

ATDI

ADVENTURE TOURISM DEVELOPMENT INDEX:
AN ADVENTURE TRAVEL SCORECARD

THE 2016 REPORT

SIXTH EDITION

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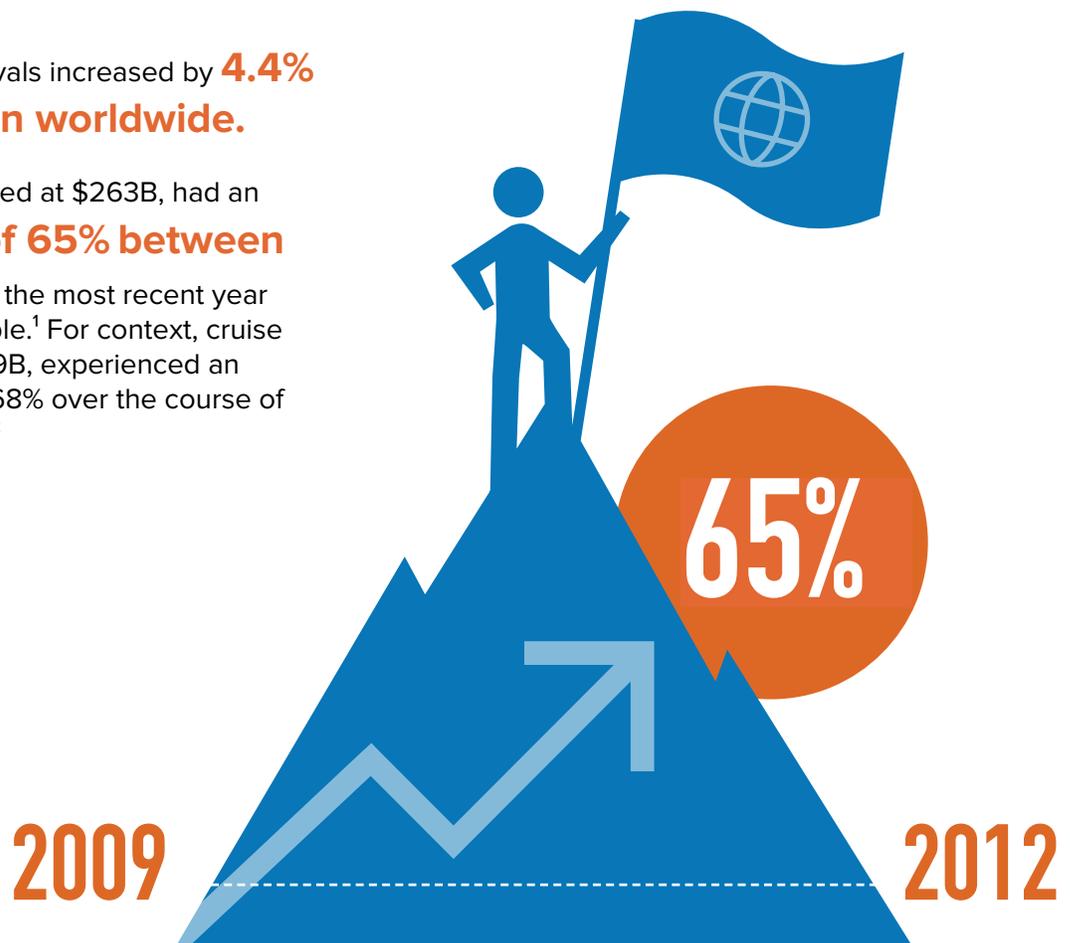
AN ADVENTURE TRAVEL SCORECARD

An Annual Ranking from the Adventure Travel Trade Association and The George Washington University

In our fast-paced world of always-on connections and instant communication through smartphones, Snapchat and WhatsApp, adventure tourism offers authenticity and simplicity—an opportunity to connect with nature and ourselves, an outlet to test physical limits and access to remote, wild and unexplored places.

Tourism of all types is growing at an unprecedented rate. According to the United Nations World Tourism Organization (UNWTO):

- International tourist arrivals increased by **4.4%** in 2015 to **1.18 billion worldwide**.
- Adventure tourism, valued at \$263B, had an estimated **growth of 65% between 2009 and 2012**, the most recent year for which data is available.¹ For context, cruise tourism, valued at \$119.9B, experienced an increase in demand of 68% over the course of ten years, 2004 - 2014.²



For countries and communities fortunate enough to possess outstanding natural and cultural characteristics, adventure tourism can provide a source of sorely needed income and an incentive to conserve vestiges of the past, current cultural identities and ecological wonders. This scorecard is intended to help destinations, tourism ministries and entrepreneurs evaluate their readiness to participate in the adventure tourism market, to identify areas in need of development and to evaluate their assets within a larger geographic context. Destinations that understand which assets most resonate with adventure travelers and then invest in strategically managing and promoting those assets, can ultimately best host and benefit from adventure-seeking visitors.

¹ Adventure Tourism Market Study, 2013. Published by The George Washington University and Adventure Travel Trade Association.

² 2016 CLIA State of the Industry. Retrieved from <http://www.cruising.org/about-the-industry/research/2016-state-of-the-industry>

