

THE 2018 REPORT
An Adventure Travel Scorecard
Eighth Edition | December 2018

ATDI

ADVENTURE TOURISM DEVELOPMENT INDEX



International Institute
of Tourism Studies

THE GEORGE WASHINGTON UNIVERSITY



ADVENTURE TRAVEL
TRADE ASSOCIATION

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INTRODUCTION

The year 2018 marks a decade since the launch of the Adventure Tourism Development Index (ATDI). In 2008, the Adventure Travel Trade Association, the George Washington University International Institute of Tourism Studies, and Xola Consulting (now retired) collaborated to develop a benchmarking tool in the form of an index for destinations seeking to build sustainable adventure tourism markets. The ATDI assesses countries' potential and readiness to compete in the global adventure tourism market based on their scores in ten pillars. The pillars capture a variety of metrics relevant to planners, policy makers, and tourism entrepreneurs.



Photo Credit: © ATTA / Rupert Shanks

The ATDI's ten pillars of Adventure Market Competitiveness are organized in three factors as shown below:

Safe and Welcoming	Adventure	Readiness
<ul style="list-style-type: none">• Sustainable Development• Safety• Natural Resources• Health	<ul style="list-style-type: none">• Entrepreneurship• Adventure Resources	<ul style="list-style-type: none">• Humanitarian• Infrastructure• Cultural Resources• Image

At its core, adventure travel is defined as a trip that encompasses natural, cultural, and physical elements. Since the first index report in 2008, the preferences of adventure tourists have changed, in turn causing tour operators and other trip providers to evolve their services. As a result, the definition of adventure travel has changed. A recent study by the ATTA in cooperation with *Outside* magazine and East Carolina University found that adventure travelers' motivations included the opportunity to experience the novel and unique, to take on some form of challenge, to have a positive impact, and in many cases ultimately to undergo a transformation of some sort.

The ATDI measures elements of tourism development that destination managers can change, as well as some that are simply out of their hands (one cannot create more coastline, for example). A country's scores can help tourism managers and developers grapple with the challenge of homing in on where to focus.

In 2008, the effect of the global economic crisis on tourism, including adventure tourism, was unknown. Despite concerns that the sector might experience a downturn, it has grown steadily over the past eight years. Research shows adventure tourism to be a particularly resilient niche, and when destinations proactively invest in their adventure markets, arrivals increase. For instance, at the AdventureNEXT trade event in May 2018, Jordan's Tourism minister Lina Annab revealed that subsequent to a focused approach toward adventure tourism development, which included several collaborations with ATTA and new product development, including the Jordan Trail, tourism arrivals in the country increased by 15% in one year. On the commercial side, 96% of 2018 AdventureNEXT buyers (forty-two were in attendance) said they were "very interested" in adding Jordan to their destination portfolios.



Photo Credit: © ATTA / Rupert Shanks

The ATDI provides an impartial perspective, since the majority of its results are drawn from third-party databases. This year, the ATDI is expanded in scope to directly reflect what travelers are saying about the world's most popular adventure activity: hiking. The team at the George Washington University International Institute of Tourism Studies used social media netnography, analysis of online reviews that travelers spontaneously share on social media, to help destinations better understand how to improve management of their natural resources and better meet traveler expectations.

A study of the three of the most popular hiking destinations—the Inca Trail, Mount Everest Base Camp, and Mount Blanc—provides destination managers with a holistic view of traveler feedback from these destinations to support future planning. Although this study limited the social media component to hiking specifically, destination managers may consider using this approach more broadly, taking into account travelers’ online reviews when evaluating adventure resources and other core assets for tourism development.



Social media activity can be useful in tracking the popularity of destinations, and also to gauge whether a particular destination is nearing a popularity tipping point. This is especially significant in light of the new phenomenon of overtourism, a rapidly emerging challenge to tourism destinations globally. Many adventure destinations, including natural areas, cultural heritage sites, and even rural areas, are being visited by more tourists than they can comfortably accommodate. This complex challenge calls for new solutions to reduce pressure points, mitigate the environmental footprint of tourists, and help tourists travel smarter.

Destinations such as Peru and Greenland, for example have specifically adopted adventure tourism strategies to preserve the places and unique experiences that draw adventure tourists. The ATDI remains a useful tool for destinations looking to prioritize this growing segment, and policy makers would be well advised to follow the lead of destinations that are actively addressing the challenges associated with overtourism and its heavy ecological footprint.

METHODOLOGY

This section summarizes the research method for the two main components of this report: the benchmarking scores for the ATDI, and the social media listening component.

ATDI

The ATDI scorecard is the only country-level ranking index 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 (EPI), the World Resources Institute, and Foreign and Commonwealth Travel Warnings, in addition to survey data from industry experts, the ATDI provides policy makers and tourism planners with a unique look at the adventure tourism opportunity.

EXPERT PANEL

The ATDI uses a panel of industry experts to help determine pillar scores for specific components of the index. Experts are people with more than five years of experience in the adventure travel industry. They are able to comment on any of the countries that they have visited in the past five years. One expert may comment on several countries. The ATDI uses a three-year moving average of expert survey results. If a country does not have three years of expert survey results, the ATDI uses an average of the available data. Each country has at least three expert responses.

Countries recognized by the United Nations are benchmarked in the ATDI and are represented in two groups: Developed Countries and Developing Countries. ATDI 2018 includes 28 Developed Countries and 163 Developing Countries.

The ATDI uses a combination of third-party data and expert opinions. The composition of each pillar is provided in the Excel Workbook, available for download on www.AdventureTravel.biz.

Countries with missing data points were given a score of one. In the case of those that were missing the EPI, the average regional score was used as substitute.

However, if more than five data points were missing, the country was dropped from the ATDI calculations. Twenty-two countries (11.5% of the total) had at least one missing data point.

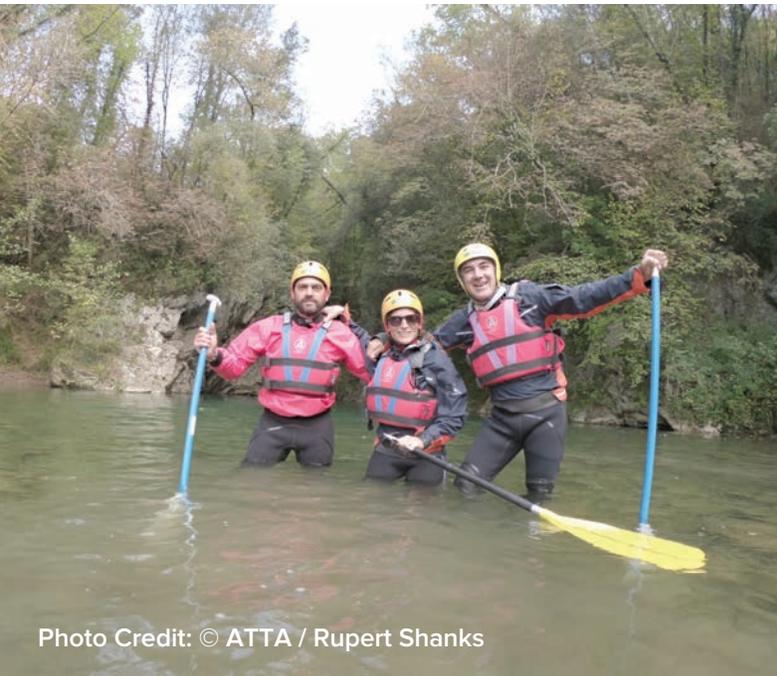


Photo Credit: © ATTA / Rupert Shanks

In 2018, there were 185 experts on the panel; 40% were women and 60% were men. On average, experts had 15.5 years of experience in tourism and 12.5 years in adventure tourism.

ATDI experts consisted of:

- Tour Operators: 58.4%;
- Travel Writers: 5.4%;
- Developers: 9.2%; and
- Other: 27% (Tourism Development Consultant, Travel Advisor, Travel Agent, Travel Marketer, Writer)

SOCIAL MEDIA LISTENING

New for 2018, the ATDI added social media listening to the analysis of countries. The ATDI ranks countries using national-level data from an array of global databases on key topics such as sustainable development policy. For policy makers and destination planners, this macro-perspective may be augmented with local-level insights gathered through social media. Online reviews shared by travelers can provide insights about their experiences in important adventure destinations. Social media netnography as an analytical tool presents some challenges, including being “noisy.” To address this challenge, the research team applied the ATDI’s pillars to help organize online reviews and their contents for analysis.

Over the course of several months, a team of graduate students and professors collected and analyzed comments posted by hikers on the following review sites popular with adventure travelers: TripAdvisor, AllTrails, and TourRadar. Questions asked included the following:

- What are visitors saying about the adventure resource and their experiences?
- How are they really feeling about the integrity of the trail, the infrastructure at the destination, the level of service and knowledge of tour guides and staff, the operation of the tour by the tour operator, and their overall experience?
- How does the content of the online reviews that travelers share on social media align with the ATDI pillars?

The first step of analysis was to refine the definition of hiking, which for the purpose of this exercise is:

- A multiday experience that occurs in a natural environment in which the hikers are either on a tour carrying some if not all of their supplies or are traveling independently by foot.

Destinations selected for analysis were:

- Mont Blanc,
- Inca Trail, and
- Mount Everest Base Camp (EBC).

These destinations were chosen based on feedback from major tour operators, such as G Adventures and REI, and how frequently these destinations are mentioned by twelve media outlets that compile lists of best places to hike. The team analyzed 100 English-language reviews of multiday hikes for all three destinations. Only reviews that were longer than one sentence were included. For the Inca Trail and EBC, reviews were collected from July 24, 2017, to July 23, 2018. For Mont Blanc, the parameters of the dates were extended to include 2013, since the majority of hikers are day-trippers, and for the purpose of this study, multiday-experience reviews were preferred.

Overall, the reviews covered twenty-five topics that fell into five categories, which were then aligned with the ATDI's pillars where a fit was evident. The five categories with corresponding topics are below. A full alignment of these categories with the ATDI pillars can be found in the Social Media Listening section of the report.

1. **Destination:** transportation, camping, hotel and lodging, food and beverage, opportunities to support local businesses, weather and seasonality, overcrowding
2. **Trail:** integrity of trail, resources such as maps, scenery, garbage, health and safety, level/perception of difficulty
3. **Tour operator:** communication, organization/itinerary, customer service
4. **Tour guide/staff:** interpretation of nature and culture, knowledge, customer service, safety, communication
5. **Trip/Experience:** value/price, interaction with local people, interaction with other hikers/customers, emotional reaction

Two independent researchers analyzed the reviews and compared the findings from each site. In cases where significant discrepancy was found in overall opinion, a third reviewer was invited in to break the tie.

HOW TO USE THE INDEX

The ATDI is a tool that tourism destination stakeholders can use to measure their adventure competitiveness against competing destinations. This allows them to identify where their strengths and weaknesses lie in terms of developing a strong adventure market.

