control.

The ATDI provides a template to support policy makers and corporate stakeholders as they begin addressing some of these important challenges. The table below describes common challenges and ways in which the ATDI Program helps address those challenges.



A one horned rhinoceros in Kaziranga National Park, Assam, India. Photo by Christina Heyniger

Issue	ATDI's Benefits
Destinations lack access to investment capital for infrastructure improvements	Country benchmark scores and Feature Adventure Destination assessments can be used to attract investors by highlighting resources and market opportunities
Destinations lack access to investment capital for small business startup	Feature Adventure Destination assessments identify “hotspots” for adventure market development which can support local businesses in attracting funding
The policies in place for resource regulation and management are inadequate	Benchmark scores gauging adventure market competitiveness provide measurable evidence of policy impacts and over time will demonstrate the benefits of sound policies. As ATDI scores build international acceptance they may serve to motivate reluctant governments to establish sound policies
Destinations lack access to markets	Feature Adventure Destinations receive direct exposure with the adventure industry — tour operators and media — who help drive visitation
Accessing appropriate expertise for marketing to adventure travelers (which are currently predominantly North American and Western European) can be difficult and expensive	The ATDI team is experienced in adventure tourism marketing and brings direct access to major industry and consumer markets
Local people and business owners may have limited exposure and education about top quality adventure tourism destination management and operations	The ATDI team is experienced in small business startup and management and works frequently with local communities to provide support in key areas, from project conception and launch to steady-state management and efficiency

In brand new markets, the Feature Adventure Destination assessment identifies Hotspots for adventure market development, suggests itineraries to emphasize benefits for rural people and the environment, and offers market exposure to the international adventure community. In more developed destinations the Feature Adventure Destination assessment can identify areas for improvement and provide guidance for continued growth and offers market exposure to the international adventure community.

Appendix:

Developed Countries Alphabetical Score Listings

Andorra	28
Australia	17
Austria	14
Belgium	19
Canada	20
Cyprus	27
Denmark	22
Finland	11
France	10
Germany	8
Greece	24
Iceland	9
Ireland	23
Italy	12
Japan	18
Liechtenstein	25
Luxembourg	13
Malta	21
Monaco	26
Netherlands	16
New Zealand	3
Norway	7
Portugal	15
Spain	5
Sweden	2
Switzerland	1
United Kingdom	4
United States	6

Developing Country Alphabetical Score Listing

Country	ATDI Benchmark	Country	ATDI Benchmark	Country	ATDI Benchmark	Country	ATDI Benchmark
Afghanistan	155	Djibouti	150	Liberia	152	Senegal	69
Albania	55	Dominica	76	Libya	106	Serbia	134
Algeria	57	Dominican Republic	43	Lithuania	12	Seychelles	116
Angola	141	Ecuador	66	Macedonia, FYR	51	Sierra Leone	146
Antigua and Barbuda	122	Egypt, Arab Rep.	34	Madagascar	89	Singapore	24
Argentina	18	El Salvador	77	Malawi	101	Slovak Republic	3
Armenia	27	Equatorial Guinea	125	Malaysia	119	Slovenia	15
Azerbaijan	54	Eritrea	157	Maldives	159	Solomon Islands	120
Bahamas, The	25	Estonia	1	Mali	113	Somalia	161
Bahrain	50	Ethiopia	104	Marshall Islands	144	South Africa	31
Bangladesh	138	Fiji	29	Mauritania	123	Sri Lanka	92
Barbados	14	Gabon	64	Mauritius	85	St. Kitts and Nevis	115
Belarus	68	Gambia, The	114	Mexico	33	St. Lucia	60
Belize	17	Georgia	39	Moldova	80	St. Vincent and the Grenadines	97
Benin	117	Ghana	95	Mongolia	26	Sudan	154
Bermuda	91	Grenada	131	Montenegro	140	Suriname	61
Bhutan	78	Guatemala	71	Morocco	37	Swaziland	87
Bolivia	65	Guinea	130	Mozambique	100	Syrian Arab Republic	96
Bosnia and Herzegovina	75	Guinea-Bissau	148	Myanmar	118	Tajikistan	84
Botswana	6	Guyana	94	Namibia	53	Tanzania	62
Brazil	36	Haiti	149	Nepal	67	Thailand	72
Brunei Darussalam	73	Honduras	88	Nicaragua	70	Timor-Leste	156
Bulgaria	7	Hungary	5	Niger	145	Togo	127
Burkina Faso	128	India	99	Nigeria	151	Tonga	136
Burundi	160	Indonesia	105	Oman	22	Trinidad and Tobago	56
Cambodia	107	Iran, Islamic Rep.	86	Pakistan	109	Tunisia	41
Cameroon	132	Iraq	153	Palau	102	Turkey	19
Cape Verde	126	Israel	11	Panama	28	Turkmenistan	103
Central African Republic	142	Jamaica	48	Papua New Guinea	139	Uganda	90
Chad	147	Jordan	8	Paraguay	82	Ukraine	30
Chile	2	Kazakhstan	40	Peru	32	Uruguay	10
China	59	Kenya	79	Philippines	74	Uzbekistan	81
Colombia	52	Kiribati	158	Poland	16	Vanuatu	108
Comoros	133	Korea, Dem. Rep.	58	Qatar	46	Venezuela, RB	42
Congo, Dem. Rep.	163	Korea, Rep.	111	Romania	21	Vietnam	98
Congo, Rep.	135	Kuwait	47	Russian Federation	23	West Bank and Gaza	162
Costa Rica	13	Kyrgyz Republic	35	Rwanda	63	Yemen, Rep.	124
Cote d'Ivoire	129	Lao PDR	93	Samoa	112	Zambia	83
Croatia	20	Latvia	9	San Marino	121	Zimbabwe	137
Cuba	49	Lebanon	38	Sao Tome and Principe	143		
Czech Republic	4	Lesotho	110	Saudi Arabia	44		