



Adventure Tourism Development Index 2010 REPORT



Adventure Travel Trade Association / The George Washington University / Vital Wave Consulting

A full-page background image showing three hikers with backpacks ascending a rocky mountain trail. The hiker in the foreground is wearing a blue cap and a green backpack. The trail leads up a steep, rocky slope with sparse vegetation. In the distance, a vast mountain range stretches across the horizon under a clear blue sky.

ACKNOWLEDGEMENTS

Adventure Tourism Development Index (ATDI) is a joint initiative of The George Washington University, The Adventure Travel Trade Association, and Vital Wave Consulting, Inc.*

CONTRIBUTORS

**Adventure Travel
Trade Association**

**The George
Washington University**

Vital Wave Consulting*

PHOTOGRAPHY

Adam Vaught www.adamvaught.net
Cover / P 11 / P 14 / P 36

ABETA www.abeta.com.br
P 2 / P 12 / P 13 / P 14

GREENLAND MEDIA GALLERY www.mediagallery.gl
P 4 / P 6 / P 16
and the *Greenland Special Report*

*Vital Wave Consulting acquired Xola Consulting Inc in June, 2011

CONTENTS

Introduction 4

Recent Trends and Importance of Adventure Tourism 5

About the Adventure Tourism Development Index 6

Methodology 9

Ten Pillars of Adventure Tourism Competitiveness 11

Rankings Analysis 17

Conclusion 27

Special Country Analysis Greenland 28

Bibliography 36

INTRODUCTION

2010 marks the third year of the Adventure Travel Development Index (ATDI). The ATDI is a ranking of adventure tourism potential for countries around the world based on principles of sustainable adventure tourism. The index gauges country potential to be competitive in adventure tourism; scores are not a reflection of a country's current popularity for adventure travel, although in some cases a country's ranking does correspond with its reputation and popularity for adventurers. The ATDI and its foundational principles support holistic tourism policy and planning, with an industry goal of economic, as well as environmental and cultural, sustainability.

This report includes an extra, in-depth analysis of Greenland as an adventure destination on page 28. More information on individual country scores, 2010 ATDI Scores, can be downloaded in Excel format at adventureindex.travel.

Tourism continues to occupy an important position in the global economy. It has been called the greatest voluntary transfer of wealth from rich to poor countries. (Ashley, 2009) and in both developed and developing countries, the sector commands attention as a means of sustainable economic development. For example: Ecuador's president Rafael Correa's 2011 goal is to see tourism become the chief source of income (over oil) for the country, and in the United States, President Obama signed the Travel Promotion Act, the first-ever national travel promotion and communications program to attract more international travelers to the US. Within this sector, adventure tourism's prominence continues to grow, as evidenced by Mexican President Felipe Calderon's statement in late 2010: "Mexico needs to become the champion of adventure travel (Adventure Travel Trade Association, 2010)." Recent research from the Adventure Travel Trade Association indicates that prior to 2007, 42% of tourism boards recognized adventure tourism was of "increasing importance" while in 2011, 89% recognized the sector as important. Furthermore, destinations such as New Zealand, Greenland and Norway are now positioning their offerings and marketing more heavily towards adventure travelers. Perhaps cementing the sector's mainstream appeal, pop culture figure Oprah Winfrey teamed with Tourism Queensland to market Australian tourism. "Oprah's Ultimate Adventure" featured the iconic talk show host icon zip-lining and snorkeling.

Adventure, as a way of travel, is increasingly appealing to travelers, allowing for a deeper cultural exchange with different people and an appreciation for the fragility of places, and is more often viewed as a "guilt-free" holiday option given that money spent can penetrate more deeply into communities, contributing to local economies.



¹ To arrive at these conclusions Xola research director Dr. Philippe Duverger accessed survey data gathered from a survey of 850 North American adventure travelers as well as World Tourism Organization data: http://85.62.13.114/media/news/en/press_det.php?id=7331&idioma=E

Recent Trends and the Importance of Adventure Tourism

A 2010 study completed by The George Washington University, Xola Consulting and the Adventure Travel Trade Association found that 26% of travelers engage in adventure activities on vacation and valued international adventure tourism as an US\$89 billion industry (The George Washington University, ATTA & Xola, 2009). A closer look further shows that adventure tourism is accelerating out of the recession with an estimated growth rate of 17% annually (December 2009 — December 2010).²

What are the implications of this growth for destinations and businesses?

The adventure tourism industry has entered a new stage with industry participants experimenting with a range of new strategies. For example, established tour companies like TUI now have 17 adventure brands, including a joint venture with Intrepid, and destinations famous for sun and sand, such as Mexico, are shifting their strategy towards adventure tourism development. Mexico's new tourism campaign, "The Mexico You Thought You Knew," pairs images of scuba divers and remote waterfalls to suggest undiscovered adventure far from the all-inclusive resorts of Cancun (<http://www.visitmexico.com/en/Visitmexico/discover>). Cruise lines are incorporating adventure activities into their on-shore excursion itineraries. Adventure tour operators are becoming increasingly profitable, with several companies earning revenues upwards of US\$100 million.² Compared to other sectors, this growth has not been at the cost of smaller startups; adventure tourism relies on innovation of entrepreneurs who are continually developing diverse set of products in frontier destinations.

² Information provided by the Adventure Travel Trade Association; the companies posting these revenues are privately held and earnings data are not public.

What is adventure tourism?

Adventure tourism is defined as travel outside a person's normal environment for more than 24 hours and not more than one consecutive year. A trip may be classified as an "adventure" trip if it involves two of the following three elements: (1) interaction with nature or (2) interaction with culture or (3) a physical activity, while the core of adventure is a trip which involves all three elements. Adventure travel trips could include a white-water rafting, hiking, and birdwatching trip in Colorado; or mountain biking in Oaxaca, Mexico with visits to local communities to learn about traditional weaving practices. (The George Washington University, ATTA & Xola, 2010)

With growth of the industry comes the move towards increased professionalization of the sector; in destinations around the world, adventure tourism companies are striving to improve their business practices and impact and interaction with the environment. Safety and responsibility are key themes at industry meetings and within companies. As their share over the larger tourism market continues to grow, it is expected that adventure tourism actors will increasingly have more influence in policy-making and development.

Recognizing that the tourism industry is a significant multiplier — supporting growth in other industries — and has a direct effect on people's quality of life and their environment,

the 2010 ATDI continues the discussion about how governments, tourism businesses, media and other interested parties value and use their resources and assets for adventure tourism.

We encourage feedback on the ATDI and information about how it is being used in your country. Please contact us at atdi@gwu.edu or visit our webpage at www.adventureindex.travel.



ABOUT THE ADVENTURE TOURISM DEVELOPMENT INDEX



The Adventure Tourism Development Index (ATDI) is a joint initiative of The George Washington University (GW), The Adventure Travel Trade Association (ATTA) and Vital Wave Consulting. Now in its third year, the ATDI offers a ranking of countries around the world based on principles of sustainable adventure tourism and is calculated through a combination of expert survey data and quantitative data gathered from international indices.

With the goal of promoting and informing sustainable development of adventure tourism, the ATDI was created to support entrepreneurs and governments who want to create and market sustainable adventure tourism products and services while benefiting communities and the environment.

ATTA promotes the ATDI program to industry and governments and supports its expansion; George Washington University continues to refine the technical methodology and calculate the scores each year; Vital Wave Consulting supports the program with project management, data analysis and report writing, and continues to apply ATDI's ten principles in its qualitative work with destinations striving to create or enhance their adventure markets.

In 2009 the team assembled an advisory board made up of government and private sector representatives from the global adventure travel industry. The 2010 ATDI Board members are:

Urs Eberhard

Executive Vice President, Switzerland Tourism

Toni Neubauer

President, Myths and Mountains

Alfredo Ferreyros

Former President, Explorandes, Peru and Founding Member, Peruvian Association of Adventure Travel and Ecotourism (APTAE)

Richard Weiss

President, Strategic Travel Consulting

Daniela Papi

Founder PEPPY, Cambodia

Nadia Lebon

Co-founder, Wanderlust Consulting

Sarah Fazendin

Principal Consultant, Travel Marketing Worldwide

Ariane Janer

Co-founder, EcoBrasil

Truis Engstrom

Associate Professor, University of Stavanger, Norway

Gustavo Timo

General Manager, Associacao Brasileira de Empresas de Ecoturismo e Turismo de Aventura, Brazil

Sandy Cunningham

Founder, Uncharted Outposts/Eco New Mexico

Michaela Guzy

VP of Travel and Business Development, Travel and Leisure Magazine

2010 Rankings Summary

The ATDI ranks countries in two categories: developed and developing, based on the countries' UN designation. The top ten developing countries for 2010, 2009 and 2008 are provided below.

