



# ADVENTURE TOURISM DEVELOPMENT INDEX

## ATDI 2020



**ADVENTURE TRAVEL**  
TRADE ASSOCIATION

International Institute  
of Tourism Studies  
THE GEORGE WASHINGTON UNIVERSITY

POWERED BY  
**ADVENTURE TRAVEL**  
TRADE ASSOCIATION

# INTRODUCTION

Welcome to the 2020 edition of the Adventure Tourism Development Index (ATDI), a joint initiative of The George Washington University International Institute of Tourism Studies (GW) and the Adventure Travel Trade Association (ATTA). The ATDI is a tool for anyone working in tourism development, but especially for Destination Management Organizations (DMOs) or other public institutions working on tourism. The ATDI assesses the potential and readiness of countries to compete in the global adventure tourism market based on their scores in ten pillars. The pillars measure country-level performance in areas relevant to planners, policy makers and tourism entrepreneurs.

The analysis for this year's report occurs while the world is in the midst of a global pandemic caused by the rapid spread of Covid-19 (coronavirus). The virus has effectively caused a total shutdown of the global tourism industry. From Buenos Aires to Beijing, hotels have closed, guides are out of work, operators are laying off staff and airlines are requesting government bailouts.

The United Nations World Tourism Organization (UNWTO) forecasts a 20-30% drop in international tourist arrivals in 2020 compared to 2019 figures. The magnitude of this fall is unprecedented compared to recent past crises. For instance, the UNWTO reports that international tourist arrivals declined by 4% in 2009 during the global economic crisis and 0.4% during the SARS outbreak in 2003.

The World Travel and Tourism Council (WTTC) forecasts that the crisis will cost fifty million tourism jobs worldwide, with Asia being hit the hardest and losing thirty million tourism jobs. The UNWTO expects that the unprecedented decrease in international tourist arrivals will translate into a decline in international tourism receipts of between US\$300-450 billion, which represents one-third of the US\$1.5 trillion generated in 2019.

The coronavirus pandemic demonstrates the urgent need for a sustainable leadership approach—one that focuses on resiliency, resourcefulness and efficiency. Now more than ever, destination managers, business owners and other sector leaders must demonstrate critical thinking skills and leadership approaches to survive through the current crisis and prepare for recovery. Building a resilient and healthy

tourism industry in a post-Covid-19 world will require coordination, planning and shared responsibility between many stakeholders: destination managers, business owners, policy makers and the local community.

Readers of the 2020 ATDI are invited to analyze not only the adventure tourism competitiveness of their destinations but also its overall resilience. In particular, Pillar 3, Health; Pillar 7, Entrepreneurship and Pillar 8, Humanitarian, provide important insight into a destination's readiness to weather a public health crisis. It is likely that elements measured within these pillars, such as the number of hospital beds per resident, will become real concerns of future travelers when they select destinations.

To more deeply explore the sustainability dimension of adventure tourism competitiveness worldwide, GW and ATTA partnered with the Global Sustainable Tourism Council (GSTC). The GSTC manages sustainable tourism standards (the GSTC Criteria) and provides international accreditation for sustainable tourism. The GSTC Global Destination Sustainability Report is provided as a companion to this report and analyzes 24 destinations that have applied the GSTC Destination Criteria and Indicators. These geographically diverse destinations vary in their level of tourism development. When used as a companion piece to the ATDI, the GSTC analysis provides additional insights into destination sustainability challenges and opportunities. While the ATDI is focused on country-level competitiveness insights, the GSTC-D report is regional and local in scope. An in-depth side-by-side analysis of the ATDI and the GSTC-D is featured throughout the document. In addition to the ATDI, we hope you will also review the companion report, GSTC Global Destination Sustainability Report, which presents a snapshot of common destination sustainability challenges and good practices.

As our world faces increasingly severe crises—due to climate change, health pandemics, terrorism and other mega-threats—only destinations that are healthy and have a solid sustainable management plan in place are likely to remain competitive in the long-term.

**The coronavirus pandemic  
demonstrates the urgent need for a  
sustainable leadership approach—  
one that focuses on resiliency,  
resourcefulness and efficiency.**



# ABOUT THE ATDI

The ATDI examines ten factors (10 pillars of Adventure Market Competitiveness) in three categories:

## SAFE & WELCOMING

- Sustainable Development
- Safety
- Natural Resources
- Health

## ADVENTURE

- Entrepreneurship
- Adventure Resources

## READINESS

- Humanitarian
- Infrastructure
- Cultural Resources
- Image

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 honing in on where to focus.

Ultimately, what the ATDI demonstrates is that adventure tourism competitiveness relies on an interconnected web of factors, none of which are the remit of any one agency or department. Rather, tourism competitiveness requires a comprehensive approach across government ministries, with private sector collaboration. This coordination can be referred to as 'tourism governance,' and takes practical form in policy.

The ATDI is a tool for tourism destination stakeholders to measure their adventure competitiveness against competing destinations, allowing them to identify strengths and weaknesses for the development of a strong adventure market.

## How to Use the Index

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 in which they fall. 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](http://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 cluster.'

© ATTA / Kristen Kellogg



© ATTA / Hassen Salum



# TOP TEN COUNTRIES FOR ADVENTURE TRAVEL

The ATDI's top ten list, as per table 1 highlights countries showing strong potential for adventure tourism competitiveness. Recall that the ATDI does not capture visitor numbers and is not a ranking for volume of tourists.

**Table 1: Top Ten Ranked Countries in 2020 and 2018**

DEVELOPED COUNTRY RANKINGS			DEVELOPING COUNTRIES RANKINGS	
	2020	2018	2020	2018
1	Iceland	Iceland	Czech Republic	Czech Republic
2	Switzerland	Switzerland	Chile	Israel
3	New Zealand	Germany	Slovak Republic	Estonia
4	Germany	New Zealand	Slovenia	Slovak Republic
5	Norway	Norway	Israel	Poland
6	Finland	Sweden	Estonia	Chile
7	Sweden	Canada	Poland	Romania
8	Canada	Finland	Bulgaria	Bulgaria
9	Denmark	United Kingdom	Romania	Slovenia
10	Australia	Australia	Costa Rica	Jordan

© ATTA / Kristen Kellogg



# Notable Movement in the Top Ten 2018 - 2020:

## Developed Countries:

- For the third year in a row, Iceland claims the top spot as the most competitive destination in the world. Iceland scores especially high in Adventure Activity Resources and is viewed positively by our expert panel.
  - Switzerland has the top score in Pillar 1, Sustainable Development due to its low unemployment rate and high score in Environmental Protection Index. It ranks high in almost all other pillars, though its Adventure Activity score is comparatively low (and decreased this year) due to an increase of species in danger according to the International Union for Conservation of Nature (IUCN).
  - Due to its score in Natural Resources and Adventure Activity resources, the United Kingdom fell out of the top ten, while Denmark moved up three spots to number nine.
- 

## Developing Countries

- For the fourth year in a row, the Czech Republic maintains its position as the most competitive adventure market within the developing country set. The Czech Republic doesn't dominate in any one pillar, but rather scores consistently well across the board, with no notable weak points.
- Israel dropped from second to fifth in the developing country set. This is due to a decrease in Natural Resources score caused by an increase in population density as well as expert opinion. Israel has one of the highest population densities within the Organization for Economic Co-operation and Development (OECD), with 410 people per square kilometer.
- Costa Rica enters the top ten for the first time since 2013, due to increases in expert perception in regards to safety and culture.
- Jordan drops ten spots mainly due to the score in Pillar 4, Natural Resources. The country experienced a seven point increase in the rate of urbanization (from 83% to 90%), and people per square meter (from 106 to 112); these changes impacted its Pillar 4 score.

## Key Findings:

- Nations around the world are increasing the amount of protected marine and terrestrial areas. Expanded protected area management systems have the add-on benefit of protecting the habitats of many endangered species.
- Countries that have instituted policies designed to mitigate and adapt to climate change are seeing the impacts in their Environmental Performance Index scores and ultimately in their Pillar 1, Sustainable Development scores. Island nations, such as Barbados and Seychelles, are making the most progress in this area.
- The worst performing countries are predominantly poor countries, in a post-conflict or conflict situation, such as Sudan and Somalia. While tourism is not a priority for rulers in these countries, it is worth noting that many popular adventure tourism destinations, such as Rwanda, Croatia and Slovenia, have had relatively recent civil wars and used tourism as a tool for economic development, job creation and rebuilding post-conflict.
- The Corruption Perception Index indicates that corruption weakens democratic institutions. In early 2020 (and as this report is being written), the world is grappling with the Covid-19 virus that is closing borders and suspending tourism. In Pillar 3, Health, the ATDI measures the number of physicians, hospital beds and nurses and midwives per 1000 people, because a healthy population is an important element of adventure competitiveness. In the wake of the pandemic, the quality and availability of medical resources in a destination will probably increase in importance for travelers.

