Global Report on Adventure Tourism

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CONTENTS

Foreword by Taleb Rifai, UNWTO Secretary General 6

Introduction by Yolanda Perdomo 9

Chapter 1
Introduction to Adventure Tourism 10

Chapter 2
Global Trends in Adventure Tourism 20

Chapter 3
The Current Structure of the Adventure Tourism 28

Chapter 4
The Potential Benefits of Adventure Tourism to Local Economies, Communities and the Environment 34

Chapter 5
Creating the Right Environment For Adventure Tourism 46

Chapter 6
Adventure Tourism Operational Standards and Certifications 60

Chapter 7
Managing Risk in Adventure Tourism 66

Chapter 8
Sector Challenges, Opportunities and Initiatives 74

Summary from ATTA President, Shannon Stowell 82



Official Messages



Foreword, Taleb Rifai, UNWTO Secretary General

For many of the world´s billions of tourists - those seeking to roam further afield in search of unique experiences - adventure travel has become a cornerstone of the tourism experience. Indeed, as we shift towards a more globalized world, consumers are increasingly seeking authentic experiences and adventure tourism is no doubt one of the segments in high demand.

For travellers, adventure tourism means an experience-based holiday; it means added value as they learn and interact with local populations and connect with their core values.

For companies and destinations, adventure travel attracts visitors outside of peak season, highlights the natural and cultural values of a destination, thereby promoting its preservation, helps differentiate destinations against the competition, and creates resilient and committed travellers. These are just some of the reasons why it is fundamental for destinations to understand and work with adventure travel professionals.

Finally, from a global perspective, adventure tourism incorporates and promotes the values of the tourism that we want – a tourism that respects cultural and natural assets and protects the most vulnerable.

Indeed, the expansion of adventure tourism creates immense opportunities for development, particularly in remote communities where adventure travel fuels the local economy, as well as generates income and employment.

Yet the growth of this segment also brings about the critical challenge of sustainable development, calling for careful and responsible tourism management. Against this backdrop, we trust that The Global Report on Adventure Tourism will make an important contribution to a better understanding of the value of this segment as well as a more sustainable tourism sector.

This Report, carried out by the UNWTO Affiliate Members Programme, was only possible due to the excellent contribution of our Affiliate Members who shared with us their strategies, priorities, and future outlook. We thank them sincerely for their contribution and engagement in this project.



UNWTO

1 BILLION TOURISTS: BILLION OPPORTUNITIES

Over one billion international tourists travelled the world in 2013, supporting jobs, generating income and boosting development.

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Introduction, Yolanda Perdomo,
Director of the UNWTO Affiliate Members Programme

Adventure Tourism: Collaboration for a Competitive Advantage

Adventure Tourism has grown exponentially worldwide over the past years with tourists visiting destinations previously undiscovered. This allows for new destinations to market themselves as truly unique, appealing to those travellers looking for rare, incomparable experiences.

Against this backdrop, The Global Report on Adventure Travel offers a thorough insightful analysis of the current and future adventure travel sector, providing global trends and structural knowledge on a significant, growing market, which is rapidly expanding, particularly in these new destinations.

The Report highlights the importance of public-private sector collaboration initiatives within the adventure tourism sector. In a sector that is not only innovative, it is resilient in reaping the benefits that adventure tourism can bring to an economy, it is necessary to put in place conditions that make the country easy to visit as well as attractive to develop.

Furthermore, this Report takes a closer look at the links between the proper management of adventure travel and a sustainable, ethical tourism which contributes effectively to community development.

Its relevance lies in its examples of best practices, challenges and future opportunities to benefit all stakeholders.

Long-term competitiveness in tourism calls for meaningful and appropriate management approaches where a multi-stakeholder partnership is an important element of promoting tourism.

Inclusively, this piece of research provides further insight into the complexities of the adventure travel sector and sheds light on the adventure travel market as a significant, valuable, growing niche within the tremendous potential that is tourism.I would like to thank all UNWTO Affiliate Members, Cape Town Tourism, MAPFRE, the Mexico Travel Channel, Thomas Cooper, Tourism Kwazulu-Natal and WYSE Travel Confederation for their engaging and insightful commentaries. I would also like to thank Affiliate Member, the Adventure Travel Trade Association for their expertise, support and contribution in this initiative.

As always in the Affiliate Members Programme, our research and collaboration efforts in Adventure Travel won´t cease here. We look forward to sharing new developments and initiatives in Adventure Travel.



1 Introduction to Adventure Tourism

Tourism is one of the most rapidly growing sectors in the world, and adventure tourism is one of its fastest growing categories. Increasingly, countries in all stages of economic development are prioritizing adventure tourism for market growth, because they recognize its ecological, cultural, and economic value.

To date no definition of adventure tourism exists in UNWTO literature, however the Adventure Travel Trade Association (ATTA) defines adventure tourism as a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion. While the definition of adventure tourism only requires two of these components, trips incorporating all three tend to afford tourists the fullest adventure travel experience – for example, a trip to Peru that involved trekking (physical activity) through the Machu Picchu trail (natural environment) and genuine interaction with local residents and/or indigenous peoples (cultural immersion).

Adventure tourism can be domestic or international, and like all travel, it must include an overnight stay, but not last longer than one year.

Adventure Tourism

Is resilient: Adventure tourists are passionate and risk-taking. The AdventurePulse: USA Adventure Traveler Profiles indicates interest in destinations that have previously suffered significant commercial tourism setbacks due to natural and political events, such as Haiti, Rwanda, and Japan.[1] The Adventure Travel Trade Association reports that adventure tourism operators routinely create and offer itineraries in places such as Colombia, North Korea, Iran, Rwanda, and other destinations recovering from environmental and political stress, making these destinations accessible to travelers seeking off-the-beaten path and authentic travel experiences.

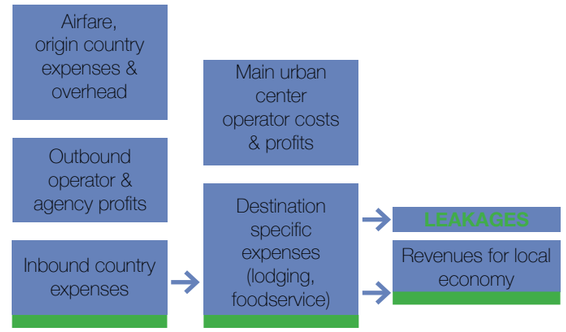
Attracts high value customers: Adventure tourists are willing to pay a premium for exciting and authentic experiences. Adventure operators have reported an average of USD 3,000 spent person, with an average trip length of eight days.[2] Trip costs vary based on length, luxury and activity levels, destinations, and distance from a traveler's starting point to the trip destination.

Supports local economies: Direct income from tourism is the amount of tourist expenditure that remains locally after taxes, profits, and wages are paid outside the area and after imports are purchased; these subtracted amounts are referred to as "leakage."

The United Nations Environment Programme (UNEP) cites that in most all-inclusive mass tourism package tours, about 80% of travelers' expenditures go to the airlines, hotels, and other international companies (who often have their headquarters in the travelers' home countries), and not to local businesses or workers. Of each USD 100 spent on a vacation tour by a tourist from a developed country, only around USD 5 actually stays in a developing destination's economy.[3] UNEP cites several studies that approximately tourism leakage to be up to 40% in India, 70% in Thailand, and 80% in Caribbean countries due to factors such as foreign-owned operators, airlines, hotels, and imported food and products.

In ATTA's Industry Snapshot 2014,[4] the adventure tour operators polled estimated that 65.6% of the total trip cost from an adventure package remains in the destination(s) visited.[5] Of each USD 100 spent on a vacation tour by a tourist from a developed country, only around USD 5 actually stays in a developing-country destination's economy. The figure below shows how the leakage happens.

Encourages sustainable practices: Adventure tourism practitioners and policymakers adhere to sustainable environmental practices. This is because they know that without pristine natural environments and meaningful cultural experiences, their destination would lose its competitiveness, and tourists would go somewhere else.



Source: UNEP (n.d.)

Types of Adventure Tourism

There are two main categories of adventure activities, hard adventure or soft adventure, and vigorous debate often surrounds which activities belong in each category. The easiest way to identify an adventure trip as hard or soft adventure is by its primary activity.

Both hard and soft adventures are highly lucrative segments of the adventure tourism sector. The cost of just the permit to summit Mt. Everest, a hard adventure activity, is estimated to be USD 11,000 per person for 2015.[7] When all of the other factors are added in, such as training, gear, airfare, tour guides, etc., the average total cost to summit Mt. Everest will be about USD 48,000 per person.[8] Commercial adventure travel tour operators offering soft adventure activities charged an average of USD 308 per day in 2012. With an average trip length of 8.8 days, the average total cost of a soft adventure trip was USD 2,710 per person, not including flights.[9]In addition to hard or soft adventure activities, there are also different types of adventure tourists. For example, adventure enthusiasts, such as avid kayakers, cyclists, or bird watchers, become progressively more skilled at a specific outdoor or athletic activity. These enthusiasts are described as passionate about a certain sport or activity, tending to pursue the same activity trip after trip, seeking new and exciting destinations in the process.[10]

Although enthusiasts' spending is on par with other types of adventure travelers, their more frequent international trips typically last an average of one extra day. They spend more money on equipment and gear, because they value brands that fit their highly specialized needs, and they seek out locations that are difficult to access or are upcoming but not yet popular.On the other hand, extreme adventurers, such as base jumpers and those who cross the Greenland Ice Cap or run 100 km races, are not as much tourists as independent travelers and thrill-seekers. Extreme adventurers spend less money, because they have their own equipment, may not seek commercial support to practice the activity, seek out locations that are difficult to access, and often camp or provide their own transport.

Extreme adventurers constitute a remarkably small segment of the sector. Thus, although they can have public relations and marketing value for a destination or company, extreme adventurers do not typcially require attention from tourism development policymakers.

Regardless of how tourism professionals organize or categorize adventure travel, adventure will always be a subjective term for travellers themselves, because it is related to one's individual experience. Adventure to one traveler may seem mundane to another. Adventure tourists push their own cultural, physical, and geographic comfort limits, and those limits differ for each person.

The table below indicates activities and their adventure classification, according to the ATTA:[6]

ACTIVITY	TYPE
Archeological expedition	Soft
Attending local festival/fairs	Other
Backpacking	Soft
Birdwatching	Soft
Camping	Soft
Canoening	Soft
Caving	Hard
Climbing (mountain/rock/ice)	Hard
Cruise	Other
Cultural activities	Other
Eco-tourism	Soft
Educational programs	Soft
Environmentally sustainable activities	Soft
Fishing/fly-fishing	Soft
Getting to know the locals	Other
Hiking	Soft
Horseback riding	Soft
Hunting	Soft
Kayaking/sea/whitewater	Soft
Learning a new languaje	Other
Orienteering	Soft
Rafting	Soft
Research expeditions	Soft
Safaris	Soft
Sailing	Soft
Scuba Diving	Soft
Snorkeling	Soft
Skiing/snowboarding	Soft
Surfing	Soft
Trekking	Hard
Walking tours	Other
Visiting friends/family	Other
Visiting historical sites	Other
Volunteer Tourism	Soft

Source: ATTA (2013)



Brief History of Adventure Tourism

Humans have been engaging in adventurous travel for hundreds of years via exploration by the likes of Marco Polo, Captain James Cook, and Sir Ernest Shackleton, who had primarily scientific, geographic, or colonial motives. However, commercial adventure travel is a relatively new phenomenon, in which travelers hire a professional guide to provide a range of technical support and equipment, as well as culture and nature interpretation.

In the mid-1800s, adventurers began to push the limits of mountain climbing and river rafting, with the first ascent of the Matterhorn in 1865 and descent of the Colorado River in 1869. Shortly thereafter, two key institutions were formed. The National Geographic Society was formed in 1888 to "increase and diffuse geographic knowledge"[11] and the Explorers Club was formed in 1904 to "promote the scientific exploration of land, sea, air, and space".[12] Both institutions continue to support adventures and expeditions today.

In the mid-1950s, many first ascents and descents attracted global attention and inspired many people to attempt their own expeditions. Maurice Herzog's ascent of Annapurna in 1950, Sir Edmund Hillary and Tenzig Norgay's ascent of Mount Everest, and others' successes were hailed in the media around the world.

The transformation from information exploring to commercial guiding in the United States can be traced back to the 1920s when Don Hatch and his brothers decided to build wooden rafts to explore the Green River in what is today known as Dinosaur National Monument. Hatch eventually formed a company, Hatch River Explorations, which was the first business to receive a national park concessioner permit for rafting in 1953.

Other seminal adventure companies formed during this time, such as Ker & Downey in 1946, Abercrombie & Kent in 1962, Micato Safaris in 1966 (luxury safaris), and OARS in 1969 (river rafting). OARS led several first river descents, including Bio Bio in Chile and the Zambezi in Zimbabwe, blending exploration with commercial adventure.

Today, Adventure Tourism is a vibrant, dynamic, and fast-changing sector with new variants routinely added into the possible experiences. Individual companies are often small, owner-operated businesses led by entrepreneurs with a drive to share their favorite places and passions with others. Adventure offers opportunities to entrepreneurs in rural areas around the world to do the same. 69% of overall international travel departures leave from Europe, North America, and South America, and together these three regions account for over USD 263 billion in adventure travel expenditures.[13]

How is Adventure Tourism Different from Other Types of Tourism?

Both public and private sector stakeholders understand that adventure tourism is inextricably linked with human and nature capital. Protection and promotion of these resources is important,[14] and the continued development of this sector must seek to protect these valuable assets.

Because of its documented benefits to the environment, local people, and local economies, governments are increasingly identifying adventure tourism as a tool for sustainable and responsible economic growth that delivers benefits to every level of society. This topic is discussed in detail in chapter 4.

In many destinations, adventure tourism has been developed without extensive new infrastructure. It can also deliver benefits, from creating local jobs rapidly to relying on traditional knowledge of local people for guiding and interpretation.

Adventure Tourism vs. Mass Tourism

Adventure tourism can also be defined by what it is not – mass tourism. Mass tourism includes large-ship leisure cruises, "sun and sand" package vacations, bus tours around city centers that stop only at iconic attractions, theme parks such as Disneyland, or casino resorts such as those found in Las Vegas, Nevada.

It relies on economies of scale, the replication of standardized products, and the reduction of costs. Mass tourism includes little cultural immersion or education and often takes place in warm climates where tourists enjoy the three "S"s – sun, sand and sea. Mass tourism can also be classified by the sheer number of people in one destination. For example, the Mediterranean, a well-known mass tourism destination, receives an average of 230 million tourists per year.[15]

In contrast, the Galapagos, a popular adventure destination, received just 180,831 visitors in 2012.[16]

Adventure Tourism vs. Other Types of Responsible Tourism

The differences between adventure tourism and mass tourism are clear, but the differences between adventure tourism and other types of tourism can be more nuanced. Below are definitions of other popular types of tourism, which share characteristics with adventure tourism, such as minimizing negative impacts and increasing local benefits:

Sustainable Tourism is tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environmentand host communities.[17]

Conservation Tourism, as defined by tourism researcher Prof. Ralf Buckley, is "commercial tourism which makes a net positive contribution to the continuing survival of threatened plant or animal species."[18] Buckley notes that while there are a variety of ways for tourism to add positive contributions to conservation, the key issue is to calculate net outcomes after subtracting the negative impacts. A broader definition of conservation tourism is tourism that delivers experiences that support the protection of natural and cultural resources through:

- Impact: creating financial incentives for conservation;
- Influence: engaging travelers, communities, and other stakeholders on the value of protecting the integrity of nature and culture; and
- Investment: driving financial support from the travel sector and the travelers for conservation.

Responsible Tourism is tourism "that creates better places for people to live in, and better places to visit".[19] Responsible tourism can take place in any environment, and many cities have adopted responsible tourism policies. Responsible tourism is clearly defined in the Cape Town Declaration of 2002.[20]

Pro-Poor Tourism is tourism that provides net benefits to poor people as defined by the Pro-Poor Tourism Partnership.[21]

Community Based Tourism (CBT) is defined by The Mountain Institute and Regional Community Forestry Training Center as a visitor-host interaction that has meaningful participation by both, and generates economic and conservation benefits for local communities and environments.[22]

Volunteer Tourism is "the practice of individuals going on a working holiday, volunteering their labour for worthy causes."[23] Volunteer tourism includes work that is not remunerated, and is sometimes also called "Voluntourism."

SAVE Tourism encompasses Scientific, Academic, Volunteer, and Educational Tourism, as defined by the SAVE Travel Alliance.[24] SAVE tourism may include remunerated work.

Ecotourism is defined by The International Ecotourism Society as "purposeful travel to natural areas to understand the culture and natural history of the environment, taking care not to alter the integrity of the ecosystem, while producing economic opportunities that make the conservation of natural resources beneficial to local people."[25]

GeoTourism is defined as tourism that sustains or enhances the geographical character of a place – its environment, culture, aesthetics, heritage, and the well-being of its residents.[26]

It is important to note that none of these types of tourism, including adventure tourism, are mutually exclusive and definitions can be overlapping. These "brands" of tourism have a specific, or even niche market value, because they resonate with a particular segment of consumers.

Who is the Adventure Tourist?

According to the Adventure Tourism Market Study 2013, 57% of adventure travelers were male and 43% were female. However, the 2014 annual global trade study, which is specific to tour operators, reflected that 53% of their travelers were female and 47% of them male.[26] The 2013 study further revealed that 37% of adventure travelers have at least a four-year degree, 11% have a professional degree, and the average individual income of an adventure traveler is USD 46,800 per year.[28]

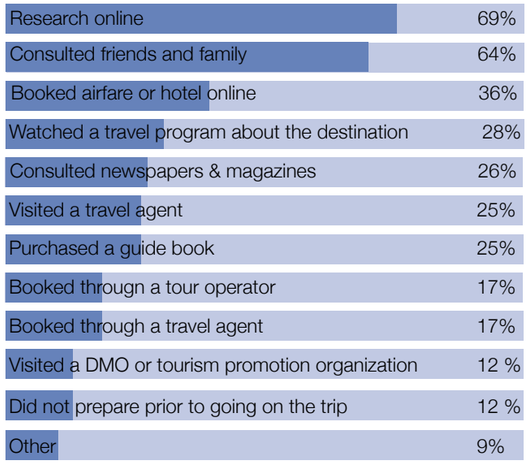
Adventure travelers continue to value international travel, with 71% of all adventure travelers (79% of hard adventure travelers) having a valid passport. A small portion of adventure travelers travel alone, 21% travel with friends, 37% travel with a spouse or partner, and 30% travel with their families, including children.

Adventure travelers rank areas of natural beauty as the most important factor in choosing their most recent destination, followed by the activities available and the climate. Non-adventure travelers ranked having friends and family at the destination as the most important factor, followed by areas of natural beauty and climate.

The reasons people engage in adventure travel are diverse, but the most often cited motivations are relaxation, exploring new places, time with family, and learning about different cultures.

When compared with non-adventure travelers, adventure travelers were more likely to use professional services, such as guides, tour operators and boutique service providers. In examining only adventure travelers, however, it is found that 56% of still handle everything on their own.