Developing Countries

2010

Israel
Slovak Republic
Chile
Estonia
Czech Republic
Bulgaria
Slovenia
Jordan
Romania
Latvia

2009

Slovak Republic
Israel
Czech Republic
Estonia
Slovenia
Chile
Bulgaria
Latvia
Botswana
Lithuania

2008

Estonia
Chile
Slovak Republic
Czech Republic
Hungary
Botswana
Bulgaria
Jordan
Latvia
Uruguay

Developed Countries

2010

Switzerland
Iceland
New Zealand
Canada
Germany
Sweden
Ireland
Norway
Finland
Austria

2009

Iceland
Switzerland
New Zealand
United Kingdom
Australia
Luxembourg
Denmark
Ireland
Germany
Spain

2008

Switzerland
Sweden
New Zealand
United Kingdom
Spain
United States
Norway
Germany
Iceland
France



Ranks & Clusters

From year to year the individual rankings in the ATDI will shift based on individual country scores in each of the categories. In addition to country rank, however, it is highly recommended that countries consider their cluster. There are three clusters: High, Medium and Low. In the data sheet, posted at www.adventureindex.travel, the mean score is highlighted in Blue; "High" in Green, and "Low" in yellow. These groupings represent nations with similar scores and therefore a country's competitive set. Countries ranked "Medium" or "Low" should aim to move into the "High Category," as this is where the most competitive adventure destinations reside.

The table below provides a comparison of countries in the High ranking cluster.

Developed

Iceland
New Zealand
Switzerland

Developing

Bhutan
Botswana
Bulgaria
Chile
Costa Rica
Croatia
Czech Republic
Dominica
Egypt, Arab Rep.
Estonia
Georgia
Hungary
Israel
Jordan
Kyrgyz Republic
Latvia
Lithuania
Mongolia
Panama
Peru
Poland
Romania
Singapore
Slovak Republic
Slovenia
Turkey
Ukraine
Uruguay



Methodology

Countries recognized by the United Nations are benchmarked in the ATDI and are represented in two groups: Developed Countries and Developing/Emerging Economies.

ATDI 2010 includes 28 Developed countries and 165 Developing/ Emerging countries.

Missing data

Countries with missing data points were given a score of one, with the exception of the Environmental Performance Index (EPI) where the average regional score was substituted. However, if more than five data points were missing the country was dropped from the ADTI calculations. Twenty-nine countries (15% of the total) had at least one missing data point, but fewer than five missing data points, and, therefore, were kept in the ADTI. Out of these countries, 50% were in the "B" group (around the average) and three (Dominica, Seychelles, and Montenegro) were ranked above average, showing the potential of these countries despite the missing data.

Overall, 195 countries are ranked in the ADTI.

The following countries were not ranked in 2010:

■ Niue ■ Nauru ■ Tuvalu ■ Holy See (Vatican) ■ Wallis and Futuna Islands

The ATDI uses a combination of third-party data and expert opinions. The composition of each pillar is provided in the 6th sheet of the data Excel Workbook (available on www.adventureindex.travel).

Changes in Methodology

For 2010, the ATDI methodology did not undergo any significant changes. However, a few changes were included in how data were collected and sorted to ensure more relevant data were included in the analysis:

1. Data were collected closer to the source when possible. This means that instead of relying on international organizations, which have a delay in releasing statistics, researchers went closer to the source, for example obtaining data from UNESCO instead of World Resources Institute. This increased the likelihood of gathering more recent timely statistics.
2. Territories (or non-independent regions) were included in respective country scores. For example, the U.K. now includes the Falkland Islands.
3. Finally, the ATDI database has been updated so that results can be sorted by geographic region and other economic classifications, such as OECD and HDI, allowing for easier country-to-country comparisons. The data is available on the ATDI's website at www.adventureindex.travel

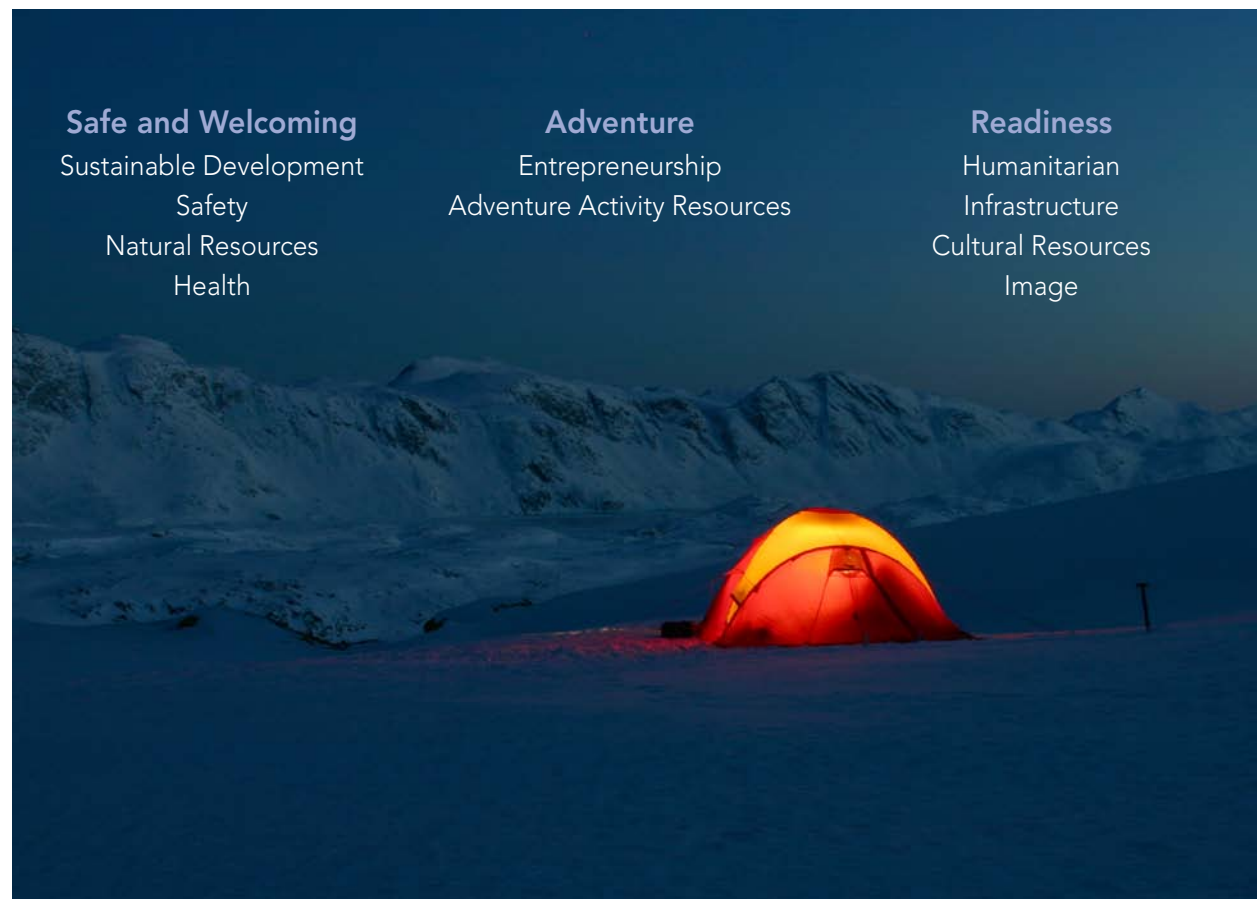


In 2010, the ATDI had a panel of 316 experts. Experts are people with more than five years of experience in the adventure travel industry. They are able to comment on any countries that they have visited in the past five years. One expert may comment on several countries. The 2010 experts were equally male and female and had on average 12 years of experience in the travel and tourism sector and 10 years of experience in the adventure tourism sector. Fifty-four percent were tour operators, 17% were travel writers and 5% worked in tourism development. The remaining 25% worked in consulting, hospitality, at destination management organizations, or had some combination of jobs. If you'd like to be considered to join the expert panel for the 2011 ATDI, please contact us: atdi@gwu.edu.