RATING COUNTRIES FOR READINESS

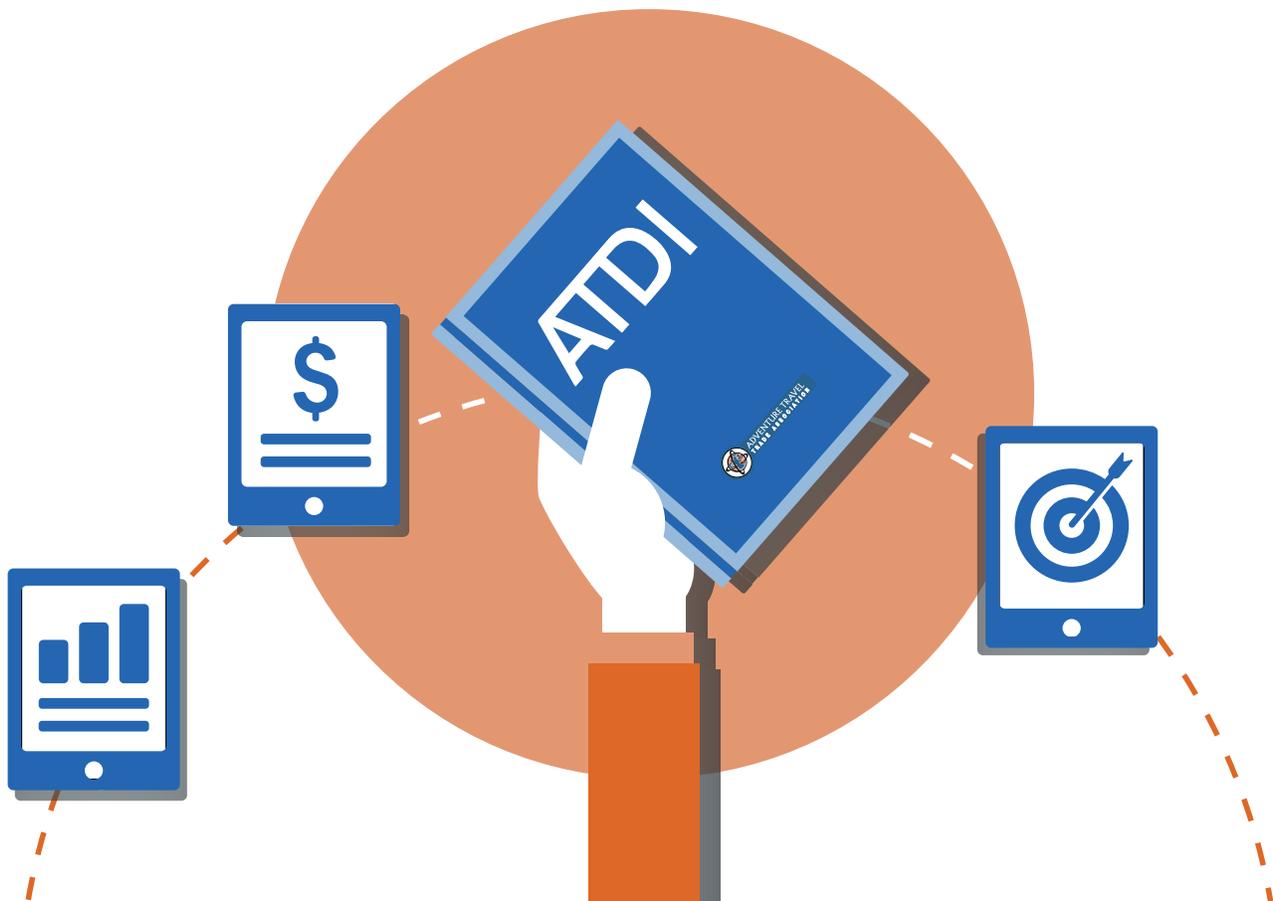
What does it take to become one of the world's leading adventure travel destinations? How should countries and communities focus their investments to benefit adventure tourism?

Since 2008, the Adventure Travel Trade Association (ATTA) in collaboration with The George Washington University has produced the Adventure Tourism Development Index (ATDI). The 2016 report for the first time provides a look at country rankings by region and a discussion of historical trends over the last five years. As in past years, the ATDI assesses the potential of and readiness for countries to compete in the global adventure tourism market based on their scores in 10 categories.

The **ATDI's scorecard** is the only country-level ranking for adventure tourism that **incorporates data from non-subjective sources**, offering a perspective to complement what surveys and expert opinion about individual destinations can reveal. Using data from a wide variety of indicators and a diversity of sources including **GDP, population density statistics, protected areas, the Environmental Performance Index, the World Resources Institute, Foreign and Commonwealth Travel Warnings**, in addition to survey data from industry experts, the ATDI provides policymakers and tourism planners with a unique look at the adventure tourism opportunity.

This ATDI offers a snapshot view of complex issues (such as 'sustainable' development) related to a country's competitiveness within the adventure tourism market that provides policy makers with opportunities to initiate dialogue that delves more deeply into market development strategy.

The practical goal of the ATDI is to provide directional guidance to market planners seeking to better prepare for and improve their efforts to meet the needs and interests of a growing global market of adventure travelers.



TOP TEN COUNTRIES FOR ADVENTURE TRAVEL

The scorecard data, collected and analyzed by the ATTA and The George Washington University, ranks 191 countries recognized and classified by the United Nations: 28 developed countries and 163 developing (emerging) countries. Countries are analyzed on a variety of metrics relevant to planners, policy-makers and tourism entrepreneurs.

Table 1 below lists the top ten developed and developing countries (as defined by the United Nations) that meet the scorecard criteria for adventure tourism potential in 2016.

Top 10 Countries, as Ranked by 2016 ATDI Report Scores		
Rank	Developed Countries	Developing Countries
1	Iceland	Czech Republic
2	Germany	Israel
3	New Zealand	Estonia
4	Norway	Chile
5	Switzerland	Slovak Republic
6	Canada	Slovenia
7	Australia	Bulgaria
8	Finland	Poland
9	Austria	Korea, Rep.
10	Denmark	Romania

Global Takeaways:

- Australia, ranked at number seven in 2016, has not been in the top ten since 2009.
- This is the first time that Denmark has been included among the top ten.
- The top nine developing countries remained unchanged between 2011 and 2016. The Czech Republic has been at the top of the list since 2015, and Romania replaced Costa Rica on the list.

RANKINGS BY CATEGORY

This section provides a description of each of the ATDI's ten categories and a look at how various regions around the world have been performing against indicators in these categories since the ATDI was first published in 2008. For each category, the report focuses either on changes that occurred between 2010 and 2016 or more narrowly on changes that occurred between 2015 and 2016, depending on the significance of a particular trend.