How did you prepare for your last trip?
(Adventure Travelers)



Source: ATTA (2013)

Types of Adventure Travel Organizations

Destinations that have prioritized adventure tourism frequently create regional associations that regulate the quality and safety of adventure tourism offered in their area. Many of these associations provide certification for members who comply with sustainability or safety criteria.

Some examples from around the world:

Aventure Écotourisme Québec is an association of stakeholders in the Canadian province of Quebec. Their mission is to "protect, represent and promote the interests of Québec's professional adventure tourism and ecotourism producers in order to develop a tourism appeal of high quality in the sectors of adventure tourism and ecotourism".[29] It receives public and private funding.

The Brazilian Adventure and Ecotourism Association (ABETA)[30] certifies its members and represents the interests of the adventure and ecotourism sectors in Brazil. ABETA works to use adventure tourism as a tool for sustainable community and destination development. It receives public and private funding.

Tour and Safari Association (TASA)[31] is a private sector body that acts on behalf of its members to encourage development and ensure standards and reliability in the Namibian tourism sector. TASA is funded by membership dues from private sector members.

The Mexican Association for Adventure Travel and Ecotourism (AMTAVE) was created in 1994 to help represent, strengthen and consolidate operators, guides, consultants and other service providers within this sector in Mexico. AMTAVE is funded through membership dues from private sector members and occasionally receives government support for specific projects.

International

Re-launched in 2004, **the ATTA** is an international organization with offices and members around the world. It brings together various adventure tourism sector stakeholders, including destinations, operators, agents, outdoor equipment and apparel brands, and NGOs.

ATTA's mission is to inspire, connect, and empower a global travel community to deliver experiences that protect natural and cultural capital and create shared economic value.[32] As the leading industry voice on adventure tourism, ATTA strives to make sustainability and safety a norm in the adventure industry. ATTA offers industry education through its AdventureEDU[33] courses and extensive, ongoing development of original industry research.

Private Sector

There are also groups of adventure operators who have formed alliances or consortiums to promote adventure travel products.

Some examples from around the world:

Founded in 2000, the **Adventure Collection** refers to itself as an alliance of best-in-class adventure travel companies.[34] Its nine members are pioneers of adventure travel, founded between 1966 and 1992. They adhere to five strategic principles, which are all focused on minimizing negative impact in destinations.

PEAK Adventure Travel[35] was founded in 2011 and is a consortium of 12 adventure travel brands that are committed to delivering excellent experiences to travelers in a responsible way. PEAK has two main shareholders, Intrepid and TUI Travel PLC. PEAK can be seen as the initiative of a mass travel brand (TUI) to enter the niche adventure market.

The Future of Adventure Tourism

Adventure tourism is one of the fastest growing sectors of the tourism sector, attracting high value customers, supporting local economies, and encouraging sustainable practices. Thus, the continued growth of this sector creates net positive impacts not only for tourism, but also for destination economies, their people, and their environment. Adventure tourism trends will be examined in the next chapter.

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#traveldonttraffic

YOUR ACTIONS COUNT

www.beresponsibletraveller.org

UNWTO

UNODC
United Nations Office on Drugs and Crime

UNESCO

HUMAN TRAFFICKING

Human trafficking is a heinous crime driven by demand. When visiting a foreign country don't fall into the trap of promoting human trafficking. If you believe that someone is being forced to work against their own free will, are being abused or if you see something that doesn't look right in a bar, a hotel or a restaurant, report it.

Your actions can make a difference in preventing sexual exploitation and forced labour. Children are particularly vulnerable; make sure you "Don't let child abuse travel".

WILDLIFE AND FAUNA

The illegal killing of protected wild animals and the illegal exploitation of plants and forests are crimes that have a devastating impact on the environment, local livelihoods and biodiversity. Think twice before buying or consuming something made out of an exotic tree, plant or wild animal as you may be contributing to their extinction or exploitation. Before travelling, familiarize yourself with local exotic dishes which may contain illegal products. Don't forget that many countries, perhaps including your own, have penalties for those caught trafficking protected wild animals, exotic plants and endangered wood products.

CULTURAL ARTEFACTS

Cultural objects such as traditional carvings, pottery and antiques make attractive gifts, but be sure you are not unwittingly buying stolen or illegally excavated or looted artefacts. Everyday, countless sites and monuments across the globe are pillaged, robbing people of their past. Specialized organized crime networks move and sell these goods. The impact that this can have is irreversible with countries and citizens being denied their heritage and cultural identities.

Make sure that the souvenirs you take home have a documented and legal history, aren't stolen and can be exported. Ask about the origin of what you are buying and always keep in mind your own country's rich history and heritage and how you would feel if this was taken away from you.

ILLICIT DRUGS

Drug trafficking is simply not worth the risk: it is illegal and if you're caught, you will end up in jail with severe consequences.

Sometimes gangs use travellers as 'plants' in order to tip off the authorities and provide a diversion to get through far larger shipments. Also don't carry packages or items for anyone else as ignorance is no defence against the law.

COUNTERFEIT GOODS



They might seem like a bargain but most counterfeit goods are neither ethically produced and may contribute to forced or poor labour conditions and high environmental impact. You might think that you are helping a small market or a street seller but behind these there are often criminal interests even coercing or exploiting sellers. More importantly, your money may end up funding organized crime groups that have diversified their money laundering and drugs businesses with counterfeit goods. Avoid putting your money in the hands of organized crime and purchase ethically while abroad.



2 Global Trends in Adventure Tourism

This section examines key trends in the growing segment of adventure tourism. Demand is on the rise as global levels of disposable income increase and consumer interest in customized and transformative (i.e. meaningful, perspective-changing) experiences grows. Thus, more people can afford to take a holiday, with a greater number opting for adventurous activities. However, changing consumer expectations, increased technology and connectivity, and changing demographics in the major source markets for adventure tourism have an impact the nature of the demand. Growth on the supply side, meaning the creation of businesses to meet and/or create demand, also exists. The barrier to entry in adventure tourism is low, especially in emerging and developing markets, and the trend is for established tourism companies in developed nations to incorporate adventure offerings into their product portfolios.

Growth in Demand for Adventure Tourism

In 2012, global tourism arrivals passed the one billion mark. As one of the fastest growing segments, adventure tourism arrivals naturally increased as well. In 2010, the first global adventure tourism market sizing study was conducted by the ATTA, The George Washington University (GWU) and Xola Consulting.[1] It found that the global value of adventure tourism was USD 89 billion. The study was repeated in 2013 and found that 42% of travelers departed on adventure trips, making the sector worth USD 263 billion—an increase of 195% in two years.[2] This remarkable growth was attributed to:

- An increase in international departures;
- An increase of travelers going on adventure trips;
- An increase in average spending.

Emerging Markets

As mentioned in chapter 1, 69% of overall international departures originate in Europe, North America, or South America; the same is true of adventure tourism. Between 2009 and 2010, South America's adventure hard travel population grew from 1.4% of all departures to 8% of all departures. The same time period saw a 5 % increase in the soft adventure population.[3] In fact, the UNWTO Tourism Highlights 2014 notes that "with rising levels of disposable income, many emerging economies have shown fast growth over recent years, especially in markets in Asia, Central and Eastern Europe, the Middle East and Africa."[4] Additionally, the report notes that Chinese travelers are the top spenders while on vacation. Developed economies will benefit from the favorable exchange rate for Russian and Chinese travelers via inbound tourism. Meanwhile, countries like the United Kingdom will experience healthier levels of domestic tourism due to the reduced purchasing power of their local currency. Widespread increases of projected arrivals from Russian, Chinese, and Latin American travelers will be changing the shape of leisure traveler demographics in the years to come.

> "With rising levels of disposable income, many emerging economies have shown fast growth over recent years, especially in markets in Asia, Central and Eastern Europe, the Middle East and Africa."

Disintermediation

In the adventure tourism sector, the trend has been towards disintermediation, meaning the removal of the middle-man—a tour operator or travel agent—who has traditionally connected the consumer in the source market to the provider or ground handler in the destination market. As the traveler can access information and trusted consumer reviews online, he is more likely to go straight to the provider.

The AdventurePulse: USA Adventure Traveler Profiles, a study of the United States of America adventure travel market, indicates 71% of the United States of America adventure travelers are making arrangements solely on their own.[5]

The trend of disintermediation is more prominent in mature adventure markets, but will likely cause changes in developing countries' supply chain in the coming decades. See chapter 3 for a more detailed discussion of supply chain and the impact of technology on the sector.

Growth in Supply of Adventure Tourism

While emerging economies are slowly outpacing developed economies for departures and spending, the UNWTO predicts that by 2015, arrivals in emerging economies will exceed those in advanced economies.[6] By 2030, 57% of arrivals will be in emerging economies. To accommodate this surge in demand, supply is expected to increase.The makeup of the sector is predominantly small owner-operated businesses. In fact, in 2013, the average size of ATTA's member companies was 44 employees.[7]

Training

Destinations around the world are focusing on adventure as a key niche segment, because of its economic and sustainability benefits. They are working to provide professional education for adventure travel companies to support local people in participating in the tourism economy.See chapter 6 for more information on adventure travel training programs around the world.

Destinations Incorporating Adventure into Brand Identity

Increasingly, destinations are recognizing that travelers are seeking more authentic products. A study by Visit Britain in 2013 noted, "The UK can also respond to increasing desire for more authentic and individual travel experiences by working with partner organizations in the business and cultural sectors to promote the UK's unique offer."[8] Around the world, destinations gear their taglines and messaging to appeal to adventure travelers:

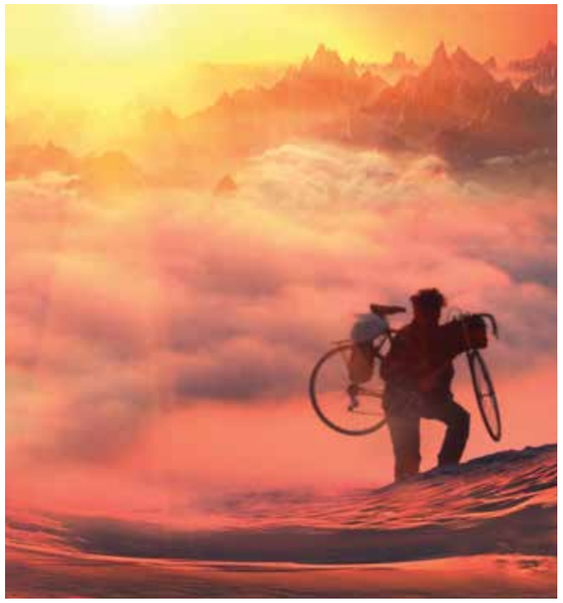
- **Norway**[9] capitalizes on its towering fjords and glaciers with the slogan "Powered by Nature"
- **Greenland**[10] emphasizes its ruggedness with "Greenland, Be a Pioneer"
- **New Zealand**[11] touts its culture, mountains, wildlife and hiking with "100% Pure New Zealand"; and,
- **Slovenia**[12] beckons with hiking, mountains and caves in its "I Feel Slovenia" campaign

The trend is far-reaching. In 2011, 79% of tourism boards reported that the adventure tourism private sector had begun to emerge and/or grow in their destination.[13]

Companies with Adventure as a Primary Brand Identity

Membership of private sector adventure associations is steadily increasing, as a growing number of travel businesses recognize that the products they already offer can be marketed as adventure products, or as they begin to diversify and offer adventure options to meet growing market demand.

Established adventure companies in North America and Europe are increasingly developing new products, opening new destinations, and expanding their commitments to sustainability in order to attract new clients, who are more frequently demanding these experiences. Peak Adventure[14] is discussed in chapter 1, and it was created by the tourism giant TUI Travel[15] in response to a need to provide desirable products to a more "experienced and sophisticated traveler [...] seeking a more engaging and adventurous holiday than before."[16] Similarly, Carlson Wagonlit Travel[17] launched Journeys of Discovery[18] to provide more adventurous itineraries without diluting their current brand, which is known for its Business Travel Management.



Increased Connectivity

Travelers are increasingly more connected, and adventure travelers also rarely leave without a phone or tablet to capture their holiday moment or stay in touch with loved ones. This trend is breaking down geographic boundaries and allowing travelers to venture further afield than ever before. The Internet helps bring market access to adventure tourism businesses located in the most remote corners of the world. From small guiding outfits to big hotels, tourism businesses need a reliable internet connection, a website, and other online platforms to successfully market and effectively communicate with clients. See chapter 3 for a more detailed discussion of technology's impact on Adventure Tourism.

Understanding the Spectrum of Adventure Activities

Adventure travelers are early adopters by nature, meaning they are generally more willing to try new destinations, activities, and travel products. Popular activities change rapidly, and it seems there is a new twist on an existing sport every year. This section examines four adventure activities at different stages of maturity.

Skiing: A Mature Activity

Skiing and snowboarding are popular winter pastimes in many parts of the world, and in countries such as Norway, Austria, and Switzerland, up to 25% of the population are active skiers.[19] 44% of skiers visit the Alps, and Eastern Europe is building resorts at an unprecedented pace.[20] There is even a resort in Lesotho: Afri-Ski.[21] In Europe, skiers tend to cross borders, whereas in North America, skiers tend to stay close to home. The ski market is a perfect example of "adventure by day, luxury by night", offerings, with upscale accommodation and Michelin restaurants available at numerous ski resorts. Ski holidays span the adventure spectrum, from heli-skiing in remote parks of Pakistan to package holidays sold by travel agents across Europe and North America. Skiing can be considered a mature activity, because entire resorts cater to the sports practice around the world, and it is available to most adventure travelers. Adventure travel activities can be, and often are, widely accessible and undertaken by mass travelers and/or in mass travel environments.

Cycling: A Growth Activity

Cycling tourism is on the rise across the world, with an increasing number of adventure tourists embarking on both road and mountain biking tours, participating in cycling events such as Ride the Rockies, or spectating events like the Tour de France. According to the European Cyclists Federation,[22] cycling brings in over EUR 44 billion annually to the continent, resulting from 2.3 billion cycling trips with a tourism value. There is no region-wide data available for other continents, but positive growth has been charted by several U.S. states. Wisconsin, for example, found that bike tourism generated USD 924 million from in-state and out-of-state visitors.[23]In 2010, the University of Wisconsin-Madison released The Economic Impact of Bicycling in Wisconsin, a study that found:

- Bicycling created 13,000 jobs in Wisconsin that year;[24]
- 48% of residents of the state of Wisconsin reported participation in recreational biking;[25] and,
- A 20% increase in biking could increase economic activity by USD 107 million and create 1,500 more jobs.[26]

According to Dr. Richard Weston of the University of Central Lancaster, "This study shows that cycle tourism is more sustainable environmentally, socially and economically; being less reliant on air travel. Cycle tourism disperses visitors to areas that traditionally do not attract tourism and supports employment in local economies."[27]

Cycling infrastructure provides an attraction to tourists and diversifies transportation options for locals, which is a major objective of many traffic logged cities. As a result, many destinations are investing in cycling infrastructure. In Quebec, La Route Verte stretches over 5,000 km across the province, including right through the city of Montreal.[28] The European continent is connected by EuroVelo, "a network of high-quality cycling routes," which is used by long-distance cycle tourists, as well as by local daily commuters.[29]

Backpacking/Trekking/ Hiking: A Growth Activity

Backpacking, trekking, and hiking are all forms of exploring destinations on foot, often on a budget. Like cycling, these types of adventure activities are on the rise. The Adventure Pulse: USA Adventure Traveler Profiles confirms that these are the most popular activities for the United States of America adventure travelers.[30] These tourists often stay in their destination longer, thus spending more money, albeit less per day. Their expenditures often penetrate deeply into local and regional economies, helping increase the spread of tourism benefits. The demand for this type of travel increases year after year, and while some destinations seek to attract these types of tourists, others prefer to focus on higher value clientele.

Australia actively courts backpackers and several Australian states have created "Backpacker Action Plans." For example, the State of Victoria's action plan states that "backpackers are less vulnerable to fluctuating economic conditions and are more likely to be resilient travellers in the wake of challenges such as the global financial crisis."[31]

Demand in key source markets is high. In North America, 18.1% of Americans[32] and 25.4% of Canadians have taken a day-long hike in the past two years,[33] and 4% of Americans and 7% of Canadians took overnight camping trips. Hosteling International has over 4 million members worldwide, and their members are predominantly backpackers.

Similar to skiing, the supply side of backpacking, trekking, and hiking spans the spectrum of adventure travel, from remote hikes in difficult to reach destinations, to well-trodden paths like the West Coast Trail or the Camino de Santiago, to trekking with the Gorillas in Rwanda. It is a low-impact segment that will continue to grow and can be lucrative if destinations position the offering correctly.

Surfing: An Underdeveloped Activity for Developing Nations

Liberia, El Salvador, and Indonesia are key examples of the many non-traditional tourism destinations that are leveraging their surfing assets. In destinations such as Northern Peru, intrepid surfers venture into remote locations and then share their findings with the surf community. Their explorations entice non-surfing tourists to explore the regions as well, opening up the area to broader adventure tourism.

While the number of surfers worldwide increased from 26 million to 35 million between 2001 and 2011, it is still regarded as a fringe adventure sport. [34]If surfing follows the trajectory of skiing, it will become available to a large number of tourists in the future, as destinations such as Indonesia may build surfing resorts that cater to the less adventurous.

Looking Towards the Future

UNWTO predicts that there will be 1.8 billion arrivals globally by 2030.[35] The Organization predicts that growth of international tourism arrivals in emerging economies will grow at double the pace of developed nations. Developed nations will see arrivals from emerging economies fueling their growth, but knowledge of adventure tourism options in these destinations is currently limited, so these need to invest in building their markets. However, the private sector may be reluctant to focus their efforts in these locations because of the longer-term challenges of maintaining a business in a developing country. Therefore, destinations need to tailor their approach to match the preferences of key target markets.



Sector Perspectives

World Youth Student and Educational (WYSE) Travel Confederation

WYSE TRAVEL CONFEDERATION

WYSE Travel Confederation is a global not-for-profit organization dedicated to developing opportunities for the youth, student, and educational travel industry. Providing international travel experiences to over 30 million young people annually, its global community of over 800 members spans more than 120 countries from adventure tour operators to youth hostels.

How important would you say adventure tourism is in the youth and student sector?

Adventure travel is clearly important to young people, a large proportion of whom travel to explore other cultures (91%). According to research from our New Horizons report,[35] they are also very likely to engage in cultural activities such as visiting historic sites (52%) or walking/hiking/trekking (49%), which fall under the definition of adventure tourism as set out in the current study.

How has the market share or value of adventure tourism changed in the past 30 years for this sector, and have these corresponded with trend changes?

We do not have this data available for such a long time period or by region, but the indications are that there has been considerable growth in all world regions as a result of the growth in youth travel, which now accounts for over 217 million international arrivals. In 2007, our research indicated that UK travelers made up 19% of the adventure market, followed by Germans at 12%, and that women are the most likely to choose this style of holiday (71%).

Do you see the adventure tourism market in your region merging with other markets (luxury travel, business travel, family travel, culinary travel, etc)?

There are indications of merging of youth market segments as more young people combine work, study, and/or holiday.