The ten pillars are categorized into three factors: Safe and Welcoming, Adventure Resources, and Readiness. The calculation method used in the ATDI has been adjusted to weigh more heavily those pillars with specific importance to adventure travel market competitiveness:

- Entrepreneurship
- Adventure Activity Resources

The graphic below illustrates the organization of the 10 pillar principles into categories:



Ten Pillars of Adventure Tourism Competitiveness

This section describes the ten pillars and provides information about how the quantitative scores for countries were derived for each pillar.



1. Sustainable Development Policy

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. To assign a quantitative value to government policies supportive of sustainable tourism, the team used the following two indicators:

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

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

2. Safety and Security

With respect to safety, the ATDI numerical benchmarks gauge how safe it is to travel in a country. The Safety Pillar is made up of two indicators and an expert opinion question:

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

Rationale: Countries with high levels of transparency and low or no travel warnings issued are safer for travelers. Lower levels of corruption are also a sign of a more secure country.

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

In 2009, the ATDI methodology added a survey question that was put to the expert panel. The question asked panelists to rate "Your perception of this destination as safe and secure for travel" on a Likert scale of -3 (very poor) to +3 (very good). This allows country experts to assess real risk to travelers from firsthand knowledge.



3. Health

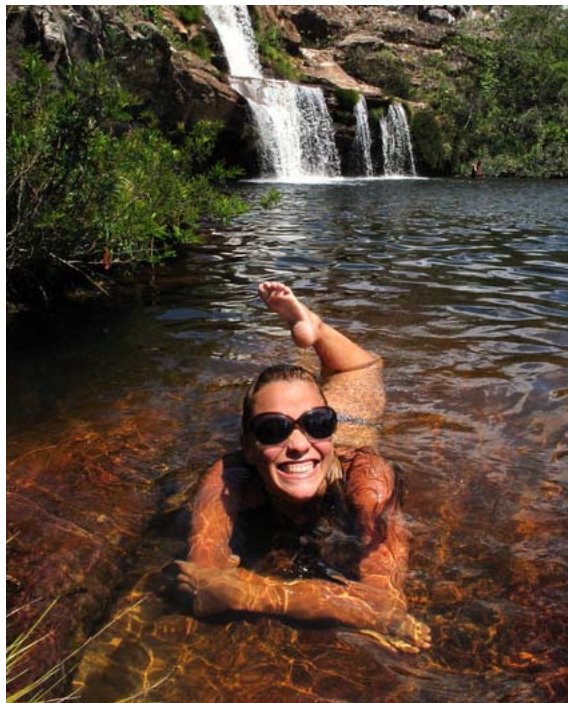
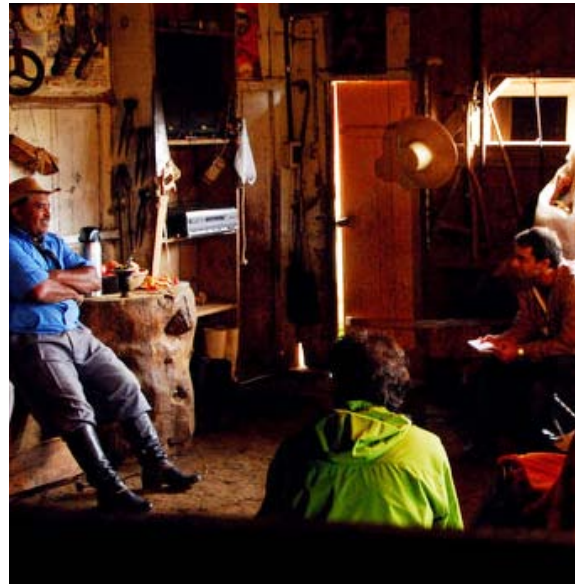
The Health Pillar attempts to gauge the level of healthcare available in a country. This is important for two reasons:

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

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

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

Rationale: A high number of beds and physicians per 1,000 people suggests higher levels of healthcare.



4. Natural Resources

Adventure travelers want untrammelled and well-managed natural resources. Destinations with unusual or rare natural resources, which are well-managed and not exploited, will earn high praise from adventure travelers and sustained market competitiveness. The Natural Resources Pillar is made up of four indicators and an expert opinion question:

From the World Resources Institute:

1. Urban Concentration
2. Population Density

From CIA World Factbook:

1. Kilometers of coastline
2. Ratio of coast to total area

Additionally, in 2009 the ATDI added a survey question that asked panelists to rate their perception "regarding the variety of natural resources at the destination" on a Likert scale of -3 (very poor) to +3 (very good).

Rationale: Places with more unpopulated open space are likely to have greater natural resources for adventure tourism. When the ATDI is applied diagnostically, emphasis is placed on discovering and valuing natural resources with fresh eyes that local populations may have overlooked as having a market value in the adventure tourism context.

One provision was made to accommodate the vast amount of coastline that Canada has, and it was rated at 5,500 instead of its actual score, in order to have scores comparable with the rest of the world.



5. Cultural Resources

Adventure travelers are as keen to learn about new cultures as they are to explore nature. For the adventure traveler, being able to experience local culture in an authentic way is a sought-after outcome of the travel investment. Destinations which encourage local people to preserve their culture — even as modern influences continue to shape and evolve local customs — fare well with adventure travelers. In valuing cultural resources the ATDI seeks not to encourage local people to become living museums to the past or actors staging outdated customs, but to acknowledge and honor their customs, recognizing their unique contribution to the world stage. The Cultural Resources Pillar is made up of two indicators and an expert opinion question:

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

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

Additionally, in 2009 the ATDI added a survey question which asked expert panelists to rate their perception of the destination as “culturally rich,” on a Likert scale of -3 (very poor) to +3 (very good).

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

In this category the ATDI recognizes a destination’s competitiveness relative to its ability to support adventure sports, which span a range of outdoor, nature-based activities — from bird watching to mountaineering; whitewater rafting to rock climbing; caving to paragliding. Destinations with 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 Activities Resources Pillar is made up of two indicators:

1. Protected Species
2. Forests, Grasslands, Drylands

Rationale: A high number of endangered species and the presence and growth of forests, grasslands and drylands indicate resources for adventure activities.



7. Entrepreneurship

While adventure travel is becoming more established as an industry, its vitality and strength originate from the so-called “fringe” or cutting edge of businesses that will try new activities, take people to new places, and are often first in trying new technologies as they have no status quo to protect.

Given this reality, the ATDI looks for and acknowledges destinations in which entrepreneurship in the business sector is thriving. Any destination in which young businesses can start up and gain traction is likely to be fertile ground for adventure tourism entrepreneurs with innovative ideas, and therefore, more likely to become competitive in the adventure travel market. The Entrepreneurship Pillar is made up of one component containing ten different factors:

1. 2010 Index of Economic Freedom

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



8. Humanitarian

The Humanitarian Pillar is concerned with human development in a country 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), combined with the density of NGOs and NGO presence, combine to indicate organizations working in humanitarian development and the level of a country's human development.

9. Tourism Infrastructure

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

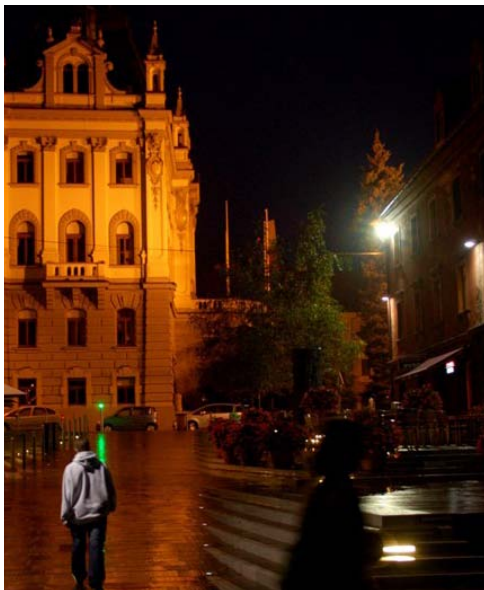
1. Hard infrastructure, such as roads, airports, lodging facilities, and trails
2. Soft infrastructure, such as:
 - Trail maps
 - Accessible information on heritage and culture
 - Ground operators and outfitters
 - Training programs for adventure tourism providers such as guides, interpreters, and ecolodges

Data for the Infrastructure pillar come from surveys of adventure and development industry experts. At least three experts rated each country on elements measuring the extent to which the country had appropriate infrastructure to welcome adventure-seeking travelers.

Example Question: "Your perception of the availability of appropriate infrastructure for adventure travel in this destination is: very poor to very good".