1. Government Policy that Supports Sustainable Development

Government policies that support sustainable tourism development safeguard the natural and cultural resources of destinations and encourage private sector investment. To the extent that governments are able to create a welcoming environment for investment and coordinate with the private sector in resource planning, the opportunity for investment that supports responsible development goals improves. The ATDI assumes that high environmental performance and low unemployment work together to create a favorable climate for sustainable development. Data for the Sustainable Development category is drawn from the following sources:

The Environmental Performance Index (created by Yale University, Columbia University, in collaboration with the World Economic Forum and the Joint Research Centre of the European Commission)

Unemployment per country (as a percentage of total labor force)

Scores in the sustainable development category have almost consistently decreased in all regions between 2010 and 2016. The exceptions were East Asia & the Pacific and Sub-Saharan Africa, which demonstrated a sharp increase between 2010 and 2011. While East Asia & the Pacific experienced the smallest decline in sustainable development between 2015 and 2016 (compared to other regions), Sub-Saharan Africa saw the greatest decline in this category.

The highest scoring country for Sustainable Development Policy is Switzerland. Unemployment in Switzerland for 2015 was 3.7%, and it is the leading country in the world in the Environmental Performance Index, which offers a method of quantifying and numerically marking the environmental performance of a state's policies. As noted in a blog post by Yale University Professor Angel Hsu for the Huffington Post, Switzerland has scored well in the Environmental Performance Index because of its "high marks in Biodiversity and Habitat Protection, and Climate and Energy. For centuries, Switzerland had only one designated protected park area; over the past five years, however, officials introduced 15 new regional parks, with two additional national park projects underway. With this surge in park development, Switzerland achieved the highest possible score for protected terrestrial areas - significantly higher than those of neighboring countries France, Italy, and Austria. In terms of climate change, Switzerland has substantially reduced the carbon intensity of its economic growth, with over half of its domestic electricity production from hydropower plants and another 40 percent from nuclear."³

Key Takeaway:

The Sustainable Development Policy category decreased by eight percent between 2015 and 2016 for both developed and developing countries. This drop in scores can be traced back to higher unemployment in many parts of the world. According to the International Labor Organization's World Employment and Social Outlook: Trends 2016 report, unemployment was an estimated 197.1 million in 2015 and is forecast to rise by 2.3 million to reach 199.4 million in 2016. Additionally, the International Labor Organization analysis indicates that global unemployment will rise in both 2016 and 2017, despite falling unemployment in some developed economies.

³ Hsu, A. et al. (2014, February 18). The 2014 Environmental Performance Index: Who's on Top and Bottom. Retrieved from http://www.huffingtonpost.com/angel-hsu/the-2014-environmental-pe_b_4797786.html



2. Safety and security

Numerical benchmarks are used to gauge a country's safety for travel. Countries with few or no travel warnings are perceived by travelers to be relatively safe and low levels of corruption generally suggest higher security, so the following two factors (along with an expert opinion survey) are used to assess safety and security:

The Corruption Perceptions Index

Foreign and commonwealth travel warnings

Although the safety score has been stable in recent years, the difference between the performance of developed and developing countries is significant. Europe and North America ranked the highest in terms of safety by a large margin. East Asia and the Pacific ranked second. Safety consistently decreased in the Middle East and North Africa between 2010 and 2016, in the wake of terror attacks. Sub-Saharan Africa has been the weakest performer in this category with the least degree of variation. Latin America & the Caribbean experienced the greatest overall improvement in the safety category between 2010 and 2016.

While this indicator does not track the impact of specific security situations – only the number of situations arising in a given year – it is interesting to note that following the terrorist attacks in Tunisia and Egypt, for example, there was a decline of around eight percent in travelers to North Africa. However, according to UNWTO Secretary General Table Rifai, “terrorist attacks in tourist areas have a short-term effect on international travel at the most.”

The highest scoring country for Safety and Security is Denmark. Denmark scored a 91, the “cleanest” of all countries in the world in the Corruption Perceptions Index. Also, there are no travel restrictions for Denmark in the Foreign and Commonwealth Travel Warnings, which is published by the United Kingdom.



Key Takeaway:

The safety score has generally been among the most stable categories between 2010 and 2016.



3. Health

This category is important because a healthy local population is thought to be better able to foster and nurture new business, care for its resources and make medical services readily available to travelers.

This category draws on three indicators from the World Health Organization:

Hospital beds (per 1000 people)

Physicians (per 1000 people)

Nurses and midwives (per 1000 people)

The indicator that measures the number of nurses and midwives available is new in this report. Aside from the changes resulting from the addition of this new indicator, it appears that health is generally stable and improving.

The highest-ranking country for Health was Monaco, while Saudi Arabia (jumped from 119 for health in the 2015 ATDI up to 76 in this year's report) saw the greatest improvement in this category followed by Uzbekistan (moving from 57 up to 22). Nepal, El Salvador and Mali saw declines in this area, as did Senegal.



Key Takeaway:

While developed countries continued to improve in terms of health resources, developing countries saw a slight drop in the healthcare category, which in part can be explained by the change in the study's methodology in 2015.



4. Natural Resources

Adventure travelers seek well-managed natural environments that are not overwhelmingly crowded, so destinations with well-protected habitats outside of population centers generally earn high praise from adventure-seeking visitors. This category draws on the following indicators from the World Resources Institute:

Urban concentration

Population density

Kilometers of coastline

Ratio of coast to total area

Additionally, expert panel survey respondents are asked to rate their perception regarding a destination's variety of natural resources. A provision was made to accommodate Canada's vast coastline, and to keep it in proportion with the rest of the world: it was rated at 5,500 instead of its actual score.

Countries that consistently rank in the top for Natural Resources are Palau, Canada, Australia, Japan, Russia, New Zealand, Norway, Iceland, and the United States. Argentina and Indonesia have also appeared in the top 10 for Natural Resources.



© Aleksandar Gospic

Key Takeaway:

While this category remained nearly unchanged between 2015 and 2016, there was a sharp increase in the scores for this category between 2010 and 2011, likely due to the fact that the ATDI draws from some databases that are not updated annually.



5. Cultural Resources

Destinations where local people are honoring and protecting their cultural traditions rate highly among adventure travelers. The category includes the following two indicators:

UNESCO World Heritage Sites

Protected area as a percentage of total land

Along with these indicators, an expert opinion survey question asks panelists to rate their perception of a destination's cultural richness on a numerical scale. It is important to note that the report data only reflects UNESCO sites and protected lands. This does not evaluate destinations generally or the extent to which protected areas are actively managed.