# METHODOLOGY

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, 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.

Countries recognized by the United Nations are benchmarked in the ATDI and are represented in two groups: Developed Countries and Developing Countries. ATDI 2020 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.adventureindex.travel](http://www.adventureindex.travel).

Countries with missing data points were given a score equivalent to the average of their geographical region where it made sense,<sup>1</sup> otherwise they received a score of one.

However, if more than five data points were missing the country was dropped from the ATDI calculations. Twenty-one countries (11% of the total) had at least one missing data point.

## Methodology Changes:

In 2020, one methodology change was made in Pillar 8. While previously countries were given a score of 1 if they were not ranked in the Happy Planet Index (HPI), this year a regional average was inputted.

It is also worth noting that the Yale Environmental Performance Index (EPI) included changes to its methodology that resulted in reduced scores for nearly all countries in Pillar 1, which incorporates EPI scores. An indicator was removed ('Environmental Risk') and a new one was introduced ('Heavy Metals' which calculates lead exposure). Furthermore, the indicator on tree cover loss changed from a 14-year average to a five-year moving average to better understand the responsiveness of trends in deforestation to policy decisions.

## Expert Panel

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 moving average of expert survey results. Each country has at least three expert responses.

In 2020, there were 360 experts on the panel; 41 percent were women and 59 percent were men. On average, experts had 15 years of experience in tourism and 12 years in adventure tourism. ATDI experts consisted of:

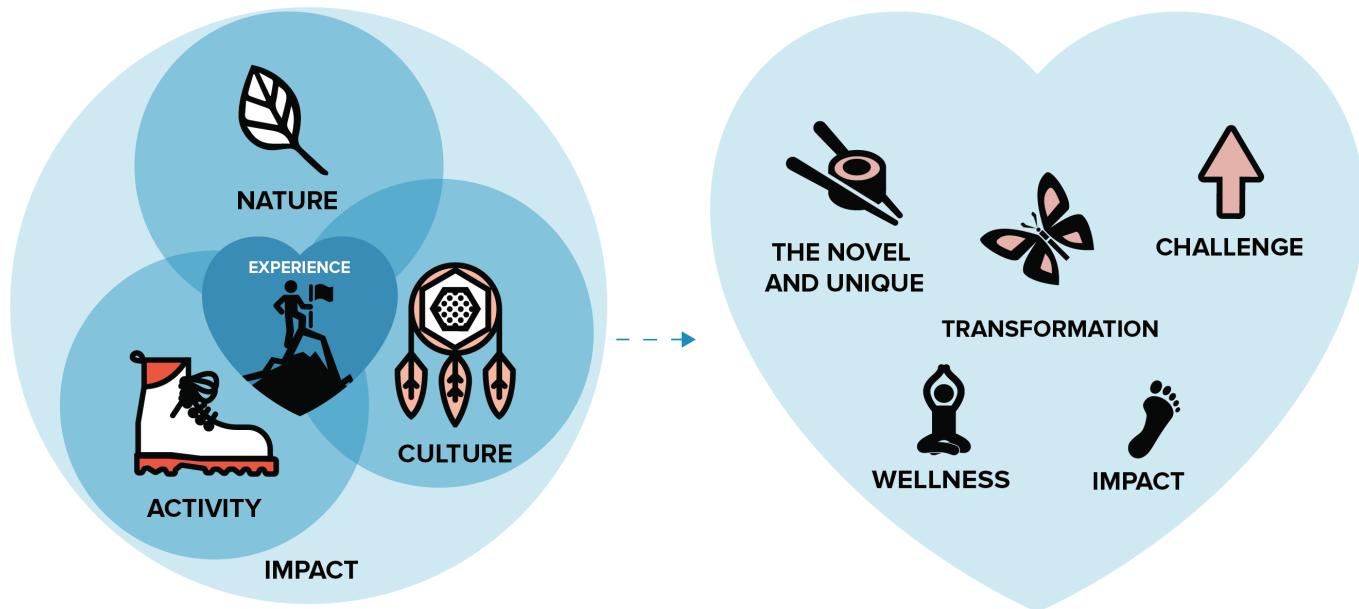


- Other: tourism development consultant, travel advisor and writer, travel agent, travel marketer, etc.

<sup>1</sup> There are three indicators where we do not take regional averages: expert opinion (if the country has never received an expert opinion; this has happened, for example with the island nation of Niue), percentage of protected area and Economic Freedom Index.

# Adventure Tourism Defined

Adventure tourism contains essential elements that make up the entire experience (nature, activity, and culture), which are used by the travel trade to understand if a specific product can be classified as ‘adventure travel.’ These elements come together to deliver specific types of experiences for travelers who are motivated by goals such as transformation, challenge and wellness.



## Essential Elements

The left side of the chart above illustrates the essential components of an adventure travel trip: nature, culture and activity. Adventure travel providers will note how the individual elements come together to deliver an overall experience underscoring the importance of considering the components of a trip as individual ingredients, and also 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. As well, the components 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 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 they 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.

To meet the definition of adventure travel, a trip must take an individual outside of his or her regular environment for more than 24 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).

From an activity perspective, the traveler perception of ‘adventure’ is always shifting. A sampling of activities associated with adventure travel could include things like: joining an archeological expedition; backpacking; bird watching; camping, caving; climbing; getting to know the locals; hiking; horseback 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.

# BIG MOVERS

In the developed country set, there were no significant movements in ranking. The two countries which made big movements, Liechtenstein and Monaco, were missing data points and benefited from increased regional averages, such as the Environmental Performance Index.

However, it is worth noting that the United States and Belgium dropped from the middle tier down to the bottom tier of countries.

## United States

The United States lost nearly two points in Pillar 4, Natural Resources and in Pillar 5, Cultural Resources, both as a result of low scores from the expert panel. This might be a reaction to the United States recently downgrading or downsizing protected areas, including the Bears Ears and Grand Staircase-Escalante national monuments.<sup>2</sup> It is worth nothing that the United States has one World Heritage Site, Everglades National Park, that is categorized as being ‘in danger,’ (an indicator for Pillar 5).

---

## Belgium

Belgium has never scored particularly high on the ATDI, but this year dropped to 21st place. This was due to a loss of 2.6 points in Pillar 4, Natural Resources, caused by a slight increase in population density and a drop in expert opinion.

**Within the developing country set, a few countries made noticeable jumps in rank.**

## Slovenia

In 2014, Slovenia launched the Slovenia ‘Green Scheme of Slovenian Tourism,’ a certification tool for both destinations and providers to encourage and increase sustainable tourism development in the destination. While not directly connected to an ATDI pillar, these efforts contribute to strengthening the enabling environment for adventure tourism, which is illustrated by a five-point increase in rank from Slovenia from ninth place to fourth place. This was due in part to two point five increases in Pillar 8, Humanitarian, caused by an increased number of NGOs operating in the country. Slovenia also increased by 0.4 points in Pillar 2, Safety, due to an increase in the CPI score.

---

## Sudan

Since a transition government came into place in Sudan in early 2019, more tourists are visiting the country, not least to explore its pyramids, which were built by the Nubians. The country has reduced visa and travel restrictions and is hoping to increase the number of tourists in the coming years. On the ATDI, Sudan moved up in the index from 159 to 142. For the first time, Sudan was included in the Economic Freedom Index. The country scores low (45/100), but this score is better than the regional average that was previously inputted. In Sudan, government spending is high, but rule of law, regulatory efficiency and open markets score poorly. Sudan also increased ten points in the Environmental Performance Index, with particularly high scores in ecosystem vitality, including forest coverage and fisheries.

---

<sup>2</sup>Kroner, R. E. G., Qin, S., Cook, C. N., Krishnaswami, R., Pack, S. M., Bonilla, O. D., ... & He, Y. (2019). The uncertain future of protected lands and waters. *Science*, 364(6443), 881-886.

## Dominica

Dominica jumped ten points from 22nd to thirteenth position in 2020. Tourism represents 11% of GDP for the island nation, but often suffers from setbacks due to natural disasters. The increase in score came from a 1.34-point jump in Pillar 5, Cultural Resources, which can be attributed to an increase in marine and territorial areas under conservation.

---

## Barbados

Barbados moved up 11 places from rank number 32 to 21. Barbados made small gains in several pillars, namely Pillar 1, Sustainable Development due to an increase in its EPI score. The increase in score comes from improvement in the areas of 'Climate and Energy.' In 2019, Barbados launched the 'Barbados National Energy Policy,' a ten-year framework designed to achieve 100% renewable energy and to become a carbon-neutral state. It is possible that this change in rank is an early success from changes implemented through this policy.