From year to year the country rankings in the ATDI shift based on individual country scores in each of the categories. In addition to country rank, countries are encouraged to consider the cluster to which they belong. Clusters are based on the groupings of countries with similar competitive scores such that the countries in the same cluster represent a competitive set. There are three clusters: High, Medium, and Low. In the data sheet, posted at www.adventureindex.travel, the mean score is highlighted in blue. Countries in the top quartile

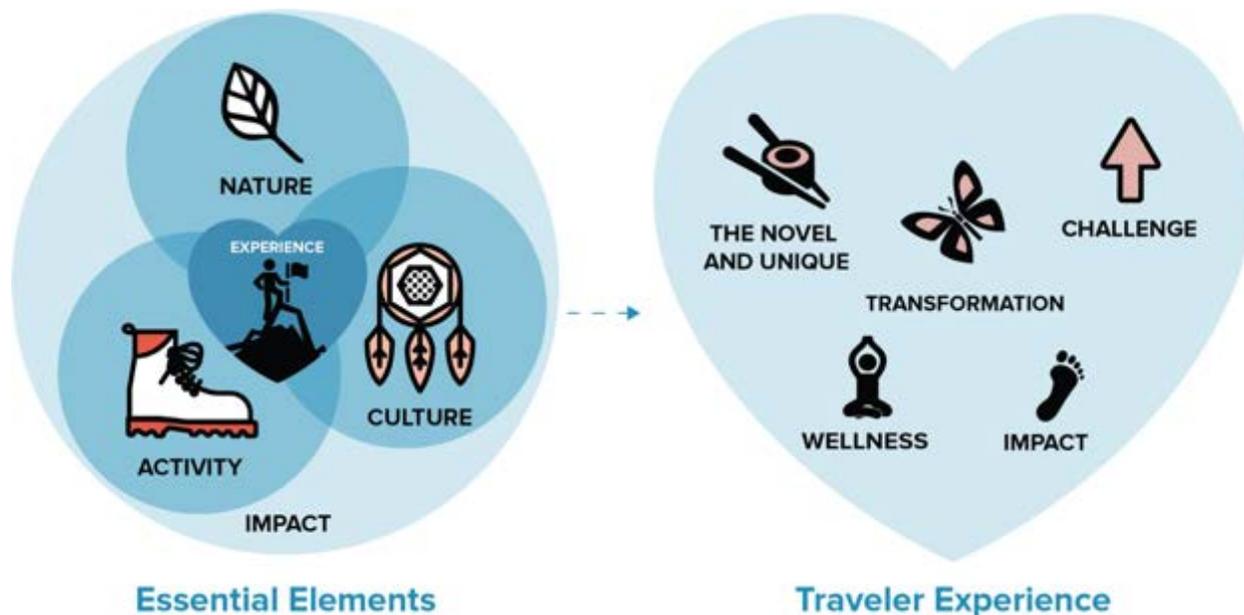
are part of the “High” cluster and are highlighted in green. Countries in the bottom quartile are part of the “Low” cluster and are highlighted in yellow. Countries ranked “Medium” or “Low” should aim to move into the “High” category, because this is where the most competitive adventure destinations reside.

Social media listening can be used to integrate the traveler perspective into the ATDI’s macro level findings. These insights provide a fuller picture of destination development needs for destination managers. The intention is for destination managers to use this approach more broadly, taking into account traveler reviews when evaluating adventure resources and other core assets for tourism development.



ADVENTURE TOURISM DEFINED

The graphic below demonstrates the new definition of adventure tourism derived as a result of recent research.²



On the left side of the graphic, the components of an adventure trip from the provider perspective are elaborated: nature, culture, and activity, with experience at the core. For adventure travel providers, recognizing how the individual elements come together to deliver an overall experience underscores the importance of considering the components of a trip as individual ingredients, and of staying attuned to how they all fit together. This might mean considering carefully the sequencing of activities, the duration, and the time given for talking about or reflecting on the experience. In addition, the components of adventure travel are located within the concept of impact. For developers of adventure travel products, impact is an important consideration. Considering and planning for impact is a basic, foundational concern; all travel providers are operating in an environment in which they have impact on the places they visit.

From an activity perspective, the traveler conception of “adventure” is always shifting. A sampling of activities associated with adventure travel could include joining an archaeological expedition; backpacking; bird-watching; camping, caving; climbing; getting to know the locals; hiking; horseback

² Viren, Paige, et al. (2017). “North American Adventure Travelers: Seeking Personal Growth, New Destinations, and Immersive Culture.” ATTA.

riding; kayaking; whitewater rafting; learning a new language; orienteering; joining a research expedition or safari; sailing, scuba diving; snorkeling; skiing and snowboarding; surfing; trekking; and many others.

From the traveler’s perspective, on the right side of the graphic, research indicates that adventure travel is motivated by a variety of longings and desires that influence how travelers consume and emotionally process their trip. Travelers are seeking mental and physical wellness, novel and unique experiences, challenge—whether physical or cultural—and often, ultimately, transformation. Travelers are also keenly aware of their impact and have a desire to have a positive impact on the environment and communities they visit.

To meet the definition of adventure travel, a trip must take an individual outside of his or her regular environment for more than twenty-four hours—and for no longer than one year—and include at least two of the following three experiences: participation in a physical activity, a visit to a natural environment, and a culturally immersive experience. (Trips longer than one year are not considered “travel” in the research context.)

TOP TEN COUNTRIES FOR ADVENTURE TRAVEL

The ATDI’s top ten list, as shown in the table below, highlights countries with strong potential for adventure tourism competitiveness. Recall that the ATDI *does not capture visitor numbers and is not a ranking for volume of tourists.*

Rank	Developed Countries	Developing Countries
1	Iceland	Czech Republic
2	Switzerland	Israel
3	Germany	Estonia
4	New Zealand	Slovak Republic
5	Norway	Poland
6	Sweden	Chile

7	Canada	Romania
8	Finland	Bulgaria
9	United Kingdom	Slovenia
10	Australia	Jordan

Key Takeaways

- Sweden’s ranking has improved since the 2017 ATDI, moving up six places from number sixteen to number six. This is a result of Sweden’s Sustainable Development score, which increased by 0.78 points, and their Health score, which increased by 3.04 points.
- Switzerland, which fell out of the top three for the first time in 2016, reemerged in the number two position in 2018. This is attributed to their Health score, which increased by 3.5 points in 2018.
- The United Kingdom and Jordan reenter the top ten for the first time since 2009 and 2010, respectively. Their scores have been steadily creeping up in most pillars.

(Note that a detailed discussion of each of the pillars and the factors taken into account in deriving each score can be found in the Rankings by Category section of the report.)

BIGGEST MOVERS

The table below shows the movement of countries up and down in the overall ranking from 2016 to 2018.

Rank	Country	Change
6	Sweden	+10
89	St. Vincent and the Grenadines	-44
99	St. Lucia	-22

149	Solomon Islands	-22
156	Korea, Dem. Rep.	-22
83	Trinidad and Tobago	-19
133	Gambia, The	-19
85	Egypt, Arab Rep.	-18
38	Armenia	-16
136	Comoros	-15
105	Jamaica	-14
109	Pakistan	-14
88	Sri Lanka	-13
52	Oman	-12
120	Antigua and Barbuda	-11
137	Mozambique	-11
152	Libya	-11
103	Bosnia and Herzegovina	-10
110	Malawi	-10

Examining the greatest movements in the overall ranking reveals that the greatest shifts have been downward. Although the reasons for the overall drop in rank are unique to each country, a new release of the Environmental Performance Index, which informs the Sustainable Development pillar, had a significant effect.

The standout among the biggest movers is Sweden, which is the one country to move up dramatically since 2018. Sweden jumped up ten spots from number sixteen in 2016 to number six in 2018. The reason for Sweden’s increase is a dramatically higher score in the Health pillar (up 3.04 points) along with increases in Sustainable Development, Natural Resources, Adventure Activity Resources, and Humanitarian scores.

RANKS AND CLUSTERS

The table below features the high cluster for both developed and developing nations.⁴

Developed

Iceland
Switzerland
Germany
New Zealand
Norway



Photo Credit: © ATTA / Rupert Shanks

⁴ Note that the high- and low-ranking clusters are calculated using the standard deviation of the full set of countries mean total raw score in each category. Therefore the high-ranking cluster is set at one standard deviation below the mean, and the lower ranking cluster is set at one standard deviation above the mean.

Developing

Czech Republic

Hungary

Israel

Latvia

Estonia

Bhutan

Slovak Republic

Croatia

Poland

Georgia

Chile

Lithuania

Romania

Uruguay

Bulgaria

United Arab Emirates

Slovenia

Botswana

Jordan

Dominica

Costa Rica

Turkey

Korea, Dem. Rep.

Philippines

ONE DECADE ON

The ADTI measures macro indicators for which change can be slow to register; therefore, major shifts in ranking are not generally seen year to year. However, a comparison of today's rankings versus the first rankings of the index in 2008 reveals some notable changes.



Rank	2018 Developed	2008 Developed
1	Iceland	Switzerland
2	Switzerland	Sweden
3	Germany	New Zealand
4	New Zealand	United Kingdom
5	Norway	Spain
6	Sweden	United States
7	Canada	Norway
8	Finland	Germany
9	United Kingdom	Iceland
10	Australia	France

Rank	2018 Developing	2008 Developing
1	Czech Republic	Estonia
2	Israel	Chile
3	Estonia	Slovak Republic
4	Slovak Republic	Czech Republic
5	Poland	Hungary
6	Chile	Botswana
7	Romania	Bulgaria
8	Bulgaria	Jordan
9	Slovenia	Latvia
10	Jordan	Uruguay

Key Takeaways

- Today's number one ranked destination, Iceland, was ninth in 2008. It wasn't until after the economic crash, which hit the island nation hard, that Promote Iceland invested extensively in marketing, product development, and becoming an airline hub. The rise in the rankings has been caused mainly by an increase in the Health and Image scores.
- Among developing countries, three countries, Czech Republic, Estonia, and Slovak Republic, have consistently remained in the top five. They have done so because of their consistent performance in the two heavily weighted pillars of Adventure Activity Resources and Entrepreneurship. In these pillars as well as the Sustainable Development pillar their scores have been at eight and above.
- Within the set of developed countries, those that have remained consistently in the top have done so because of their ongoing excellent performance (score >8) in the Adventure Activity Resources and Entrepreneurship pillars. Switzerland, which scored nearly ten in Entrepreneurship in 2018, bolstered their position with the addition of their high scores in Sustainable Development and Safety.
- In 2008, Spain, the United States, and France were all ranked within the top ten. A decade later, they have fallen (none more dramatically than the United States, which now places twentieth) in the ranks, and have been replaced by Canada, Finland, and the United Kingdom.
- Among the developing nations, Israel, currently ranked at number two, was initially not in the top ten at all. This is mainly because of sharp increases in expert opinion on Image, and Adventure Activity Resources.
- A few countries that were in the top ten in 2008 such as Botswana, Latvia, and Uruguay, have dropped out of the top ten. Botswana and Latvia scores dropped mainly because of more than two-point drops in Pillar 10, Image. Although Belarus made gains in Pillar 1, Sustainable Development, the country's overall score has decreased over time because of decreased scores in all other pillars of the ATDI.

(Note that a detailed discussion of each of the pillars and the factors taken into account in deriving each score can be found in the Rankings by Category section of the report.)

RANKINGS BY CATEGORY

This section provides a description of each of the ATDI's ten categories and a table with scores showing change from 2016 to 2018 for the top three ranking countries.



1. Government Policy that Supports Sustainable Development



Photo Credit: © ATTA / Josiah Holwick

Government policies that 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.