High scoring countries for Cultural Resources in 2015 and 2016 include Germany, Italy, Spain, France, China, Monaco, Mexico, United Kingdom, India and Brazil.



Key Takeaway:

This category saw a slight reduction of one percent in both developed and developing countries between 2015 and 2016.



6. Adventure Activity Resources

This category ranks a destination's competitiveness relative to its potential ability to support adventure sports, which span a range of outdoor, nature-based activities, from bird-watching to mountaineering, whitewater rafting to rock climbing, caving to paragliding. Destinations with natural resources that lend themselves to a particular activity—such as a healthy reef for snorkeling or forests that provide habitat for a wealth of bird species—can find themselves with an opportunity to develop tourism options around a particular group of activities and take advantage of a sustained competitive edge. This category assesses:

Threatened species

Forest area coverage change

The highest score for Adventure Activity Resources is held by Iceland. Other countries scoring well in this category indicating the potential to host adventure activities include Chile, Israel, Rwanda, Dominican Republic, and Lesotho. Lesotho, a landlocked country surrounded by South Africa, forms the greatest part of a globally recognized biodiversity hotspot - the eastern mountains or “Drakensberg-Maloti” mountains of Southern Africa.



© Turismo Chile

Key Takeaway:

This score increased by an average of nine percent between 2010 and 2016 in all countries. However, it dropped by four percent between 2015 and 2016 almost exclusively as a result of a loss of forest coverage. Southeast Asia saw the greatest overall improvement between 2010 and 2016 along with the African nation of Comoros, which has stemmed once-rampant deforestation and tends to draw travelers to its idyllic beaches and to Mount Karthala, the world's largest active volcano.



7. Entrepreneurship

While adventure travel is becoming well established, its vitality and strength still rely on cutting edge businesses eager to host new activities, use new technologies, and take visitors to explore new places. Adventure travel companies tend to be small, owner-operated businesses run by people with a passion for introducing visitors to their part of the world. Destinations where young start-ups are popular generally prove to be fertile ground for adventure tourism entrepreneurs with innovative ideas. Therefore, these areas are more likely to become competitive in the adventure travel market. The Heritage Foundation's **Economic Freedom Index**, which measures the impact of liberty and free markets around the globe, is used to assess this category.

The highest scores for Entrepreneurship are held by Singapore, Australia, Switzerland, New Zealand, Canada, Chile, Mauritius, Ireland, Denmark and Estonia.

As noted by the Heritage Foundation, which assembles the Economic Freedom Index, Singapore benefits from its openness to global trade and investment that continues to provide a solid basis for “economic dynamism.” Furthermore, “a transparent regulatory environment, buttressed by well-secured property rights, provides commercial security for the innovative and resilient private sector.”⁴

Similarly, the Heritage Foundation states that Australia is a “vibrant free-market democracy” and has recorded impressive economic progress without undergoing a single recession for almost 25 years. In addition to its abundant natural resources, the economy has benefited from lasting entrepreneurial development facilitated by an effective system of government, a well-functioning legal system, and an independent bureaucracy.”⁵



© ATTA/Hassen Salumi

Key Takeaway:

The Entrepreneurship score dropped by one percent in developed countries and increased by 0.6 percent in developing countries between 2015 and 2016, indicating that adventure tourism entrepreneurs in developed countries face a slightly more challenging situation than they did last year, while those in developing countries saw their situation improve slightly. Latin America and the Caribbean, Sub-Saharan Africa, and East Asia and the Pacific are the only regions that saw an overall increase in this category between 2010 and 2016. In Europe and North America the category consistently decreased in this time period.

⁴ 2016 Index of Economic Freedom: Singapore. (2016). Retrieved from <http://www.heritage.org/index/country/singapore>

⁵ 2015 Heritage Foundation. Accessed 5/25/2016. <http://www.heritage.org/index/country/australia>



8. Humanitarian

Like the health category, this indicator gauges conditions for local people and is noteworthy because it recognizes that engagement and support of the local population is as important as attracting and caring for visitors. In addition, adventure travelers frequently seek out opportunities to volunteer and to enjoy authentic, unscripted experiences. Consequently, tour operators often find themselves looking for non-governmental organizations (NGOs) and aid organization partners to help offer their visitors short-term opportunities for volunteering while experiencing authentic travel. This category includes the following three indicators:

Happy Planet Index (HPI): the leading global measure of sustainable well-being, uses data on life expectancy, experienced well-being and ecological footprint

NGO density

NGO presence

The highest score in the Humanitarian category is held by Iceland. Iceland scores very high in the HPI, reflecting high life expectancy, relatively high levels of experienced well-being, and a very high ecological footprint. (See more at: <http://www.happyplanetindex.org/countries/iceland/#sthash.99U7fpKB.dpuf>)

In recent years cooperation between the Government of Iceland and NGOs in the country has been increasing: “twice a year, following an application and assessment process, grants are allocated to projects implemented by NGOs. Specific guidelines for cooperation with NGOs have been revised in order to harmonize guidelines for humanitarian and emergency assistance and for development cooperation projects. They now apply to all cooperation between the government of Iceland (the MFA and ICEIDA) and NGOs in the field of development cooperation.”⁶



Key Takeaway:

While individual regions generally saw increases in the Humanitarian category between 2010 and 2015, globally the Humanitarian category has declined by nine percent in developed countries since 2010 and by one percent in developing countries between 2015 and 2016. While many developed countries score low on the HPI because of their environmental footprints, low-income countries in sub-Saharan Africa rank poorly because of low life expectancy and low well-being. Countries that scored highest on the HPI are high and medium developed countries in Latin America. Globally, the number of NGOs increased by five percent from 272,039 to 287,120.