The scale provided spanned from -3 (very poor) to +3 (very good). To highlight the fact that the infrastructure required for adventure tourism is often much less extensive than that required for mainstream tourism, the phrase "appropriate for adventure travel" was used.

When the ATDI's ten pillars are used as framework for diagnostic evaluation in countries or destinations, the team examines both hard and soft infrastructure as it pertains to adventure travelers.



10. Image

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

Data for the Adventure Image Pillar come from surveys of adventure and development industry experts. At least three experts rated each country on elements measuring the extent to which the country has the perception of an adventure destination.

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

Why did Cape Verde's Score change dramatically?

In 2009, Cape Verde ranked 122nd and in 2010 its rank rose to 44th. Why the dramatic change? In examining Cape Verde's scores from 2009 the following picture emerges: the country received a 1 in Adventure Activity Resources and Cultural Resources, indicating missing data. This means information was not available from the International Commission for Endangered Species from which the ATDI draws data to calculate scores in those categories. However, in 2010 Cape Verde received 7.89 in Adventure Activity Resources and 4.62 in Cultural Activity Resources. The higher score is the result of data obtained directly from the World Database on Protected Areas (www.wdpa.org), the World Resources Institute (www.earthtrends.wri.org), and UNESCO World Heritage Center, World Heritage List (whc.unesco.org/en/list/).

Why does the US rank so low?

It may come as a surprise that a country so rich in natural resources and adventure activities ranks 21st overall, below Belgium and Denmark. The US score suffers in the "health" and "humanitarian" pillars. The country has fewer physicians and beds per 10,000 people than other developed countries. It is worth noting here that the ATDI does not measure quality of health services, rather the index uses the hard data available from the World Health Organization or from the country itself. The US humanitarian score is also low, indicating a low density and presence of NGOs. So, although in 2010 the US gained 13 points in the "Readiness" category, its other scores were stable year over year and overall, it underperformed compared to other developed nations. Although state governments are often active in promoting tourism, there is a significant lack of attention from the national government — unlike most countries, the US does not have a designated agency responsible for tourism development and promotion. However, this may be changing. In 2010, the Travel Promotion Act was signed. This legislation calls for an overseas travel promotion program which the US projects could yield millions of new visitors, \$4 billion in new economic stimulus, 40,000 new American jobs, and \$320 million in new federal tax revenue.³ The Congressional Budget Office reports that the bill will reduce the deficit by \$425 million and increase revenues by \$135 million over the next 10 years. The bill is funded by a \$10 fee paid by overseas visitors to the United States and matching funds from the US private travel sector.

³ US Travel Association: http://www.poweroftravel.org/statistics/keyissues_intl_tpa.htm



Comparing the Top Countries in Both Groups

	Switzerland	Israel
Sustainable Development	9.15	7.52
Safety	8.85	6.10
Health	5.49	5.35
Natural Resources	6.48	6.11
Adventure Resources	7.87	7.84
Entrepreneurship	9.48	8.08
Humanitarian	4.27	3.54
Cultural Resources	6.31	6.07
Infrastructure	8.66	8.66
Image	8.86	8.57

Both Israel and Switzerland rank first in their respective categories and also have similar scores at the pillar level. There are no pillars in which Israel scores higher than Switzerland, which slightly outperforms the former on sustainable development policies and safety. Both countries share nearly identical infrastructure and adventure activity scores. Infrastructure and adventure activity scores rely heavily on expert opinion — and it is interesting to note that the ATDI's panel of experts viewed each country's adventure offering to be of the same quality.

Rankings Analysis

Developed Countries

#1: Switzerland

Ranking	2010: 1
	2009: 2
	2008: 1

All Tourism Arrivals 2009: 8,294,000
Percent Change from 2008: -3.7%

Tourism is an important industry for landlocked Switzerland and the Swiss Alps provide a dramatic backdrop for a variety of adventure activities. In fact, this landscape is a key motivation for tourists to visit. Switzerland has a long history of tourism, with records of hotel nights being kept since 1934 (Swiss Federal Statistics Office, 2009).

Switzerland

	2010	2009
Sustainable Development	9.15	9.31
Safety	8.85	9.50
Health	5.49	4.56
Natural Resources	6.48	6.71
Adventure Resources	7.87	7.53
Entrepreneurship	9.48	8.94
Humanitarian	4.27	6.31
Cultural Resources	6.31	6.72
Infrastructure	8.66	9.56
Image	8.86	9.19

Mountain tourism activities, located in some of the least industrialized areas, are reflected in the tourism slogan "Get Natural".

The Swiss are avid travelers and outdoor enthusiasts and many places have a recreational culture that serves the tourism industry well.

Switzerland is ranked number one in the ATDI for its commitment to sustainability (28.8% of the country is protected,⁴ and it ranks second on the Environmental

Protection Index), support of entrepreneurs, and strong adventure image. Switzerland also has extremely low unemployment, at 3.5%.

Switzerland also ranks first overall on the World Economic Forum's (WEF) Travel and Tourism Competitiveness Index (TTCI), where it ranks second in sustainability and second in ground infrastructure (World Economic



⁴ http://earthtrends.wri.org/pdf_library/country_profiles/bio_cou_756.pdf

#2: Iceland

Ranking
2010: 2
2009: 1
2008: 9

All Tourism Arrivals 2009: 1,235,000
Percent Change from 2008: +11.7%

Forum, 2009).

With a greater number of flights (Air Iceland added twelve new destinations in 2009), local currency still weak in the wake of the national financial market crash, and extensive global coverage as a “good value destination,” Iceland saw a significant increase in tourism arrivals in 2010 over 2009. The share of tourism in Iceland’s total export revenue was 16.9%, and as the importance of marine product exports decreases, tourism becomes increasingly important (Icelandic Tourism Board, 2007). Within Icelandic tourism, adventure products and services dominate, a result of Iceland’s exotic location and unique ecological and geologic landscape.

Iceland	2010	2009
Sustainable Development	9.41	9.08
Safety	8.73	9.45
Health	6.0	4.41
Natural Resources	7.35	7.55
Adventure Resources	9.02	8.84
Entrepreneurship	8.70	8.59
Humanitarian	4.05	6.90
Cultural Resources	4.58	4.72
Infrastructure	8.40	9.55
Image	9.29	9.64

According to Iceland Statistics, over 70% of people indicated that “Nature” was a main motivator for visiting Iceland.⁵ The tourism board, perhaps acknowledging this motivation, adopted the slogan: “Iceland Naturally.” Furthermore, Iceland’s



National Tourism strategy specifically mentions three things important to adventure tourists: a “unique and varied landscape and nature,”

“protection of the environment,” and the “culture and people.” Iceland ranks first on the Environmental Protection Index. The country’s innovative online marketing campaign, which launched this year “Be Inspired by Iceland,” encouraged all Icelanders to share what they loved about their country and was designed to reinvigorate the tourism industry after the drop caused by the Eyjafjallajökull volcano eruption.

Iceland ranks 16th on the WEF TTC index. Although it scores first in safety and security and ICT Infrastructure, it ranks poorly in natural resources - only 4.7% of Iceland’s total land is protected. Additionally, despite lower prices brought by the financial crises, the island country still scores poor in price competitiveness.⁶

⁵ http://www.ferdamalastofa.is/upload/files/Tourism_in_Iceland_in_figures_oct_%202009.pdf

⁶ These were taken from 2007.

#3: New Zealand

Ranking	2010: 3
	2009: 3
	2008: 3

All Tourism Arrivals 2009: 2,525,044
Percent Change from 2008: +2.7%

Tourism is a very important industry in New Zealand, where international tourist expenditure accounted for US\$9.5 billion or 18.2% of New Zealand's total export earnings and 8.7% of total GDP.⁷ Tourism employs one in ten people in New Zealand. The yield of the average tourist is high, because for the majority of the world it is a long-haul destination, which inherently includes a higher spend per tourist. 1.6 million international tourists (or 63%) and 11.1 million domestic tourists took part in nature-based activities in 2008 (Tourism New Zealand, 2011).

New Zealand	2010	2009
Sustainable Development	8.29	8.99
Safety	9.15	9.65
Health	4.46	5.11
Natural Resources	7.43	7.69
Adventure Resources	7.40	7.17
Entrepreneurship	9.58	9.20
Humanitarian	3.20	4.34
Cultural Resources	5.62	6.45
Infrastructure	8.80	9.88
Image	10.00	10.00

The branding of New Zealand, "100% Pure (You)," also presents an adventure and nature-based image.