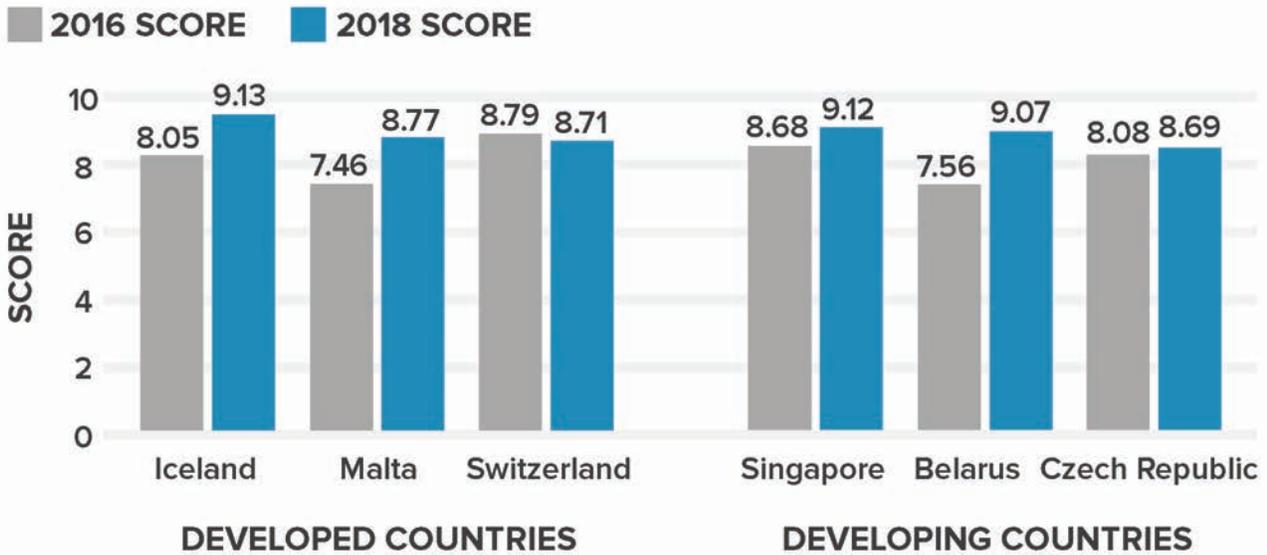
High environmental performance and low unemployment create a favorable climate for sustainable development, and government policies are an important factor in driving country performance in these areas. Two indicators are measured in this pillar:

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

The most significant shifts in 2018 are seen in Pillar 1. This is because of a new release of the EPI (which is updated every two years). The countries ranking highest in sustainable development are Iceland, Singapore, and Belarus (Singapore was in the top three in 2016, too). Overall, scores in Pillar 1 are higher than in previous years, caused by improved scores in the Environmental Performance Index.

The chart below shows the top three developed and developing countries in the category of Government Policy that Supports Sustainable Development.

TOP 2018 SCORES | Government Policy that Supports Sustainable Development



Although last year Switzerland achieved the top score in Pillar 1, it drops two spots to number three this year. Understanding why nations move within the ATDI requires a close review of component scores that can become quite lengthy. In general, however, it appears that Switzerland’s drop is caused by a small increase (0.03) in the unemployment rate.

Iceland takes the top spot in Developed Countries in 2018. Singapore, the top score for Developing Countries, retains its first-place position. The top three benefit from low unemployment rates. At 5.8%, Belarus has the lowest unemployment in Eastern Europe, and the percentage has been on a downward trend since 1991. Singapore’s unemployment rate is 3.5%. Iceland’s unemployment jumped up to 7% in 2008 but has been going progressively down and was 4.7% in 2017.



2. Safety and Security



Photo Credit: © ATTA / Hassen Salum

This pillar evaluates how safe it is to travel in a country.

The Safety pillar is made up of two indicators and an expert opinion question:

1. The Corruption Perceptions Index
2. Foreign and Commonwealth Travel Warnings

Expert Opinion Question: Your perception of this destination as safe and secure for travel is...

(Respondents are given a Likert scale of Very bad [-3] to Very good [+3]).

Countries with high levels of transparency and few or no travel warnings issued are safer for travelers.

Lower levels of corruption are also signs of a more secure country.

The top overall scores for safety and security are three developed nations: New Zealand, Denmark, and Finland. In the Developing Countries category, the top scorers are Singapore, United Arab Emirates, and Bhutan. Overall, scores in this pillar dropped because of lower scores in the Corruption Perception Index, except for Bhutan, the score for which, in that index, rose by 2 points. The CPI said that this year, “the majority of countries are making little or no progress in ending corruption.”

The chart below shows the top countries for safety in 2018 and 2016. In 2016, the three developed countries leading for safety were also Denmark, New Zealand, and Finland; the only change is the slightly higher score for New Zealand, moving it into the top position for 2018. The three developing countries leading for safety were Singapore, Barbados, and the United Arab Emirates. Bhutan was in sixth place in 2016 and moves up to third for 2018. Barbados, number three in 2016, falls to twelfth place in 2018.

TOP 2018 SCORES | Safety and Security

■ 2016 SCORE ■ 2018 SCORE





3. Health



Photo Credit: © ATTA / Border Free Travels

The Health pillar attempts to gauge the level of health care available in a country. This pillar assumes that a healthy local population is better able to foster and nurture new businesses, and to care for its resources responsibly. Availability of good health care is also important to adventure travelers.

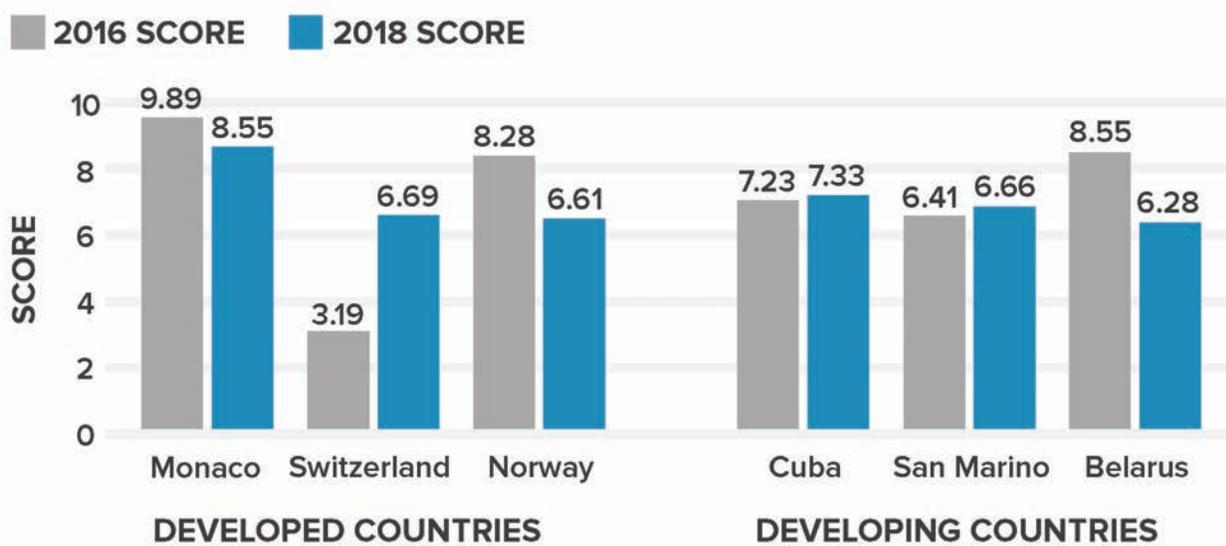
The Health pillar is made up of two indicators from the World Health Organization:

1. Hospital beds (per 1000 people)
2. Physicians (per 1000 people)
3. Midwives and nurses (per 1000 people)

A high proportion of beds and health care professionals suggests higher levels of health care.

Data for Pillar 3 is pulled from the World Health Organization statistics. There were significant changes to the data this year, which resulted in some major shifts in the ATDI. As shown in the table below, Switzerland's score went up by 3.5 points, whereas Belarus's score went down by 2.27 points. (This still kept them in the top three, as many other country scores decreased.) Cuba, currently ranked first overall, reported an increase of doctors per inhabitant. (Cuba currently has the highest density of physicians in the world.)

TOP 2018 SCORES | Health



Although Monaco also placed first last year, Switzerland and Norway are new entrants to the top three. Switzerland moved up 3.5 points from last year. Other countries that significantly improved their scores in this category were Greece (+2.65), Sudan (+2.45), and Georgia (2.25). In the 2016 ATDI, Japan and Belgium held the second and third spot respectively. In the developing set, the first and second position for 2018 are the same as in 2016, and San Marino replaces Qatar at number three. Qatar in fact had one of the sharpest drops in this category, falling 3.8 points. Belarus, Turkmenistan, Russia, and North Korea also dropped more than 2 points.



4. Natural Resources



Photo Credit: © ATTA / Jonah Grubb

Adventure travelers want untrammelled and well-managed natural resources. Destinations with unusual or rare natural resources that are well managed and not exploited will earn high praise from adventure travelers and be more likely to sustain market competitiveness.

The Natural Resources pillar is made up of four indicators and an expert opinion question:

From the World Resources Institute:

1. Urban Concentration
2. Population Density

From the CIA World Factbook:

1. Kilometers of Coastline
2. Ratio of Coast to Total Area

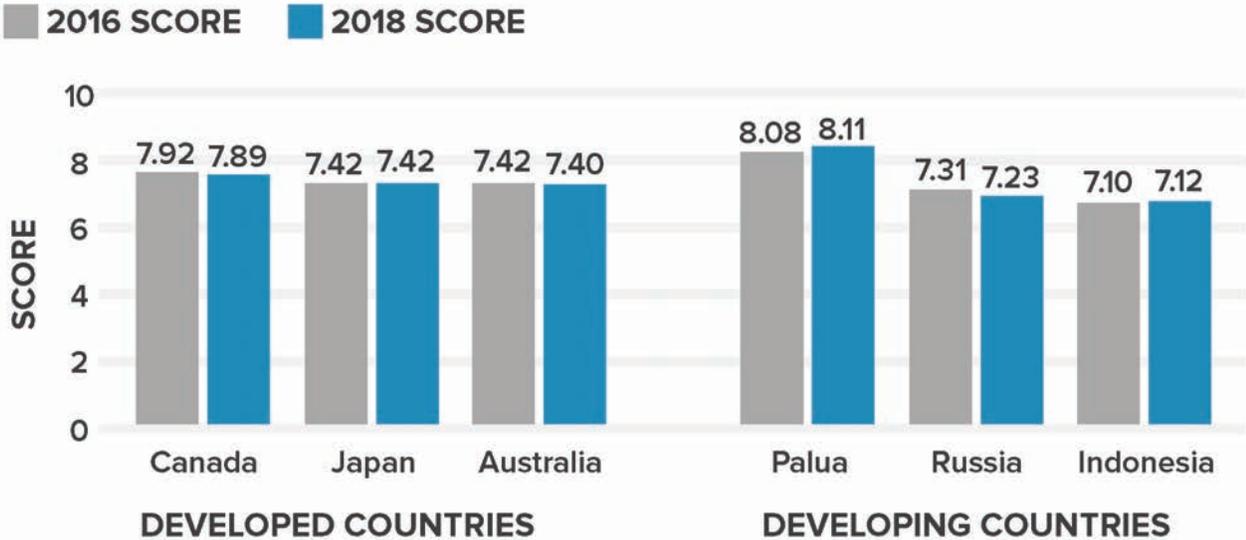
Expert Opinion Question:

Your perception regarding the variety of natural resources in this destination is...

(Respondents are given a Likert scale of Very bad [-3] to Very good [+3]).

Each year, the ATDI adjusts for Canada’s extremely large coastline. To keep it in proportion with the rest of the world, it is rated at 5,500 instead of its actual score. There is limited movement in the Natural Resources pillar score, because coastline is unchangeable and population density also shifts slowly.

TOP 2018 SCORES | Natural Resources



The island nation of Palau and the vast nation of Canada, both with low population densities, have consistently scored high on Pillar 4. In 2016, Japan tied for third place with Australia. In 2018, a slight drop in expert opinion moved Australia to third place in the Developing Countries category.

In both country sets, the top three countries are the same as last year. However, Australia and Japan have switched places.



5. Cultural Resources



Photo Credit: © ATTA / Hassen Salum

Adventure travelers value the opportunity to interact with local culture in a meaningful way. Destinations that encourage local people to preserve their culture—even as modern influences continue to shape and evolve local customs—fare well with adventure travelers.