---

## Costa Rica

Costa Rica increased its ranking by nine places, moving from number 19 to number ten. Costa Rica improved its score on the Corruption Perception Index by two points, which is reflected in the ATDI score of Pillar 2, Safety.

---

## Serbia

Serbia increased 13 places from 39th place to 26th place in 2020. Serbia improved its score on the Corruption Perception Index, which increased its score in Pillar 2, Safety. Unemployment dropped by 5% (to 10% overall), increasing Serbia's score in Pillar 1, Sustainable Development.

---

## Micronesia

The Federated States of Micronesia moved up 24 places from 66th place to 43rd place. Slight increases across the board helped Micronesia improve its rank. For example, a slight increase in the Corruption Perception Index resulted in gains in Pillar 2, Safety. An improvement in expert opinion led to a one point increase in Pillar 4, Natural Resources. In Pillar 8, Micronesia benefits from a strong regional average, which is imputed as it is not ranked on this index.

---

## Seychelles

Seychelles was ranked 53rd in 2018, and moves up to 30th position in 2020, a jump of 23 places. Seychelles made massive improvements in the Environmental Performance Index, ranking first in the 'Climate and Energy' category and 39th overall. Similar to Barbados, Seychelles has prioritized mitigating climate change through new policies; for example, innovative approaches to decarbonization, transitions to renewable energy sources and reduction of greenhouse gas emissions. The Seychelles has done commendable work in bringing back species from the brink of extinction, including the Seychelles magpie-robin and the Seychelles scops owl. Finally, the Seychelles launched a new marine spatial plan in 2018, putting an additional 210,000 square kilometer marine area under formal conservation. This is reflected in an increase in Pillar 5, which incorporates protected areas.

# ATDI Pillars & Rankings per Pillar

This section provides a description of each of the ATDI's ten pillars and the top three ranked nations in developing and developed categories.

## 1. Government Policy that Supports Sustainable Development

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 highest scores in sustainable development are Switzerland, Denmark and Malta. The highest developing country scores are Israel, Qatar and Belarus (only Belarus was in the top three in 2018). Unemployment rates stayed mostly steady and therefore shifts in Pillar 1 scores can be attributed to changes in the EPI scores. The chart below shows the top 3 developed and developing countries in the category of Government Policy that Supports Sustainable Development.

TOP SCORES FOR GOVERNMENT POLICY THAT SUPPORTS SUSTAINABLE DEVELOPMENT



Overall, scores stayed mostly consistent in Pillar 1, with the notable exceptions of Congo, Djibouti and Angola which dropped by three points due to drops in their Environmental Performance Index scores. Singapore dropped by 1.12 points, to rank 5th in the pillar (last year, Singapore placed 2nd). This is due to a dramatic drop in its EPI score, which can be attributed to a drop in Air Quality, for which it ranked 134th and Biodiversity and Habitat for which they ranked 175th. The top performers have unemployment rates under 7% (with Qatar boasting 0.7% unemployment) and have top scores in both components of the Environmental Performance Index: Environmental Health and Ecosystem Vitality. The EPI notes that the top performing nations are those that have made long-term commitments to protecting public health, natural resources and GHG emissions from economic activity.<sup>3</sup>

Several developed nations such as Singapore and Iceland scored lower in the EPI in 2018 than in previous years, and this can be attributed to small changes in methodology. An indicator was removed ('Environmental Risk') and a new one was introduced ('Heavy Metals' which calculates lead exposure). Furthermore, the indicator on tree cover loss changed from a 14-year average to a five-year moving average to better understand the responsiveness of trends in deforestation to policy decisions.

## 2. Safety and Security

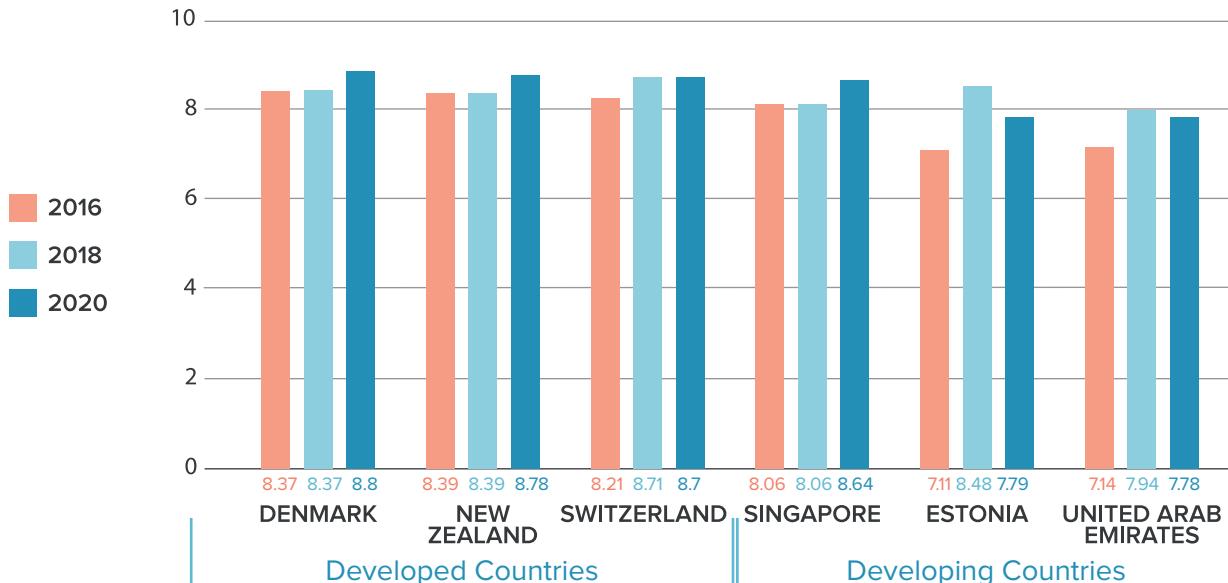
This pillar evaluates how safe it is to travel in a country. Countries with high levels of transparency and low or no travel warnings are safer for travelers. Lower levels of corruption are also a sign of a more secure country. The Safety Pillar is made up of two indicators and an expert opinion question:

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

**Expert Opinion:** 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)).

The top overall scores for safety and security are three developed nations: Denmark, New Zealand and Switzerland. In the developing country ranking, the top scorers are: Singapore, Estonia and United Arab Emirates.

TOP SCORES FOR SAFETY AND SECURITY



<sup>3</sup> 2018 EPI Report: Results. (2018). Retrieved from <https://epi.envirocenter.yale.edu/2018/report/category/hlt>

### 3. Health

The Health Pillar attempts to gauge the level of healthcare available in a country. This pillar assumes that a healthy local population is more able to foster and nurture new businesses, and to care for its resources responsibly. Availability of good healthcare is also important to adventure travelers. Sadly, the appearance of the Covid-19 virus in 2020 provides a useful example of the relevance of the Health Pillar to adventure travel. In the coming years, it will be interesting to see how COVID-19 impacts these countries compared to others.

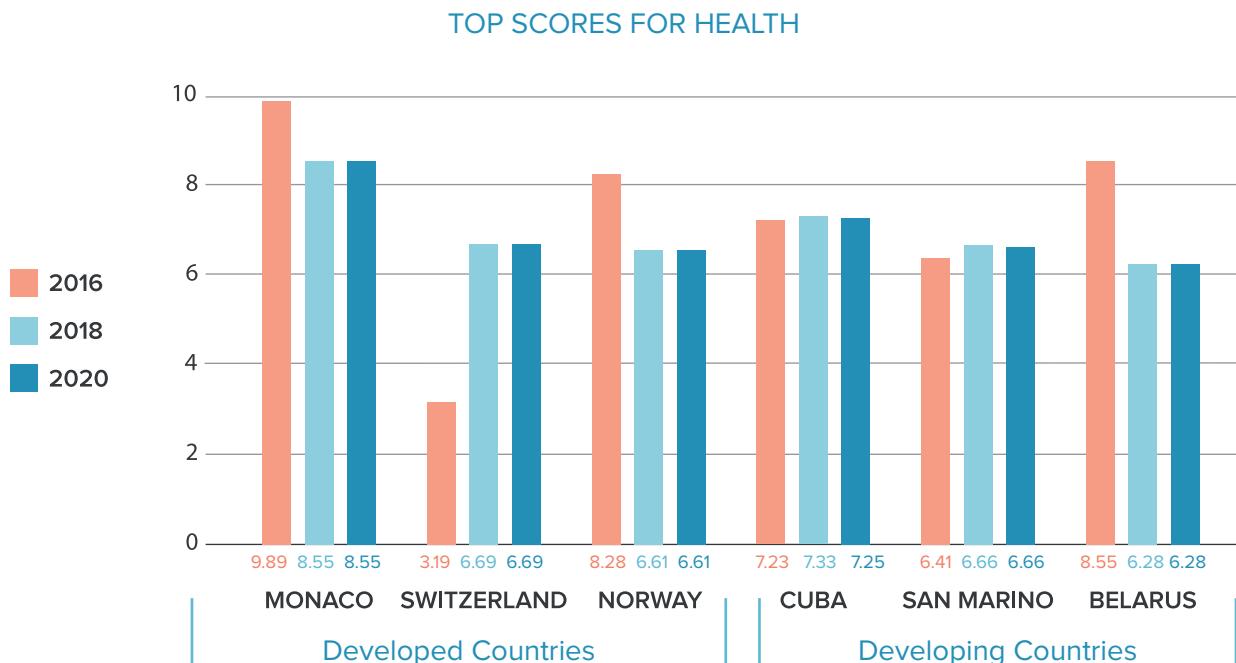
The Health Pillar is made up of three indicators from the World Health Organization:

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 healthcare.