⁶ Iceland Ministry for Foreign Affairs. Retrieved from <https://www.mfa.is/foreign-policy/development-cooperation/humanitarian-and-emergency-assistance/ngos/>



9. Tourism Infrastructure

Unlike mass-market tourists, adventure travelers are frequently less sensitive to deficiencies in hard tourism infrastructure, but perhaps more sensitive than other travelers to soft tourism infrastructure. While hard infrastructure may take substantial capital investment and years to develop, the soft infrastructure required by adventure travelers can often be developed with relatively little capital outlay.

Hard tourism infrastructure includes:

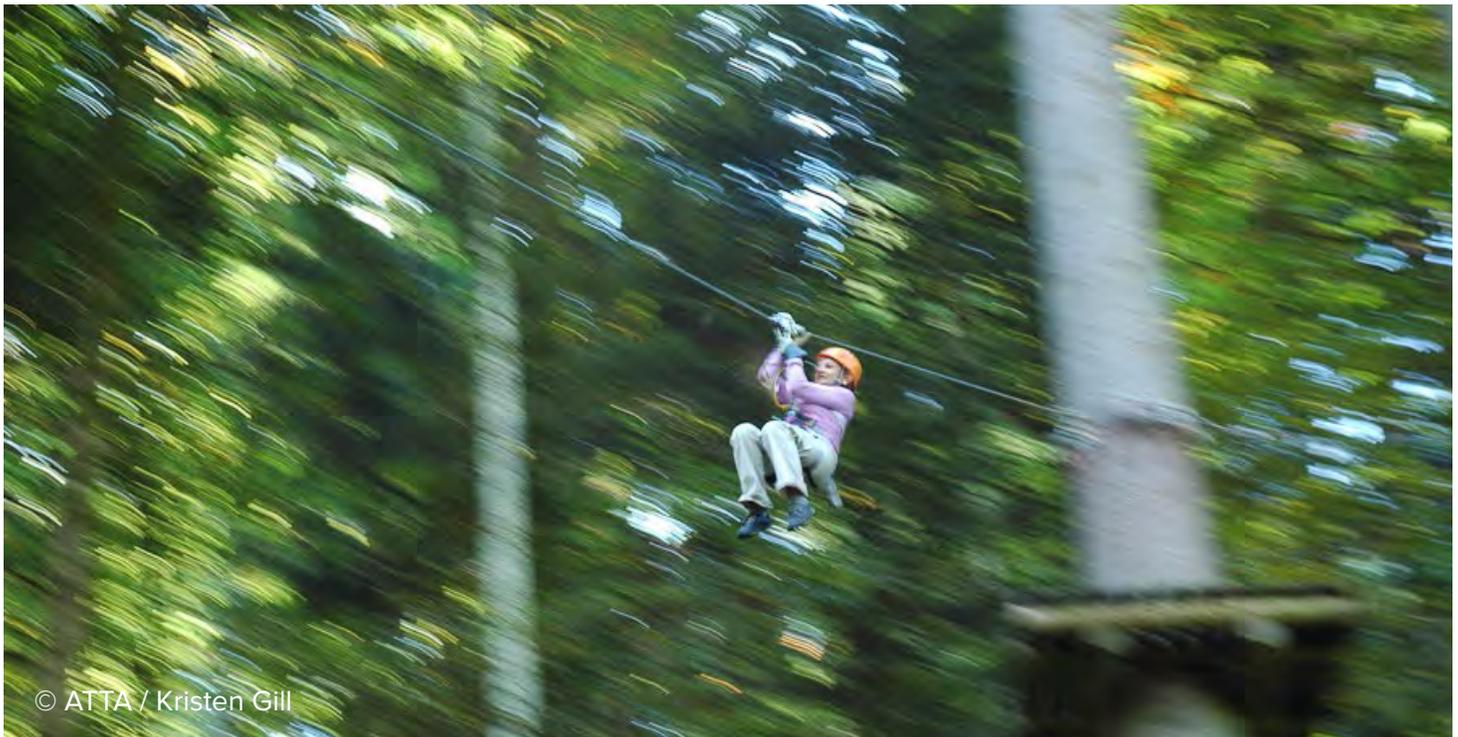
Roads, airports, lodging facilities and trails

Soft infrastructure refers to:

Trail maps, accessible information on heritage and culture, ground operators and outfitters, training programs for guides, interpreters and eco-lodges

Data for this category is gathered from surveys of adventure and development industry experts. At least three experts rate each country on elements measuring the extent to which the country has infrastructure in place (both hard and soft) to accommodate adventure-seeking travelers.

High scoring countries in the Infrastructure category in 2016 include Australia, Germany, Iceland, Micronesia, Namibia, New Zealand, Peru, South Africa, Switzerland, Turkey.



Key Takeaway:

Survey scores for infrastructure declined by two percent in both developed and developing countries and declined globally by eight percent between 2010 and 2016.