The Cultural Resources pillar is made up of three indicators and an expert opinion question:

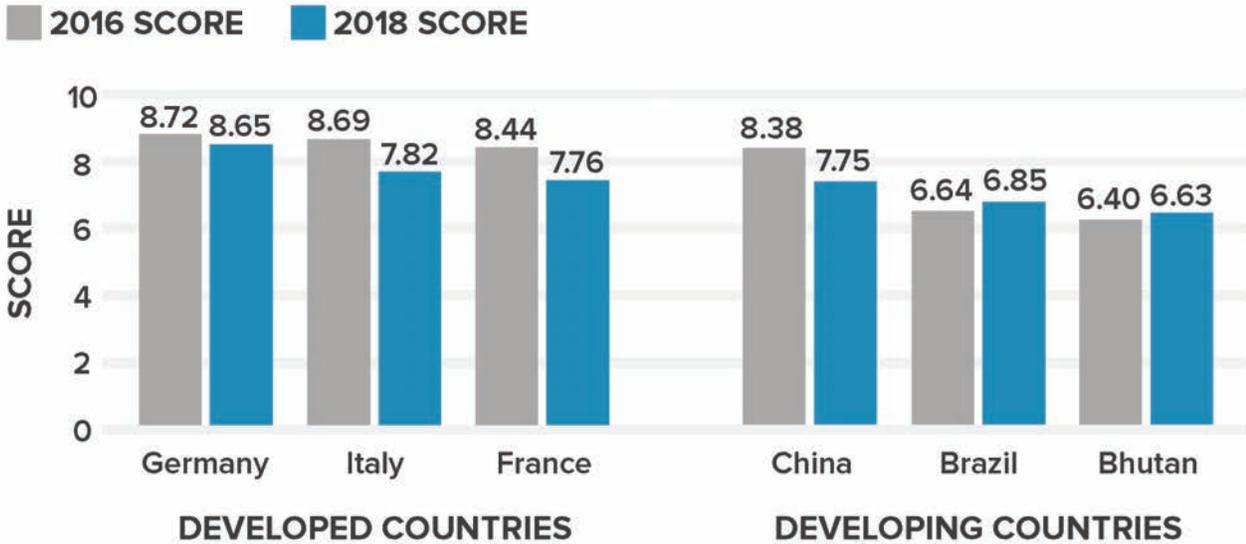
1. UNESCO World Heritage Sites
2. UNESCO World Heritage Sites in danger
3. Protected Area as a % of Total Land

Expert Opinion Question: Your perception of this destination as culturally rich is...
(Respondents are given a Likert scale of Very bad [-3] to Very good [+3]).

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

To successfully protect cultural resources, a country must have institutions in place that are tasked with regulating their use and ensuring their protection. Countries that score high in Pillar 5 are also peaceful; when a country is unsafe or embroiled in conflict, preserving cultural artifacts often falls off the list of priorities. Germany, Italy, and France maintain their top three positions in this pillar from 2016 to 2018. China maintains its number one spot among the developing nations in Pillar 5, and Brazil and Bhutan move up and replace Mexico and India, which were second and third place respectively in 2016.

TOP 2018 SCORES | Cultural Resources





6. Adventure Activity Resources



Photo Credit: © ATTA / Kristen Kellogg

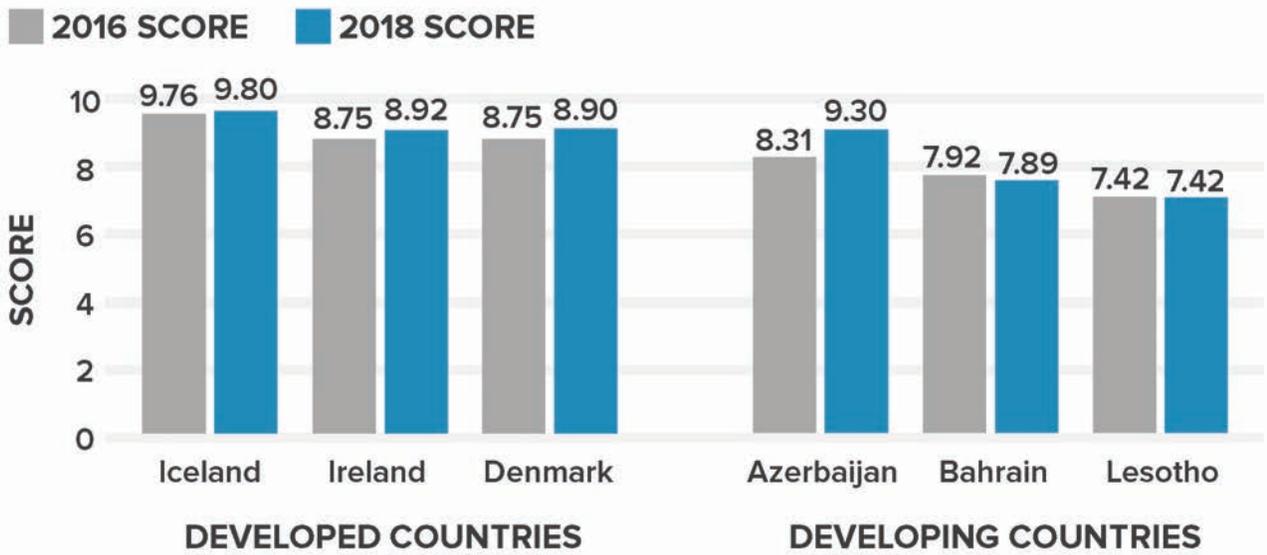
In this pillar the ATDI recognizes a destination’s competitiveness relative to its ability to support adventure sports, which span a range of constantly evolving outdoor, nature-based activities—from bird-watching to mountaineering; whitewater rafting to rock climbing; caving to paragliding. Destinations 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 an opportunity for sustained competitive advantage.

The Adventure Activity Resources pillar is made up of two indicators:

1. Threatened Species
2. Forests, Grasslands, Drylands

A low number of threatened species and the presence and growth of forests, grasslands, and drylands indicate resources for adventure activities. In the Adventure Activity Resources pillar, ATDI assumes that a country that is supporting endangered species and also has a large percentage of forests, grasslands, and drylands intact is handling its other adventure assets well and therefore has strong potential for adventure tourism through the preservation of these assets.

TOP 2018 SCORES | Adventure Activity Resources



The top twenty in this pillar are dominated by countries in the developing world (with the exception of the top three developed countries). Iceland, Ireland, Denmark, and Lesotho have typically scored high on this pillar, but Bahrain and Azerbaijan are new to the top three, a result of a significant increase of forest coverage in 2017. Lesotho, a small country, fares well in this particular pillar since its percentage of forested land is high compared with other, larger countries.

The top three developed countries were consistent from 2016 to 2018. From the set of developing countries, the leaders in 2016 were Lesotho, Sierra Leone, and Burundi, replaced by Azerbaijan, Bahrain, and Lesotho in 2018.



7. Entrepreneurship



Photo Credit: © ATTA / Hassen Salum

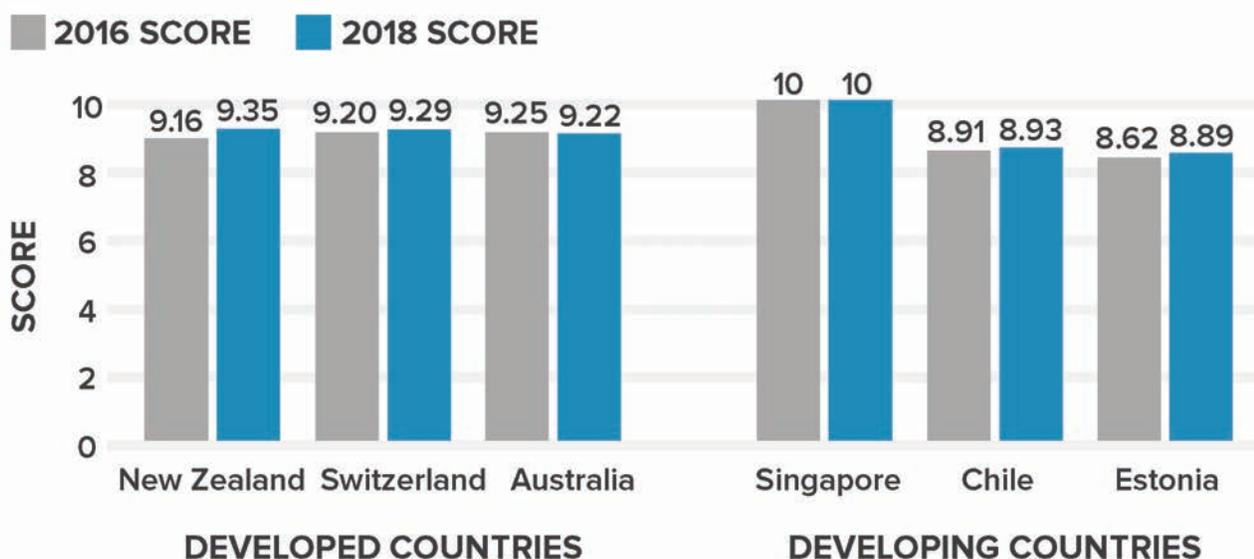
The backbone of the adventure industry is small businesses, led by passionate entrepreneurs who continuously innovate their product. Favorable business climates for entrepreneurship make it easy for small and medium-sized tourism businesses to start up.

The Entrepreneurship pillar uses one indicator:

1. Index of Economic Freedom

This indicator assesses ten 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.

TOP 2018 SCORES | Entrepreneurship



Singapore has the only perfect score on the entire index in Pillar 7. Throughout the index scores in this pillar have increased as more countries have instituted policies leading to greater economic freedom. The top three in the developed set remain the same as the previous year, but New Zealand and Australia have switched places. Singapore and Chile keep their top positions, and Estonia edges out Mauritius for the number three spot.

The Index of Economic Freedom notes the positive effects of economic freedom that are also illustrated in the interconnected web of the ATDI:

As successive editions of the Index have documented since 1995, the affirmative link between economic freedom and long-term development is both unmistakable and robust. People in countries that allow more economic freedom live longer and have higher incomes. They have better health and access to more effective education. They are able to be better stewards of the environment, and they push forward the frontiers of human achievement in science and technology through greater innovation.⁵

⁵ Heritage.Org, Highlights of the Economic Freedom Index, <https://www.heritage.org/index/pdf/2017/book/highlights.pdf> (retrieved July 1, 2018)



8. Humanitarian



Photo Credit: © ATTA / Rupert Shanks

The Humanitarian pillar is concerned with human development in a country and its link to the desire for adventure travelers to enjoy authentic, unscripted experiences. Adventure travelers 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 can offer their visitors a short-term opportunity to contribute to relevant causes and also have the chance to see real people in unmanufactured situations. As the trend toward volunteer tourism and its appeal to adventure travelers continues to build, the ATDI acknowledges that destinations with volunteering opportunities available to adventure travelers are competitive in the larger market for adventure tourism.

The Humanitarian pillar is made up of three indicators:

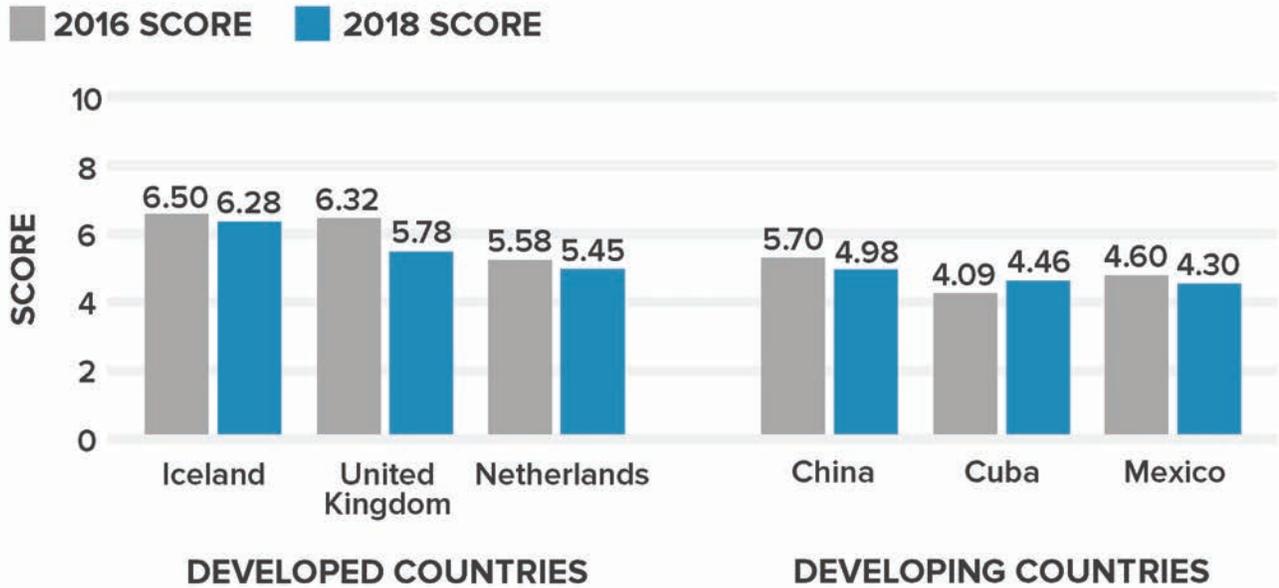
1. Happy Planet Index (HPI)
2. NGO Density
3. NGO Presence

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

Humanitarian scores in the ATDI are some of the lowest overall as a result of relatively low scores on the HPI, a core component of the Humanitarian pillar. The top ten countries on HPI have high life expectancies and low ecological footprints. The scores shifted because of a new release of the HPI in 2016.