Data for Pillar 3 is pulled from the World Health Organization statistics.

There were no major shifts in score from the previous ATDI, indicating that numbers of beds, physicians, midwives and nurses mostly held steady over the last two years. While in most pillars, we see developed countries claiming the highest scores overall, in Pillar 3, Cuba actually ranks second overall with a score of 7.25.



## 4. Natural Resources

Adventure travelers want untrammeled and well-managed natural resources. Destinations with unusual or rare natural resources, which are well-managed and not exploited, will earn high praise from adventure travelers and 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:**

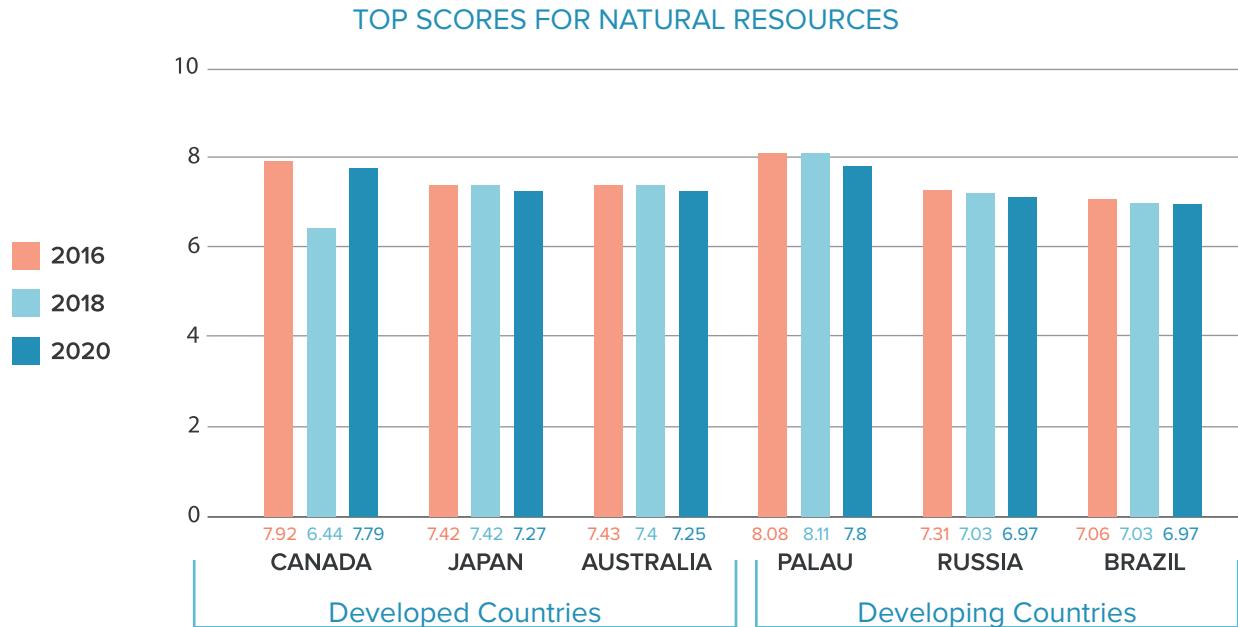
1. Urban Concentration
2. Population Density

**From CIA World Factbook:**

3. Kilometers of coastline
4. Ratio of coast to total area

**Expert Opinion:** 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 Pillars score, because coastline is unchangeable and population density also shifts slowly.



In 2020, some of the biggest movement can be seen in Pillar 4, Natural Resources, despite the fact this indicator comprises scores that are either immovable (coastline) or slow to change (population density). In fact, the shifts are caused by the fifth indicator in this pillar, expert opinion. Underscoring how natural disasters will affect travelers' view of adventure tourism destinations, Australia's score dropped slightly due to a lower rating by experts. The expert survey took place in late 2019 when wildlifes featured heavily in the news, and this likely impacted their opinion.

**14** The top scorers benefit from low population density or low urbanization, as well as strong responses from expert opinions.

## 5. Cultural Resources

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

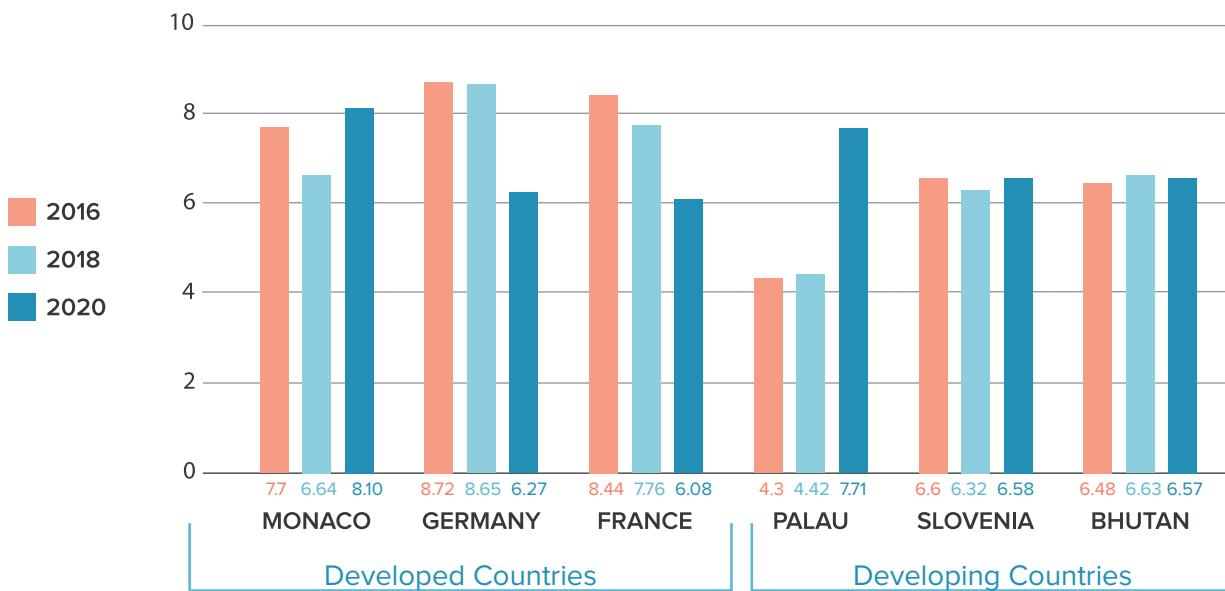
The Cultural Resources Pillar is made up of three indicators and an expert opinion question:

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

**Expert Opinion:** 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

TOP SCORES FOR CULTURAL RESOURCES



For many years, Germany, Italy and France have scored in the top three in this pillar—but this year, as smaller countries give increasingly large portions of their terrestrial and marine territory protected status, the top scores have shifted and Monaco takes the top rank.

The data used for protected areas is not updated every year. When it is updated (as it was this year), it causes significant shifts in Pillar 5 scores. Increasing the area under conservation is a priority for many governments, as they seek to protect endangered species, biodiversity and primary forests. Protected Planet wrote in 2018, “that significant progress has been made to accelerate protection of biodiversity on land and in the ocean,” with 15% of the earth’s land surface and inland waters protected, and just above 7% of the global ocean protected.