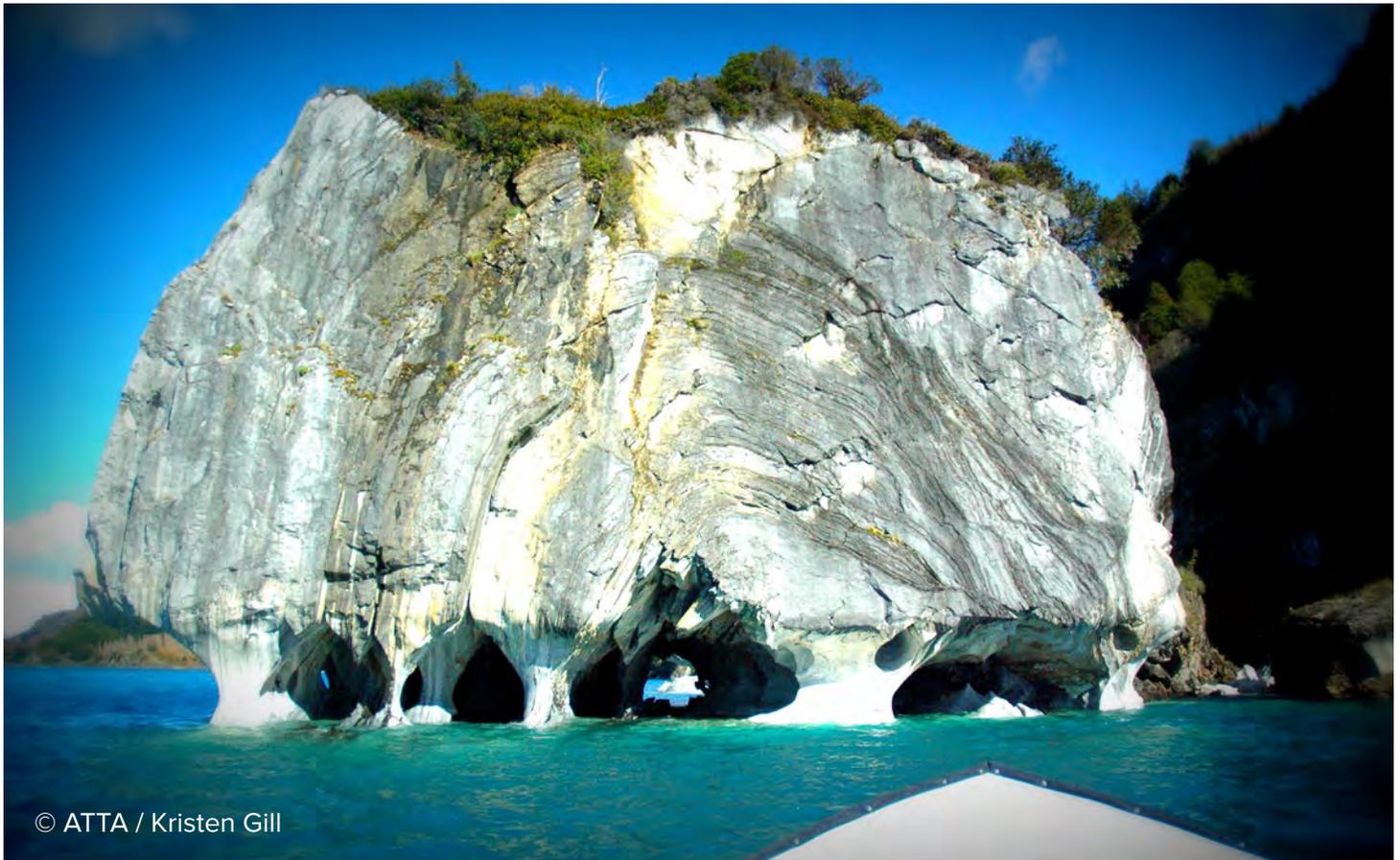


10. Brand

A country's brand can be one of the most malleable and subjective aspects, both to plan for and assess. As important as it is, a destination's brand—particularly with regards to adventure travel—is frequently not a high priority for destination planners. Data for this category is drawn from surveys. At least three industry experts rated each country on elements measuring the extent to which the country is perceived as an adventure destination.

The countries ranking highest for brand in 2016 were Kyrgyzstan, New Zealand, and Nepal.

- Kyrgyzstan, surrounded by glaciers emphasizes its mountainous assets in its adventure tourism marketing with the tagline “Something New, Something Different”
- New Zealand touts its culture, mountains, wildlife and hiking with 100% Pure New Zealand
- Nepal, whose Naturally Nepal logo includes a stylized high peak and bears the tagline “Once is not enough”



Key Takeaway:

Although the absolute scores for Brand have declined from year to year, the top ten highest ranking countries for this category have remained constant since 2013: Australia, Chile, Iceland, Kyrgyzstan, Micronesia, Nepal, New Zealand, Peru and Yemen.

REGIONAL OUTLOOK

For the first time, the ATDI report provides an overview of regional trends and rankings. This information is particularly relevant to destination managers and developers seeking to better understand how their country compares with nearby destinations that may have similar natural, adventure and cultural attributes. Viewed through a regional lens, the benefits of strong management policies or a focus on brand development for example, become more obvious. For example, consider New Zealand, which for years has invested in the 100% Pure brand. The marketing campaign, focused on sustainability and the pristine qualities of the country's natural assets, has contributed to its sustained growth in the adventure tourism sector.

Table 2 Indicates the ranking of the top five countries by region⁷ for 2016.

	East Asia and the Pacific	Eastern Europe and Central Asia	Latin America and Caribbean	Middle East and North Africa
1	New Zealand	Croatia	Chile	Israel
2	Australia	Turkey	Costa Rica	Jordan
3	Japan	Armenia	Uruguay	United Arab Emirates
4	South Korea	Kazakhstan	Dominica	Qatar
5	Philippines	Kyrgyzstan	Barbados	Saudi Arabia

	South Asia	Sub-Saharan Africa	Europe and North America
1	Bhutan	Botswana	Iceland
2	Nepal	Mauritius	Germany
3	Sri Lanka	Rwanda	Norway
4	India	Zambia	Switzerland
5	Pakistan	South Africa	Canada

⁷ UNWTO designated sub-regions

FROM THE LOCALS

Interviews with tourism ministry officials and local businesses in several of the countries leading their region were conducted to provide a local perspective on the regional rankings.

Adventure Tourism in Botswana

Jillian Blackbeard, Marketing Manager for Botswana Tourism, reports a “huge” drive exists to expand the adventure sector in Botswana, as it aligns with the tourism board’s mandate to develop new products and diversify the places within Botswana that travelers visit. Botswana is positioned as a leading primary eco and adventure tourism destination, and it is especially well known for its luxury safaris within the Okavango Delta and Chobe National Park. The country is also a model for conservationists and is praised for its intense focus on wildlife conservation. In the February/March 2016 issue of National Geographic Traveler, travel writer and sustainable tourism consultant Costas Christ profiled Botswana in an article titled, “The Last Sanctuary”. Christ writes that with more than 100,000 elephants slaughtered between 2010 and 2012 across the African continent, Botswana has become home to the largest herds of free roaming elephants, with one third of the continent’s threatened elephant population.

Botswana Tourism is deeply aware of the value and importance of the country’s wildlife – as a global asset as well as an important element in the local economy. In order to maintain the integrity of its well-known areas, Botswana Tourism is focused on a strategy of “high value, low impact” and looking to broaden the focus for visitors outside of the areas for which it is currently known.