As shown in the graph below for developed countries, in 2016, Iceland and the United Kingdom placed first and second respectively in the developed sector, but France was number three. The Netherlands has jumped up four spots to third place for 2018.

TOP 2018 SCORES | Humanitarian



Among the developing nations, China maintains its first-place spot in 2018, and Cuba and Mexico replace Israel and Costa Rica.



9. Tourism Infrastructure



Photo Credit: © ATTA

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

Tourism infrastructure includes:

- hard infrastructure, such as roads, airports, lodging facilities, and trails;
- soft infrastructure, such as trail maps;
- accessible information on heritage and culture;
- ground operators and outfitters; and
- training programs for adventure tourism providers such as guides, interpreters, and ecolodges staff.

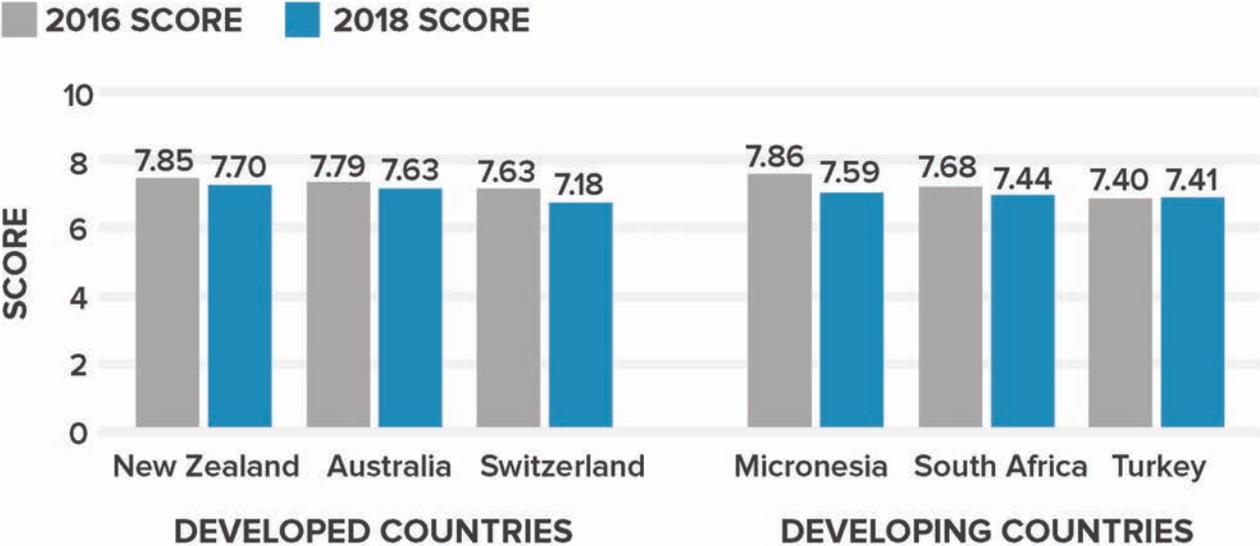
This pillar uses data from one expert opinion question:

1. Your perception of the availability of appropriate infrastructure for adventure travel in this destination is...

As shown in the tables below, the top three positions overall are all nations in Oceania. Australia, New Zealand, and Switzerland have long histories of welcoming adventure tourists and working with stakeholders to develop appropriate infrastructure for tourists. South Africa has a well-developed network of protected areas and appropriate infrastructure for adventure tourism, especially wildlife tourism. Turkey, where tourism represents 13% of GDP, has consistently scored well in this pillar as well. The government has invested heavily in tourism infrastructure, and that is recognized by the ATDI's 2018 expert panel.

The rankings of countries in both the developed and developing set are unchanged from 2016.

TOP 2018 SCORES | Tourism Infrastructure





10. Brand



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 visitors will support the country's ongoing sustainable development strategies. The ATDI examines a destination's adventure travel image.

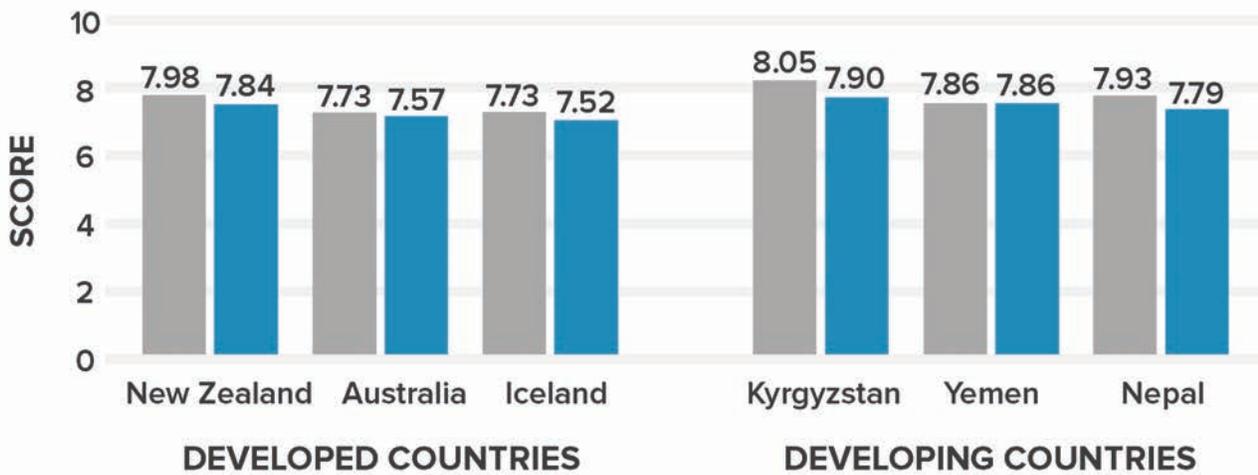
This pillar uses data from one expert opinion question:

1. Your perception of this destination as an adventure tourism destination is...
(Respondents are given a Likert scale of -3 [very poor] to +3 [very good]).

In 2016 New Zealand also ranked first in this pillar, and Australia and Iceland were tied for second place. In 2018, Australia narrowly outperforms Iceland. In the Developing Countries category, the rankings are the same, except Peru now displaces Micronesia for fourth place.

TOP 2018 SCORES | Brand

■ 2016 SCORE ■ 2018 SCORE



Kyrgyzstan has several initiatives, including donor-funded projects, aimed at increasing adventure tourism. It has invested in familiarization trips and press tours (including a joint initiative with the ATTA), which has generated significant positive coverage of the destination. Yemen, in second place, is an outlier. At the time of writing, Yemen is facing a major humanitarian crisis as a result of a bloody war, yet at least three experts rated its infrastructure as “very good” for adventure tourism. New Zealand has long been ranked highly in this pillar; the country’s brand 100% Pure has stood the test of time and continues to innovate with new marketing campaigns to stay top of mind.

ANALYSIS OF FACTORS

In addition to considering the ten pillars individually, the ATDI combines pillars into factors: Safe and Welcoming, Adventure, and Readiness. The factors bundle the individual pillars and weight more heavily for the final ATDI score those elements most important to adventure tourists.

The following paragraphs summarize country rankings by factor.

SAFE AND WELCOMING FACTOR

Adventure tourists value destinations that provide a safe and secure environment for them to travel in and that are welcoming to foreign people. The Nordic countries are generally safe and welcoming, with Norway and Iceland placing first and second respectively in the Developed Countries category.

Two Eastern European countries (Belarus and the Czech Republic) rank second and third in the Developing Countries block. Cuba places first in this factor. For tourism, it is one of the least expensive options in the Caribbean. The *Lonely Planet* describes the security situation in Cuba favorably: “There is almost no gun crime, violent robbery, organized gang culture, teenage delinquency, drugs or dangerous no-go zones. If a local comes at you holding a machete, he’s probably about to split open a coconut for you.”⁷

Top Three in Safe and Welcoming Factor, 2018

Rank in Safe and Welcoming Factor	Developed Countries	Developing Countries
1	Norway	Cuba
2	Iceland	Belarus
3	Switzerland	Czech Republic

⁷ Lonely Planet Online, <https://www.lonelyplanet.com/cuba/havana/safety> (retrieved July 31, 2018)

ADVENTURE FACTOR

The Adventure Factor is a combination of two pillars: Adventure Activity Resources and Entrepreneurship. This factor measures the adventure competitiveness of destinations and is weighted the most heavily in the ATDI. In the Developed Countries category, Iceland and Switzerland rank first and second, as they do across several pillars. However, the third place, Ireland, does not show up in any of the other top ten rankings. Some interesting aspects of Ireland’s overall ranking are that it has few species at risk, has experienced low forest coverage change, and ranks sixth on the Economic Freedom Index, which informs Pillar 7.

In the Developing Countries category, Bahrain scores first because of its low percentage of forest area coverage change and high placement on the Economic Freedom Index. Singapore benefits from its high placement on the EFI, and Chile from its low change in forest coverage.

Top Three in Adventure Factor, 2018

Rank in Adventure Factor	Developed Countries	Developing Countries
1	Iceland	Bahrain
2	Switzerland	Singapore
3	Ireland	Chile

READINESS FACTOR

The Readiness Factor measures how ready a destination is to host adventure tourists. The top-ranked countries in the Developed category are well-established destinations that have been receiving adventure tourists for several decades. Germany, France, and the United Kingdom have well-developed trail systems, excellent cultural tourism opportunities, and well-preserved nature. All three are in Western Europe, and indeed, most other countries in that sub-region also rank highly in this factor. Among developing countries, there is broader geographic representation. China, although well known for its large number of outbound tourists, received nearly the same amount of inbound tourists in 2017 (137 million). This is especially impressive considering that only sixteen countries have a visa-waiver program with China.

Top Three in Readiness Factor, 2018

Rank in Readiness Factor	Developed Countries	Developing Countries
1	Germany	China
2	France	Slovenia
3	United Kingdom	Peru

REGIONAL OUTLOOK

For the second year in a row, ATDI 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.

Region	Countries	Comment from 2016 Report
East Asia and the Pacific	<ol style="list-style-type: none"> 1. New Zealand 2. Australia 3. Japan 4. South Korea 5. Philippines 	Same as 2016.
Eastern Europe and Central Asia	<ol style="list-style-type: none"> 1. Croatia 2. Georgia 3. Turkey 4. Montenegro 5. Kyrgyzstan 	Georgia new at number 2. Kazakhstan out of top 5. Montenegro new to top 5.