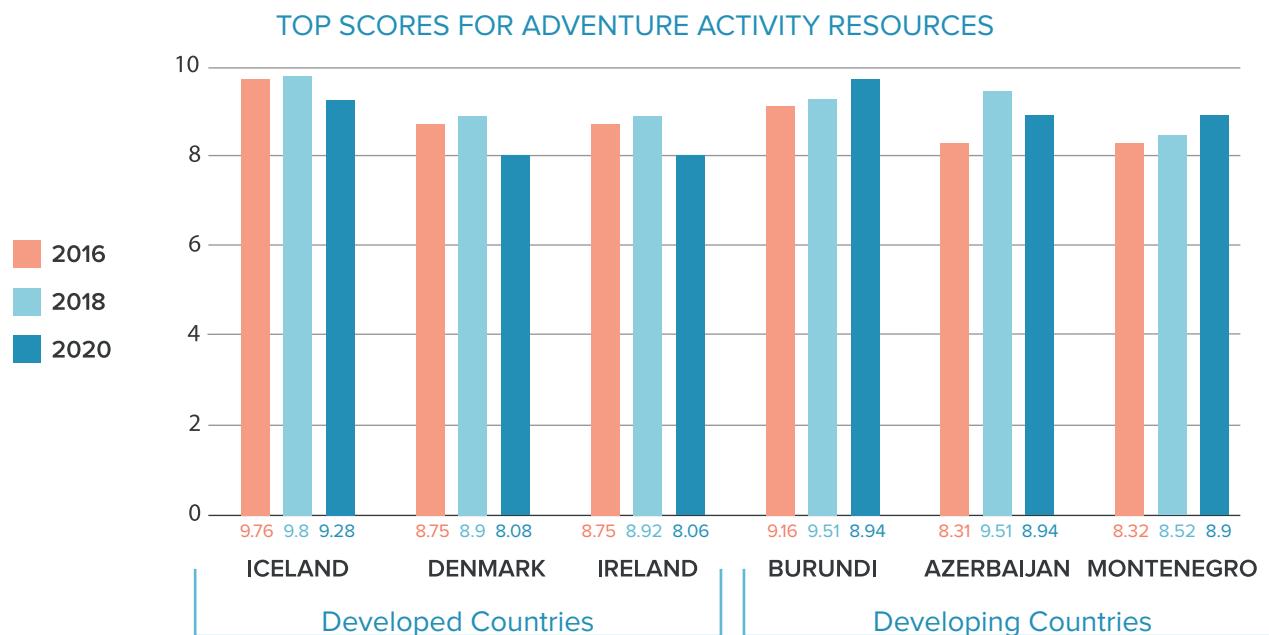
## 6. Adventure Activity Resources

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.

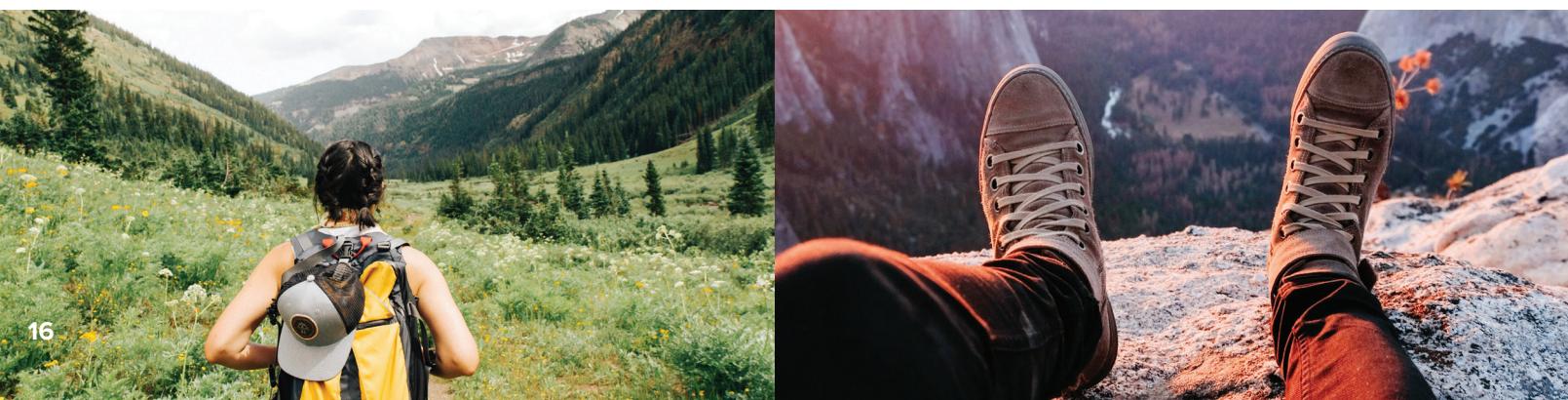
The Adventure Activity Resources Pillar is made up of two indicators:

- 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 makes an assumption that a country which 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.



This is one of the few pillars where developing countries outperform developed nations. While Iceland maintains the top score, the 15 next best countries are from the developing world. Over time, the countries in the top three have maintained consistent scores, indicating no sharp increases or decreases in endangered species or forests, grasslands and drylands.



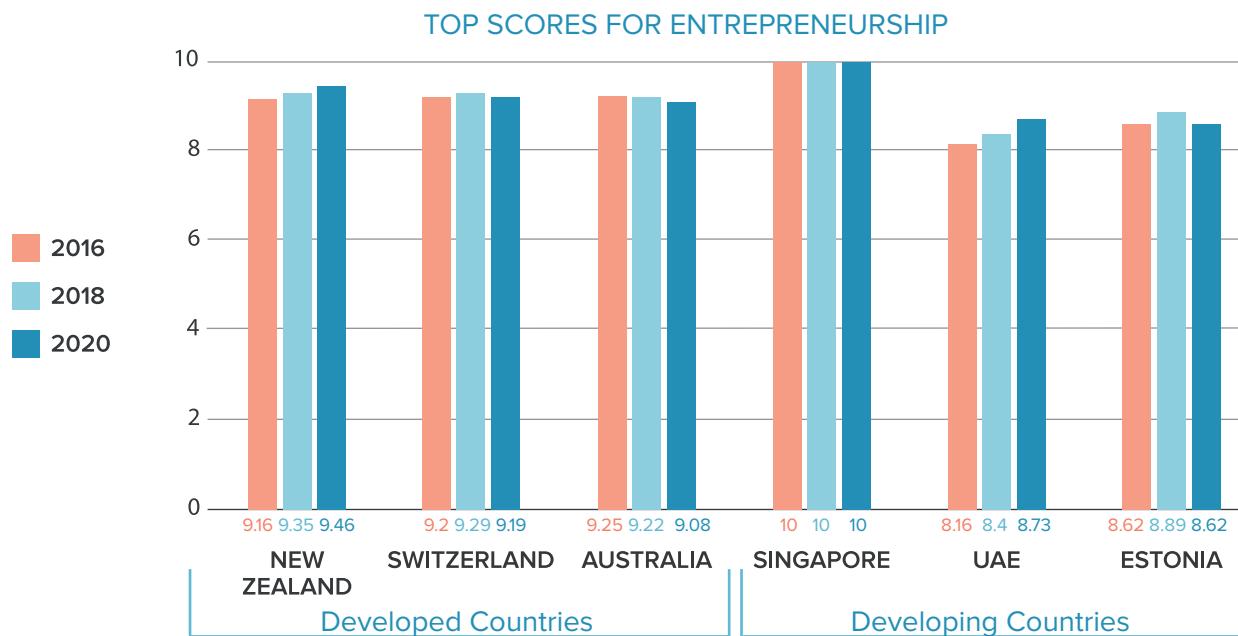
# 7. Entrepreneurship

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 is comprised of one indicator:

## 1. Index of Economic Freedom

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



The Economic Freedom Index finds that economic freedoms correlate with increased prosperity and healthier populations that live longer and who are better stewards of the environment. This reinforces the web-like nature of adventure tourism competitiveness—success factors are inextricably linked together.

For the third year in a row, Singapore scores a perfect score in this pillar, and the top scoring countries remain the same. In general, they have the same things in common. They score well in the ‘Rule of Law’ category, which measures indicators such as property rights, government integrity and judicial effectiveness—these elements give investors confidence. With the exception of Singapore, they score relatively poorly on ‘Government Size’ which looks at indicators for government spending and tax burden.



## 8. Humanitarian

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.

Pillar 8 points to destination resilience in two ways. First, NGOs provide critical assistance to responding to crisis and reconstituting in the aftermath. Second, national response to any crisis will have an impact on the wellbeing of people in the destination, which is reflected in the Happy Planet Index as ‘life expectation.’ Countries that provide meaningful economic relief packages to companies and individuals will likely result in more positive outlook and general life satisfaction. How countries respond to the current pandemic may influence their Pillar 8 scores in future ATDI reports.