What are the typical spending characteristics of adventure tourists in your region? For example, in your view, do you see spending patterns of adventure travelers differing in any way from the spending patterns of package tourists?

The average youth adventure tourist spent around EUR 4,000 in 2013. This is around EUR 1,500 more than in other youth travel segments. The higher spend for adventure tourists corresponds with an increased average trip length of 118 days, compared to 58 days for youth travel as a whole.

What are the most popular destinations for student and youth travelers?

According to WYSE Travel Confederation's research, youth travelers' top ten destinations for adventure travel are:

1· United States of America
2· Canada
3· Australia
4· France
5· United Kingdom
6· New Zealand
7· Italy
8· Spain
9· Thailand
10· Argentina

What adventure activities have been the most popular in the last 5-10 years, and what activities are currently new or trending?

Cultural activities tend to be the most popular, followed by activities in nature. In terms of trends, walking/hiking/trekking activities have increased globally over the past few years—18.7% of respondents indicated that they participated in these activities in 2007, increasing to 48% in 2013.

Which activities appear to be declining in popularity?

We did not observe any decline in activities.

As a final point, it is important to highlight that our research shows that youth, student and educational travelers are now communicating more than ever during their travels, with almost 35% using social media daily to connect with their fellow travelers, plus friends and family at home. The availability of free WiFi within a destination is therefore essential to enabling communication between youth travellers and their peers.

To find out more about youth, student and educational travel trends visit www.wysetc.org

David Chapman, WYSE Travel Confederation's Director General

Sector Perspectives

Interview with Mexican Travel Channel and Alltournative

Does your organization specifically target adventure tourists in marketing or product development? If yes, when did this begin?

Alltournative started operating in 1999. The very first zip line in the Yucatan Peninsula was set in Pac-chen, the first Mayan village where we started operations.

How important would you say adventure tourism is in your region? On a scale of one to ten, how important is it in terms of comparison to other tourism niches (business, luxury, beach/sun, wedding, etc?) What is the most important tourism segment to your organization?

We place adventure tourism in our region at a 7. Other tourism niches still receive more promotion than adventure, as "beach and sun" is still the most important tourism segment for Mexico.

Could you comment on what you think the market share or value of adventure tourism is in the past 30 years for your organization's region?

We believe it's a growing segment; it might be 32% of total market share today.

How do you see this changing—has adventure market share changed in the past few years?

Yes, there are more adventure products being offered in destinations, and more people are willing to try these new products and itineraries.

How many adventure tourists do you receive annually, and how much do they spend?

We had 132,000 arrivals last year, and we estimate that will reach 140,000 for 2014. Our expeditions cost USD 129 per adult and USD 99 per child.

Are there any policies that support the growth of adventure tourism in your region?

There is a club product, led by the OVC (Visitors and Conventions Bureau in Cancun).

What are the most popular destinations in your region for adventure tourists?

The archaeological site of Coba, the jungle, and Mayan villages—where adventure activities can be done.

What adventure activities have been the most popular in the last 5-10 years?

Zip-lines mostly, as well as swimming in Cenotes.

What activities are new or trending upwards currently? Where are you expecting the most growth?

4x4 vehicles. Socially responsible tourism and fair-trade tourism.



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3 The current Structure of the Adventure Tourism sector

Tourism is a complex sector with many players contributing to the final consumer product. This chapter examines the structure of the adventure tourism sector, which includes the following:

- Supply chain;
- Marketing channels;
- Destination structure, meaning the governmental entities charged with regulating and promoting tourism;
- Technology, which has greatly impacted the way adventure tourism products are created, marketed, sold, and experienced.

To understand the structure of the adventure sector, it is important to understand how demand is created by the consumer. Demand refers to the amount of desire within the market to purchase adventure tourism holidays. People must be motivated to travel, and they must have access to information and resources that allow them to plan their trips and ultimately book them.

Adventure tourists typically go through six stages of travel:

Dreaming	"I'd like to take a holiday somewhere this year."
Consideration set	"I'd like to visit either the Caribbean or Europe."
Planning	"I've decided I'll visit Italy, now I need to book hotels and activities."
Booking	"I need to pay for my trip to Italy."
Experiencing	"Italy is amazing!"
Sharing (can occur before, during and/or after a trip)	"Look at this amazing trip I am going to take / am on / just got back from!"

Source: ATTA (2013)

Factors influencing the demand for adventure tourism include:

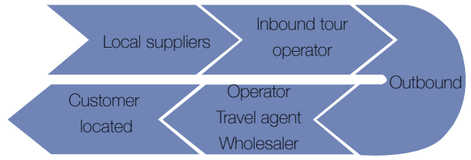
- The cost of an adventure tour;
- The cost of related products (e.g. airline tickets);
- The capacity or income of target markets;
- Marketing, which appeals to the preferences or motivations of travelers.

Businesses and destinations involved in adventure tourism need to understand and consider these factors if they are to successfully create demand for their offerings.

Supply Chain

A tourism supply chain is the system of people, products, activities, and materials that gets a product or service from its raw state through production and distribution to the consumer.As with any sector, volume discounts drive the mass price point, so major retailers primarily market select trips that sell in high volume. The supply chain for these mass tourism products is often very simple, comprising only transportation and accommodation elements.

The adventure tourism supply chain is more complex. Niche products often require specialized knowledge and operations. Adventure tourism's supply chain linkages go very deep, and this is one of the key reasons that adventure tourism delivers greater benefits at the local level. Supply chains vary from destination to destination. The makeup of the most involved adventure tourism supply chain is typically as follows:



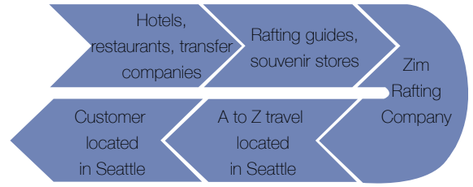
Source: ATTA (2013)

The adventure tourism supply chain does not always follow this traditional pattern. Parts of the chain might be minimized or overlooked, and the connection to those actually providing the product or service might be much more direct, depending on the scope or type of offering.The chain may be shortened depending on the product, the size of the local supplier companies, and the distance between the customer and the destination. For example, if a Danish customer is booking a skiing holiday in Austria, it is possible that he will book directly with the ski resort through their website rather than utilizing a travel agent.



Soure: ATTA (2013)

However, if a North American customer is booking a rafting holiday in Zimbabwe, they will likely contact the tour operator that they used for past international adventure trips, who will work with a ground operator in Zimbabwe, who will then book hotels and transport with local suppliers.



Source: ATTA (2013)

While the outbound operator is based in the source market, the inbound operator and local suppliers are in the destination. In developing markets, the majority of adventure tourism is delivered through a chain as outlined above, and the customer is only in contact with the outbound operator.

Outbound Operators

Outbound operators, such as retail travel agents or wholesalers, market to consumers. They are a one-stop shop for consumers who don't have the time, knowledge, or confidence to piece together an entire adventure itinerary. However, these agents and operators don't necessarily have the local knowledge themselves. They sell destinations around the world and rely on a network of inbound operators, who then compile itineraries on the ground in the destination.

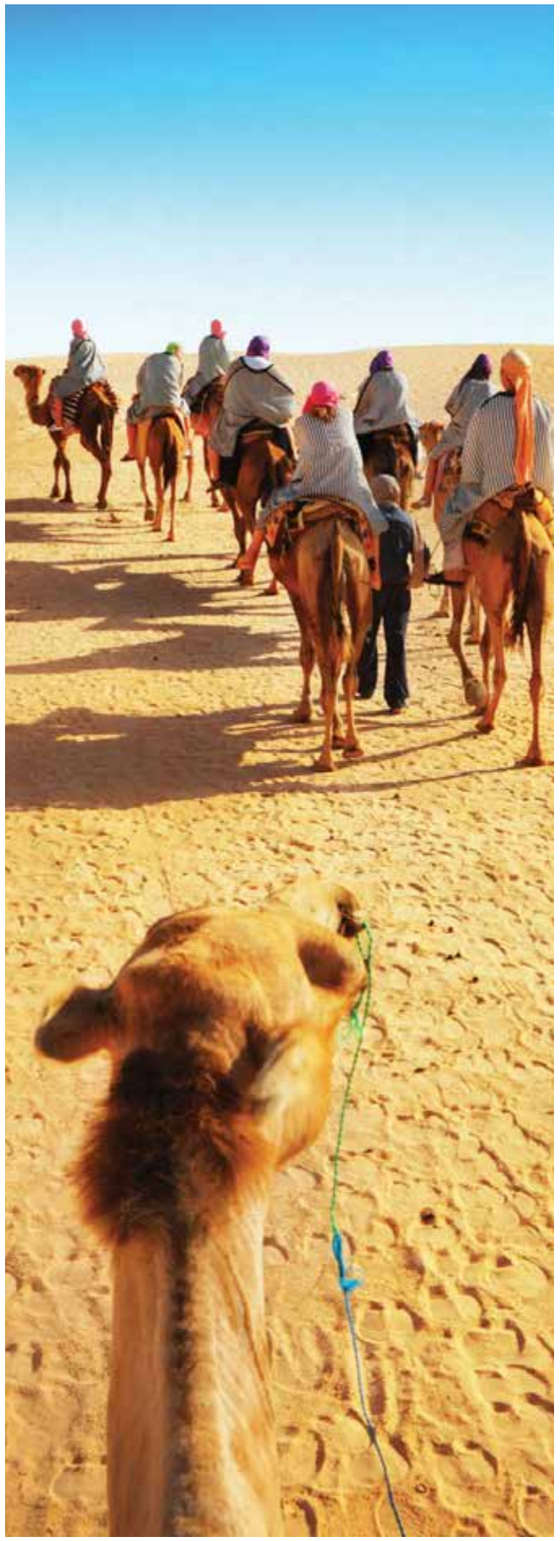
Outbound operators market to clients through online marketing, print collateral, consumer show attendance, and traditional advertising.

Inbound Operators

Inbound operators are based in the destination and develop itineraries that are sold by their outbound partners around the world. The inbound operator selects the accommodations, activities, and restaurants and coordinates transportation to put together a comprehensive itinerary that is offered to the outbound operator. The inbound operators often don't have the resources to recruit clients directly, since the cost of acquisition is high and can typically only result in one sale, whereas the outbound operator stands to benefit from repeat business. In turn, the inbound operators work with many local suppliers, from transport companies, to lodges, to craft providers to create an entire itinerary.Inbound operators market their services to outbound operators, predominantly through trade show attendance, association memberships, familiarization (FAM) trip invitations, digital communications, and outreach.

Local Suppliers

Local suppliers are based in the destination. They are hotels, restaurants, activity providers, souvenir stores, etc. They market their services to inbound operators through relationship building and local trade fair attendance. They are also accessed by independent travelers while in-country or increasingly directly booked via the Internet.



Marketing Channels

Adventure tourism is marketed to the consumer in different ways, either directly or indirectly. Efficient marketing is one of the keys to a profitable and sustainable business. As companies grow and establish stronger reputations, their marketing channels will change.

Direct marketing relies on communicating directly to clients, typically through direct mail, online marketing, websites, social media, and attendance at consumer shows.

As mentioned above, adventure products are typically marketed by intermediaries, who provide the access to market in the most cost-effective way (the trend of disintermediation, discussed in chapter 2, is a threat to outbound operators and impacts the makeup of the traditional supply chain). The products therefore need to be commissionable.

Destination Structures

Depending on the history of the destination, the level of development, and the types of products offered, the structure of the government organization that promotes and/or regulates tourism differs around the world.

In some countries, tourism is the responsibility of the Ministry of Trade, in others it's the Ministry of Environment, and still others have a dedicated Ministry of Tourism. The government entity is often responsible for destination development, regulation, ensuring sustainability, and quality control. In addition to the government structure, most countries have some sort of destination marketing entity that is responsible for the promotion of the destination. Most Destination Marketing Organizations (DMOs) are non-profit structures, and they often partner with the private sector to increase the impact of their activities.

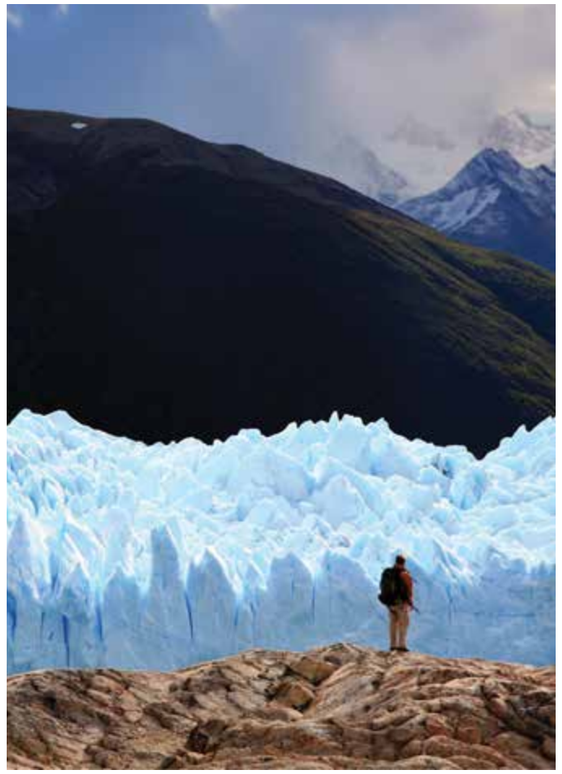
As a specialized agency of the United Nations in the field of tourism, UNWTO consistently encourages national governments around the world to recognise the importance of tourism in economic and social development.

This includes the setting up of properly resourced Ministries that are dedicated to tourism. See chapter 5 for a detailed discussion of the governmental attitudes, policies, and practices necessary to enable and encourage adventure tourism.

Private Sector Associations

In addition to the government entity regulating tourism, private sector associations are a critical part of the destination structure. Associations bring together stakeholders and provide a collective voice for the sector. The ATTA is currently the major global association dedicated to adventure tourism. There are also two other main types of associations within the sector: activity-based, such as the International Mountain Biking Association (IMBA) or the International Rafting Federation (IRF), and geographically-based, like the Brazilian Adventure Travel Association. It is worth noting that there are many associations that overlap with the adventure travel sector such as those focused on ecotourism, nature-based tourism, cultural-based tourism, etc.

These associations raise awareness of adventure tourism, conduct research and training, and provide support to the members.



Impact of Technology

The tourism sector is one of the sectors most impacted by the Internet. As early as 1952, Global Distribution Systems allowed travel agents around the world access to dynamic inventory of airline flights and tour itineraries. The accommodation sector soon followed the airline sector and today, travel aggregators like Kayak and Expedia have not only impacted traveler behavior in each phase of the buying process, but also the manner in which adventure companies and destinations position and market their products.

The Internet and the development of online portals have drastically changed the landscape of mass tourism; however, the impact to the adventure tourism sector is more on the demand side than the supply side. Consumers are empowered through access to a wide range of information and tools, including a massive and ever-growing number of consumer-generated reviews. For example, the travel review website, TripAdvisor, which has the world's most popular travel application for smartphones, reached a milestone number of 150 million reviews in February 2014 and has over 2 billion unique World Wide Web visitors a year.[1]

As mentioned in chapter 2, travelers are now more likely to travel further afield, because the internet enables them to feel confident about their destination before leaving, courtesy of destination images, weather reports, reviews and the ability to download maps and guides.

The Internet also has intrinsic impacts on the adventure tourism supply chain. The Internet has eliminated the linear nature of the chain, because tourists are now able to access any part of it online. Similarly, any part of the chain can market directly to the consumer. Chapter 2 discussed the trend towards disintermediation, which is heightened by the popularity of online booking systems. These systems allow for clear price comparisons, peer reviews, and even 360 degree video tours, which allow the tourist to access a considerable amount of information to inform their booking. Consumers can easily book packages online and are doing so in increasing numbers. However, they still show a strong tendency to book offline, creating a need for businesses to support both online and offline channels and transactions. New software emerges every day that aims to fill this gap by providing customized, yet automated itineraries to a myriad of destinations, but such software has yet to gain significant market share.Technology helps adventure travel businesses optimize their operations, achieve greater marketing reach, and improve their products. It allows both destinations and enterprises to better understand their competition and their clients. Most importantly, technology allows businesses to reach their clients more easily. New skills are now required to be successful in adventure tourism. Online marketing is critical to raising awareness of any product, and organizations need to adapt to ensure they have the right software and/or platforms in place to attract their target markets. According to TripAdvisor, the Internet is the second most important source of inspiration for leisure travelers (after word-of-mouth recommendations from family and friends) and the top planning resource.[2] Websites are the new storefronts. They need to capture the imagination of the virtual user immediately while also providing a seamless online experience, because the competition is always just one click away. Search engine optimization has also become critical, as 58% of leisure travelers start the planning process with a simple Internet search.[3]

Online, the currency is conversations, and consumers need to be engaged and inspired to visit a destination. Today, good marketing relies on effective storytelling. Social media is especially conducive to storytelling. In the experience economy, customers are searching for a compelling story and for destinations that appeal to their values and support growing global values such as sustainability, promoting and supporting local businesses and products, and responsible business. Social platforms, such as Facebook and Twitter, also allow for real-time customer service, authentic conversations with and between clients, and ways for travelers to share their trip experiences before, during, and after the trip takes place.

The prevalence of mobile phones and tablets have also impacted the way destinations and companies market their products. 42% of travelers use their mobile devices to search for information while on vacation.[4] Websites need to be fast, mobile-friendly and optimized, and easy to navigate on small screens. Travelers are also beginning to book trips via their mobile phones, with one in four people in United States of America (the) booking on a mobile device.[5]

CHAPTER 3 END NOTES

1 TripAdvisor (2014), TripAdvisor Now Offers 150 Million Reviews and Opinions with 50 Million Pieces of Content Posted in the Past Year, Press Release (online), available at: http://www.tripadvisor.com/PressCenteri6611-c1-Press_Releases.html (24-09-2014).

2 Ibid.

3 Ibid.

4 Ibid.

5 Ibid.

UNWTO



UNWTO **Elibrary**

The UNWTO Elibrary is the largest online collection of publications and statistics in the field of international tourism. It includes over 1165 UNWTO publications and 900 regularly updated tourism data sets (Tourism Factbook).

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4 The Potential Benefits of Adventure Tourism to Local Economies, Communities and the Environment

A decade ago, The International Ecotourism Society (TIES)[1] launched a public awareness campaign that emphasized "your travel choice makes a difference." That sentiment is still true today and further exemplified by the joint 2013 UNWTO, UNODC and UNESCO anti-trafficking campaign, "Your actions count – be a responsible traveller" engaging tourists to join the fight against the illicit trafficking of persons, cultural artefacts, wildlife, illegal drugs and counterfeit goods.

The tourism industry is one of the largest economic sectors in the world accounting for 9% of global GDP and one in eleven jobs[2]. The impacts of tourism are large and complex, not least because tourism can focus on the most vulnerable natural and cultural sites across the globe. Today, short-term financial gains can often take precedence over long-term environmental and cultural considerations.