Europe and North America (Note: Canada and the USA don't enter in the top 5 when considered against this competitive set.)	<ol style="list-style-type: none"> 1. Iceland 2. Switzerland 3. Germany 4. Norway 5. Sweden 	<p>Canada left top 5.</p> <p>Sweden entered top 5.</p> <p>Switzerland moved up.</p> <p>Germany moved down.</p>
Latin America and the Caribbean	<ol style="list-style-type: none"> 1. Chile 2. Costa Rica 3. Uruguay 4. Dominica 5. Peru 	<p>Barbados left top 5 (was previously number 5).</p> <p>Peru entered top 5.</p>
Middle East and North Africa	<ol style="list-style-type: none"> 1. Israel 2. Jordan 3. UAE 4. Bahrain 5. Saudi Arabia 	<p>Qatar left top 5.</p> <p>Bahrain came in at number 4.</p>
South Asia	<ol style="list-style-type: none"> 1. Bhutan 2. Nepal 3. India 4. Sri Lanka 5. Maldives 	<p>Pakistan was number 5 last year.</p> <p>India and Sri Lanka switched places.</p> <p>Maldives came into top 5.</p>
Sub-Saharan Africa	<ol style="list-style-type: none"> 1. Botswana 2. Mauritius 3. Rwanda 4. Zambia 5. Seychelles 	<p>Numbers 1–4 are the same as last year, but South Africa dropped to eighth place and Seychelles moved up.</p>

SOCIAL MEDIA LISTENING:

What Travelers Say About Adventure's Most Popular Destinations for Hiking

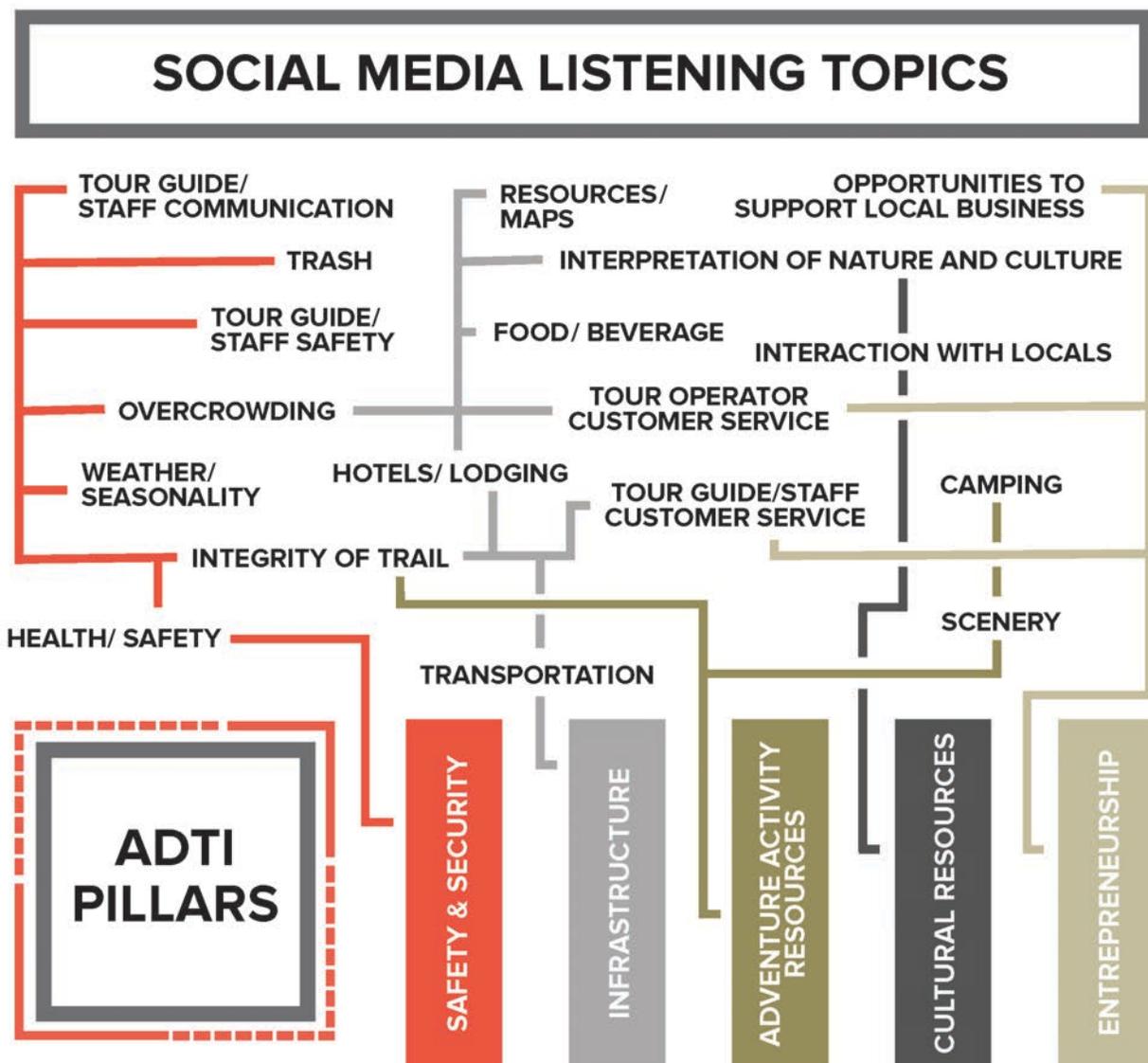
The ATDI ranks countries at a national level using data from an array of global databases on key topics such as sustainable development policy. For policy makers and destination planners, this macro-perspective may be augmented with insights from travelers' online reviews of their experiences in important adventure destinations.

General Findings

In general, the researchers found that social media reviews can be loosely correlated with five of the Adventure Travel Development Index pillars:

- Safety and Security
- Infrastructure (both hard and soft, such as trails, roads, maps, and lodging)
- Adventure Activity Resources, such as trail maintenance and scenery
- Cultural Resources, for example, historic or cultural designations such as protected areas or World Heritage sites
- Entrepreneurship, which refers to ground operators, tour operators, and food and other local service providers

The graphic below illustrates the linkages between the topics that emerged from analysis of online reviews shared by travelers on social media and the ATDI pillars.



One major factor that travelers discuss often that does not have a clear correlation with the ATDI's ten pillars is the emotional experience of their adventures.

Highlighting the alignment between social commentary and the objective country-level scores for countries can sharpen the understanding of which areas to focus on most for improvement.

DESTINATION SNAPSHOTS

MONT BLANC

Hikers rave about the wildflowers, tall forests, open meadows, glaciers—and of course the accommodations and meals—on the Tour du Mont Blanc, an alpine system of trails that circles France, Italy, and Switzerland, leading hikers around the Mont Blanc massif.

Given that Mont Blanc is a hiking destination in France and Italy (along with a portion in Switzerland), destination planners and managers in France may take the country's ATDI pillar scores into consideration alongside the social listening results. The results of the social media listening were generally positive. Ninety percent of reviewers left positive reviews about their experience on the Tour du Mont Blanc, with travelers discussing approximately three issues per review. The most commonly noted positive and negative attributes of the Tour du Mont Blanc are indicated below.

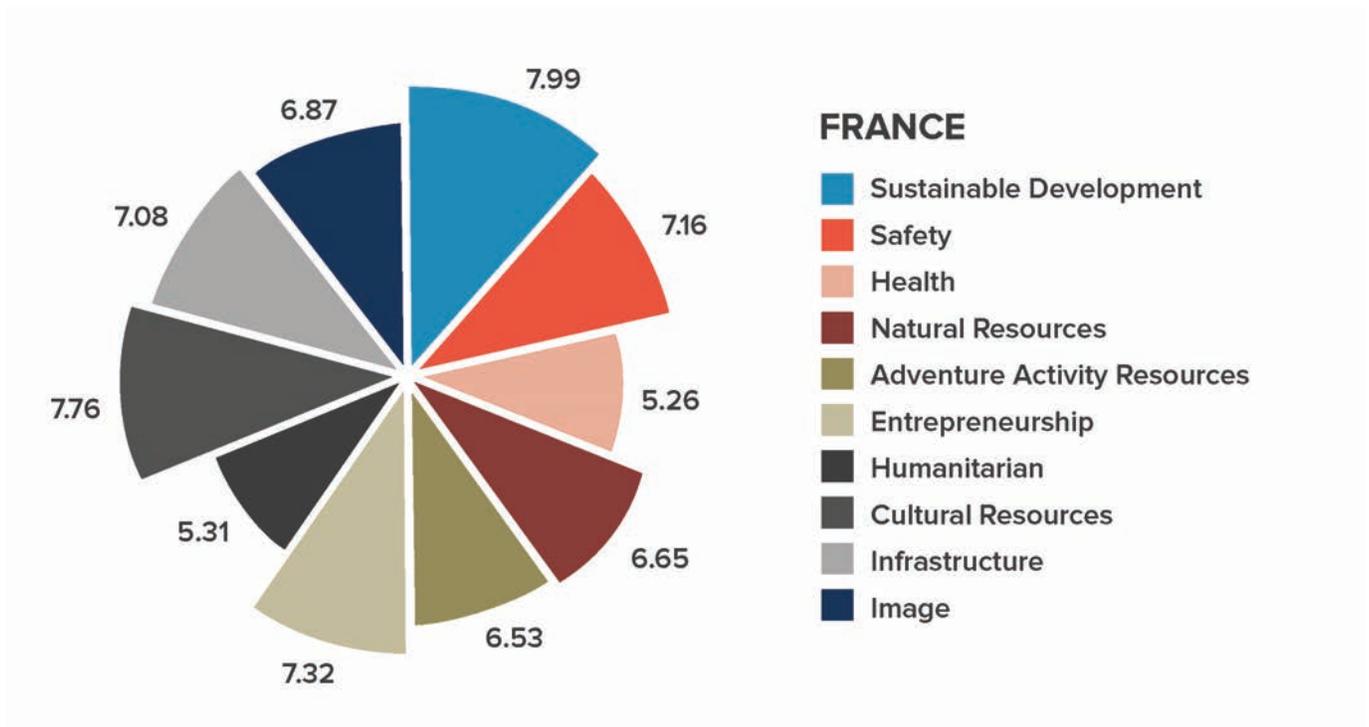
Most common positively reviewed attributes:

- Emotional: 25.9%
- Scenery: 24.1%
- Hotels/Lodging: 8.3%
- Food/Beverage: 6.7%

Most common negatively reviewed attributes:

- Weather/Seasonality: 50%
- Health/Safety: 25%

The chart below illustrates France's performance in the ATDI. Recalling that 10 is a high score in the ATDI, it is clear to see from the chart that France performs extremely well.



To bring a more local level of analysis into the ATDI framework, the social listening remarks (100 Mont Blanc hiker reviews in total) are aligned with the ATDI pillars in the discussion below.

Entrepreneurship:

- Approximately 15% of reviews discussed the quality of service they received from their tour guide.
- Although none of the reviews specifically mentioned opportunities to support local businesses, most travelers were staying in and getting meals at local inns and lodges.

Unlike the other two hiking destinations reviewed for this analysis, guides are not required for Mont Blanc. As one TripAdvisor reviewer said, “There are several ways to do the hike. You can go totally on your own with just your maps and guidebooks, you can have the route laid out for you and accommodations/reservations made by a tour company, or you can go with a guided tour. We went with a guided tour... and loved it. The guides do not just point the way, they share their incredible knowledge about everything imaginable” (Jan 01, August 2015).

Few reviews mentioned opportunities to support local businesses other than their overnight stays at local accommodations, including inns, hotels, and *refuges*.

Infrastructure:

- A total of 5% of reviews mentioned cultural resources, such as maps and guidebooks, or signage available throughout the trek.
- Approximately 23% of reviews discussed the lodging options along the trail.
- A total of 6% of reviews noted transportation options other than hiking.

Many reviewers chose to do self-guided tours for more flexibility, noting that the trail had excellent signage and was “incredibly well marked” (Liz M., AllTrails, February 2018) with “fantastic resources along the way” (Erica F., AllTrails, November 2017).

Most reviews about accommodations were positive. “The inns and lodges in the towns of the region were lovely. All of the towns are very ready for the 30,000 hikers each summer. We encountered very clean rooms, hearty meals, and very welcoming hospitality” (Country Walkers, TripAdvisor, August 14, 2016). A few reviewers were not as satisfied with their lodging experiences on the trail. As one hiker explained, “The warning would be to expect basic shared accommodation in the *refuges*, as you sleep with your team in bunk beds and there appears to be no option to take the slight upgrade to a double occupancy room or better food . . . One couple decided they would go to a separate hotel to have some better amenities” (Rob, TourRadar, September 2016).