The Humanitarian Pillar is made up of three indicators:

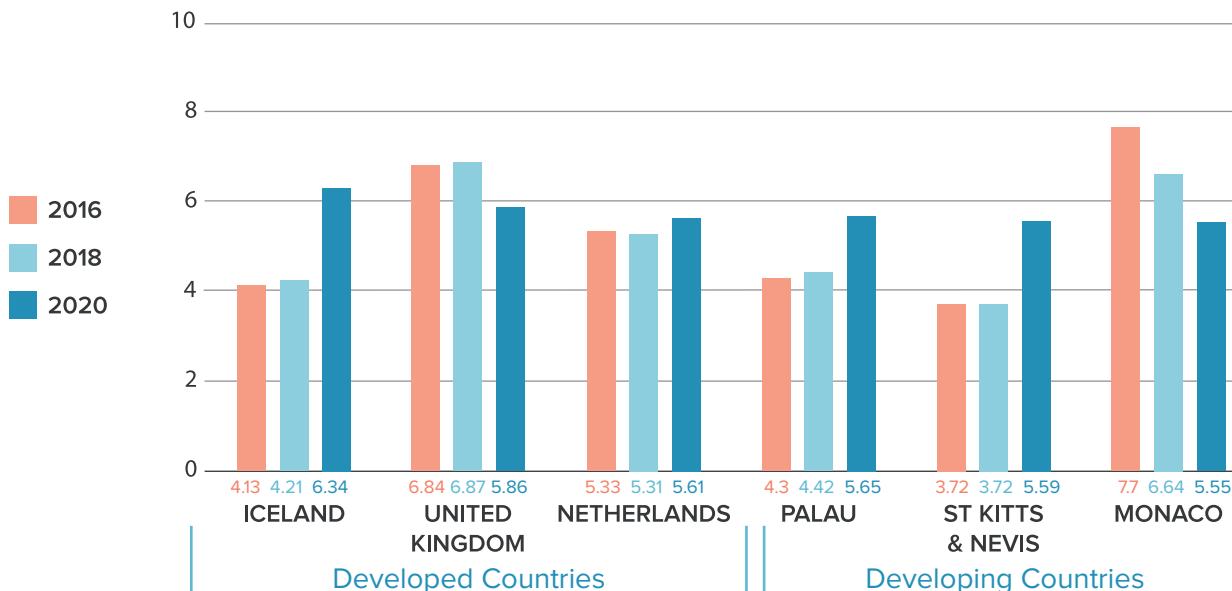
**1.** Happy Planet Index (HPI)

**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 involvement of organizations working in humanitarian development and the level of a country’s human development.

TOP SCORES FOR HUMANITARIAN



This year, an entirely new set of countries rank in the top three in Pillar 8. Shifts in this pillar were caused by an updated data set of NGOs, which also affected the second indicator, which is the density of NGOs in each nation. The Happy Planet Index has not been updated since 2016, so that indicator remains unchanged. Palau scores highest among developing countries, and has emerged as a leader in sustainable tourism through its innovative ‘Palau Pledge’ and policies to protect its natural assets, like banning suntan lotion to protect coral reefs.

# 9. Tourism Infrastructure

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. While 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.

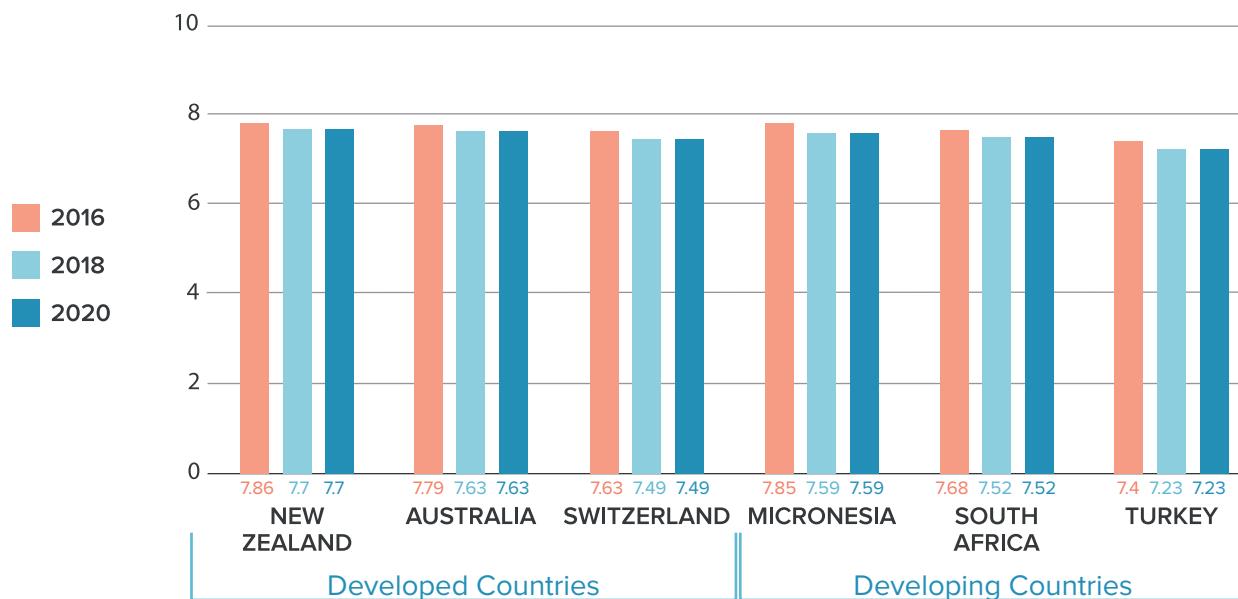
Tourism infrastructure includes:

- » 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
- » Training programs for adventure tourism providers such as guides, interpreters, and ecolodges

This pillar uses data from one expert opinion question:

**Expert Opinion:** Your perception of the availability of appropriate infrastructure for adventure travel in this destination is: (respondents are given a Likert scale of Very bad (-3) to Very good (+3)).

TOP SCORES FOR INFRASTRUCTURE



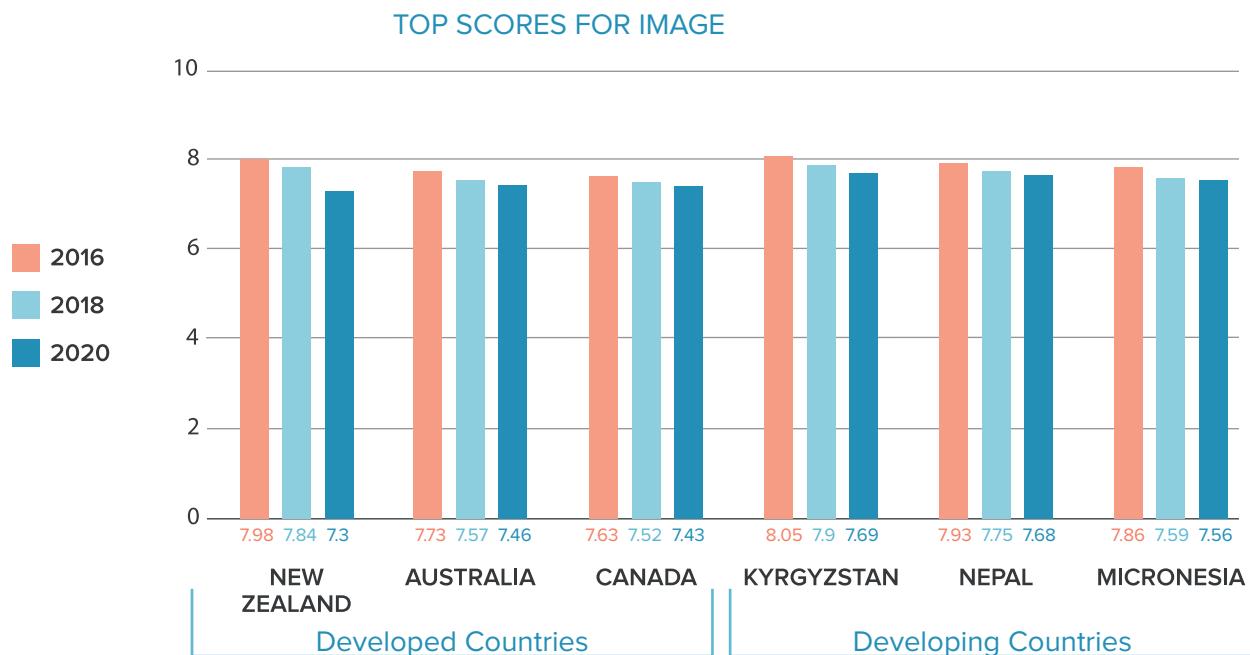
When pillars rely solely on expert opinion, there is little movement in ranking or scores because the ATDI takes a three-year moving average. Therefore, the top three in each set are the same as in ATDI 2018. The scores reflect experts' opinions that the infrastructure is appropriate for adventure tourists. It is an example of how components of adventure tourism competitiveness can be separated—for example, while South Africa is perceived as having good infrastructure for adventure tourism development by our experts, it scores poorly in regards to safety. Tourists will consider these and additional factors when making a decision, which is why the interconnected web of factors must be addressed by policy makers, instead of just one pillar or another.

# 10. Image

A country's image can be one of the most malleable aspects of market competitiveness, but it is also frequently mismanaged as a way of guiding sustainable market development. An 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:

**Expert Opinion:** Your perception of this destination as an adventure tourism destination is: (respondents are given a Likert scale of Very bad (-3) to Very good (+3)).