© Cameron L. Martindell

Adventure Tourism in Chile

Chile is leading among its regional neighbors in part because of its high scores in the Entrepreneurship category. Solange Fuster, Marketing Director for SERNATUR, Chile's National Tourism Service says that Chile supports its adventure tourism entrepreneurs through its ongoing commitment to training and mentoring. This combined with the country's mountains, deserts, fjords, forests and glaciers—along with a vast and rugged coastline— draw adventure-seeking enthusiasts from around the world.

Ms. Fuster suggests that the most popular activities among adventure travelers are trekking, which is done throughout the country's diverse landscape; sailing, especially in the Valparaiso and Coquimbo regions; and horseback riding, also found throughout the country along diverse routes. Many other unique activities are also found, such as rafting, kayaking, scuba diving, recreational fishing and mountaineering.

With respect to adventure tourism promotion and focus, Ms. Fuster explains “We promote Chile as a destination that provides unique experiences related to nature and culture. The image and message we deliver includes mainly adventure tourism.” In 2015, Chile received the World Travel Award for best Latin American adventure tourism destination. To further support the industry's professionalization, policymakers continue to refine and develop standards.



© Turismo Chile

Adventure Tourism in Croatia

Croatia led its regional peers because of its strong scores in the Adventure Activity Resources category. In Croatia, Iva Puđak Mihajlović, of the Croatian National Tourist Board, says the most popular adventure activities are cycling, hiking, river rafting and sea kayaking. With Croatia's more than 1200 islands, islets, rocks and reefs sailing is another favored way to discover the country. Visitors who kayak are able to travel to some of the nearest islands discovering hidden beaches and bays, many of which are inaccessible from inland. River rafting allows visitors to float down waterfalls surrounded by deep canyons.

Ms. Mihajlovic observes, "People are becoming more active and the demand of diverse activities is rapidly increasing." She further points out that the Croatia National Tourist Board is investing in the development of infrastructure and facilities for new or less popular adventure activities, making an effort to "consider nature and environment protection at the same time." One significant project is called Greenways. Greenways are paths, which run along two rivers in Croatia – the Sava River and the Danube. Both of the Greenways projects are very important for local communities and adventure tourists as the routes connect several countries, showcasing different cultures, local cuisines, and traditions.

In addition to this, the Croatian National Tourist Board provides subsidies every year to projects, which have the aim of improving active tourism in specific areas of the country. Projects include segregation and signage for bike trails, signage and additional facilities along hiking/walking trails and equipping routes on natural rocks for climbing.

The Board perceives active tourism as one of the key products in the country's tourism strategy and emphasizes it as an important element of all promotional campaigns and activities.



Adventure Tourism in Iceland

Icelandic tourism has grown substantially in recent years, with tourist arrivals doubling between 2012 and 2015. A large majority of visitors cite Iceland's natural assets as the main incentive for their visit. Also, various adventure-based recreational activities are developing their base of operations in magnificent surroundings and focusing on the adventure components of the experience.

Iceland's natural environment is rugged and challenging, as the island is constantly in creation due to its volcanic foundations. Mountains, glaciers, rivers and waterfalls abound, as well as geysers and sulfaterras that remind visitors of the active forces just under their feet. The ocean also provides a myriad of possible adventures, exploring the marine vistas through sailing and diving. Backcountry skiing is an increasingly popular sport.

Almost 800 licenses for tour operators and travel agencies have been issued since 2010, a majority of them within the adventure sector. Activities connected with glaciers are the most popular, along with whale watching tours.

Currently, Iceland is experiencing a rapid growth of tourism and consequently the foreseen pressure on nature, communities and infrastructure. In order to manage these growing pains, Icelandic tourism authorities have started a process where Destination Management Plans (DMPs) will be structured for each area of the country. This holistic approach has the objective of coordinating local, regional and national factors that can affect the visitor experience, quality of life and preservation of Iceland's fragile natural environment. The DMPs will include strategies for planning, developing and marketing each area and predefined ways of managing the different processes that influence the development of tourism throughout the country, with the aim of ensuring the sustainable growth of the industry.

To support the growing adventure travel sector, the Icelandic Tourist Board hosted an ATTA AdventureEDU workshop in April 2015, and the Promote Iceland agency recently hosted a workshop on the marketing of adventure tourism. The Icelandic Tourist Board also manages Vakinn, a quality and environmental certification system for Icelandic tourism (www.vakinn.is). Out of the 24 categories defined other than accommodation categories, at least 15 can fall under the definition of adventure tourism.

The aim of Vakinn is to strengthen quality, safety and environmental awareness within Icelandic tourism by means of guidance and support in addition to promoting social responsibility of tourist service providers in the process. For its members, Vakinn is an effective tool to increase quality and safety, providing diverse supplementary materials, guidelines, data and checklists that are useful in improving operating procedures.



Courtesy Icelandic Tourism Board

Adventure Tourism in Israel

Israel, like its neighbor Jordan, scored high in the Adventure Activity Resources, Entrepreneurship and Infrastructure categories. In addition to performing well in these categories, it also performed well within the region for the Sustainable Development category, as a result of its low unemployment rate of five percent, compared with 14 percent for Jordan, for example.

Ora Merin, Managing Director of Giant Leaps Travel in Israel, organizes the country's adventures by category: land, air, sea, and 'under the surface.' With its sweeping religious history and historical importance numerous cultural monuments and sites exist to explore. In addition, a wide array of more physical activities can be pursued: rappelling in underground caves, skydiving, paragliding, snorkeling and scuba diving in the Red Sea.

Israel boasts extremely well developed soft infrastructure, including an extensive network of hiking trails. One of the most ambitious trails is the Israel Trail, which is 880km spanning the length of the country. The Israel Trail is well known around the world and includes a network of local hosts along the trail. More well-marked hiking is available in the south of Israel, where visitors to the Negev desert find Maktesh Ramon, one of only seven such craters in the world (another four are also in Israel). Travelers from the north heading to the Red Sea may now pass through this remote area and hike this unusual "erosion cirque." A visitor center was renovated and reopened in 2013. The new Mitzpe Ramon Visitors Centre provides detailed maps of the area's hiking trails and a museum with a 3D model of the maktesh, plus exhibitions and films on the local geology.