Some reviewers discussed alternative transportation options, such as the popular Aiguille du Midi gondola, for those who cannot or do not wish to take the multiday Tour du Mont Blanc hike but still want to experience the region’s beautiful scenery. The reviews indicate that the infrastructure, including transportation options, is designed to cater to travelers of varying levels of fitness.

Safety and Security:

- A total of 24% of reviews mentioned the weather/seasonality during their hike.
- Only 4% of reviews discussed health and safety issues on the trail.

Reviewers mentioned a few safety issues, mostly caused by unanticipated poor weather. The most common complaints involved freezing temperatures, cloudiness, pouring rain, or heavy snow accumulation. However, one reviewer noted, “There wasn’t enough safety up the mountain either, we were able to go onto the glacier up there, but you could easily slip down between the gaps and NEVER get out” (Misti B., TripAdvisor, June 2015).

Recommendations for Destination Managers

Comparing France's ATDI scores in the categories of Infrastructure and Safety and Security alongside the social listening reviews suggests the following:

- With respect to Infrastructure, the ATDI score is 7.08, indicating a favorable scenario. However, additional perspective gained through social listening reveals that better expectation setting might be needed for some travelers with respect to accommodation. Another aspect of infrastructure could be considered the guiding community, which as shown above, receives high marks.
- The ATDI score for Safety is 7.16, indicating a favorable scenario. Social media listening corroborates this with a caveat about preparing for unpredictable weather. A possible point of improvement could be publicizing and providing more information clarifying the physical challenges of hiking Mont Blanc to make sure hikers understand the safety risks.

EVEREST BASE CAMP

Monasteries, museums, Buddhist temples—and the awe-inspiring Himalayan views—make the Everest Base Camp twelve- to fifteen-day trek world-class.

The findings from social media listening about Everest Base Camp were also generally positive, with 86–87% of reviewers recording positive reviews of their overall experience. These travelers covered approximately 4.7 issues per review. The most common positive and negative attributes discussed in the reviews of Everest Base Camp are noted below.

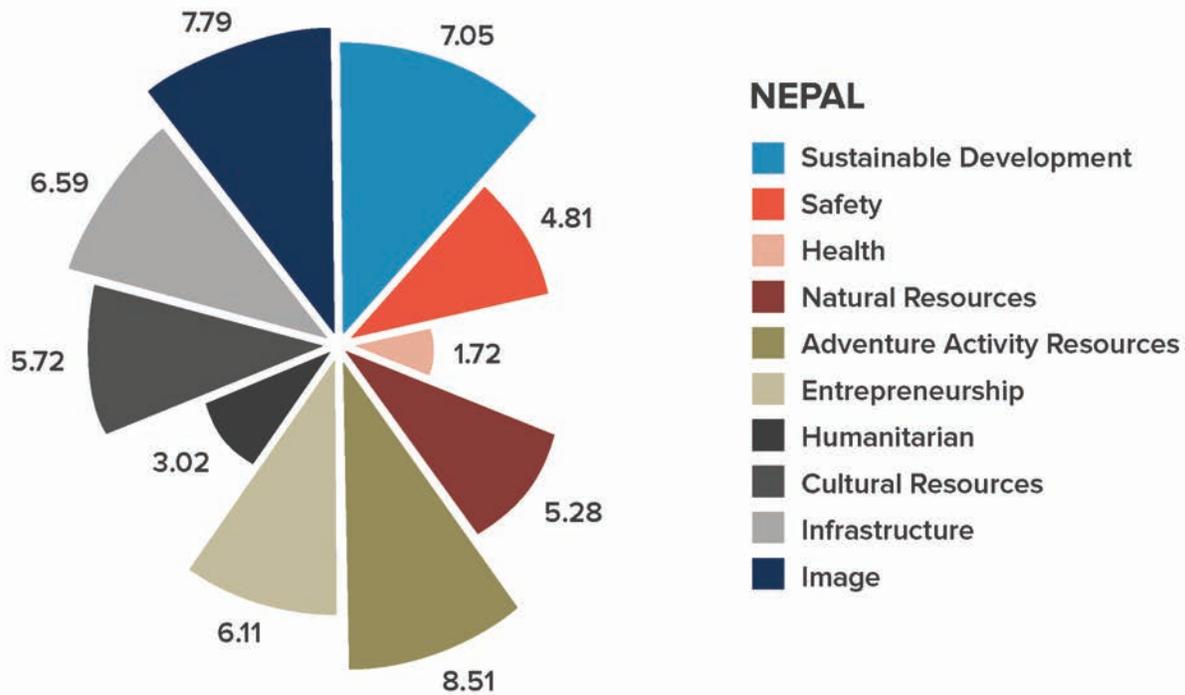
Most common positively reviewed attributes:

- Emotional: 17.3%
- Scenery: 11.8%
- Tour Guide Customer Service: 11.4%
- Tour Operator Customer Service: 7.7%

Most common negatively reviewed attributes:

- Weather/Seasonality: 12.50%
- Hotels/Lodging: 10.5%
- Health/Safety: 9.4%

The chart below illustrates Nepal's performance in the ATDI. Note that Nepal scores highest for Adventure Activity Resources and Image. Its lowest scores are in the areas of Safety, Health, and Humanitarian.



An overwhelming majority of traveler reviews—86 to 87%—were positive. Although the trek is difficult, its challenges appear to be what draw and reward visitors. As one TripAdvisor reviewer said, “While on the trek, there are often moments when you question if all the effort is worth it, but the sense of accomplishment and the gorgeous breathtaking views make up for all the pain. Looking back at the experience, would highly recommend it for adventure seekers looking to explore some magical untouched sights” (Ritika J., TripAdvisor, August 2017).

Entrepreneurship:

- Only 4% of reviews mentioned opportunities to support local businesses.
- About 50% of reviews discussed the level of customer service provided by their tour guides and other staff throughout the hike.
- Approximately 17% of reviews recounted interacting with the local Nepalese.

Most reviewers used professional tour operators to hike to the Everest Base Camp, and feedback was generally very positive. In particular, reviewers cited professional customer service, knowledgeability, and friendliness of the tour guides and staff. One reviewer noted that the tour guide “made the trip something special for us and made it much more than a trek, but a cultural, historical and geographical educational experience” (John Hotham, TourRadar, May 2018). Another wrote, “Our excellent guide was incredible in how hard he worked to ensure that our trip was an experience of a lifetime. We

became good friends, and learned so much from him about the area, and the Nepal people and customs. His reverence for the traditions and culture made our trip through this spiritual land a very moving moment in our lives” (DolmaSherpa, TourRadar, July 2018).

However, there were a few negative outliers—reviewers who mentioned that their guides did not follow proper safety procedures. For example, reviews mentioned that guides failed to carry medication or oxygen tanks to assist with altitude sickness.

The reviews for this trek mentioned interacting with the locals more than reviews for the other two destinations. In general, hikers described the local Nepalese people as humble, welcoming, and friendly. Interactions with locals tended to occur within tea houses, which are the main types of lodging on this trail. However, one reviewer mentioned that “[Our tour guides] also gave us a window into the true lives of the Nepalese people in this area. They even arranged for us to have lunch along the trek with [a local] family in their home. It was one of the highlights of our trip.”

Infrastructure:

- Approximately 22% of reviews discussed the quality of lodging along the trek—one-third of these reviews were negative, and two-thirds were positive.
- The analysis found mixed reviews with regard to the quality of the tea houses, which are the primary form of accommodation. “The accommodations in tea houses (small Nepal family owned) along the route were each an enriching experience” (DolmaSherpa, TourRadar, July 2018). Reviewers who did not enjoy their lodging experience used phrases such as “varying sorts of uncomfortable,” “colder than I had expected,” and “totally over-priced” to describe the tea houses. One reviewer went as far as to say that there are “very poor hygiene facilities in terms of toilets, accommodation, you will sleep under negative zero conditions because guest houses don't have proper heating facilities” (Ismail M., TripAdvisor, April 2018).

Infrastructure:

- A total of 6% of reviews discussed issues of overcrowding.
- About 4% of reviews mentioned the integrity of the trail.

A handful of reviewers mentioned the crowds on this trek during peak season. As one hiker said, “The main trail is fantastic but was packed with hikers, porters, and pack animals—sometimes jammed to a standstill” (Joseph D, AllTrails, June 2018).

A few also discussed their disappointment with the amount of garbage on the trail. “Considering Everest is a national park, there was a lot of litter and [it] was not very looked after well due to many campers—bit of a shame to see such a beautiful area not truly appreciated” (Jason W., TripAdvisor, May 2017).

Safety and Security:

- Approximately 14% of reviews mentioned the weather/seasonality for their hike.
- About 10% of reviews discussed health and safety issues along the trail.

Although the majority of reviews indicated overall positive hiking experiences, they also described cold weather conditions, overcrowding, health, and safety. Acclimatization was a common concern. “As we go higher, the air gets thinner and thinner; one can see some people suffering from high altitude sickness especially above 3500m and the helicopters fly like autos to assist the people who need evacuation” (Gdinesh, TripAdvisor, March 2017).

Recommendations for Destination Managers

Comparing Nepal’s ATDI scores in the categories of Infrastructure and Safety and Security alongside the social listening reviews suggests the following:

- There is room for improvement of safety as seen by Nepal’s average ATDI safety score. One way this can be achieved is by providing clear recommendations for acclimatizing to the altitude. For example, advise hikers to arrive a little early and spend an extra day in Namche Bazaar, allowing time to adjust to the lack of oxygen; walk slowly; bring along Diamox, a medication used to treat altitude sickness; and get in shape before leaving home.
- Destination managers should note the red flags travelers raise about overcrowding and garbage. Destination managers should use these insights to prompt deeper assessment of these issues to define the scope of the problems and identify possible solutions in collaboration with tour operators and other key stakeholder groups.
- Destination managers would also benefit from helping lodge owners understand how they can make their properties meet the expectations and quality standards of foreign visitors by providing them with training and technical guidance.

INCA TRAIL

Terminating at Machu Picchu, the “Lost City of the Incas,” the Inca Trail crosses Andean peaks, cloud forest, rain forest, and Incan ruins.

Similar to the other two treks, the social media listening of the Inca Trail garnered generally positive reviews. A total of 87–90% of the reviewers wrote positive reviews, with each review mentioning approximately 4.8 issues. The most prevalent positive and negative attributes described in the reviews are shown below.