The challenge is for the tourism sector to use its best efforts to reduce the negative impacts of tourism, while safeguarding and/or enhancing local environments, biodiversity, and culture.Tourism can, where appropriately managed and monitored, play an important role in poverty alleviation, cultural understanding, and biodiversity conservation. As such, adventure travel must be consciously planned and undertaken to maintain or enhance biological and cultural diversity and to be economically viable and socially equitable.

Adventure Travel can be of enormous benefit to tourist destinations, creating employment and income and providing a strong incentive for conservation. It can also raise public awareness of the many goods and services provided by biological diversity and of the needs to respect traditional knowledge and practices.

"The challenge is for the tourism sector to use its best efforts to reduce the negative impacts of tourism, while safeguarding and/or enhancing local environments, biodiversity, and culture. "

It has the potential to reconcile economic and environmental concerns and give practical meaning to sustainable development. Short and long-term customer advocacy and financial support for marginal communities often springs from the transformative experiences that Adventure Travel can bring, with customers gaining an understanding of how their immediate, and sometimes ongoing, support can help preserve a destination's key cultural and natural capital. Adventure travel also helps push tourist spending to the rural fringes of a destination.

Destinations often struggle to get customers beyond their iconic spots. An example of this could be Rio de Janeiro, Brazil. Adventure tourism has the potential to solve this problem, for example, by providing the customers with opportunities to venture beyond Rio de Janeiro and visit the Atlantic rainforest for sea kayaking, cultural activities, and more.

Adventure tour operators can play a key role in contributing to a sustainable vision for the sector through their selection of service providers, vendors, the activities they promote, and the facilities they choose to use. As reflected in this chapter's case studies, choosing to stay at one of Namibia's Joint Venture lodges has the compounding benefit of contributing to both conservation and community development in a conservancy.

Further, staying with operators who are part of the South Luangwa Conservation and Community Fund in Zambia ensures each safari guest contributes to sustaining a similar balance of conservation and community development at destination, as illustrated in the adjoining.

"Adventure tour operators can play a key role in contributing to a sustainable vision for the sector through their selection of service providers, vendors, the activities they promote, and the facilities they choose to utilize."

UNWTO: Promoting Tourism as a Key Agent of Community Development

Tourism is a people-based economic activity built on social interaction. By opening the doors to employment opportunities and decent livelihood, leading skills and capacity development, it can have a strong transformative impact on communities, especially those existing in poverty, at the margins of society or in remote areas. This is especially prescient in 2014 as UNWTO has selected 'Tourism and Community Development' as the key theme for World Tourism Day, celebrated on 27 of that year.

As a UN agency charged with overseeing and advancing the Millennium Development goals, UNWTO devotes considerable resources to supporting projects that enhance community development through tourism. For some years now, UNWTO has been building tourism development grassroots projects across the world, through programmes such as the ST-EP (Sustainable Tourism-Eliminating Poverty) Initiative, whose tourism development projects are aimed specifically at the community level.

One example of a successful ST-EP project involving the community was Nepal´s Great Himalaya Trail project, which created a trekking route connecting to lesser-known areas, unlocking the tourism potential of these sites and turning them into lucrative economic assets for the poor communities living in these areas.

The local population was trained and educated in trekking and adventure tourism, eventually creating an enabling environment for sustainable tourism development.

> **'Local populations should be associated with tourism activities and share equitably in the economic, social and cultural benefits they generate, and particularly in the creation of direct and indirect jobs resulting from them'.**
>
> Article 5.1, Global Code of Ethics for Tourism

From the point of view of the consumer, the development of community-based tourism is also important. In an increasingly globalised world, those looking to go beyond familiar settings such as 'sun and sand' destinations can find an authentic connection with the history, culture and customs of their destination through engaging with community based tourism products and services, whether these are locally-run tours, hostels, adventure activities or food outlets. If managed properly, the proceeds of what they spend go directly to supporting grassroots development and into ensuring that long term operations will benefit both host and traveller.

> **"Tourism can only prosper if it engages local populations by contributing to social values such as participation, education and local governance"**
>
> Taleb Rifai, UNWTO Secretary General, World Tourism Day 2014

Global Code of Ethics for Tourism

Article 1: Tourism´s contribution to mutual understanding and respect between persons and societies

Tourists should respect the social and cultural traditions and practices of all peoples and tourism activities should be conducted in harmony with their laws and customs

Article 2: Tourism as a vehicle for individual and collective fulfilment

Tourism activities should respect the quality of men and women, promote human rights and be free from exploitation in any form. The UNWTO Protect Children from Exploitation campaign draws attention to one of the world´s most vulnerable groups; children caught up in child labour and sexual exploitation, and encourages the implementation of professional codes of conduct to protect them.

Article 3: Tourism, a factor of sustainable development

Tourism development should safeguard the natural environment, protect natural resources and minimize waste production. A large part of this goal involves striking the balance between the volume, timing and location of visits.

Article 4: Tourism, a user of cultural heritage of mankind and contributor to its enhancement

Tourism policies and activities should be conducted with respect for artistic, archaeological and cultural heritage. Financial resources from visits to cultural sites and monuments should be used for their upkeep, development and enhancement.

Article 5: Tourism, a beneficial activity for host countries and communities

Local populations, in particular disadvantaged groups, should share in the economic, social and cultural benefits associated with tourism activities. This could be through the employment of the poor in tourism enterprises or the direct sale of local handicraft and products by the poor.

Article 6: Obligations of stakeholders in tourism development

Tourism professionals have an obligation to provide tourists with objective and honest information; governments should inform their nationals of the dangers they may encounter during their travels abroad; the press should issue honest and balanced information on events and situations that could influence the flow of tourists.

Article 7: Right to Tourism

The many recreational and educational benefits of tourism should be respected and made as widely available as possible. Everybody should have the opportunity to enjoy a safe and fulfilling trip, without discrimination for gender, race, disability or other issues.

Article 8: Liberty for tourist movements

Tourists should have access to places of transit and stay to tourism sites without being subject to excessive formalities of discrimination.

Article 9: Rights of the workers and entrepreneurs in the tourism sector

The fundamental rights of salaried and self-employed workers in the tourism sector and related activities should be guaranteed. In exchange for the freedom to invest and trade, enterprises should become involved in local development and avoid the excessive repatriation of their profits, thereby enabling local communities to benefit from the growth of tourism.

Article 10: Implementation of the Global Code of Ethics for Tourism

The public and private stakeholders in tourism development should cooperate in the implementation of these principles and monitor their effective application.

Further reading and resources:

·UNWTO Ethics & Social Tourism Programme - ethics.unwto.org
·Global Code of Ethics Tourism - ethics.unwto.org
·The Responsible Tourism and Traveller - ethics. unwto.org/en/content/responsible-tourist
·Protect Children from Explotation in Tourism and Travel - ethics.unwto.org/en/content/protection-children-tourism

Namibia Communal Conservancy

Namibia's communal conservancy model is internationally acclaimed and epitomizes the principle that tourism can actively contribute to sustainability while also flourishing itself. Not only does Namibia's conservancy program protect wildlife, natural resources, and rural communities, it provides vast economic opportunities for tourism's private sector, which then returns income to that same community through local employment and joint venture lodge agreements. Conservation NGOs, including the WWF in Namibia, work together with the Ministry of Environment and Tourism under the networking umbrella of NACSO, the Namibian Association of CBNRM Support Organizations, to support conservancy development and to achieve conservation at a national scale.Communal conservancies are registered by the Ministry of Environment and Tourism (MET) and adhere to Ministry regulations.

Communal conservancies "are self-governing entities that actively manage wildlife and other natural resources, conserving them and benefitting from them economically."[3] They are registered by the Ministry of Environment and Tourism (MET) and governed by a constitution, an elected management committee, a game management plan, and a benefits distribution plan. A communal conservancy consists of an area of land, marked by fixed boundaries, which are agreed upon by the founding members and neighboring communities. The land is typically split into zones, "integrating traditional resource uses with new income sources: tourism, the sustainable use of wildlife including consumptive forms such as trophy hunting and fishing as well as non-consumptive forms such as touring fishery protection areas and exclusive wildlife conservation areas."[4]A conservancy has:

- a constitution
- an elected management committee
- a game management plan
- a benefits distribution plan

Fifteen years after establishment of the first four communal conservancies, there are now 79 communal conservancies, covering 19.5% of Namibia's land. One in five rural Namibians live in a communal conservancy and benefit from their rights over its natural resources. As a result of the wildlife protection that is integral to the conservancy program (game management plan), Namibia now boasts the largest free-roaming population of rhino in the world, and apex predators such as the lion, cheetah, and leopard have expanded in both range and numbers.

The conservancy movement has become a global model, with its ideas and principles being studied by over 20 countries, including those in Africa, Asia, and the Americas. "The empowerment of such large numbers of community members to benefit from wildlife and tourism resources across such a large scale is globally exceptional and sets a standard that other countries seek to emulate."[5]

Community Conservation & Tourism

Namibia's Community Based Natural Resource Management (CBNRM) program has become internationally renowned since its founding in the 1990s. Conservancies are adding to rural development, employment, and livelihoods and are making significant biodiversity contributions. The continued expansion of conservancies and community forests, linked to national parks and freehold land areas under similar conservancy structures, is countering habitat fragmentation and increasing the connectivity of biological corridors at large landscape scales.For those conservancies with income, benefits are distributed in accordance with its members' wishes, as agreed at an annual general meeting. Cash distribution is rare, with conservancies usually opting to use its proceeds for a mix of benefits to the community. Examples include donations to schools, bursaries for students, food distribution to pensioners, diesel to pump water for livestock and wildlife, and repairs to infrastructure damaged by elephants.Within communal conservancies, wildlife populations have recovered and provided the basis for more than 40 joint venture tourism lodges, 44 hunting concessions, and approximately 200 enterprises that have generated over NAD 303 million (USD 34 million) in benefits to conservancies and their members since 1998.[6]The Namibian model is one of sustainability, based upon increasing wildlife numbers, habitat protection, and improving economic opportunities for local people. The model has energized other countries to emulate it, from Kenya to South Africa, Mongolia to Nepal, as well as United States of America (the).Benefits are being driven by recovering wildlife populations, which are still expanding and increasing in most of the conservancies. Once considered best used as poached meat for consumption, wildlife are now being increasingly managed as community assets to promote wildlife watching tourism. As a consequence, Namibia's communal areas boast population recoveries of many species of wildlife that are elsewhere in severe decline in Africa.

Examples include:

- Elephant populations across Namibia have increased from approximately 14,000 in 1995 to over 20,000 today;
- Hartmann's mountain zebras in northwest Namibia have increased from less than 1,000 in 1983 to more than 30,000;
- Lion numbers in the same region have recovered from approximately 25 in 1995 to around 150 today, demonstrating both a recovered prey base and increased tolerance from community members towards their presence;
- The northwestern conservancies contain the largest free-roaming population of black rhino in the world, while black rhino have been relocated (Figure 2) from protected areas or tourism concessions to nine communal conservancies.[7]

Conservancy Business Models for Lodge Operations

Since 1998, Namibia's CBNRM program has been working with the private sector to develop tourism in communal conservancy areas. As a result, the conservancy tourism sector has become one of the most dynamic parts of the national tourism economy. Private sector tourism in Namibia's communal conservancies is typically handled in the form of a joint venture lodge, in which an established tourism company and a communal conservancy jointly invest in a business that they manage and from which they derive profits. The community brings the availability of the land and a commitment to managing it for purposes of co-existing with wildlife, local labor interested in working at a lodge, and their unique cultural heritage. The private sector partner brings capital for construction of the lodge, as well as marketing and management expertise. The parties should consent and benefit from the partnership. The community gets jobs, training, and new skills, and the conservancy gets income for their natural resource management operations, which is a vital part of the conservancy mission. The community also learns about and gains a heightened appreciation of the role of conservation in economic development. The state benefits from community development driven from the grassroots, biodiversity protection, and improved land/wildlife management in rural areas. The private sector benefits from a stable partner, secure access to high value land areas, and the opportunity to grow and profit from a nature-based tourism business.The conservancy program has been engaged in developing partnerships with the private sector in constructing, managing, and marketing lodges in the conservancy areas for almost two decades. Ideally the program strives for maximizing the sense of ownership and generating profits from the lodge operations.[8]

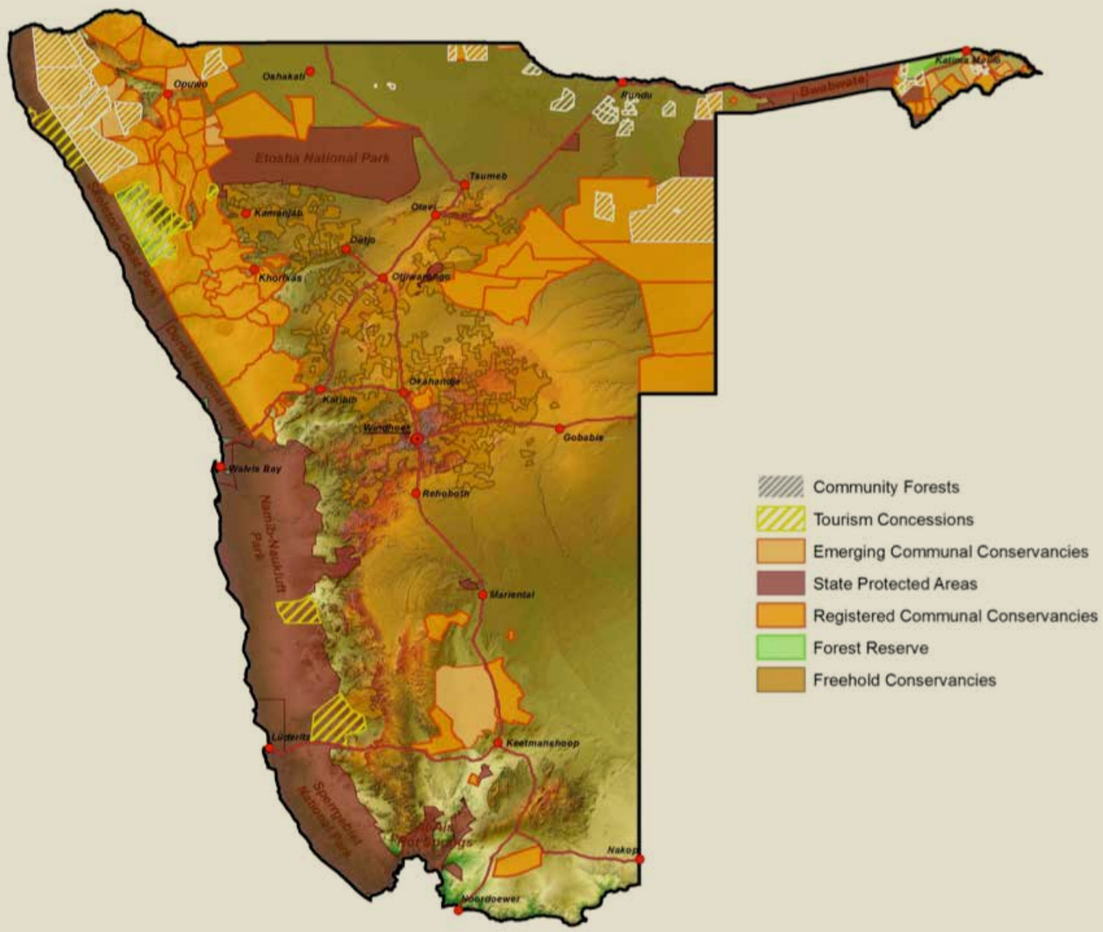
Traditional JV Structure—The BOT Model

The build, operate, transfer (BOT) approach to lodge development has been in practice in Namibia since implementation of the legislation establishing the conservancies in the late 1990s. Under the BOT system, a JV lodge agreement is negotiated between the conservancy and their private sector partner. The conservancy commits to establishing an exclusive tourism zone, with a dedicated footprint for a lodge and designated areas for wildlife viewing/photo safaris. In return, the private sector partner provides the capital and builds, manages, and markets the lodge. In addition, within the framework of their agreement, the lodge operator guarantees local employment and negotiated fees paid to the conservancy, generally based on the lodge performance. The conservancy fee is important because it covers costs associated with conservancy management of the land and contributes toward community projects and/or support to local residents to offset the cost of living with wildlife. In the early days, it wasn't easy to attract investors to partner with conservancies. Because the BOT model is viewed as the least complicated arrangement, with low risk and low returns for the conservancy, it has been the favored mechanism. However, the BOT model offers the least sense of ownership and engagement by the conservancy. Thus, in recent years, the CBNRM program has been supportive of a number of more innovative business models that strive to further increase the benefits to the conservancy, the sense of involvement, and the likelihood of collective ownership over a particular business.

Alternatives to the BOT Model

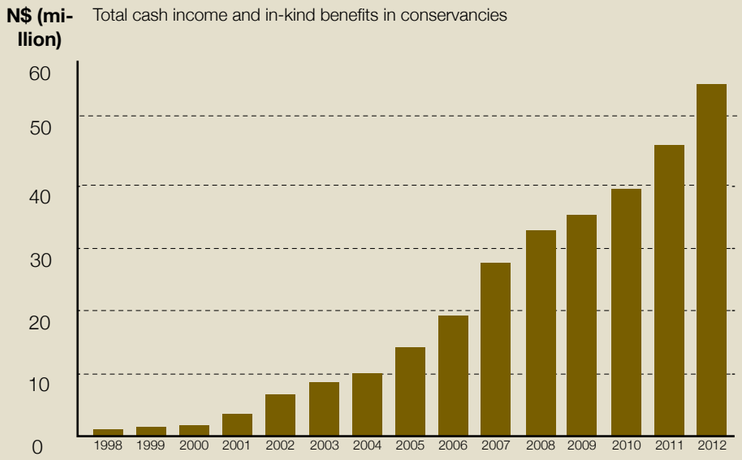
There are new approaches that range across the partnership spectrum beyond the BOT model, which are greatly expanding the range of benefits to communities while at the same time, deepening their engagement with the tourism sector and building a greater sense of ownership. The CBNRM program has additional examples of conservancies that have had the opportunity to access sufficient financing to ensure 100% capital ownership of the built assets (the lodge).

Namibian Conservation at a Glance



Benefits to People

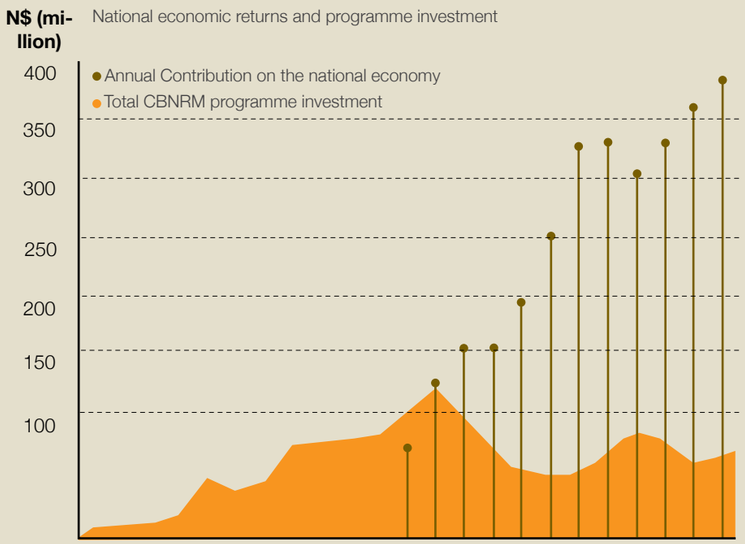
A quick glance at the figure opposite shows that benefits from the CBNRM Programme grew from almost nothing in 1994 to over N$ 56 million in 2012 (US$ 6.3m) amounting to cumulative benefits of over N$ 303 million (USD 34 m) since the programme began.