The youth/back-packer markets are very important to New Zealand (in 2009, the country received 259,574 tourists between the ages of 15 and 24). New Zealand's Go All the Way Campaign was designed to appeal to this demographic.



In the ATDI, New Zealand scores well in the adventure factor, as it scores 99.9 on the business freedom section of the Economic Freedom Index indicating an extremely friendly environment for entrepreneurs. As the EFI states, "Start-up companies enjoy great flexibility under licensing and other regulatory frameworks."

The recent earthquakes in New Zealand will likely have an adverse effect on tourism in the near term, which will add to the financial contraction caused by the global recession, which has caused unemployment rates to rise and weakened the local currency.

⁷ Key Tourism Statistic: February 2011 Ministry of Economic Development

#4: Canada

Ranking
2010: 4
2009: 16
2008: 20

All Tourism Arrivals 2009: 16,092,823⁸
Percent Change from 2008: +2.3%

Canada	2010	2009
Sustainable Development	7.74	8.56
Safety	8.92	9.29
Health	3.40	2.95
Natural Resources	8.07	8.36
Adventure Resources	7.68	7.27
Entrepreneurship	9.40	9.05
Humanitarian	3.63	4.76
Cultural Resources	6.10	6.42
Infrastructure	7.34	5.59
Image	9.69	8.78

Tourism in Canada constitutes three percent of GDP and 3.4% of all employment. In fact, tourism in Canada contributes as much to Canada's wealth as agriculture, fisheries and forestry combined. Therefore, it is no surprise that the government has made tourism a priority sector (Canadian Tourism Commission, 2010). In 2009, Canada created the Marquee Tourism Event Program, a \$100 million, two-year stimulus program designed to provide support to the country's tourism industry, which suffered during the global recession.

Canada is the second largest country by geographic area in the world, and its varied natural environments create excellent adventure opportunities year-round. The

national tourism organization, the Canadian Tourism Commission, markets the country, works with provinces, and conducts accurate research to support the sector. Nearly 75% of Canada's exports go to the United States, and tourism is no exception with 68% of tourists coming from the US.

In 2010, Canada improved significantly in its ATDI ranking. Notable increases were in the infrastructure and health pillars. It also made gains in the adventure factor, which is weighted more heavily. This is due to a 0.4 point increase in the Economic Freedom Index, which makes Canada the 6th freest economy in the world, and the freest economy in North America.

Canada ranks 5th in the WEF TCC. It scores high in natural resources, airport infrastructure, and its friendly policy environment which includes very short time required to start a business.



⁸ December 2010 Tourism Snapshot, Canadian Tourism Commission http://en-corporate.canada.travel/sites/Corporate/images/pdf/Research/Stats-figures/International-visitor-arrivals/Tourism-monthly-snapshot/TourismSnapshot_2010_12_eng.pdf

Rankings Analysis

Developed Countries (cont'd)

#5: Germany

Ranking	2010: 5
	2009: 9
	2008: 8

All Tourism Arrivals 2009: 24,224,000
Percent Change from 2008: -2.7%

Germany	2010	2009
Sustainable Development	7.93	7.40
Safety	8.41	8.95
Health	6.06	5.21
Natural Resources	6.19	6.45
Adventure Resources	7.67	7.30
Entrepreneurship	8.43	8.05
Humanitarian	4.47	5.92
Cultural Resources	9.14	8.47
Infrastructure	8.24	9.19
Image	8.10	8.19

The German Tourism Board, which is responsible for international and domestic marketing has a special focus on Green Travel, is touting Germany as the leader in environmentally friendly behavior and protection of nature. In 2009 the Board chose the theme, "Active Lifestyle" with a focus on walking and cycling (The German National Tourism Board, 2010).



Germany moved up four positions in the ATDI, ranking fifth overall in 2010. Gains were made in the areas of sustainable development policies, as well as the adventure factor. Germany's 32 Cultural World Heritage Sites and 32% of land protected create a high score in Cultural resources. This is further demonstrated by the GTB's focus on religious tourism and "castles, parks and gardens."

Germany ranks third in the WEF TCC, scoring especially high in health and hygiene and ground transport infrastructure. As the host of the massive ITB Berlin, it is unsurprising that it also ranks highly for International Fairs and Exhibitions.

Rankings Analysis

Developing Countries

#1: Israel

Ranking
2010: 1
2009: 2
2008: 11

All Tourism Arrivals 2009: 2,321,000
Percent Change from 2008: -9.7%

Israel	2010	2009
Sustainable Development	7.52	8.04
Safety	6.10	6.09
Health	5.35	4.58
Natural Resources	6.11	6.36
Adventure Resources	7.84	7.57
Entrepreneurship	8.08	7.76
Humanitarian	3.54	4.41
Cultural Resources	6.07	6.91
Infrastructure	8.64	9.52
Image	8.57	8.81



In 2010, Israel swapped places with the Slovak Republic claiming the #1 spot in the ATDI for developing countries. Despite the volatile security situation, Israel is not considered unsafe by adventure travel experts. Furthermore, it has excellent infrastructure and natural and cultural resources. Israel's appeal is broadening, with Israel statistics (Israel Central Bureau of Statistics, 2009) reporting a drop in religious tourism and a rise in general interest tourism, as well as a drop in tour groups and a rise in independent tourists. The Ministry of Tourism has a goal of attracting 5 million tourists and continues to market to various segments, especially the cultural traveler. The Ministry of Tourism has launched a "100 Years of Green," campaign (Israel is one of two countries that has more trees today than it had 100 years ago) which encourages travelers to travel more sustainably and promotes green initiatives throughout the country.

Israel scores 33rd on the WEF TCC. While its competitive advantages are in areas such as ICT infrastructure, human resources and health and hygiene — they score poorly in environmental sustainability, especially in treaty ratifications.

#2: Slovak Republic

Ranking	2010: 2
	2009: 1
	2008: 3

All Tourism Arrivals 2009: 1,298,000
Percent Change from 2008: -26.5%

Slovak Republic	2010	2009
Sustainable Development	5.42	7.88
Safety	5.51	7.50
Health	1.79	5.61
Natural Resources	5.13	6.56
Adventure Resources	8.05	7.40
Entrepreneurship	7.00	7.94
Humanitarian	1.18	3.74
Cultural Resources	6.16	6.60
Infrastructure	6.56	8.10
Image	8.57	9.05

Slovakia has consistently ranked high in the ATDI. This is perhaps unsurprising as the Slovak government has consistently prioritized the sector, seeing it as a tactic for economic development, and the main offerings are adventure related, mostly revolving around mountain holidays and winter sports. The Carpathian Mountains extend across the North of the country providing an exciting environment for adventure. There are also many Slovakia cultural resources, including many ancient castles. In fact, the country's tourism slogan, "Little Big Country," suggests the range of varied experiences possible within a small geographic area. The majority of visitors to Slovakia come from neighboring countries such as the Czech Republic, Poland and Austria.

In 2010, the government created the Ministry of Culture and Tourism of the Slovak Republic. Prior to that, in 2007, the government adopted the "New Tourism Development Strategy and State Tourism Policy of the Slovak Republic," which advanced the idea of "tourism for all," a strategy for decreasing seasonality and increasing employment. The strategy seems well-placed as Slovaks are avid travelers. In 2003, 45% of Slovak residents took a long vacation either abroad or in Slovakia (Detente Consultants, 2010).

Slovakia ranked 46th on the WEF TCC Index, scoring highly in tourism infrastructure and health and hygiene, but poorly in airport infrastructure and affinity for travel and tourism.



#3: Chile

Ranking
2010: 3
2009: 6
2008: 2

All Tourism Arrivals 2009: 2,750,000
Percent Change from 2008: +1.9%

Chile	2010	2009
Sustainable Development	7.90	8.02
Safety	7.70	7.87
Health	2.49	2.85
Natural Resources	7.21	7.47
Adventure Resources	7.61	7.20
Entrepreneurship	9.07	8.83
Humanitarian	3.53	4.31
Cultural Resources	5.27	5.39
Infrastructure	6.66	5.15
Image	9.55	9.61

In Chile, tourism represents 4.5% of GDP. The National Tourism Board — SERNATUR is under the Ministry of Economy. Domestic tourism is a high priority for Chile, with marketing programs such as Muevete por Chile (Go Around Chile), Vacaciones de Tercera Edad (Senior Travel) and Gira de Estudio (High School Trips).

Chile tries to take a responsible approach to development. Since 2007, all tourism projects have been subject to environmental impact assessments.