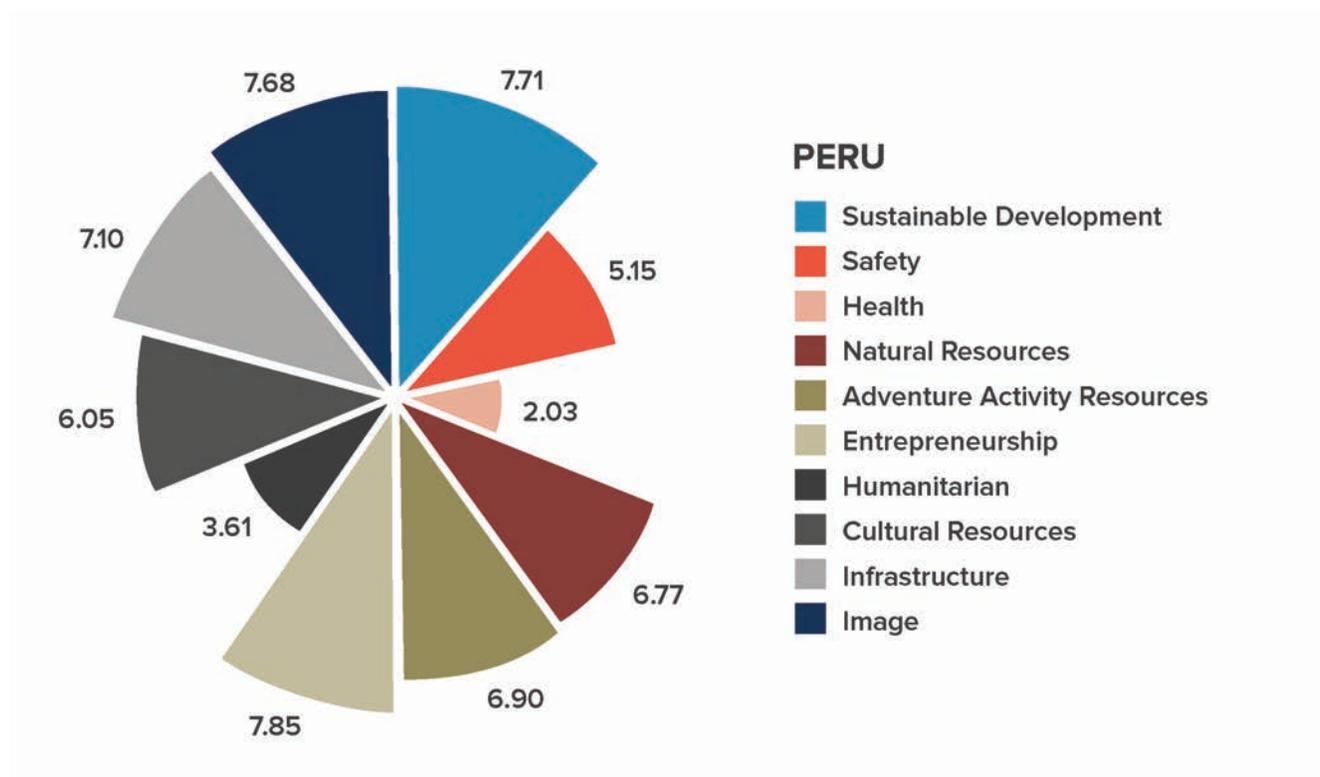
Most common positively reviewed categories:

- Emotional: 19.3%
- Tour Guide Customer Service: 12.8%
- Scenery: 9.8%
- Food/Beverage: 8%

Most common negatively reviewed categories:

- Health/Safety: 22%
- Weather/Seasonality: 14%
- Overcrowding: 9.3%
- Camping: 8.1%

The chart below illustrates Peru’s performance in the ATDI. Note that Peru scores fair for Sustainable Development, Image, Infrastructure, Entrepreneurship, and Natural Resources. The country scores lowest in the Safety, Health, and Humanitarian pillars.



The social listening remarks of the Inca Trail align most with the ATDI categories of Entrepreneurship, Infrastructure, and Safety and Security.

Researchers found that between 87 and 90% of the reviews were positive, with 19.3% of reviews featuring emotionally evocative adjectives. One hiker summarized her experience as follows: “Yes, it was difficult at times, and I’m afraid of heights, so that was another challenge, but it was all worth it. They call it a pilgrimage, and it truly is. I think everyone should try to challenge themselves with this as it is such a worthy goal . . . and even if you’re sore and tired, you’ll enjoy every step and every view” (1204fish, TripAdvisor, April 2018).

Entrepreneurship:

- Only 3% of reviews mentioned opportunities to support local businesses, such as buying food or equipment from local businesses and supporting community projects.
- Nearly 55% of reviews discussed the level of customer service provided by their tour guides and staff during the trek.
- Only 3% of reviews noted any interaction with locals along the trail.

Tour guides are required to hike the Inca Trail, and tour guide customer service was positively cited in 12.8% of the reviews. Reviewers cited their overall experience with their tour company, guides, and porters, raving about the quality of customer service, helpfulness, and knowledgeability of the hiking staff. For example, one reviewer said that “Miguel was an incredible guide. He has a true passion for what he does and for his country. He told us stories the entire time, pointed out plants and animals and became almost like family to us. We adore him” (wanderlust8800, TripAdvisor, March 2018).

The guides shared their personal stories, natural and cultural information, and opportunities to visit local sites. “We don’t usually go on guided tours but found we learnt a lot more about the country, culture and history by travelling with a guide in a group like this. The visits to community projects were very interesting” (James B, TripAdvisor, March 2018).

Infrastructure:

- No reviews mentioned any cultural resources or signage along the trail.
- Approximately 7% of reviews discussed issues from overcrowding.
- About 16% of reviews noted the quality of camping on the trek.
- A total of 6% of reviews discussed the integrity of the trail.

Although tour guides provided knowledge and history of the area, no other cultural resources or signage on the trail were noted in the reviews analyzed.

A recurring issue mentioned throughout the reviews was overcrowding at Machu Picchu. “Machu Picchu is overrun with 3,000 tourists by late morning. I had a much greater sense of history and presence with the other Incan sites along the trek” (Spiritll, TripAdvisor, May 2018). As this reviewer noted, the crowds are not along the trail, but rather at the end of the trek. Another reviewer on TripAdvisor said, “Why do all those people have to take selfies right at the edge of the cliff at the Sun Gate? Insane! The Inca Trail was a once in a lifetime experience. I even enjoyed it more than Machu Picchu because of the crowds” (Anonymous, TripAdvisor, November 2017). It is not necessary to hike the Inca Trail to arrive at Machu Picchu; there are other transportation (train and bus) and trail (Salkantay and Lares Treks) options.

Camping is necessary on this multiday trek. Although most reviews of the camping experience met expectations—and some even mentioned that food and support from the campsite staff exceeded expectations—poor sanitation was noted in a few reviews. One hiker wrote that “The toilets along the trail are a really grim experience but that was to be expected” (Ollie J., TripAdvisor, March 2018).

Safety and Security:

- About 18% of reviews mentioned the effects of weather/seasonality on their hike.
- Approximately 14% of reviews discussed health and safety, primarily altitude sickness.

Health and safety concerns were a recurring theme throughout the Inca Trail reviews, including stomach issues and occasional injuries. Many reviewers noted that they personally were affected by altitude sickness or others in their group suffered. As one TripAdvisor reviewer said, “[The trek] is for the determined. It is very difficult, and you must really want to achieve this hike. Many with all the fitness and determination in the world do not make it past day 2. The reason is altitude and your reaction to it. Be sure to have enough time to acclimatize before attempting the hike” (Anonymous, TripAdvisor, October 2017). The trek itself comes with some danger as well, as some hikers mentioned injuries, perilous conditions, and extreme weather on the trail. For example, “Just be very very very careful up there as the steps were very treacherous to go up, and nevermind coming down the same way. I was on all four just to make sure I don’t fall” (Jian Ru Jenny J, TripAdvisor, April 2018).

Recommendations for Destination Managers

Comparing Peru's ATDI scores in the categories of Entrepreneurship, Infrastructure, and Safety and Security alongside the social listening reviews suggests the following:

- Destination managers and tour operators have an opportunity to play a greater role in educating visitors about natural and cultural resources. Most of that information is currently transmitted by the local tour guides.
- Tour operators have an opportunity to partner with local communities to support local businesses and entrepreneurs along the trail.
- Destination managers can also better prepare hikers for the experience with information about health and safety. Hikers should be advised to prepare adequately in advance of their trip, bring proper equipment, acclimate to the altitude, and not overestimate their athletic abilities. Since more people positively reviewed lodging, camping facilities, and food, destination managers might reinforce with local operators the great work in this area and consider using this kind of positive feedback in promotional materials. Providers who are not doing as well in these areas may be supported in learning from the local champions.
- Tour operators need to manage travelers' expectations about overcrowding and its effect on the overall experience. The online reviews indicate that this site may be experiencing overtourism. It is important that destination managers and tour operators work together to reduce pressure points at Machu Picchu. This may involve developing improved visitor management strategies and marketing new products in other locations.



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LOOKING AHEAD: Prioritizing Adventure Tourism Destination Management

In recent years, destinations around the world have been grappling with “overtourism.” This refers to the phenomenon of tourism demand being greater than the supply, or destinations exceeding their carrying capacities, leading to overcrowding in tourism destinations. Overtourism has myriad negative effects, including a reduction in quality of life for local residents, negative effects on conservation, and poor experiences for tourists.

The media coverage of overtourism has principally concerned cities—but adventure destinations and attractions are part of the conversation. As ATTA CEO Shannon Stowell noted in the closing keynote of the Adventure Travel World Summit in October 2018, “We in adventure travel used to think we were the good guys in tourism... Yet, our position has become increasingly uncomfortable with adventure travelers also overrunning destinations- loving them to death. Overtourism, climate change, plastic waste, cultural erosion, habitat loss is not on the horizon. They are here, now....and overtourism exacerbates all these issues. We need healthy tourism to be the standard and for exploitative, destructive tourism to end.”

In combination with industry pressure to put destination management on equal footing with destination marketing, more and more destinations are addressing overtourism in their strategic planning process. For example, in Iceland (ATDI Rank: 1), a country with a ratio of six tourists to every resident, overtourism is a major concern. Iceland's government and industry are focusing their management and marketing efforts on geographic dispersal. Tactics include increasing the level of tourism providers' service and safety, and marketing to higher value traveler segments. Marketing campaigns promote the country as a four-season destination and promote destinations around the island. Marketing campaigns, such as the Iceland Academy and the Icelandic Pledge, aim to educate tourists on how to travel responsibly.

To date, the industry's perception of adventure tourism is that it typically emphasizes small-group or individual, personal experiences. However, as the number of outbound departures grows, adventure travel stakeholders will need to ask the critical question, "Are mass tourism and adventure tourism mutually exclusive, or can many tourists in one space participate in adventure travel?"

On Thursday, September 27, 2018 World Tourism Day the George Washington University International Institute of Tourism Studies and

colleagues at the Center for Responsible Travel gathered industry leaders from around the world to share their approaches to the vexing challenges stemming from overtourism. Representatives from many ATDI countries, such as Iceland, Australia, Peru, and Spain, shared their experiences and ideas for possible pathways forward. All presenters stressed that overtourism evolves from a complex set of challenges and that solutions need to be multifaceted and site-specific.

Francesca Street—who interviewed three of the panelists for her CNN feature "Can the World Be Saved from Overtourism?"—summarized the key takeaway as follows: "Speakers agree that government, locals, and tourism companies working together is the best recipe for success."

Johanna Jainchill, in her Travel Weekly story "Experts Talk Threat of Overtourism and Possible Solutions," said, "Among the clearest takeaways from the event was that governments worldwide need to step up and recognize they are the first line of defense in saving their historical cities and natural treasures from being 'loved to death.'"

A few additional takeaways from the forum are outlined below:

- **Recognize the tipping point:** More isn't always better. Determine maximum capacity for your destination and monitor social media to determine whether it's on traveler hot lists.
- **Plan ahead: Make tourism part of comprehensive urban, regional, and destination plans. Stay flexible and adaptable:** What works for historic sites doesn't necessarily work for beach communities, for example. Needs differ and change over time.
- **Rethink good governance and management:** Destination Management Organizations (DMO's) have a vital role to play beyond marketing; they need to participate in the sustainable management of destinations.
- **Redirect visitors:** Encourage visitors to travel smarter, to seek out hidden gems, and to contribute to the protection of the places they visit.

A USEFUL TOOL:

Promoting Sustainable Growth of Adventure Travel

Beyond providing an insightful overview of trends affecting adventure tourism, the ATDI scorecard is 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. Social media netnography can be used to complement the ATDI scorecard's macro-viewpoint by providing insights about what travelers are saying and how they are feeling about adventure resources. These insights can help to improve management of the resources on which adventure travel is built.

The scorecard and social media netnography results can also be used to prompt deeper assessment, discussion, and understanding of key issues affecting sustainability, such as overtourism, and to foster new public-private partnerships that can better address areas in particular need of attention and investment.

FOR MORE INFORMATION

Visit AdventureIndex.Travel

or Email info@adventurertravel.biz

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