Source: NACSO (2012)

Benefits to Economy

The contribution to the national economy of the CBNRM programme is equally impressive. The graph opposite shows that investment by donors and government in the conservancy movement and CBNRM peaked in 2002, and now has declined to the 1997 level. The contribution to the national economy has grown strongly, reaching almost N$ 400 million (US$ 44.9m) in 2012, - figures adjusted for inflation.



Source: NACSO (2012)

The Luangwa Conservation and Community Fund

The Luangwa Conservation and Community Fund (LCCF) was established in 2009 with the mission of supporting sustainable development in and around South Luangwa National Park, Zambia. Last year, LCCF raised over USD 200,000 for local conservation and community development initiatives. Funding comes from the commitment of participating lodges to collect a guest fee of USD 10 per night, per guest. Participating lodges represent approximately 70% of the rooms available in the region, and that number is growing. These lodges and operators include Mfuwe Trails and the Bush Camp Company, Robin Pope Safaris, Flatdogs Camp, Kafunta River Lodge, Croc Valley Camp, Remote Africa Safaris, Shenton Safaris and Luangwa River Lodge.

LCCF has a clear mandate for how the funds must be spent; 50% of the funding goes to the South Luangwa Conservation Society, and 50% of the funding goes for local community development programs.

South Luangwa Conservation Society (SLCS)

The SLCS is not just a casual part-time player in the conservation sphere. They have 72 full-time employees, most of who are working on anti-poaching initiatives, including extensive foot patrols. The South Luangwa National Park is 9,050 square km, and foot patrols can be up to two weeks in length. The SLCS works in close collaboration with the Zambia Wildlife Authority (ZAWA), which has a ranger on every patrol.

Last year, the SLCS purchased an airplane with half of the funds for this purchase price coming from LCCF. They raised the rest through donations, including substantial contributions from lodges in the area. They also raised enough to hire a full-time pilot. Flight time is split between the work of SLCS and the Zambia Carnivore Project (ZCP), a conservation NGO.

School Children Sponsorships

While 50% of LCCF funding from lodges must go directly to the SLCS, the other 50% is more loosely administered, and the lodges have more discretion on how to spend it. For the past two years, many of the lodges have committed their LCCF community development funding to the construction of Mfuwe's first secondary school. To date, the LCCF has funded the construction of four new classrooms, a new dormitory for students who travel long-distance and lodge at the school, new furnishings, and a new bathroom with running water, a septic tank, etc. Construction of the new secondary school has been funded almost entirely by the tourism sector in the region through the LCCF. Until this year, students had to travel two hours to the regional town to attend high school.

Conclusion

The commitments of lodges in and around South Luangwa National Park to operate within the larger landscape set them apart from a destination perspective. Their collective commitment to both conservation and community development, facilitated by the establishment of the LCCF, create an entirely new and immensely attractive destination profile. Many lodges strive to do well by the environment and their host community, but very few examples exist of lodges collaborating together to have an impact at a scale beyond their individual company means. However, from the purchase of a plane for a local conservation organization, to the building of the first secondary school, to the support for staff to serve on local school boards, to their engagement with ZAWA, South Luangwa's safari lodge operators are setting a new standard for how the tourism sector should measure positive impact.

Sector Perspectives

Whale Watch: An Indigenous Tourism Case Study

Whale Watch is a multiple award-winning, nature tourism company in New Zealand, owned and operated by the Kati Kuri people of Kaikoura, a Māori subtribe of the South Island's larger Ngai Tahu Tribe. It is New Zealand's only marine-based whale watching company, offering visitors an up-close encounter with giant sperm whales at all times of the year. Whale Watch tours operate daily, and its 95% success rate allows it to guarantee an 80% refund if a tour does not see a whale.

Being fully tribal-owned and operated, Whale Watch is an excellent example of tourism providing a vehicle for the empowerment of an indigenous community; its tourism business activities have created socio-economic benefits for both the indigenous and wider Kaikoura community.

Whale Watch was formed in 1987 in response to a declining local economy that hugely impacted Kaikoura's Māori population. At the time, Kati Kuri tribal leaders believed that the local sperm whales held the answer to the Māori community's unemployment problems. They knew from their traditional stories that their ancestor Paikea had journeyed to a new life in New Zealand on the back of the whale Tohora. It seemed appropriate for Paikea's descendants to again ride on the back of the whale to a new life. And so it proved to be, not just for Māori but the wider Kaikoura community.

The Establishment of Whale Watch

Kaikoura is a rural district and town situated on the east coast of the South Island of New Zealand. It has a proud Māori tradition and European history, both of which have strong connections to whales. In early times, the Māori connection was cultural, and the European connection was commercial.

As the second smallest territorial district in New Zealand, Kaikoura has a resident population of 3,552 people with some 16% identifying as Māori.[9] Notwithstanding its small size, there are few places in the world that can boast of such natural wonders as those offered by land and sea in Kaikoura.

WHALE WATCH®
KAIKOURA • NEW ZEALAND

Because a cold, north-moving coastal current is met by a warm offshore southward-moving current and a steady upwelling, Kaikoura provides abundant food supply for marine animals. In particular, "deep underwater canyons with depths of 870 and 1600 m occur fairly close to the shore and they contain many of the deep-water fish and squid species favoured by sperm whales."[10]

Prior to the establishment of Whale Watch, Kaikoura's economy and employment depended largely on farming and fishing industries and on government organizations such as railways, public works, and the post office. Government restructuring and corporatization of numerous government departments considerably impacted Māori throughout the country because of job layoffs.In Kaikoura, the corporatization of the Railway Department affected Māori families who were widely employed as train drivers, locomotive assistants, gangers, and track maintenance crews.

With the closure of many government departments, Māori unemployment grew, with a worrying 90% unemployment rate among Māori youth. For the Māori, it was time to search for alternative ways of creating employment. The majority of the development options examined by the Māori related to the tourism industry. In the final analysis, the Māori chose a whale watching venture Following the completion of a feasibility study and two years of planning, Māori families set out to establish a whale watching business. The early years were turbulent with considerable challenges.

To set up the business, Māori families had to mortgage their homes and cars as collateral for a government enterprise loan, because they were unable to obtain a loan from the commercial banks.

The Impact of Whale Watch

Following the establishment of Whale Watch, Kaikoura saw a rapid increase in visitor arrivals. had a rapid increase in tourism. In 1987, Kaikoura had 3400 visitors; by 1995, this number had skyrocketed risen to 88,000. The company's operation stimulated investment in new accommodations, restaurants, and other sea-based tourist ventures. Whale Watch is now the single largest employer in Kaikoura. In peak-season, the company directly employs up to 70 people and supports many extended families.[10] Within 10 years after Whale Watch's founding, many locals had come to believe that economic and employment opportunities were largely dependent on the tourism industry, and that Whale Watch was the biggest tourist attraction Kaikoura had to offer.[11]

Whale Watch possesses an enviable record—transforming from its humble beginnings into a multi-million dollar business that is tribally-owned and operated. The Kati Kuri people view tourism as a young but growing enterprise, and many see Whale Watch as the beginning of their participation in the international tourism industry.

The Success of Whale Watch

The organizational development and management philosophy of Whale Watch is of considerable significance when looking at the indisputable international success of this Māori-owned tourism business.

Whale Watch is philosophically committed to providing a quality whale watching experience while carefully managing the use of a rare natural resource.

The Māori view themselves as visitors to the world of the whales and respect it as such at all times. As a Māori-owned company, Whale Watch cherishes the twin values of hospitality to visitors and reverence for the natural world. It is a philosophy that embraces the people, the land, the sea, and all living things as one.From the outset, the Kati Kuri owners adopted a standard company structure, well known by the business community as the basis for the company's activities. As the shareholders of the company, the Kati Kuri owners selected individuals with business acumen for a small board of directors and retained the power to appoint and remove those directors.

This ensured that the shareholders were always kept aware of the strategic development of the company and were in a position to constantly assess the director skills necessary to achieve the company's business goals.

Directors were required to understand the shareholders' values, possess strategic capability, and have relevant technical expertise. The respective roles of the shareholders, board of directors, and operational management were clearly defined, as were their lines of accountability. Operational management was accountable to the board of directors on a monthly basis and the board of directors was accountable to the shareholders through the annual general meeting. The company has continuously used its growing experience in the industry to build up internal operating skills and expertise, and its leadership has actively monitored market trends and its business partnerships. The observations of the long-serving board chairman of Whale Watch say a lot about the company's business success. It is clear from his comments that strategic planning is one of the strengths of Whale Watch—the company is able to set a vision that is simple and clear, that is owned by everyone, that infiltrates their business partners, and that deploys quality analysis of market information, where the consumer is king.

> "When the entire industry looks at you as a leader then as Māori we are achieving the ultimate."

> "Success has enabled Whale Watch to be more Māori focused, to reflect its values and this is empowering."

> "We can do what we want - when we want to - the things we want to do reflect who we are. We are a company owned by Māori and proud of it. We are not owing to anyone and have control over ourselves spiritually, and economically. We can make decisions without seeking permission from anyone else."

This has been achieved in part through "empowering our own people with a vision of the future."[12]



CHAPTER 4 END NOTES

1 The International Ecotourism Society: www.ecotourism.org (24-09-2014).

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11 Simmons, D. and Fairweather, J. (1998), 'Evolution and Change in Kaikoura: Responses to Tourism', Towards a Tourism Plan for Kaikoura. Kaikoura Case Study Report No. 10.

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5 Creating the Right Environment For Adventure Tourism

In an effort to spread the benefits of tourism to a wide range of regions and communities, destinations are often seeking to diversify their traditional offerings by promoting adventure tourism to bring visitors out of urban centers and into more rural places.Like any sector, adventure tourism does not operate in a vacuum. It both affects and is affected by a myriad of social, cultural, economic, ecological, and geographic factors, as well as political regulations and social norms; some of these support its development and others hinder it. In addition, serving the interests of diverse local and international stakeholders is necessary for a thriving adventure tourism market.This chapter discusses the factors necessary—national, state, and/or local policies, and practices—to allow adventure tourism to develop and flourish. The factors mentioned provide a good outline for the development of other types of tourism activity too.

"Adventure tourism is attracting attention for its emphasis on rural areas, local culture, and because it can often be developed within existing infrastructure."

The Enabling Environment for Adventure Tourism

The enabling environment encompasses many interrelated conditions that affect the success of sustainable, responsible adventure tourism in a country or region. The tourism sector is known for its ability to create jobs and generate foreign exchange, and as such, many local authorities seek to encourage tourism activities and attract visitors. In particular, adventure tourism is attracting attention for its emphasis on rural areas, local culture, and because it can often be developed within existing infrastructure. Often, it's the presence of visitors that makes it a destination, rather than destinations seeking to create a tourism activity. However, even with these obvious benefits, there are certain conditions that must be present for market development.

Attitudes

Social license

Adventure tourism often occurs in difficult to reach places and often affects vulnerable people. Ideally, prior to any tourism development, the network of potentially affected stakeholders or communities should give input. This is referred to as "social license." Social license is an intangible priority, but it is critical to the success of the development of any project.

Social license must be earned and maintained. Social license has three critical components:

Legitimacy: Legitimacy must be established by demonstrating that the development project adheres to cultural and social rules. It typically involves an initial consultation process, which includes preparation of accurate and accessible communication to community members and other stakeholders about planned projects. Mechanisms to receive community views, suggestions, and concerns need to be established, and community input should be taken into account in project design. It can be useful to establish forums, such as local community advisory committees, to ensure ongoing community engagement through the life of a project or program.

Credibility: Credibility must be created by providing accurate and consistent access to information about the project, which may involve a signed agreement.

Trust: Trust will be gained between the parties when both sides feel that they are benefiting from the project and that the other is maintaining their best interests as much as possible. Destinations both large and small should strive to obtain require social license before adventure tourism development occurs. Social license should also lead to another intangible characteristic, which is referred to by the World Travel and Tourism Council[1] as an "affinity for tourism", This is demonstrated by characteristics such as the society accepting foreigners' presence, which is especially critical for adventure tourism.

Prioritization of the sector

Beyond the social license, policy officials at high levels need to recognize the potential of the tourism sector and prioritize it accordingly. Prioritizing tourism requires dedicated institutions that oversee tourism promotion and development at a national level. Tourism Boards or Ministries of Tourism may be coupled with Ministries of Trade, Environment, or Culture, but it is critical that they have a place at the cabinet table.

These institutions should have a budget that allows them to be effective and to assign leaders who are knowledgeable about tourism. A board of directors, comprised of leaders from the public and private sector, can help ensure that all interests are prioritized.

As a niche market segment, Adventure Tourism should be given representation within the tourism institution. Investing in research on target adventure markets, adventure trends, products with potential, and sharing that information with the private sector will further demonstrate the prioritization of the adventure sector and encourage public-private partnerships that result in a healthy adventure sector.

The following example demonstrates prioritization of the sector:

> **Mexico:** Mexico invests heavily in tourism and also places a specific focus on adventure tourism. This focus on adventure began in 2009, when policymakers sought to include adventure in their priorities, along with traditional "sun and sand" tourism. The government spends approximately USD 160 million a year on national and regional tourism development and promotion.[2]
>
> With respect to adventure tourism, both the national and state governments have invested in numerous adventure product development projects and promotional events. National policies are being reformed to ease visa and banking regulations, and innovative marketing practices, e.g. the Mexico Taxi Project,[3] are in place to help shift the attitudes of tourists.

Policies

Sound policies guide adventure tourism development and should support the sustainable growth of the sector. They are typically developed at the national level and take a long–term approach. Policies need to be flexible and dynamic, because tourism is a volatile sector, often impacted by unforeseen events, such as natural disasters or political upheavals, not to mention budget cuts.

Good governance

The previous section discussed the need for national government prioritization of the sector. In addition, institutions need to conduct public affairs and manage public resources in a responsible way. They also need to take initiative and manage dialogue between all stakeholders. This is referred to as "good governance." The quality, culture, and geographical extension of good governance are critical.

Tourism policy: The first aspect of good governance is a tourism policy at the highest level that clearly defines the framework for the management and growth of the sector, as well as coordinate with other national initiatives (e.g. sustainability, environment, labor, infrastructure). Most destinations have a tourism policy or a written strategy or action plan that dictates the long-term mission and vision of tourism in that location. Today, most policies or plans have a sustainability component, and destinations are increasingly creating specific sustainable tourism policies. Although the precise language differs from destination to destination, ecotourism, sustainable tourism, and adventure tourism policies typically have the same goals.

Examples of tourism strategies that have included elements relevant to adventure tourism include:

> **Bulgaria**: Three Ministries (Environment, Water, and Economy) came together to write the National EcoTourism Strategy and Action Plan. The process took two years and included a "Cooperation Protocol" between the ministries to implement the plan. The plan included institutional development, marketing, and ecotourism business development.[4]
>
> **British Columbia, Canada**: The Adventure Tourism Policy[5] issued by The British Colombia Ministry of Forests, Lands and Natural Resource Operations, regulates guided adventure tourism activities. It includes rules on concession use, crown land use, permits, and pricing.

Regulating body (managed by the public or private sector)
Tourists need to feel confident that various actors in the adventure tourism sector are adhering to agreed-upon standards or criteria. This is especially important for the adventure sector, where activities can be risky. Countries or regions benefit when there is a regulating body in place to ensure adventure sector participants are complying with basic standards for guiding and equipment safety, as well as hotel hospitality and service standards.

> **Costa Rica**: Costa Rica was an early ecotourism destination, and policymakers recognized that the country's main attraction was its natural assets. The Costa Rican Tourism Board created the Certification for Sustainable Tourism, a "legally permissible instrument for discriminating between sustainable and conventional businesses."[6] It is a self-assessment that tourism businesses can take and submit to an independent committee, which then does an external audit. The tourism board, which is part of the government, is the regulating body and provides this free tool to businesses. The accreditation can then be used in marketing.

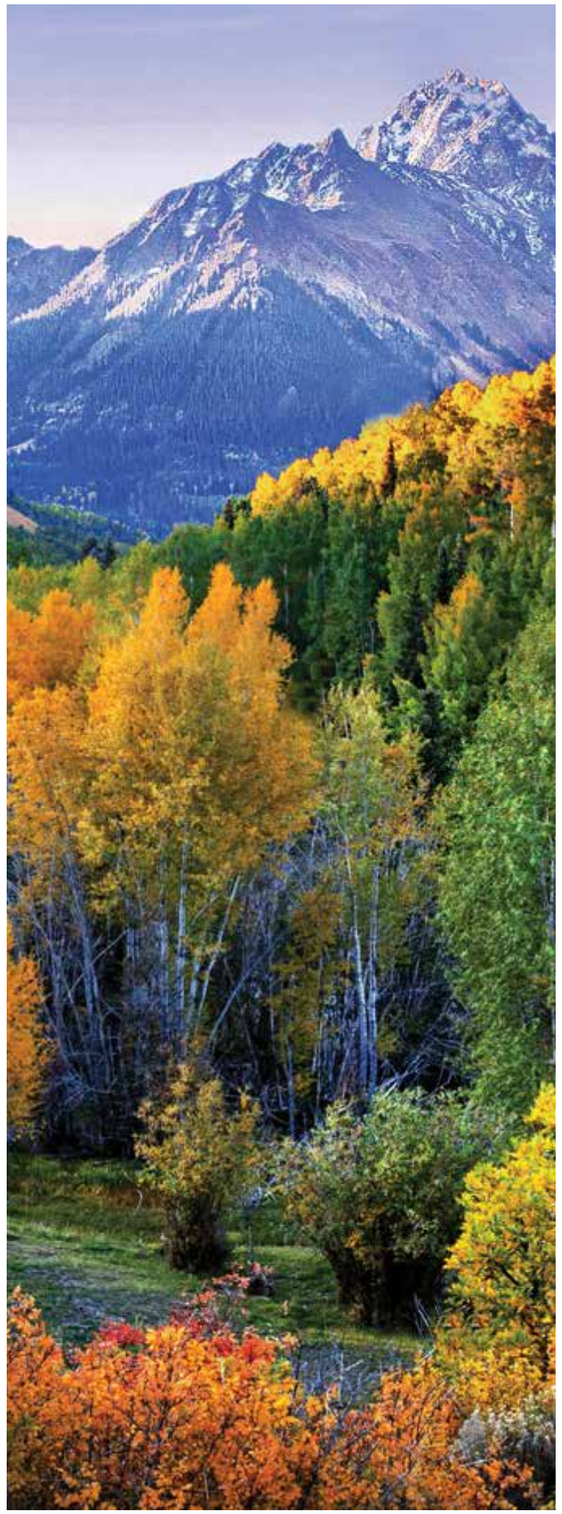
Marketing body: A marketing body (or DMO, as discussed in chapter 3) with the mandate to promote the country or region is important, and this agency or institution should specifically call attention to adventure tourism opportunities if the sector is to thrive. Good adventure tourism marketing includes business-to-business marketing, building relationships with adventure operators who can sell adventure products; business-to-consumer marketing, inspiring travelers to experience the adventure product; and, connecting the travelers to the businesses that sell the adventure products.