A "Tourism Cluster on Special Interests," ensures that sustainable tourism is incorporated in protected areas, and aims for integral management of public and private services there. Its commitment to sustainable Development policies can be seen in its high sustainable policy score in the ATDI.

Chile ranks 57th in the WEF TTC Index, ranking high in policy rules and regulations, but surprisingly low in natural resources. In contrast, Chile scores well in Natural Resources in the ATDI, pointing to a difference in the way each index evaluates this resource relative to tourism. The ATDI measures coastline and the ratio of coastline to surface area, as well as population density. The ATDI also incorporates a survey question. The TCC Index evaluates the number of World Heritage Sites, the total protected area, the quality of the natural environment (survey question) and the number of total known species.



#4: Estonia

Ranking	2010: 4
	2009: 4
	2008: 1

All Tourism Arrivals 2008*: 1,970,000

Percent Change from 2008: +3.7%

*2009 data not available

Estonia	2010	2009
Sustainable Development	7.67	6.04
Safety	7.19	7.59
Health	5.08	4.31
Natural Resources	6.25	6.52
Adventure Resources	7.93	7.56
Entrepreneurship	8.81	8.64
Humanitarian	2.79	3.28
Cultural Resources	5.39	7.13
Infrastructure	7.55	8.57
Image	8.10	8.10

Estonia has consistently ranked high in the ATDI, taking the number one spot in 2008. Tourism accounts for 3.1% of Estonia's GDP. Estonia performs especially well in the Entrepreneurship pillar as it ranks 14th on the Economic Freedom Index — it has the 5th freest economy in the Europe.

Finland and Russia are the biggest markets for this Baltic state. Fast speed ferries linking Tallinn and Helsinki have contributed to this growth of Finnish patrons



and joining the Schengen in 2007 facilitated the process for Russians (VisitEstonia.com, 2010).

Tourism in Estonia is managed by the Estonian Tourism Board, which is under the direction of the Ministry of Economic Affairs and Communication. The plan which guides development, The National Development Plan for Tourism 2007-2013, has sustainable tourism as a central goal including: promoting the implementation of sustainable development principles, promoting development of ecological tourism products, promoting the implementation of environmental management systems and certification.

Estonia ranks 27th in the WEF TTC Index, scoring high in tourism infrastructure and ICT infrastructure.

#5: Czech Republic

Ranking	2010: 5
	2009: 3
	2008: 4

All Tourism Arrivals 2009: 6,032,000
Percent Change from 2008: -9.3%

Czech Republic	2010	2009
Sustainable Development	8.17	8.16
Safety	6.45	7.27
Health	6.08	5.25
Natural Resources	6.09	6.41
Adventure Resources	7.80	7.40
Entrepreneurship	8.30	7.94
Humanitarian	3.45	4.29
Cultural Resources	6.37	6.97
Infrastructure	6.92	7.76
Image	7.14	7.62

The Czech Republic has had great success with tourism, famous for their spirit of Eastern Europe. The Czech National Tourism Board — CzechTourism — is a grant-aided department of the Ministry for Regional Development. Its principal mission is to market Czech Republic, under the tagline “Number One in the Heart of Europe.” The main source of tourism funding, as in other European transition economies, is from EU Structural funds (in 2009, Czech National Tourism Board received

13.4 million Euros). This money in part goes to a “Rural Development Program,” which supports tourism in non-urban areas or adventure tourism— helping tourist dollars reach poorer people.⁹

The Czech Republic scores 26th on the WEF TTC Index, ranking high in tourism infrastructure and health and hygiene; two areas where it also performs well in the ATDI. On the TCCL, the Czech Republic loses significant points in Airport infrastructure.



⁹(<http://www.hotelmule.com/management/html/51/n-3851-5.html>)

CONCLUSION

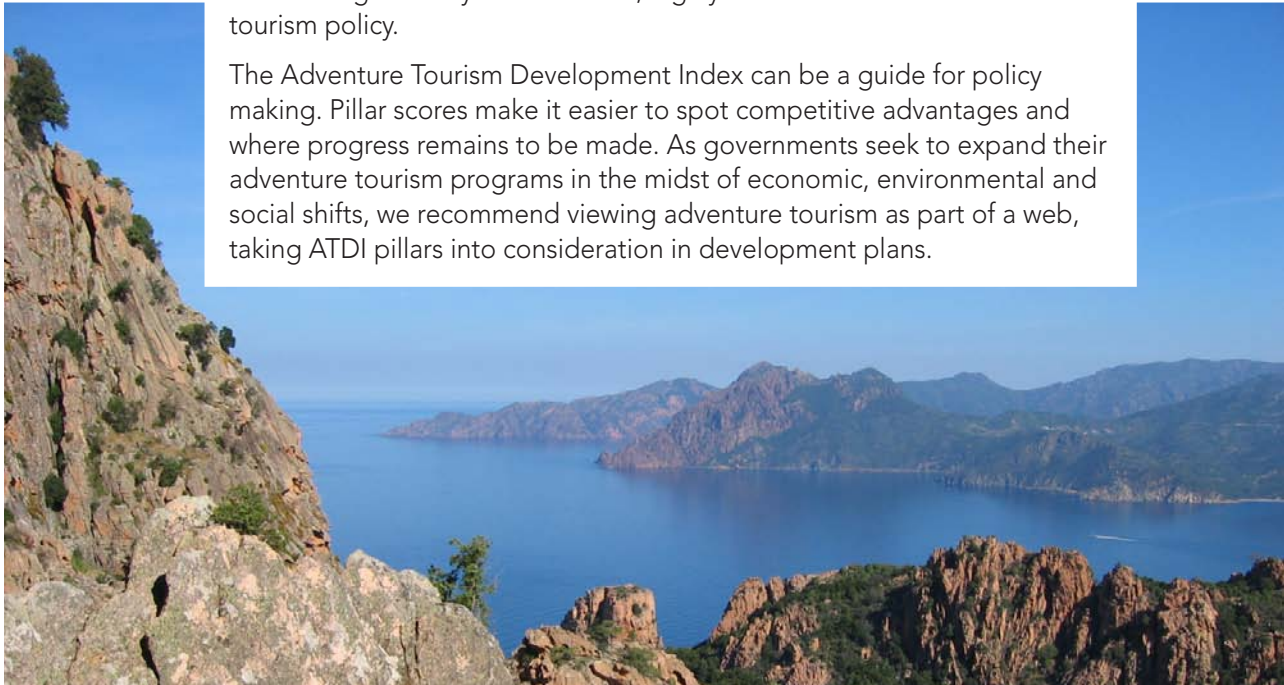
Tourism, including adventure tourism, is a “nodal” industry. That is, it supports and is supported by successes or failures in other industries. The tourism product relies directly on, and produces economic benefits for multiple sectors, such as transportation, accommodations, food and beverage, and entertainment. Adventure tourism services are typically provided by locally-owned, small and medium sized businesses. This makes adventure tourism a diverse and fragmented industry, with important local impacts. However, it also naturally implies that industry-level actions are difficult to coordinate, and both positive and negative effects can be difficult to measure. In a cyclical and delicate industry such as this, for every benefit, there is a corresponding possible negative impact.

Adventure tourism finds itself operating at a nexus of culture, environment, economy and politics, and it is increasingly relevant given the current events in global politics. How the industry is developed is influenced by world events, as well as local circumstances. Adventure tourism can be a tool to help rebuild after a political crisis or natural disaster. Policies can help to create jobs or stimulate cross-cultural exchange.

Many of these adventure tourism development efforts are occurring in a grass-roots environment, with a lack of skilled labor, a lack of technology, and lack of institutional memory at higher levels — making the planned growth of tourism a challenge. Despite this, the demand for tourism experiences continues to grow, with new markets such as China, India, Brazil and Russia’s outbound tourism increasing dramatically.

Emerging tourism destinations must focus on competitive advantages, to use scarce resources in the most efficient and innovative ways in order to develop and market desirable and profitable products. These efforts should be guided by an innovative, highly coordinated and realistic tourism policy.

The Adventure Tourism Development Index can be a guide for policy making. Pillar scores make it easier to spot competitive advantages and where progress remains to be made. As governments seek to expand their adventure tourism programs in the midst of economic, environmental and social shifts, we recommend viewing adventure tourism as part of a web, taking ATDI pillars into consideration in development plans.





“Our backyards are like your national parks.”