The government of Israel supports tourism as an economic engine for the country and specifically offers entrepreneurs financial assistance with marketing. For example, tour operators can receive compensation from the government to travel to an international conference, or host familiarization trips.



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WHAT DRIVES TRAVELER CHOICE?

A better understanding of the specific factors that greatly influence visitation can help policymakers plan for the future. With this in mind ATDI researchers correlated tourism arrivals data with ATDI performance scores for individual countries.

Data reveals that **80 percent** of the variation in the number of arrivals in **Europe and North America** correlates with the variation found in the scores for Cultural Resources, Adventure Activity Resources, and Natural Resources. For example, Canada's higher number of tourist arrivals correlates with its higher scores in the Cultural and Natural Resources categories. This suggests that travelers are valuing Canada's natural and cultural resources above other assets. In contrast, in **Latin America and the Caribbean**, the scores for Cultural Resources and Brand had the highest correlation to the number of arrivals, suggesting that travelers to this region are responding to these characteristics.



© ATTA / Mark Doa

Key Takeaway:

Developed countries are clearly competing for adventure travelers based on the three core elements to adventure: cultural, natural and adventure resources. Countries in these regions might choose to differentiate themselves from their competition by developing clear and consistent branding on the assets the data indicates matters most to travelers.

COUNTRIES WITH THE MOST SIGNIFICANT SHIFTS IN RANK, 2015 AND 2016

The table below highlights countries that have experienced the greatest shift in rank from 2015 to 2016.

Country	2016 ATDI Rank	Rank Change from 2015	
Developing Countries (as designated by the United Nations)			
Saudi Arabia	39	+30	↑
Philippines	23	+29	↑
Bahrain	43	+24	↑
Uzbekistan	85	+22	↑
Comoros	121	+20	↑
Nepal	65	-19	↓
El Salvador	79	-19	↓
Mali	131	-19	↓
Colombia	70	-22	↓
Senegal	81	-26	↓
Developed Countries (as designated by the United Nations)			
Belgium	5	-26	↓
Sweden	16	-7	↓
France	19	-9	↓

*Countries with missing data for the ATDI 2015 were excluded from the analysis so as not to skew the data.

COUNTRIES WITH THE MOST SIGNIFICANT SHIFTS IN RANK, 2015 AND 2016 (continued)

Key Takeaway:

- Saudi Arabia is the only country on the list to demonstrate improvements in Sustainability Policy between 2015 and 2016 (i.e. increase of 9.4 percent). Additionally, Saudi Arabia—like many developed countries—saw a significant improvement in the Health category, which is largely due to a change in methodology that included the number of nurses and midwives as a new indicator.
- The only two countries on the list to show improvement in the Adventure Activity Resources category for 2015 to 2016 are Comoros and the Philippines. While Comoros lost 9.7 percent of its forests between 2005 and 2010, the archipelago of islands did not experience any further loss to forest cover between 2010 and 2015. The Philippines experienced a sharp increase in reforestation as a result of a government-sponsored reforestation program. While forest coverage changed by only 0.73 between 2005 and 2010 in the Philippines, its forest area coverage increased by 17.54 percent between 2010 and 2015.
- Among the countries with the most dramatic changes, Comoros had the greatest improvement in Entrepreneurship (5.87 percent) between 2015 and 2016 due to its improvement on the Economic Freedom Index.
- Colombia and Senegal dropped in rank as a result of a decrease in their Sustainability Policy scores (-16.4 percent and -14.1 percent respectively), which in both cases can be traced down to an increase in the unemployment rate which factors into this score. Also, Colombia's Safety score fell (-11.4 percent) based on Foreign and Commonwealth Office travel warnings linked to narcotics trafficking that continues to affect some rural and urban areas. Senegal's Brand score dropped by -10.2 percent because of a decline in expert opinion and Senegal's score in Cultural Resources dropped by 7.8 percent in 2016 after dropping in UNESCO's World Heritage List and the World Database on Protected areas.
- France declined in the Health category, primarily because of the change in indicators, which previously did not reflect the number of nurses and midwives.



OVERALL TRENDS ANALYSIS

Government policy that supports sustainable development scores have been negatively impacted by a **consistent increase in unemployment rates** in nearly all assessed regions. This trend is compounded by the fact that the **entrepreneurship category consistently decreased**, even in Europe and North America. These declines signal the need for new and innovative approaches to foster growth in micro, small and medium enterprises that can help to decrease unemployment at scale, especially among young people, and support the growing adventure travel market.

Secondly, while **safety and security** remains **relatively stable** as a category, exceptions are seen most notably in the **Middle East and North Africa**, where **decreases** have been consistent over the past six years. **Latin America and the Caribbean** experienced the greatest overall improvements in the safety category and the **biggest growth** in tourism arrivals.

During recent years, many leading and emerging destinations have been impacted by major human and natural disasters, such as the spread of deadly viruses, terrorist attacks and violence directed at visitors. While there is little that destination management organizations can do to control these events, they can hasten recovery and lessen the damage from such incidents. Advanced planning and coordinated action is needed to deal with tourism crises and reinforce resilience.



A USEFUL TOOL TO PROMOTE THE SUSTAINABLE GROWTH OF ADVENTURE TOURISM

Beyond providing an insightful overview of trends affecting adventure tourism, the **ATDI scorecard** is intended to be a **useful tool to help destination managers and other stakeholders define priorities and craft a shared vision for sustainable growth**, tackle areas of poor performance and enhance their readiness for growth. The scorecard results can also be used to prompt deeper assessment, discussion and understanding of key issues impacting sustainability and to foster new public-private partnerships that can better address areas in particular need of attention and investment.

Adventure travel companies can help to generate awareness of the report by sharing it with their various audiences and using it to advocate for the prioritization of key issues. They can also work hand-in-hand with destination managers to craft a shared vision for responsibly-managed adventure tourism that provides rewarding experiences for travelers while enhancing the socio-economic, cultural and environmental well-being of tourism-dependent communities around the world.



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