> **The Canadian Tourism Commission (CTC)**: The CTC is Canada's national marketing organization CTC works with three groups of stakeholders—consumers, international trade, and Canadian trade—providing each with relevant tools. For example, their Explorer Quotient,[7] is a psychographic tool that helps providers understand their target market. CTC turned the Explorer Quotient into a consumer tool by asking travelers to take a quiz titled, "What's Your Traveller Type?," and then offering activities that the consumer would enjoy in Canada based upon the results.

Visa and permit policies: These policies should allow tourists to easily enter the country for their holiday. Convoluted visa processes can pose a significant barrier to increasing adventure tourism. Importantly, visa information needs to be consistent and easily available, such as on the tourism website. Countries may consider relaxing visa policies around key events, such as the World Cup or the Olympics, which attract visitors from all over the world. Countries may also consider implementing e-visa or automated border processing to speed up waits and facilitate ease of entry. Reforming visa policies can have rapid, meaningful impacts. In 2012, Mexico reduced the waiting time for visas for Russian citizens from 45 days to 24 hours, and the number of Russian tourists rose from 1,000 per year to 42,000 per year.[8]

In recent years, improved visa facilitation to promote economic growth and job creation has been one of the core tenets of UNWTO policy and coordination work with national governments and other international organizations. An outline of this work and UNWTO recommendations on visa facilitation are presented in the adjoining article.

In addition to, or occasionally instead of a visa, some adventure activities may also require special permits. For example, crossing the Greenland Icecap requires a permit from the Greenlandic Expedition office, and requirements to obtain that permit include insurance that covers emergency rescue.[9]



UNWTO and Visa Facilitation

Facilitation of tourist travel is closely interlinked with tourism development and can be a tool to foster increased demand and generate economic development, job creation and international understanding. This objective is of particular relevance in a moment where most economies look to stimulate their exports and economic growth.

In 1963, the United Nations Conference on International Travel and Tourism stressed the dependency of tourism development on the actions of governments, especially the facilitation of governmental formalities for international travel. More than fifty years later, restrictive visa-issuance policies and complicated entry formalities are still stifling tourism growth, particularly from emerging economies, which are also some of the fastest-growing source markets for tourism.

For example, according to a report published jointly between UNWTO and the World Travel and Tourism Council visa facilitation could generate between six to ten million additional international tourist arrivals for ASEAN Members States by 2016. The resulting extra arrivals would bring in between USD 7 and USD 12 billion in additional international tourism receipts and create between 333,000 to 654,000 new jobs by 2016[10]

Despite the challenges, it is evident that the link between visa facilitation and economic growth through tourism is increasingly recognized by national authorities, which have accompanied such recognition with concrete facilitation measures. The clear and strong tendency to ease visa procedures first observed during the period 2010-12, continued in 2013 and is likely to continue in the future.

Current situation[11]

- In 2013, destinations around the world still required on average two thirds of the world's population to obtain a visa prior to departure. On the other hand, some 18% of the world's population was able to enter a destination without a visa, while another 15% could receive a visa on arrival.
- Globally there is a significant variety in visa policies, from countries allowing almost any citizen to enter freely to countries requesting visas indiscriminately.
- Overall, emerging economies tend to be more open than advanced ones.
- South-East Asian, East African, Caribbean and Oceanian destinations are among the most open regions while Central African, North African and North American destinations are the most restrictive regions.

Joint research by the UNWTO and the World Travel & Tourism Council (WTTC), in May 2012 demonstrated that improving visa processes could generate an additional USD 206 billion in tourism receipts and create as many as 5.1 million jobs by 2015 in the G20 economies.

UNWTO has identified five important areas of opportunity for visa facilitation:

Delivery of information

The availability and reliability of the information on entry formalities – especially visa requirements and procedures is among the simplest measures to address. This information, especially the elements of entry formalities of importance to the traveller, should also be available in multiple languages.

Facilitate current visas processes

A major opportunity for improvement is the way visa requests for temporary visitors are processed in general as well as the requirements linked to this process. Whether these requirements are personal interviews, official documents or certificates, they usually produce at least temporary bottlenecks as well as uncertainty and long wait times. Among the techniques suitable for improving these processes are the better use of modern information technologies by service providers and the consideration of visas on arrival.

Differentiate treatment to facilitate tourist travel

The technique of facilitating the visa process for certain types of visitors is widely used among countries, especially for temporary visitors who are visiting for tourism purposes. The form this facilitation takes can range from easing restrictions depending on the means of transportation – for example, cruise passengers can be allowed to disembark from the ship without a tourist visa or to arrive by charter planes – to special treatment for specified geographical areas or ports of entry.

Institute eVisa programmes

Currently, a widely discussed opportunity is the use of eVisa. If an entry visa cannot be avoided, eVisa is the option preferred over the traditional, paper visa. It can be more easily obtained and requires neither the physical presence of the applicant nor the presence of the passport. These considerations are especially important for destinations without a widespread network of embassies and consulates.

Establish regional agreements

There are already a number of regional agreements in place that allow travellers from a third country to move freely between member countries once admitted by one of the participating countries. For citizens of one of the Member States of some regions, such as the Schengen area in Europe, it is even possible to travel without a passport by simply using a valid national document of identification. The agreements made between the Members States of the South African Development Community to introduce a Univisa, and separately between Uganda, Rwanda and Kenya for a Tripartite Tourism Visa are a good example of this.

UNWTO will continue to promote and advocate for visa facilitation to support economic growth and development through tourism. In cooperation with the International Civil Aviation Organization (ICAO), the Organisation for Economic Co-operation and Development (OECD), the Asia-Pacific Economic Cooperation (APEC), the World Travel & Tourism Council (WTTC) and other partners, UNWTO will continue to provide case studies, evidence of the relationship between visa facilitation and tourism growth as well as benchmarking information to support this important process of visa facilitation for tourism.

Additional resources

The Impact of Visa Facilitation in ASEAN Member States, UNWTO-WTTC, January 2014
UNWTO Tourism Visa Openness Report, November 2013
Declaration by Tourism Ministers of the G20, May 2012



Safety and security policies

· Adventure travelers are more likely to travel to remote locations and engage in riskier recreational activities than mainstream tourists. In the Internet age, word-of-mouth is worth as much as government travel advisories, and adventure travelers will refer to both before booking a holiday. A destination marketing tool should provide current safety and security information, using real-time communication tools like Twitter to get the message out.

· Not all adventure activities or destinations are covered by travel insurance. For example, World Nomads,[12] a travel insurance provider, does not provide insurance for the Running of the Bulls in Spain or heli-skiing. Adventure providers must take special care to make insurance available for activities they offer if they want to attract adventure travelers.

· Tourists need to feel confident that adventure providers comply with international standards of safety. In the absence of a global regulating body for adventure tourism, numerous market-based standards are observed, with differing levels of local and national oversight. See chapter 7 for a more detailed discussion of this issue.

Tourism Infrastructure

Adventure travelers are less sensitive to deficiencies in hard tourism infrastructure, such as airports and paved roads, but are perhaps more sensitive to soft infrastructure, such as signage, good guide training, and clean trails. Adventure destinations need policies that prioritize the type of infrastructure valued by adventure tourists. Examples include:

Tourism Signage in Australia: Western Australia Tourism creates signage for established tourism businesses. They provide strict guidelines for the creation of signage to ensure consistency across the state. Tourism businesses, such as accommodations, attractions, wineries, historic sites, etc. can apply for the state to create the signage for them.[13]

Cycle Trails in New Zealand: Destinations around the world are investing in bike trails as low cost, soft infrastructure improvements that benefit both locals and tourists. The Nga Haerenga bike trails in New Zealand were first created to "provide a healthy and enjoyable way for New Zealanders and international visitors to see the country, but would also generate economic, social and environmental benefits for our communities."[14] The funding came from the government as well as local stakeholders and communities. They created a robust website to provide up-to-date information on the trails and to enable tourists and locals to plan their trips.

Management of the assets that attract visitors

Adventure destinations must also have policies in place that protect the three assets that adventure tourists value most—natural, cultural, and adventure resources. National authorities should regulate commercial activities in areas of high cultural value and natural beauty to ensure that these activities do not detract or interfere with the quality of the tourism experience.

Natural resources: Adventure tourists are generally seeking pristine natural environments and bio-diverse habitats to explore, and these require high levels of protection by governments. Protection of nature through, for example, the gazetting (an official designation) of conservancies, the creation of national parks, and the designation of Ramsar[15] sites (wetlands of international importance), helps attract adventure tourists who recognize these designations as adventure opportunities. Although adventure tourism is widely viewed as a green sector (environment-friendly), its dependence on natural resources makes negative impacts more conspicuous.[16]UNWTO has long recognized biodiversity as an important issue for tourism development of all kinds. An outline of UNWTO's work and recommendations in the field of tourism and biodiversity is presented in the adjoining article.

Cultural resources: Adventure tourists are equally keen to learn about the culture of their destination, and experiencing local culture in an authentic way is a sought after activity. 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. To ensure protection of cultural resources, destinations can nominate heritage sites to UNESCO, work with heritage organizations to safeguard patrimony, and manage carrying capacity to avoid over-visitation. In many parts of the world, tourism activity (and often, due to its unique characteristics, adventure tourism) takes place in territories claimed by indigenous peoples. The adjoining article from the World Indigenous Tourism Alliance (WINTA) explains this in more detail. Furthermore, respecting the rights of indigenous peoples is an issue that UNWTO has addressed directly through its support of international recommendations and dialogue between all stakeholders. An outline of UNWTO's position on this topic is also presented in this chapter.

Adventure resources: Adventure tourists are naturally also seeking adventurous activities; not only ski slopes or hiking trails, but also cooking classes and volunteer opportunities. Destinations that offer a greater diversity of activities, both active and immersive, will attract more adventure tourists. To support the development of adventure resources, policies for training should be in place for specialized guiding and interpretation.

UNWTO and Biodiversity

All tourism – even in city centres – relies on natural resources for supplies of food, clean water and other 'ecosystem services' that ultimately depend on biodiversity. For most other types of tourism, biodiversity contributes significantly to the attractiveness and quality of destinations, and therefore to their competitiveness.

UNWTO has long recognized biodiversity as an important issue and is one of the many issues that the organisation addresses with its wide range of international partners. As the present report describes, biodiversity is fundamental for the sustainable development of tourism (adventure tourism in particular) since its activities depend so closely on the pristine natural environments that visitors travel to appreciate.In 2006, UNWTO, with the support of the Federal Government of Germany established the Consulting Unit on Tourism and Biodiversity for Tsunami Affected Countries, based in the UN premises in Bonn, Germany.

Among the tasks of the UNWTO Consulting Unit, the following can be highlighted

· Provide support to UNWTO Member States on biodiversity-based sustainable tourism, participatory tourism planning, and connecting biodiversity-based tourism to overall economic development;

· Support the development of biodiversity-related sustainable tourism products by local stakeholders;

· Assist UNWTO Member States in finding new funding opportunities for biodiversity-related tourism development projects;

· Apply the Guidelines on Biodiversity and Tourism Development of the Convention on Biological Diversity (CBD) for planning processes in tourism destinations, and demonstrate how this approach can be applied by destinations for management of tourism and biodiversity;

· Develop management, communication and participation tools, as well as training and capacity building for enabling local people to participate in and benefit from tourism projects related to biodiversity.

In 2010, in advance of World Tourism Day held on the theme, UNWTO published a guide 'Tourism and Biodiversity: Achieving Common Goals Towards Sustainability'. This guide offered a detailed explanation of the many linkages between tourism and biodiversity and offered a series of recommendations for UNWTO itself, governments (national and destination level), the tourism sector, IGOs and NGOs.

A summary of these recommendations is presented here:

1. Promote and implement best practices for avoiding or minimising negative impacts of tourism on biodiversity

There are many examples of best practices that are being applied in the tourism sector, including use of specific technologies, operational methods and standards that result in reduced pressures on biodiversity. Guidance on best practices for avoiding or minimising the impacts of tourism activities on biodiversity needs to be promoted widely to, and implemented by the tourism sector.

2. Integrate biodiversity considerations into national and local sustainable tourism plans, and in planning decisions on tourism development

To enable better coordination between biodiversity management and tourism, biodiversity considerations need to be taken fully into account in national and local sustainable tourism plans, both by revision of existing tourism plans, and by incorporating biodiversity considerations into preparation of future tourism plans and strategies.

3. Use the Convention on Biological Diversity Guidelines on Biodiversity and Tourism Development to assist

Implementation of the biodiversity and ecosystem service components of sustainable tourism Protection of biodiversity is one of the elements of sustainable tourism. The Global Sustainable Tourism Council (GSTC) reflect both the CBD Guidelines and the UNWTO Code of Ethics for Tourism, and collectively these provide a firm basis for implementation of sustainable tourism, including biodiversity and ecosystem service components.

4. Apply the findings of the UNEP report on The Economics of Ecosystems and Biodiversity (TEEB) to the sustainable management and development of tourism

The TEEB study has highlighted that biodiversity conservation makes economic sense. Failure to protect biodiversity has led to loss of valuable ecosystem services, and the TEEB sets out key policy approaches and management actions that are designed to correct this failure.

5. Promote investment in ecological infrastructure that protects and supports tourism

The TEEB emphasises the value of investing in ecological infrastructure – including effective management and expansion of protected areas, and restoration of ecosystem services, for example, by rehabilitating reefs and forested areas. In many cases, investments in ecological infrastructure create opportunities for tourism, and tourism revenues can help contribute to the long-term success of such investments.

6. Minimise impacts on biodiversity from adaptation of tourism to climate change

Climate change is affecting biodiversity and economic activities, including tourism. As tourism adapts to climate change it is important to avoid shifting tourism activity to new and potentially more sensitive areas which would create additional pressures on biodiversity.

7. Ensure that where projects use tourism as a tool to support biodiversity conservation and/or poverty alleviation, the tourism components have a clear economic base

The success or otherwise of tourism activities and developments depends on market demand from tourists and linkages with other businesses in the tourism value chain. Where tourism is considered as a component in conservation and/or development projects, it is therefore important to take into account the realistic level of market demand.

8. Increase knowledge and understanding about the linkages between biodiversity, ecosystem services and tourism

9. Promote sustainable tourism products and activities linked to protection of biodiversity

10. Involve all relevant stakeholders in evaluating and determining the balance between use of ecosystem services for management and development of sustainable tourism, and other sustainable uses

Further reading:
Tourism and Biodiversity: Achieving Common Goals Towards Sustainability, UNWTO 2010

Destination Flyways: Protecting the World's Original Long-Distance Travellers

Millions of migratory birds set out to travel the world each year, flying along the same routes known as 'flyways'. Spanning continents and oceans, and used by a myriad of bird species, the flyways represent one of the most spectacular and valuable assets of the world's natural heritage.

In 2012, a record one billion tourists crossed international borders - a true milestone in international travel and a clear sign of the strength of the tourism sector. The project Destination Flyways has been set up by UNWTO, with support from the Federal Ministry of the Environment, Nature Conservation, Building and Nuclear Safety of Germany (BMUB), to channel this strength into a force for global biodiversity conservation and enhanced livelihoods for local communities by creating a network of sustainable and resilient destinations.

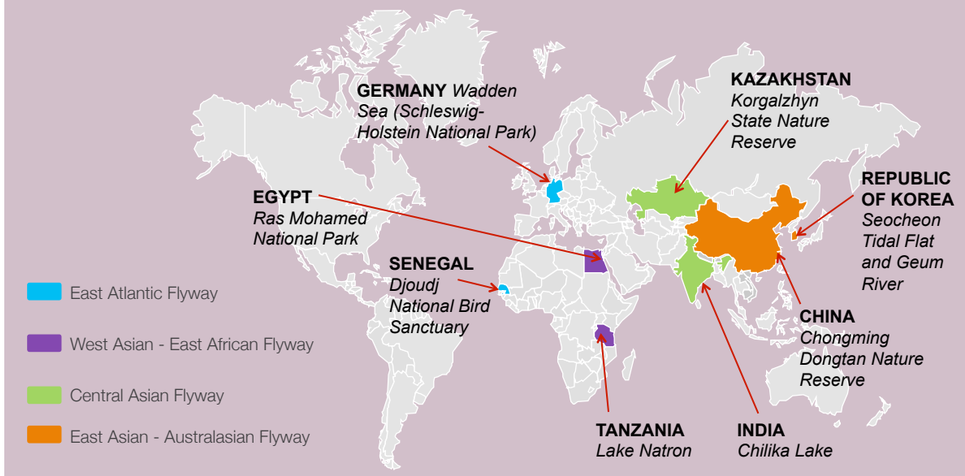
During their travels, migratory birds depend upon a chain of vital sites for breeding, staging and wintering. Due to their natural values, these sites are often managed under different conservation schemes and also endowed with great tourism potential. However, external pressures continue to grow, representing a threat for migratory birds, key habitats and the ecosystem services that they provide.

Destination Flyways uses an innovative approach to promote and enhance their conservation.

By providing an adequate framework for sustainable tourism management and diversifying the tourism offer along the flyways, Destination Flyways has the objective of generating revenue for improved management of biodiversity and spread the benefits of tourism to local communities, while creating attractive experiences for tourists.

The preliminary phase of the project was completed mid-2014 by the UNWTO Consulting Unit on Tourism and Biodiversity and in collaboration with other UN agencies, including among others, the Convention on Migratory Species of Wild Animals and the Ramsar Convention, national partners and NGOs with expertise in the field of migratory species conservation such as BirdLife International and Wetlands International.

Following a participatory approach, opportunities to promote the conservation of migratory birds through sustainable tourism have been identified along eight selected sites in Africa, Asia and Europe and fundraising for the main phase is ongoing.



Information and Communication Technology (ICT) infrastructure

As discussed in detail in chapter 3, adventure tourists (like all travelers) are increasingly turning to the Internet to research, plan, book, and share their vacations. A destination that is not well connected loses competitiveness. Adventure opportunities need to be discoverable online and easily bookable. Destinations benefit when tourists share their experiences in real-time, which may inspire others in that traveler's network to book a holiday as well.

Price competitiveness

Adventure tourists are willing to pay a premium for authentic, unique activities; however, in today's global market, even adventure tourism products compete with every other tourism product at their price points.[17]To remain competitive in the adventure market, prices should either be on par with similar experiences in other countries, or the destination should clearly and effectively market its Unique Selling Proposition.

Accurate and innovative marketing

Tourism branding and marketing plays a wider role in promoting the image and international perception of a country, both externally and internally. Tourism marketing needs to be honest and accurately manage the expectations of the tourists. Destinations should actively target adventure travelers in their messaging.