— Arne hardenberg

For many people, Greenland has become synonymous with “climate change.” It is in fact a nation that throughout its history has had to adapt to change, climate and others, in innovative and exciting ways. The significant changes occurring in the country are exposing new opportunities for tourism, allowing adventure tourists to venture further than ever before into the high Arctic.

Greenland is not ranked in the ATDI, because it is not officially recognized as a country by the United Nations. It currently has Self-Rule status from Denmark, and although political winds are blowing towards complete independence, it has not yet reached that status. The local economy is dependent on fisheries, and while mineral exploration appears to be promising, the government is also focused on more immediate diversification options such as tourism. Tourism currently contributes 3% to the government GDP of the country (based on estimates from the Greenland Tourism Board).

At the special request of the Greenland Tourist Board (GTB) the ATDI team was able to collect the relevant data points for Greenland to derive a score and prepare this analysis.

Adventure industry businesses and media may find this special report useful in building awareness and understanding about Greenland’s position as an adventure destination.

Greenland's ATDI Score

The table below summarizes Greenland's rank in the ATDI's three factors: Safe and Welcoming, Adventure, and Readiness vis a vis other developed and developing countries. The competitive countries were chosen for their similar tourism assets and product offering to Greenland; by coincidence, these are a set of very mature tourism destinations.

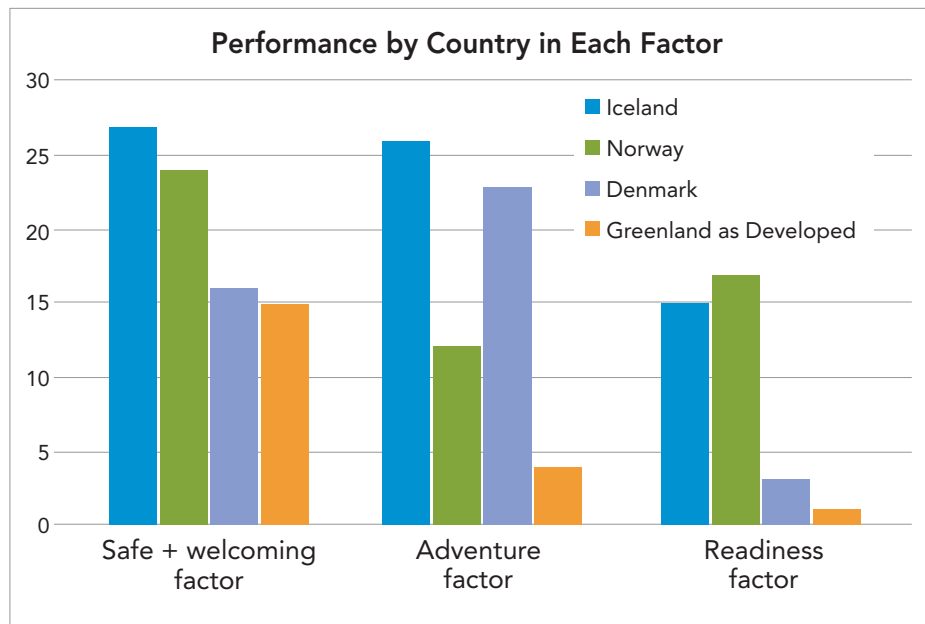


In the table below, Greenland's rank is calculated among the set of Developed and Developing countries. The individual components that make up each category can be seen in Figure 1.

	Country	Rank	Safe + Welcoming	Adventure	Readiness
	Developed Countries (28 total)				
	Iceland	2	1	2	13
	Norway	8	4	16	11
	Denmark	16	12	5	25
	Greenland	25	13	24	27
	Developing Countries (163 total)				
	Chile	3	16	5	29
	Greenland	37	1	58	88

The table results illustrate that Greenland scores near the bottom of the group of Developed countries. This set, which includes much of Greenland's competition, comprises mature tourism destinations, with notably stronger infrastructure. When considered among the group of Developing countries, however, Greenland is in the upper range of competitors. It compares favorably to Developed countries with respect to Safe and Welcoming, and is the best among Developing countries in this factor. With respect to Readiness, it fares less well against Developed countries, near the very bottom of the group.

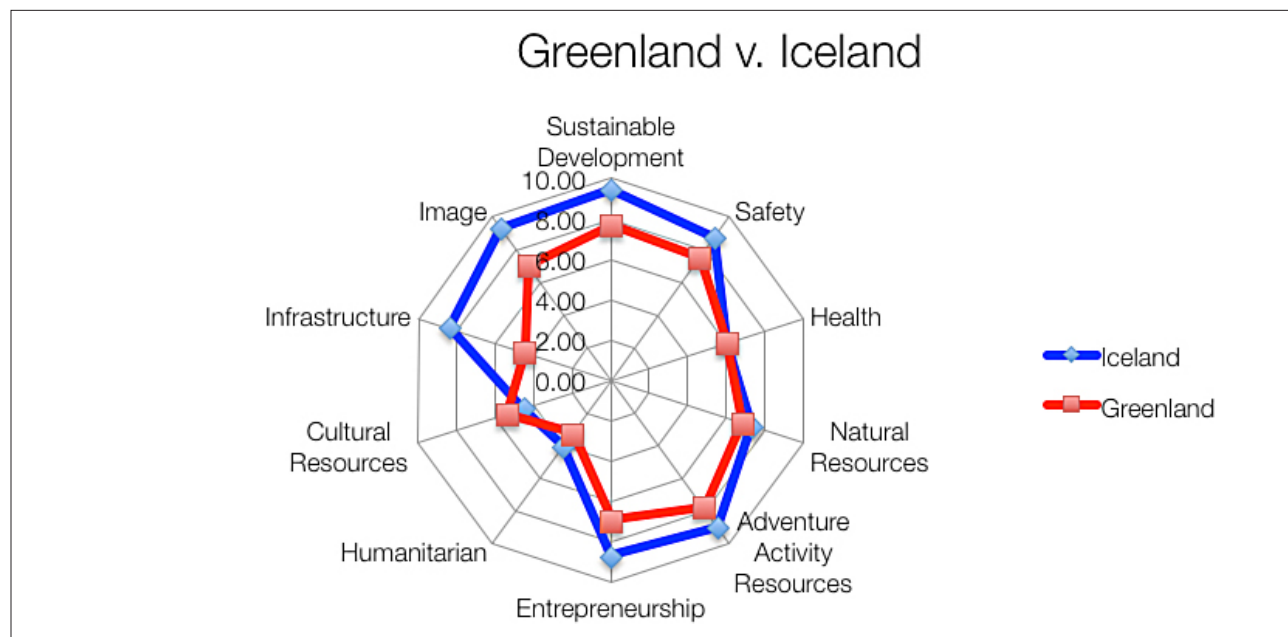
Greenland performs well in the Safe and Welcoming category, illustrating strong scores in Sustainable Development Policies, Safety, Health and Natural Resources. In the Adventure category, Greenland performs very well in Adventure Activity resources, but underperforms in Entrepreneurship. As a destination in development, Greenland receives a low score in overall "Readiness," due to its limited infrastructure and low brand awareness.