Canada and Micronesia are new to the top three set, having replaced Iceland and Yemen respectively. A high score in this pillar indicates that experts have a positive perception of the destination as an adventure destination. The top six countries have traditionally targeted adventure tourists. The scores also suggest that targeted marketing pays off. New Zealand, Australia and Canada are known to invest heavily in market research and have a long history of messaging to adventure tourists through innovative segmentation strategies; for example Canada uses its Explorer Quotient methodology. Countries also benefit from launching new campaigns. For example, Nepal launched a new brand and tag-line, 'Lifetime Experiences,' with a focus on the variety of products in Nepal. They have also recently launched Visit Nepal 2020, with a slew of promotional activities (although the principal ambition is reaching two million international visitors). The developing countries in the top three have received significant amounts of donor aid to develop adventure tourism, and this is surely known by the expert community.

© ATTA / Hassen Salum



© ATTA / Hassen Salum



# REGIONAL OUTLOOK

The ATDI provides two rankings, one each for developed and developing countries. In this section, the table below considers rankings from a regional perspective. This may be useful for destinations seeking to understand how they compare to their closest neighbors.

Table 2 indicates the ranking of the top five countries by region for 2020.

**Table 2: Top Five Countries Ranked by Region for 2020**

	EAST ASIA & PACIFIC	EASTERN EUROPE & CENTRAL ASIA	SOUTH ASIA	SUB-SAHARAN AFRICA	EUROPE & NORTH AMERICA	LATIN AMERICA & THE CARIBBEAN	MIDDLE EAST & NORTH AFRICA
<b>1</b>	New Zealand	Croatia	Bhutan	Botswana	Iceland	Chile	Israel
<b>2</b>	Australia	Georgia	Nepal	Seychelles	Switzerland	Costa Rica	Jordan
<b>3</b>	Japan	Montenegro	Maldives	Mauritius	Germany	Dominica	United Arab Emirates
<b>4</b>	South Korea	Turkey	India	Rwanda	Norway	Uruguay	Morocco
<b>5</b>	Mongolia	Serbia	Sri Lanka	Cape Verde	Finland	Barbados	Qatar

## Key takeaways:

- The number one position in each geographic subregion are destinations that have invested significantly in the adventure segment of their brand and rank high in Pillar 10, Image.
- Even within these top performers, Pillar 3, Health Scores, can be very low. This might become an increasingly important consideration for travelers and operators who are marketing in a post-pandemic context. In addition, these indicators suggest an inability to respond to any future public health crises.
- Georgia and Jordan, both ranked second in their region, have been supported by development agencies programs focused on adventure tourism development. Development agencies select sectors that improve social performance, create jobs and lift communities out of poverty.



# ATDI RANKINGS THIS YEAR

## Developed Countries

RANK	COUNTRY	RANK	COUNTRY
1	ICELAND	15	FRANCE
2	SWITZERLAND	16	NETHERLANDS
3	NEW ZEALAND	17	JAPAN
4	GERMANY	18	LUXEMBURG
5	NORWAY	19	SPAIN
6	FINLAND	20	MALTA
7	SWEDEN	21	BELGIUM
8	CANADA	22	ITALY
9	DENMARK	23	UNITED STATES
10	AUSTRALIA	24	PORTUGAL
11	AUSTRIA	25	CYPRUS
12	MONACO	26	GREECE
13	UNITED KINGDOM	27	LIECHTENSTEIN
14	IRELAND	28	ANDORRA

## Developing Countries

RANK	COUNTRY	RANK	COUNTRY	RANK	COUNTRY	RANK	COUNTRY
1	CZECH REPUBLIC	42	BAHAMAS	83	TAJIKISTAN	124	ZIMBAWE
2	CHILE	43	MICRONESIA	84	TRINIDAD Y TOBAGO	125	GAMBIA
3	SLOVAK REPUBLIC	44	PALAU	85	VANUATU	126	BURUNDI
4	SLOVENIA	45	RUSSIAN FEDERATION	86	ALGERIA	127	LESOTHO
5	ISRAEL	46	BELIZE	87	EGYPT	128	TONGA
6	ESTONIA	47	PHILIPPINES	88	JAMAICA	129	BURKINA FASO
7	POLAND	48	MAURITIUS	89	ECUADOR	130	CAMEROON
8	BULGARIA	49	BAHRAIN	90	GHANA	131	MYANMAR
9	ROMANIA	50	MEXICO	91	IRAN	132	BENIN
10	COSTA RICA	51	UKRAINE	92	BOSNIA & HERZEGOVINA	133	MALI
11	CROATIA	52	ST. VINCENT & THE GRENADINES	93	MARSHALL ISLANDS	134	HONDURAS
12	KOREA REP	53	KAZAKHSTAN	94	GUYANA	135	TIMOR-LESTE

RANK	COUNTRY	RANK	COUNTRY	RANK	COUNTRY	RANK	COUNTRY
13	DOMINICA	54	BRAZIL	95	NICARAGUA	136	YEMEN
14	BHUTAN	55	RWANDA	96	INDIA	137	GUINEA
15	HUNGARY	56	OMAN	97	SRI LANKA	138	EQUATORIAL GUINEA
16	LATVIA	57	MACEDONIA FYR	98	MALAYSIA	139	MADAGASCAR
17	URUGUAY	58	BELARUS	99	KIRIBATI	140	MAURITANIA
18	GEORGIA	59	BRUNEI DARASSALAM	100	LEBANON	141	GUINEA-BISSAU
19	MONTENEGRO	60	CAPE VERDE	101	INDONESIA	142	SUDAN
20	JORDAN	61	SAUDI ARABIA	102	GABON	143	MOZAMBIQUE
21	BARBADOS	62	DOMINICAN REPUBLIC	103	KENYA	144	AFGHANISTAN
22	UNITED ARAB EMIRATES	63	COLOMBIA	104	SURINAME	145	NIGER
23	TURKEY	64	ST. LUCIA	105	ANTIGUA & BARBUDA	146	TOGO
24	LITHUANIA	65	CHINA	106	GRENADA	147	WEST BANK & GAZA
25	BOTSWANA	66	NAMIBIA	107	TANZANIA	148	LIBERIA
26	SERBIA	67	NEPAL	108	CAMBODIA	149	SIERRA LEONE
27	ALBANIA	68	ZAMBIA	109	SOLOMO ISLANDS	150	ERITREA
28	MOROCCO	69	TUNISIA	110	BOLIVIA	151	KOREA
29	PERU	70	SAMOA	111	PAKISTAN	152	LYBIA
30	SEYCHELLES	71	LAO PDR	112	SAO TOME & PRINCIPE	153	SYRIAN ARAB REPUBLIC
31	PANAMA	72	VIETNAM	113	ETHIOPIA	154	HAITI
32	MONGOLIA	73	MOLDOVA	114	MALAWI	155	ANGOLA
33	QATAR	74	SENEGAL	115	VENEZUELA	156	CONGO
34	SINGAPORE	75	EL SALVADOR	116	PAPAU NEW GUINEA	157	CENTRAL AFRICAN REPUBLIC
35	THAILAND	76	SOUTH AFRICA	117	SWAZILAND	158	NIGERIA
36	ARMENIA	77	SAN MARINO	118	PARAGUAY	159	DJIBOUTI
37	FIJI	78	UZBEKISTAN	119	UGANDA	160	CHAD
38	ARGENTINA	79	GUATEMALA	120	COTE D'IVOIRE	161	REP CONGO
39	KYRGYZ REPUBLIC	80	ST. KITTS & NEVIS	121	COMOROS	162	IRAQ
40	AZERBAIJAN	81	CUBA	122	BANGLADESH	163	SOMALIA
41	KUWAIT	82	MALDIVES	123	TURKMENISTAN		



## Adventure Tourism Development Index & Global Sustainable Tourism Criteria for Destinations: Complementary Tools

The ATDI and the GSTC-D are complementary tools that when used together can provide a country with a holistic snapshot of adventure tourism competitiveness and health of its tourism destinations. The ATDI provides policy makers with high level direction that can be useful in aligning national tourism priorities and investments, while the GSTC-D offers leaders at the local level guidance needed to define definitive, destination-specific strategies. Together, these tools can help destination managers, travel companies and other destination stakeholders more effectively support sustainable tourism development and management.

Whereas the ATDI distills complex issues (such as sustainable development policy or nature and culture resources) as they relate to a country's adventure tourism competitiveness into a single score, the GSTC provides a look at destination sustainability at a granular level, offering destination managers a detailed examination of local market sustainability health, using a set of 100 sustainability indicators. We invite you to review the companion piece, GSTC Global Destination Sustainability Report, to read more about the good practices and shared challenges associated with sustainable destination management worldwide.