Greenland: In 2010, Greenland shifted its marketing to focus exclusively on the adventure sector. Its messaging and imagery were designed to capture the imaginations of tourists who sought off-the-beaten track adventures and authentic cultural interactions. Greenland's marketing focused equally on the cultural, and especially the culinary, through its "Taste of Greenland," program and adventure activities with the launch of a blog, 99% Backcountry.[18] Its marketing also portrayed a modern Greenland, where girls in traditional costumes rode scooters. The messaging resonated with how locals saw themselves and inspired tourists to visit.

"Tourism marketing needs to be honest and accurately manage the expectations of the tourists."

Training

Training programs for the purpose of developing the skill sets associated with adventure tourism is important, both to strengthen the enabling environment for adventure tourism and to ensure optimization of the local employment and income benefits of the sector. An example of this is the AdventureEDU is a program that assists governments, destination management entities, associations, and individual tour companies in providing the adventure travel experiences, with an emphasis on safety and sustainability.

Conclusion

At its core, adventure tourism relies on a destination's combination of top-level natural and cultural assets, that attract adventure tourists. While adventure tourism may require less capital investment for infrastructure, investment in elements that compliment the natural, cultural, and adventure assets are necessary for adventure tourism to flourish. These elements, as discussed in this chapter, require extensive stakeholder consultation and responsible policy development. The requirements for well-managed natural assets, as well as healthy, educated, and receptive rural populations remain complex and important considerations for the creation of a thriving adventure tourism market.

Ultimately, while governments can work to ensure that attitudes, policies, and practices are in place to create fertile ground for adventure tourism, the success of the sector relies on the creation of innovative, compelling products by the private sector too.



Building Partnerships for Sustainable Tourism: UN Steering Committee on Tourism Development (SCTD)



In 2010, the World Tourism Organization (UNWTO) launched an initiative for a more cohesive approach to tourism development at the international level.

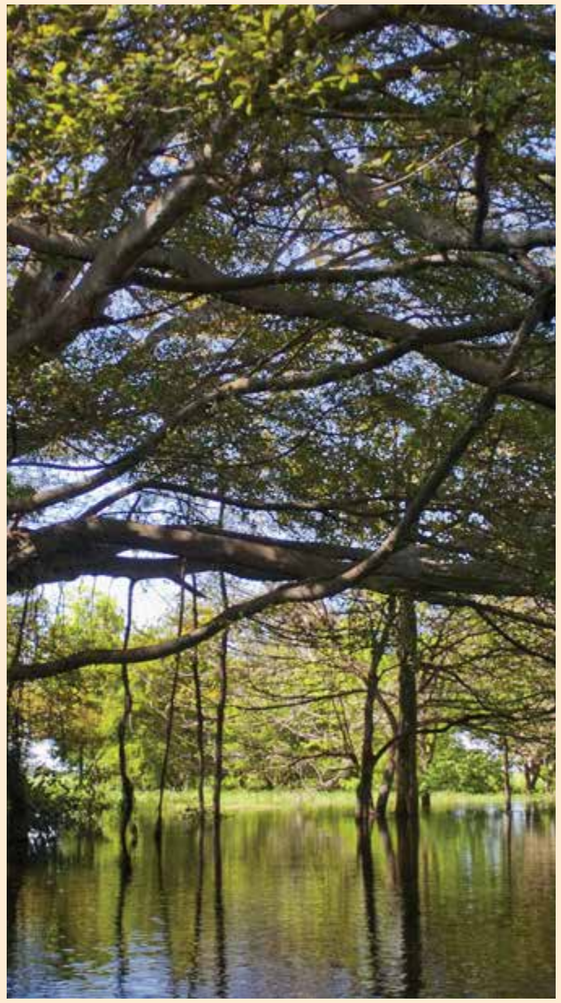
Since then, nine key international organizations have joined forces and formed the United Nations Steering Committee on Tourism for Development with the objective to strengthen the developmental impact of international tourism.

- International Labor Organization (ILO)
- International Trade Center (ITC)
- United Nations Conference on Trade and Development (UNCTAD)
- United Nations Development Programme (UNDP)
- United Nations Environment Programme (UNEP)
- United Nations Educational, Scientific and Cultural Organization (UNESCO)
- United Nations Industrial Organization (UNIDO)
- United Nations World Tourism Organization (UNWTO)
- World Trade Organization (WTO)

The SCTD brings together the tourism-specific experiences and state-of-the-art tourism expertise of each of its nine UN agency members with a view to creating synergies for a more coordinated, effective and efficient delivery of technical assistance to developing countries, thus complementing their efforts to build up a competitive national tourism sector. On a functional level, the SCTD provides specialized tourism assistance aimed to maximize tourism´s capacity to support countries in reaching development goals, while preserving their cultural and environmental assets.

The UN-SCTD is committed to further improve its catalytic role to help developing countries with special attention to Least Developed Countries, Small Island Developing States, and Land-Locked Developing Countries, in enhancing their capacities to achieve a more beneficial participation in the international tourism and travel industry while ensuring inclusive and sustainable growth of both, the tourism sector and local communities.

To support the delivery of an integrated service for tourism, the SCTD will build on the strength of each agency and programme to identify and mobilise financial resources necessary to respond to developing countries' needs.
As an innovative institutional framework for Delivering as One for Tourism, the SCTD will also explore the possibility of creating a Multi-Donors Trust Fund for sustainable tourism development in the future.



Sector Perspectives

Promoting the Rights of Indigenous Peoples through Tourism

WINTA
WORLD INDIGENOUS TOURISM ALLIANCE

Indigenous peoples contribute significantly to the enhancement of global diversity and sustainability through the maintenance of their traditional knowledge, cultural practices and irreplaceable natural resources. Indigenous peoples also seek and are entitled to all human rights established under international law to maintain their status as culturally distinct and self-determining peoples. When these two factors combine, they provide benefits not only for indigenous peoples but for all peoples in all areas of society and especially through tourism. These benefits will increase as the world becomes more homogenous and indigenous cultures provide differentiation, authenticity and the enrichment of visitor experiences.

Tourism and indigenous culture have much to offer each other. However, in the history of tourism development, human rights violations have been frequently raised and denounced by human rights advocacy groups, NGOs, trade unions and other civil society organizations. Sadly, indigenous groups have often been the victims of such human rights violations. Indigenous and non-indigenous tourism leaders, acknowledge the dichotomy that tourism can present. On one hand tourism provides the strongest economic driver to restore, protect and promote indigenous cultures, and on the other hand it can also diminish and destroy those cultures especially when tourism activities impinge on the rights of indigenous peoples to self-determination.For businesses seeking to engage with and promote the rights of indigenous peoples, today guidance is available through an extensive framework of international indigenous human rights conventions, declarations and guidelines. However this wasn't always the case.

Research undertaken by the World Indigenous Tourism Alliance (WINTA) concludes that From a tourism industry viewpoint the Larrakia Declaration which was adopted by the Pacific Asia Travel Association and endorsed by the UNWTO in 2012 is arguably the most important statement of commitment from the tourism sector to giving practical effect to the United Nations Declaration on the Rights of Indigenous Peoples 2007.

While there is an abundance international business guidelines on human rights, tourism activity has presented indigenous communities with a dichotomy.

When driven from outside the community, the negative impacts of tourism have included disruption to lifestyles and ecosystems, poor distribution of benefits to the hosting destination, the pressure to turn cultural traditions into products and unequal participation in the planning of projects dominated by foreign or government interests. Many critics comment that the tourism industry is dominated by outside interests, which retain most of the benefits and leave the host communities to suffer the costs.

At the same time, leading indigenous tourism organisations also advise that tourism is not inherently negative for indigenous peoples and can provide important support for cultural revitalisation, revenue generation, employment and community sustainability, provided that Indigenous peoples themselves have the opportunity to be involved in all decision-making processes regarding tourism on their traditional lands and territories.

WINTA's recent research into indigenous human rights and tourism in the jurisdictions of Australia, New Zealand and the Pacific Islands has found that the positive contributions of tourism to indigenous communities are currently understated and that considerable potential exists for the tourism sector and the human rights sector to mutually benefit and produce enhanced outcomes for indigenous communities by working collaboratively.

As a consequence, WINTA recommends that cross-jurisdictional tourism industry associations collaborate in the implementation of an international tourism recognition system for business best practice in indigenous human rights; and that within jurisdictions the tourism sector and human rights sector combine to promote tourism as a vehicle for self-determination and empowerment of indigenous communities.

Johnny Edmonds,Director, WINTA

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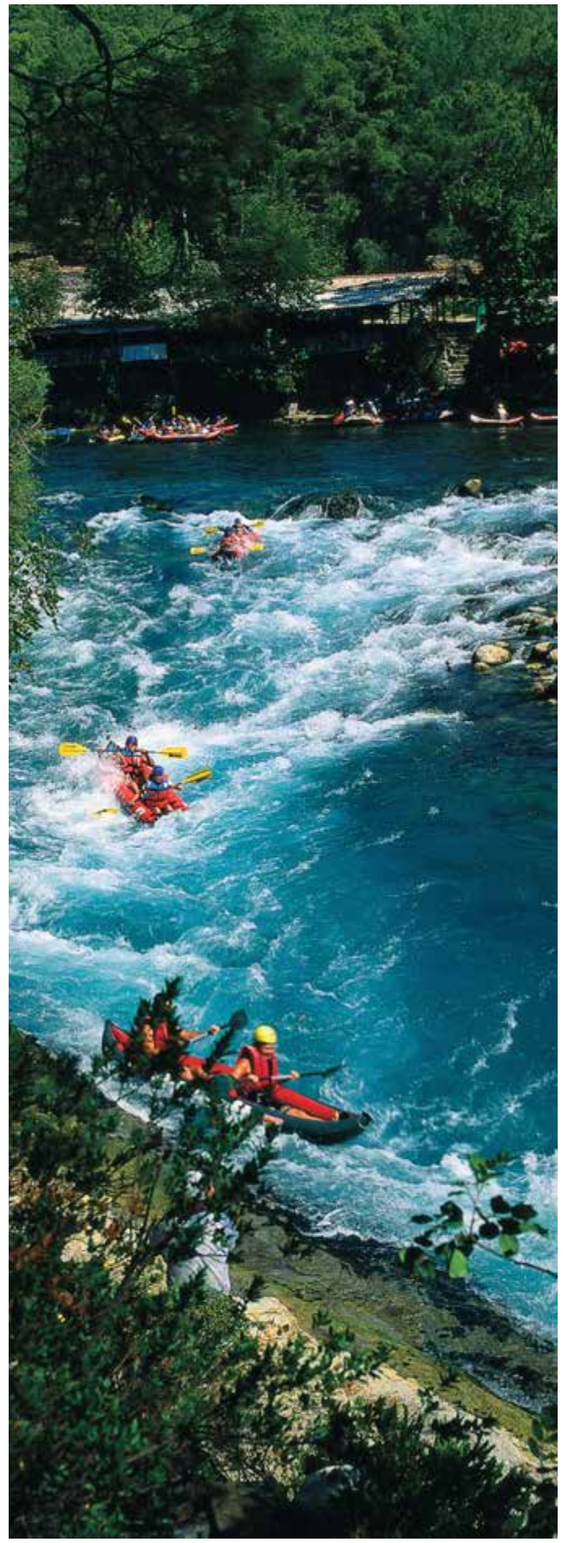
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6 Adventure Tourism Operational Standards and Certifications

This chapter provides a discussion of best practices, standards, regulations, and certifications in adventure tourism, as well as an overview of the adventure tourism safety standard adopted by the International Organization for Standardization (ISO) in 2014.

Best Practices

Best practices are voluntarily-observed operating methods, which have been shown over time to deliver superior results. In adventure tourism, there are numerous sector best practices, providing guidance to companies on everything from marketing strategy to conservation.

Best practices are extremely important in adventure tourism, because travelers are regularly brought into close contact with local communities and often spend days moving through sensitive natural environments. Even if adventure travel tour operators are not regulated by local or federal agencies, they should be aware of the following best practices when operating their businesses:

Risk reduction and safety

Adventure tour operators should follow the best practices to reduce risk and ensure safety across a variety of adventure activities, which are detailed in the certifications section below.

Cultural

Adventure tour operators must take heed of local customs, educate guests on best practices when interacting with local communities, and curate experiences that legitimately and accurately portray the culture and benefit the destination's inhabitants. For example, the Aboriginal Tourism Association of British Columbia defines "an authentic Aboriginal cultural tourism experience" as one that is "majority Aboriginal owned or controlled" (51 % or higher) and meets three sets of standards:[1]

- Market or export-readiness;
- High operating standards; and,
- Cultural content, meaning content that "is culturally appropriate and recognized by the originators of that culture while providing an opportunity for visitors to interact with Aboriginal people during the cultural tourism experience.[2]"

The government-funded program requires an application process and ongoing review and renewal[3].

Other requirements include a minimum of one year of business and a "proven track record for demonstrating quality, safety and professional operations to be considered market ready.[4]"

Environmental

The safety and environmental responsibility needs of a tourism activity change based on the environment, whether desert, mountain, or marine. Environment-specific safety concerns include wildlife, climate, footing and heights, drowning, and more. Environmentally, each clime is sensitive in different ways. For example, sunscreen and personal products are very harmful to fish and coral in marine environments. Below are some examples of environmental best practices for adventure businesses:

UNEP's World Conservation Monitoring Centre: While not tourism-specific, the Centre provide a variety of data on biodiversity, ecosystem preservation, protected areas, environmental assessment, and best practices.[5] Its work and resources include biodiversity conservation for specific environments, such as marine areas, mountain regions, the arctic, drylands. It addresses such issues as capacity-building and climate change effects and are an excellent resource for leaders and stakeholders considering operational tourism planning and management.

The Leave No Trace Seven Principles: Created by the Leave No Trace Center for Outdoor Ethics, the Seven Principles are often summarized by the consumer-oriented tagline "Take only photographs, leave only footprints." The Seven Principles are a tourism-specific program marketed to tourists and widely adopted by operators in their policies and client education practices. The Seven Principles, which are meant to provide the least amount of disturbance via tourism traffic to destination environments, are as follows:

- Plan Ahead and Prepare
- Travel and Camp on Durable Surfaces
- Dispose of Waste Properly
- Leave What You Find
- Minimize Campfire Impacts
- Respect Wildlife
- Be Considerate of Other Visitors[6]

Integrating Good Practices in a Tour Operator's Supply Chain:[7] Developed by Conservation International, Rainforest Alliance, and UNEP, this best practice guide provides practical tips to adventure tour operators. The guide includes information on sourcing and creating best practice handbooks and guide handbooks, utilizing websites, trade associations, and assessments, and other pragmatic steps to take to minimize impacts.

Additional derivative resources are available for specific environments and activities, such as front-country, children, heritage sites, river corridors, fishing, urban, climbing, huning, and international.

Standards

Best practices often evolve into standards over time. Standards are typically endorsed and/or recognized by an institution of the sector, but are also frequently developed from within the market and adhered to voluntarily. Examples of formally articulated standards that are voluntarily observed in the adventure tourism business include quality assurance programs for hospitality services, such as New Zealand's Qualmark or Australia's T-QUAL, and environmental management standards, such as the Global Reporting Initiative.

Adherence to standards are not always enforced, but over time it may become obvious to business owners that following the standards are in their best interest.

Adventure tourism market-driven standards are:

- Owned by sector stakeholders, such as tour operators and guides, because they are developed over time by the stakeholders themselves;
- Cost effective, in that they are developed organically from within the sector;
- Capable of widespread adoption as it becomes obvious the standards are in the best interest of stakeholders;
- Slower to develop, but have long term applicability, because they are often observed consistently and without significant oversight;
- Not enforceable or officially regulated.

The Global Sustainable Tourism Criteria is a current example of a set of market-driven standards that are followed by many stakeholders in the adventure sector.. It is a globally sourced set of criteria addressing sustainability issues in tourism across four topics—sustainable management, socioeconomic impacts, cultural impacts, and environmental impacts.



Regulations

In contrast to standards, regulations are established and enforced by the government. These can be much more expensive to develop, implement, and enforce. In adventure tourism, regulations are often created by government agencies and specify how sector participants must operate in areas of safety and wilderness conservation.Adventure tourism regulations:

- May evolve from standards already in play in the market;
- Often come about as a result of public and private sector concerns about safety;
- Carry enforcement power, usually by governments;
- Often are politically driven.

Establishing new regulations and the mechanisms for enforcing them is often an expensive and time-consuming undertaking for national government.

Certifications

Certifications can be awarded by governments or commercial entities and validate that a company or individual guide is adhering to a particular standard or regulation.

In adventure tourism, certifications exist to validate the technical performance of guides in specific activities. Below are a few of the leading technical certification bodies:

- Rafting: The International Rafting Federation (IRF)
- Mountaineering: International Mountaineering and Climbing Federation (UIAA), American Mountain Guides Association (AMGA)
- Rock climbing: American Safe Climbing Association (ASCA)
- Canyoning: International Canyoning Organization for Professionals (ICOPro), American Canyoneering Academy.

Many other activity-specific technical safety certifications exist. However, it is important to note that none of the certifications described carry the rule of law, although they are widely recognized by sector practitioners.

Adventure sector professionals may also participate in certification programs that are not specific to adventure tourism, but are nonetheless relevant to the sector, such as certifications that validate the quality of:

- Hospitality and guest service standards: For example, the ISO 9001:2008, the International Hospitality Association, Hospitality Assured
- Quality of attractions and venues: For example, the Malta Tourism Authority offers a "Quality Assured Seal," and Visit England's Visitor Attration Quality Schenes program also provides a benchmark for consumers to evaluate tourism businesses based on standards
- Quality of interpretation provided by guides: Examples include the Field Guides Association of Southern Africa, International Tour Management Institute (United States of America (the)), Professional Association of Wilderness Guides and Instructors (Canada), Wilderness Scotland

Certifications are often viewed as a way to communicate quality to consumers, signalling that the service provider is reputable and professional.

"A successful, responsible, and safe adventure tourism operation requires a more expansive set of skills and processes."

Adventure Guiding Standards

Numerous standards and training programs exist to prescribe how to lead various types of adventure activities from a technical perspective (e.g. the technical aspects of rock climbing or white water rafting). However, a globally recognized standard describing the many requirements of an excellent adventure travel guide—from technical proficiency to group management and cultural interpretation—does not yet exist.

Adventure travel operations and the technical and non-technical challenges they carry vary widely by the location, size, scope, activity, environment, and length of the experience. Adventure travel guiding is multi-faceted, complex work, drawing on interpersonal skills, technical skills, and local knowledge. Guides are perhaps a tour operator's most important resource. They are on the front lines with guests during a trip and bear responsibility not only for guest safety, but also guest learning and enjoyment.Guides also perform a valuable marketing service for companies, differentiating one adventure tour operator's services from another by creating the memorable experiences and personal connections that inspire guests to return to travel with the same company repeatedly, even as the destinations they visit may vary. Increased focus on the adventure sector also brings increased scrutiny on the quality of the services provided by adventure travel tour operators and their guides.