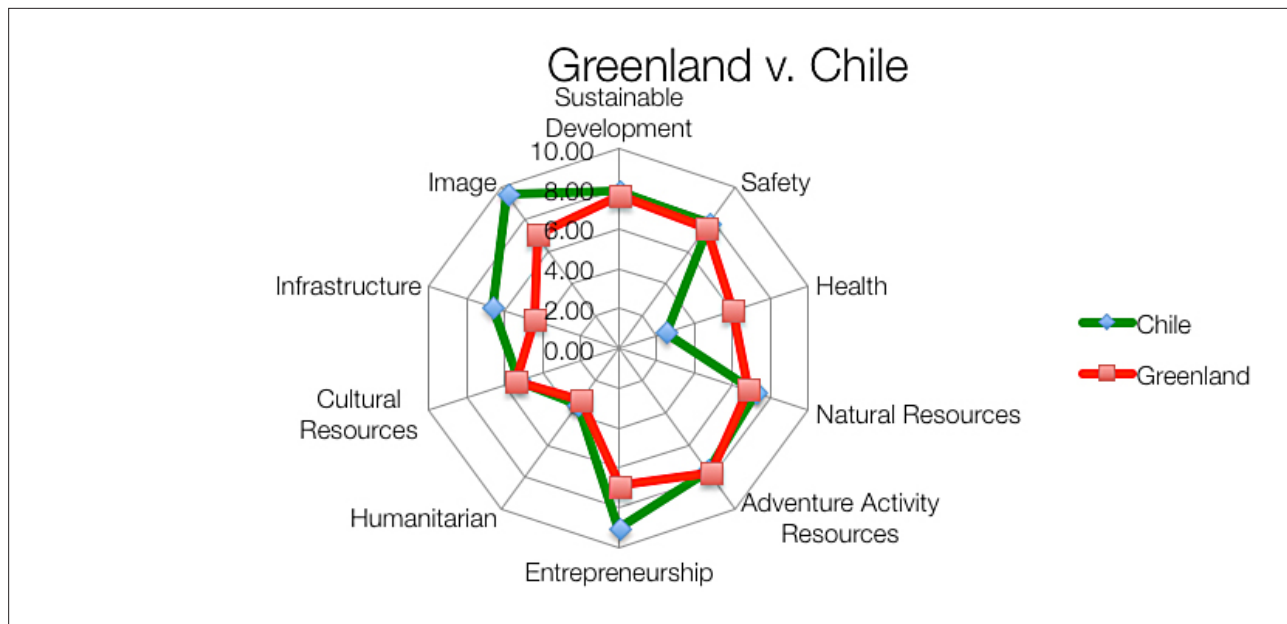


The graph above illustrates Greenland's position compared to top developed competitors.

Figure 1: Components Per Factor

Greater insight into Greenland's position can be gained when its score is examined on a pillar by pillar basis. In the graphs below, Greenland is compared to Iceland and Chile. The outer points of the web represent a perfect score, whereas the center is a zero. Viewed this way, it is clear that overall, Greenland scores close to its competitors, especially on assets that cannot be created such as Natural Resources. Areas where improvement can be made, such as Infrastructure and Sustainable Development Policy, can be easily improved through strong policies and smart investment.





What do these scores mean to tour operators and investors looking to develop in the country, and tourists wishing to visit Greenland?

As this special report finds, Greenland already has a solid foundation in natural, cultural and adventure assets for developing a sound adventure tourism market. Strong marketing and branding towards the adventure tourist at the national level will attract new tourists. And combined with a decentralized system of development at the municipal level, there's the foundation for the creation of regional products, which are distinctive and differentiated, encouraging travelers to return to experience new parts of the country.

Greenland's tourism strategy is focused on the adventure tourist, with physical and sometimes risky activities, itineraries that include cultural and natural elements and an emphasis on enabling small businesses that provide local, authentic experiences. Greenland has chosen to build its image on adventure tourism because it recognizes that its resources and assets match the desires and interests of this high-value market.

The government in Greenland is also very much committed to sustainable development. The minister of environment recently declared "All future decisions taken by Inatsisartut (the government) are subject to an environmental assessment..."



Naalakkersuisut wants the principle of sustainability incorporated in other areas and plans for the coming years to focus on a stronger effort to create specific and realistic goals regarding the issue of sustainable development.” Recently, a concerted focus on Corporate Social Responsibility has emerged across all sectors, including tourism. Air Greenland signed the UN Global Compact in September 2010 and a conference entitled Future Greenland was held for all industries in November 2010, with a special focus on Corporate Social Responsibility. Greenland understands the importance of sustainability as well as the need to define it in a Greenlandic context.

Tourists considering a trip to Greenland or tour operators planning to expand their offerings to Greenland must be pioneering in spirit; at this stage of development the infrastructure is limited. But as anyone in the adventure business knows, for adventure tourists these challenges offer tantalizing appeal.



Visiting Greenland is a pioneering and adventurous experience. Below are three itineraries which provide a mix of cultural, adventure and natural elements:

With its huge icebergs, the midnight sun's everlasting light and a wide variety of attractions at sea, on land and in the air, North Greenland, is an exciting area for travelers. This extensive Arctic region stretches from the southern part of Disko Bay, known for the Ilulissat Ice Fjord, to Ultima Thule and the town of Qaanaaq in the extreme north. This is one of the world's most northerly inhabited areas and the Inuits' proud traditions continue today with a seal hunting and fishing culture that exists in harmony with the Arctic nature and its resources. The following itinerary offers a compelling mix for the adventure traveler:

Experience: 4 days in Ilulissat during the spring

Day 1 Ilulissat

- Physical Adventure: ■ Hiking to Sermermiut
- Cultural Adventure: ■ Traditional turfhouse Kaffemik
- Nature Adventure: ■ 4 hour dogsledging

Day 2 Kangia

- Physical Adventure: ■ Boat trip to Ilimanaq ■ Boat trip to Rodebay
- Cultural Adventure: ■ Life in a settlement Kaffemik
- Nature Adventure: ■ Diskobay by sea Icebergs

Day 3 Ilulissat icefjord

- Physical Adventure: ■ Boat trip to Ilimanaq ■ Boat trip to Rodebay
- Cultural Adventure: ■ Life in a settlement Kaffemik
- Nature Adventure: ■ Diskobay by sea Icebergs

Day 4 Ilulissat

- Physical Adventure: ■ Dogsledging full day tour
- Cultural Adventure: ■ Dogsledge to the settlement of Rodebay
- Nature Adventure: ■ Ilulissat hinterland ■ Making igloo
■ Feeding eskimo dogs ■ Ice fishing



Across the ice, over to to East Greenland travelers will find one of nature's last remaining unspoilt regions on the planet. The long winter, where the sea is frozen and the extensive field ice belt, which drifts on the currents along the coast in the spring and summer, has resulted in East Greenland becoming very isolated from both the rest of Greenland and indeed the rest of the world. The itinerary below is designed for early spring and summer, when the mild temperatures allow for extensive exploration in the area:

Experience: 4 days in the Tasiilaq area during the spring

Day 1 Arrive in Kulusuk

- Physical Adventure: ■ Short hiking from airport to the settlement
- Cultural Adventure: ■ Traditional drumdancing ■ Dinner and evening with locals
- Nature Adventure: ■ Fjordtour by boat ■ Wildlife

Day 2 Sermiligaag

- Physical Adventure: ■ Boat trip to Sermiligaag
- Cultural Adventure: ■ Stay with local hunting family ■ Præsentation of traditonal costume
- Nature Adventure: ■ Attending hunting with the local hunter

Day 3 Tasiillaq and Kuummiut

- Physical Adventure: ■ Randonne skiing ■ Ice/deep sea fishing for sharks and wolffish
- Cultural Adventure: ■ Dogsled driving license
"Where you as a tourist on a traditional dog sled trip are inactive, just sitting on the sled enjoying the nature, we would like to you to be part of handling and driving the sled. You will be introduced to the historical background, theory and all the working procedures of dog sledding. This training will end with a test in a marked area, and a driving licence will be issued."
- Nature Adventure: ■ Whalewatching ■ Deep sea fishing ■ Iceberg cruise
Mittivakkat Glacier by helicopter This sightseeing flight takes us up over Ammassalik Island with views across mountains, glaciers and fjords and lands. 1000 metres altitude on Mitivagkat Glaciers. 25 min stop to take photos and enjoy the silence, before the return flight.



South Greenland the land of contrasts, known for its flowering plains and fertile valleys, ice-filled fjords, numerous glaciers and mineral-rich mountain landscapes. The region has a well-developed farming industry with extensive grazing pastures for sheep and horses and some of the best-preserved Norse ruins.

Experience: 4 days in South Greenland during the summer

Day 1 Qassiarsuk overnight in Tasiusaq

- Physical Adventure: ■ Hiking from Qassiarsuk to Tasiusaq ■ Horseback riding
- Cultural Adventure: ■ Reconstructions from Norse ■ Local food tasting
- Nature Adventure: ■ Agricultural visit: sheepfarming ■ Angling

Day 2 Tasiusaq and Ilua

- Physical Adventure: ■ Hiking from Tasiusaq to Viewpoint Kayaking
- Cultural Adventure: ■ Folkdance and choir
- Nature Adventure: ■ Angling from shore ■ Icebergs and glacier

Day 3 Narsarsuaq and Qooroq

- Physical Adventure: ■ Hiking to Indland- ice in Narsarsuaq Boattouring to Qooroq
- Cultural Adventure: ■ Kaffemik
- Nature Adventure: ■ Fjordsystem ■ Iceberg

Day 4 Igaliko

- Physical Adventure: ■ Hiking to Igaliko ■ Hiking to Ilimmaasaq
- Cultural Adventure: ■ Nunatourism ■ Norse ruins
- Nature Adventure: ■ Life in a Settlement ■ Mountainering



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