Over the years the ATDI has served as a reference for governments from a diverse set of countries from Latin America to Asia and Scandinavia to help inform national tourism strategies; similarly the GSTC-D is also in use in many countries around the world, such as Indonesia, Republic of Korea, and Colombia—which have all adopted the GSTC-D criteria as a national standard—no country has yet to integrate both tools in charting a sustainable development course.



Figure 1: ATDI & GSTC-D as Complementary Destination Tools

The table below provides a side-by-side comparison of the ATDI and GSTC.

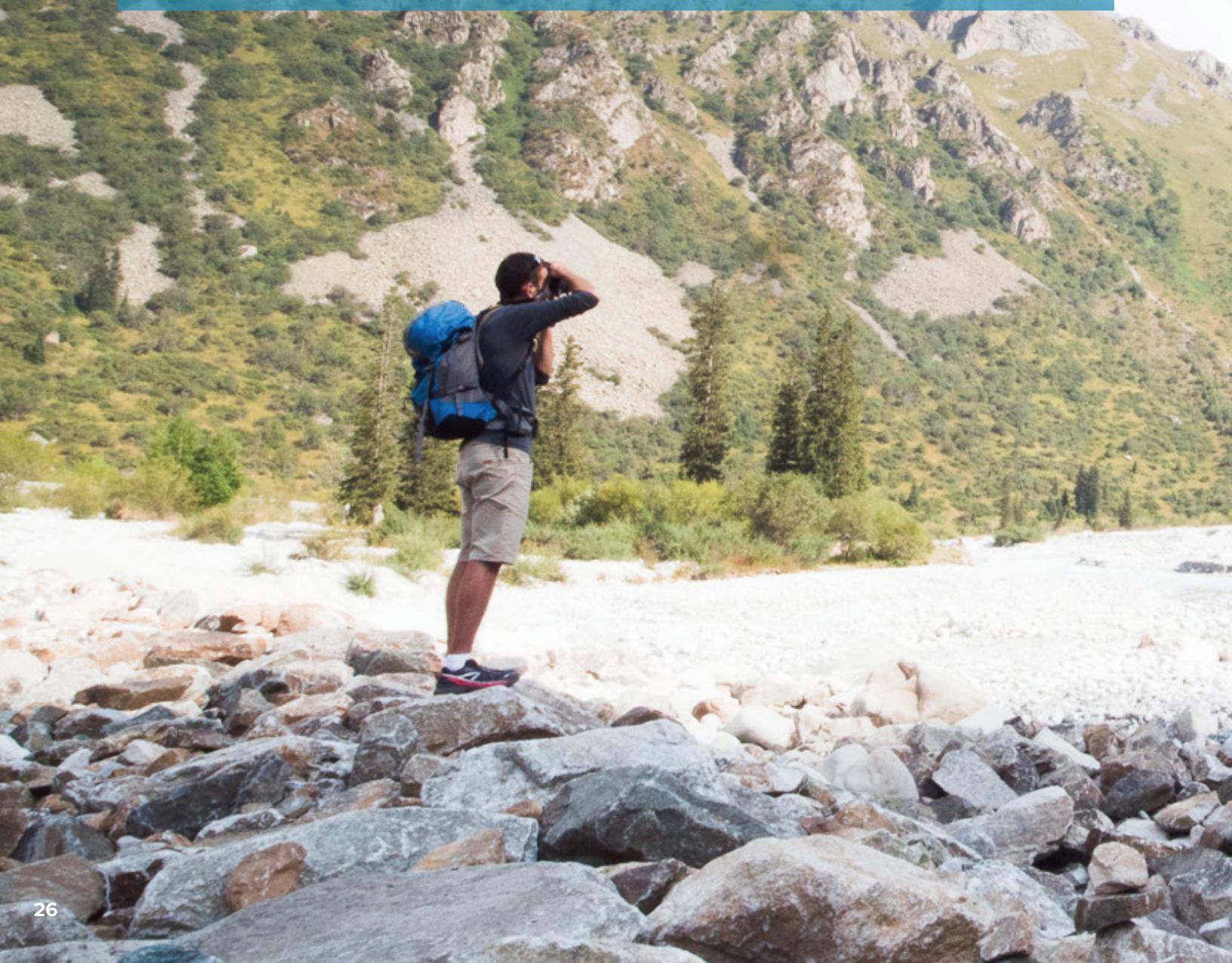
**Table 3: Comparison of ATDI & GSTC-D**

	<b>ATDI</b>	<b>GSTC-D</b>
<b>GOALS</b>	Assess destination competitiveness for adventure tourism	Assess destination sustainability
<b>LEVEL OF ANALYSIS</b>	Country-level	Sub-national *can be applied at the national-level, but it is uncommon
<b>ASSESSMENT</b>	Scorecard Country-level ranking	Self- or Independent destination assessment  Report card that uses a traffic light system to flag destination risks and good practices
<b>INDICATORS</b>	Uses output indicators of measurement (quantitative)  Consists of 10 categories that are measured by 20 indicators and expert opinion on 5 topics that range from safety and security to infrastructure.	Uses input, or process, indicators of measurement (qualitative)  Includes nearly 40 criteria that are measured by over 100 indicators.
<b>DATA</b>	Uses third-party databases and expert opinion	Uses local level data and local expert insights
<b>ASSESSMENT CATEGORIES</b>	<ol style="list-style-type: none"> <li>1. Policies that support sustainable development</li> <li>2. Safety and security</li> <li>3. Health</li> <li>4. Natural resources</li> <li>5. Cultural resources</li> <li>6. Adventure activity resources</li> <li>7. Entrepreneurship</li> <li>8. Humanitarian</li> <li>9. Tourism infrastructure</li> <li>10. Brand</li> </ol>	<ol style="list-style-type: none"> <li>1. Destination policy and planning</li> <li>2. Community involvement and benefits</li> <li>3. Management of natural and cultural assets</li> <li>4. Environmental issues</li> </ol>

# Continuous Improvement of the ATDI

The side-by-side analysis of the GSTC-D and ATDI highlights the complementary nature of these two tools. The ATDI provides a country-level ranking on competitiveness for adventure tourism, and GSTC-D reveals a local level snapshot of destination sustainability. Both competitiveness and sustainability are interrelated and critical for overall destination success.

This comparison is helping to inform the ATTA and GW's thinking about specific ways to improve the ATDI so that it can provide deeper insights about the long-term health or sustainability of adventure travel at a national level. The need for sustainable and effective destination management and leadership is more urgent today than ever before as the Covid-19 global pandemic rages and we face existential threats associated with climate change. The hope is that destination managers, adventure travel companies and other stakeholders will work together to bring back tourism from the unprecedented shock and transformation brought on by the global pandemic. This unique moment in history provides us with an opportunity to not only rebuild the destination and maintain its competitiveness but to address the larger issues that will enable it to grow sustainably and thrive over time.



# CONCLUSION

This report helps destinations understand their adventure tourism competitiveness, as well as track their competitiveness over time. Understanding the factors that lead to competitiveness, as well as specific strengths and weaknesses, can help policy makers develop better plans and strategies, align and collaborate more closely with important partners in both the public and private sector.

In this edition of the ATDI, there are reasons to be optimistic about the future of adventure tourism. Countries are increasing their share of protected marine and terrestrial areas, efforts to mitigate climate change are working, and many countries have increased economic freedoms and expanded support to entrepreneurs. At the same time, corruption around the world is increasing, the extinction rate is increasing, and big cities, especially in the developing world are becoming more densely populated—all indicators that reduce competitiveness.

As competitiveness indicators move up and down, and they do so slowly, unpredictable shocks can bring entire tourism economies to a standstill. The current public health crisis is an example of such a shock, that very few, if any, tourism managers prepared for.

The pandemic has been called ‘the great equalizer,’ and in tourism perhaps there is some truth to that. In the aftermath of the Covid-19 pandemic, every destination in the world will be in the same position: working to restart tourism in a way that is safe, conscious of the new reality and new concerns of travellers but also delivers jobs to their communities. The need for sustainable leadership—focusing on resiliency, resourcefulness and efficiency—is more urgent today than ever before. Designing new sustainability initiatives, economic relief plans and marketing campaigns will be an opportunity to increase competitiveness as well as long-term resilience. Both competitiveness and sustainability are interrelated and critical for overall destination success. The GSTC-D Criteria and Indicators, which is a complementary tool to the ATDI, can assist destination managers to create real change from the ground up and put destinations on a more sustainable path. Competing in a post-pandemic world will require innovation, flexibility, and determination—luckily, these are precisely the things that characterize our adventure tourism industry.

© ATTA / Rupert Shanks



**ADVENTURE TRAVEL**  
TRADE ASSOCIATION

International Institute  
of Tourism Studies

THE GEORGE WASHINGTON UNIVERSITY