A successful, responsible, and safe adventure tourism operation requires a more expansive set of skills and processes than the purely technical, such as managing diverse groups of people or entertaining guests of different ages; however, due to the difficulty in defining and scaling "softer" skill education programs (particularly across cultures), most regional, national, and market-based training programs focus on technical safety and environmental standards. While there are numerous technical activity standards and tourism quality assurance systems with relevance to adventure tourism, the only internationally recognized standard specific to adventure tourism is the ISO Adventure Tourism Safety Standard: ISO/ TC 228 WG 7 discussed below.

Adventure Tourism Safety Standard

The ISO Adventure Tourism Safety Standard, ISO/ TC 228 WG 7,[9] is the only official, international adventure tourism standard. The policy's adoption occurred in the spring of 2014 and addresses the ideation, structure, creation, and process of effective safety management systems and resources for consumers, buyer operators, and tourism organizations involved in adventure tourism activities. The following chapter explores the ISO Standard components in detail.



CHAPTER 6 END NOTES

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7 Managing Risk in Adventure Tourism

Defining Risk in Adventure Tourism

Risk is defined broadly as a situation that exposes someone or something to danger, harm, or loss. Risk can be a physical safety matter, a risk of property loss, a financial business risk, and more.

In varying degrees, risk in terms of physical safety and property security is present in most adventure tourism experiences, because adventure travelers tend to gravitate both toward activities that carry some inherent risk level and destinations that may not be as developed from an infrastructure or training perspective. Managing risk in commercial adventure travel operations is necessary for the safety of travelers and to avoid litigation in the event of an accident.

Risk management requires the attention of adventure tour company owners, managers, and the guides who work directly with guests. Business owners and managers bear the responsibility for targeting an optimal safety level for all activities, through an assessment of the desired level of risk, and by providing appropriate guide training. Guides must possess technical skills to escort guests safely through their activities, as well as interpersonal and group management skills. This chapter will examine the types of risk present in adventure tourism, best practices in managing those risks, two examples of nations that have been proactive in risk management within their local adventure tourism industries, and potential business liabilities that pose a risk to adventure companies' financial security and viability.

Many risk management models in tourism deal exclusively with the safety and physical risks of adventure tour activities. For example, in Brazil, sector operators assess risk on a formulaic scale of probability multiplied by consequences:[1]

Risk Analysis: (RA) = Probability x Consequences

Probability runs on a scale of 1 (rare) to 5 (certain), while consequences run on a scale of 1 (no harm) to 5 (catastrophic). The minimum Risk Analysis possible—1 (rare) x 1 (no harm) = 1—would be a risk that is highly unlikely to happen, and if it did occur, would not result in harmful consequences. Therefore, this outcome is a very acceptable operational risk. The maximum Risk Analysis—5 (certain) x 5 (catastrophic) = 25—is a risk that is sure to happen, and if it occurred, would be catastrophically harmful.

Such an outcome is a risk that is unacceptable in any situation and should be avoided or aborted immediately. Professor Ralf Buckley of Griffith University provides a more holistic and circumstantially fluid method for assessing the risk aspects of running an adventure tourism business, beyond just the safety and physical risks associated with activities.[2] Professor Buckley reviews risk in adventure tourism across six categories:

- Commercial: The standard commercial risks associated with business management. Examples specific to tourism include travel market downturns or drops in visitors due to changing consumer preferences, terrorism, natural disasters, exchange rate shifts, and more.
- Legal: Permits and licenses required for adventure tour operators to operate legally; ensuring that contractual arrangements with commercial partners and suppliers are appropriate.
- Medical: Depending on the destination, conditions, and activities involved in the trip, advanced screening may involve age, strength, and general health. Risk factors here include fitness and pre-existing medical conditions.
- Operational: Operational logistics of risk, such as itinerary details, gear, lodging and vehicle maintenance, and quality, as well as emergency operations, such as medical evacuations, carrying first aid kits, and guide training in field medicine.
- Physical: Physical safety during the adventure activity; the prevention of injury or disease. As mentioned above, this aspect garners the most sector attention.
- Social: Managing interactions among clients, between clients and guides, and between the group and people in the community. Group harmony is important on adventure travel trips.

Buckley advises how to mitigate risk levels particular to the medical and physical risk categories prior to trip embarkment:

> One of the key issues for commercial adventure tourism operators is to screen clients to ensure they have adequate health, fitness, and skills to undertake the particular activity concerned. In addition, adventure tour operators are likely to be particularly concerned to ensure that clients carry their own comprehensive travel insurance, which includes both medical and medical evacuation cover.[3]

In addition to Professor Buckley's summary of legal risks, Mona K. McPhee, Senior Counsel at Desh International Law, recommends consideration of the following aspects of legal risk:

- **Civil:** Violations of written laws, failure to perform due diligence in assessing risks presented to clients, breach of contract, fraud, personal injury, property damage, mismanaged operational relationships, data and privacy injuries, advertising or intellectual property violations, etc.
- **Regulatory:** Failure to properly apply and register for permits, bribes to government officials, failure to properly hold and account for client money, misrepresentations in marketing, failing to honor laws imposing sanctions, crossing borders illegally, environmental spills and threats, illegal poaching, etc.
- **Criminal:** Fraud, theft, poaching, trafficking, and more.
- **Other:** Countries outside the Western-hemisphere or or those with a British colonial "English" law system may have other legal risk not addressed here.

Best Practice Approaches to Adventure Risk Management.

The International Organization for Standardization's (ISO) adoption of an international standard for adventure tourism safety management in 2014 represented a significant development for the professionalization of the adventure tourism sector. The standard, known as ISO/TR 21102 and ISO 21103 provides a basis for adventure tourism activity providers to plan, communicate about, and deliver adventure tourism activities as safely as practicable.

For more information on ISO visit www.iso.org.

Conclusion

Risk is inherent in adventure tourism, and as the sector evolves and expands, formal management systems are emerging. The creation of the international standard through the ISO provides the sector with a global guideline to follow. Niche industries within adventure tourism have both a long history and current evolution of creating, training, and upholding technical standards. Furthermore, as more nations implement their own local approaches to managing risk and support the companies that operate in this sector with appropriate regulation, it is expected that the safety of adventure tourism will continue to improve, with fewer operators able to provide commercial services without adequate training and licensing.

Adventure Tourism operations should consider legal and risk management concerns and best practices at the outset of creating their businesses and make maintaining and updating these processes a regular part of their business routine. Crisis and risk management plans should be communicated to appropriate stakeholders, and consumer education throughout the sector should also be prioritized.

Sector Perspectives

Interview with MAPFRE

MAPFRE | ASSISTANCE

Even though the question set seems to be aimed at companies who offer liability insurance to adventure tourism companies, rather than those as we MAPFRE ASSISTANCE who insure the end-user, please see below our responses:

Do you know/ what are the key areas of safety risk that general adventure tourism operators need to be aware of?

Adventure tourism is a subcategory of tourism that is rapidly growing in popularity where risk plays an important role; the seriousness in which each operator manages risk varies greatly.

Some of the most important areas of safety, that general adventure tourism needs to be aware of, are:

- Legal and Compliance: is advisable to find out what particular legal obligations must be complied with before starting up any activity.
- Adequate protection as well as health & safety requirements must be followed.
- Instruction and preparation is indeed the first line of protection, ensuring that owners, staff and participants are adequately trained and the right equipment is provided.
- Insurance; To assess the exposure to risk, and ensure adequate liability insurance is in place, consult with a trustworthy insurer or agent.

Do you know/ what are the key areas of legal risk for adventure tourism operators need to be aware of globally?

Due to the nature of adventure tourism, operators could be faced with common law damages as consequence of their actions, or lack of. Moreover, there has been a substantial growth in the Court's disposition to acknowledge mental injuries, giving them the same right to reparation as physical injuries.

Implementing an effective risk and safety management system is sensible for all tourism operators, especially those related to hazardous activities. Once properly implemented, the management system can address safety across all aspects and levels of the organization.

What principles for specific technical sports activities would you recommend using as a framework for other industry activities and non-technical activities (PADI, DAN, etc)?

Within MAPFRE ASSITANCE we consider the following as the most common hazardous activities:

- American football
- Assault course
- Battle re-enactment Breathing observation bubble diving
- Canyoning
- Canyon swinging
- Cascading
- Coasteering
- Fencing
- Flying (piloting private or small aircraft or helicopter)
- Gliding
- Gorge swinging
- Gorge walking
- Hang-gliding
- High diving
- Horse jumping (not polo or hunting)
- Hydro speeding
- Kite surfing (over land)
- Manual labour (at ground level, no machinery)
- Martial arts (training only)
- Micro lighting
- Motorcycling (over 125cc - not racing)
- Mountain biking (including downhill racing and extreme ground conditions)
- Mountain boarding
- Ostrich riding or racing
- Parachuting
- Paragliding
- Parapenting
- Parasailing (over land or snow)
- Parascending (over land or snow)
- Quad biking
- Rock climbing
- Rugby
- Sand yachting
- Scuba diving (qualified, maximum depth 40 m) under 14 days*
- Scuba diving (qualified, maximum depth 50 m) under 14 days*
- Scuba diving (unqualified, maximum depth 30 m) under 14 days*

- Sea canoeing
- Sea kayaking
- Shark diving (inside cage)
- Sky diving
- Tall-ship crewing
- Vla ferrata
- White or black water rafting (grades 5 to 6)
- Yachting (racing or crew) outside territor

* British Sub Aqua Club (B.S.A.C.) or equivalent.

What are the necessary legal steps / best practices that operators must complete in the foundation and organization of a new adventure travel company? What ongoing risk management practices should they be aware of in their business maintenance?

Adventure tourism operators need to become much more aware of the risk involved in their activities; physical and legal areas have the potential to impact severely on their level of financial risk and businesses viability. The main recommendation would be for all operators to ensure that they are covered for public liability, including exemplary damages or punitive damages.

What certifications do you know of that focus on adventure tourism safety?Which are required and which of non-required certifications are high quality and recommended? Do you know of any studies which have been done to benchmark whether certifications increase an operator's marketability?

There are numerous accreditations and endorsements that apply to different aspects of this type activity. Among the most common and well known are:

- ISO 21101 which defines how adventure tourism operators manage operations with regards to safety;
- ISO/TR 21102 set the minimum competences and the expected results related to adventure tourism.

What, if any, standards exist for operators in choosing reliable partners? Is it up to the company to follow their internal values or do legal guidelines exist for this?

As main recommendations we believe the below should be adhered to at all times:

- All staff should have the proper, relevant qualifications.
- Risk, health and safety information should be available for all participants at all times.
- A risk assessment should be implemented before any new business starts providing their adventure activities.
- Ongoing external supervision, ensuring that they are compliant with all safety standards and regulations.

What role does crisis communication planning ideally take as part of an operators risk management plan?

Communication planning is part of the safety management program which defines, enhances and sets principles and practices, enabling tourism operators to proactively identify and mitigate operational risks whilst stimulating a safety culture.

Does an operator need to have a legal team on hand in case of a crisis?

It is always advisable to have additional and specialized support in all matters not only legal but communication and compliance too, as when a crisis arises all elements of the risk management system are put to the test.



Jair Marrugo, Managing Director of MAPFRE ASSISTANCE in the United Kingdom

Sector Perspectives

Adventure Tourism: Managing Risk and Providing Security

If the risk is inherent to the human being and in its daily activities, it reaches its maximum relevance in adventure tourism. Adventure carries certain risks, without which it would not be such an adventure and participants are likely to be attracted equally between excitement and the sensation of risk. However risk seeking a tourist is, they do not desire a dangerous situation or environment and even less in an accident or injury. While adventure tourism may be more active than mass tourism, or occur in more uncontrolled environments, does not mean is should be less secure.

In recent years adventure tourism has grown as a result of a new type of traveler who demands new and different experiences, encouraged by more accessible destinations, new activities and new places almost unexplored. But along with the risk, travelers also look for reasonable, consistent and proper management of those risks by tourism operators, with which they usually establish a contractual relationship. Without such measures, adventure tourism would become a senseless risk activity.

The objective of the companies providing services of adventure should be the reduction of risk perceived by the tourist, through instruments such as the reputation of the company's management and training, the quality and suitability of the technical equipment used, the level of traveler preparation and the security measures surrounding the activities to be performed.

In the adventure, the risks come from the human element (physical and mental capacity, resistance training, health status, expertise, flair and leadership), the environment (risks of geography and climatology, as forest fires, floods, lightning, eruptions, orography, ground instability, mist and fog, etc) and equipment (equipment used, safety and maintenance, and monitors, information, protocols for emergencies, adequacy and appropriateness of the material). Risks generally include bodily harm and in few cases death, and to a less extent property damage or negative tour experiences.

The adventure tourism operators assume a general or professional liability with their clients, and are obligated to inform participants of the risks involved, any unpredictability and how to minimize them, the impossibility of reducing to zero risk, as well as the importance of compliance with safety rules and instructions issued by the organization in order to obtain informed consent.

In addition to contractually implement these obligations and liabilities, the operator must subscribe mainly two types of insurance, one relative to accidents in order to cover personal injuries suffered by participants in the development of the adventure activities undertaken, and the other of civil liability and property damage caused to the participants as a result of fault or negligence on the organization's development and control of activities. For example, an operator must not lead to a group of tourists to the edge of a cliff without taking precautionary measures, providing instructions and warnings regarding the distances, and should not enter with a group on a challenging path or in bad weather. Neither should they allow a client to join a trip who, due to a physical inability, could cause danger to the rest of the team members in case of an emergency by being unable to act or react. This risk management should be done at the time of the trip recruitment through questionnaires designed to assess and identify future problems that the participants themselves may not be aware, including health, medication, treatment or special needs.

In conclusion, Marsh Spain can give five recommendations for adventure tourism operators facing risk management, not exclusive of other specifics by activity:

- Develop a risk map per activity
- Inform and educate participants of each activity before its development
- Dynamic control of participants conditions, the environment and equipment to be used, which may create risks
- Develop protocols and responsiveness to emergencies and accidents
- Acquire insurance for personal accidents and liability

Marsh Spain, José María Elguero

Sector Perspectives

Interview with: Thomas Cooper

Thomas Cooper[4] started its international legal practice in 1825 and is experienced in key jurisdictions around the world. Our travel & tourism team gives advice to tourist suppliers, tour operators, booking services, and travel agencies and their insurers, related to consumers' claims within the framework of their package holiday contracts.

What are the key areas of legal risk that adventure tourism operators need to be aware of globally?

The law on adventure tourism may change from one country to another and not all have the same level of development. Different countries, such as New Zealand, Canada, or the United Kingdom, are introducing specific legislation governing the activity of adventure tourism operators. The main purpose of this legislation is to provide more safety and offer more guarantees to consumers, avoiding accidents involving death or serious personal injuries. These regulations generally focus on high risk activities for which people receive lessons or are supervised under the responsibility of the operator.

Bearing in mind the global scope of many operators' activities, people injured in a holiday accident or the relatives of a person involved in a fatal accident will normally try to bring their claim in the jurisdiction in which the highest compensation is awarded or in the court of their domicile. Consequently, each operator must assume that the valuation of any personal injury may be different in each particular jurisdiction, and that on many occasions, the contractual validity of any jurisdiction or choice of law clauses between the operator and the consumer may be limited by compulsory legal provisions that are intended to protect the consumer.

For example, if a consumer who fell during a guided mountain climbing trip has the choice to bring the claim in the United States, he will no doubt do so since the American courts and the applicable American Law normally grant the highest compensation, which may amount to several million USD in case of death.

On the other hand, if the claim were brought in Spain because the consumer's permanent residence was in Spain, it is quite likely that a Spanish judge would apply the approved level of compensation applicable to road traffic accidents, possibly with some uplift, but in any case awarding amounts which are substantially lower than the amounts awarded in the United Statesof America.

What are the necessary legal steps/best practices that operators must complete in the foundation and organization of a new adventure travel company? What ongoing risk management practices should they be aware of in their business maintenance?

The first recommended steps for anyone intending to start operating as any adventure travel company is to carry out a search of the specific legislation of the country in which the relevant activity is going to be undertaken. This search may focus on the legal or administrative requirements to obtain a licence to be allowed to provide services which involve high risk activities, or a registration/certification, the requirements of which may change from one country to another. It is also possible that there may be various public administrations within the same country, each with its own regulations and with its own requirement for granting licenses or certifications, in addition to those set out in the relevant state legislation.

What do liability companies require of operators before providing liability insurance? What factors are involved when a company is deemed uninsurable by a liability company?

Insurance companies require that the assured makes a precise declaration of the risk which is intended to be insured. Any failure to declare the risk may affect future cover for any incident for which the assured may be responsible. The risk declaration may have to include not only a description of the high risk activities which are going to be carried out, but also any risk management plan, the qualifications of any employees or coaches, and the number and the profile of the potential consumers.

In the insurance market there are policies intended for adventure tourism operators which adapt to the needs of the latter based on the type of intended activities. For example, the risk is not the same in trekking as in canyoning, so the insurance premium may change depending on the sort of services which will be provided.

On the other hand, the insurance companies often request that the instructors, guides, and coaches have all the qualifications required for the practice of the relevant high risk activity, and that the company has in force all the licenses, certifications, or registrations required by the applicable legislation.The consequences of an operator being considered uninsurable are obvious. On the one hand, it is more than likely that the applicable legislation requires that the high risk tour operator have proper civil liability insurance, with specific cover depending on the relevant activity, before any license, certification, or registration is granted. As a result, the lack of insurance may bring about the cancellation of any license, certification, or registration required. On the other hand, a company not having insurance, or having insufficient cover, will be directly responsible for any compensation payable in case of personal injury or death.

What, if any, standards exist for operators in choosing reliable partners? Is it up to the company to follow their internal values or do legal guidelines exist?

The employment of local partners as subcontractors is normally the decision of the international operator. The operator may request safety standards exceeding the standards required by the law of the country where the activity will be performed. These higher standards may be, for example, requiring additional insurance cover, preparing a joint risk management plan, or carrying out external safety auditing. This is not always easy to do as a result of the distance, and so it is advisable that the international operator visit the local subcontractor regularly to check the qualifications of its staff, technical equipment, emergency plan, etc.

Does an operator need to have a legal team on hand in case of a crisis?

Although it is always advisable to have professionals specializing in the different areas of a company's scope of business, the possibility of having in-house lawyers depends on the size of the operator. What is important is to have access to qualified legal assistance, whether internal or external, and a series of standard procedures in case of an accident, such as an emergency plan. In many cases, the study and defense of a claim is undertaken by the insurance company in accordance with the terms of the policy.

What legal responsibility do operators have to inform clients of dangers in a host destination, either likely or potential?

As a rule, the operator should inform the client fully of any risk involved in the relevant activity before it starts. This will enable
the client to make an informed choice in relation to undertaking the activity in question, and in the unfortunate event of an
incident, depending on the circumstances, the operator may allege or oppose the negligence of the client.

Javier Hernández Valenciano

CHAPTER 7 END NOTES

1 Jean Claude Razel, J. Owner of Alaya, Former President of ABETA (Brazilian Ecotourism and Adventure Travel Trade Association), and contributor to Aventura Segura (Brazilian adventure safety program) (2014), email exchange with the individual.

2 For more information of Professor Ralf Buckley please see: http://www.griffith.edu.au/environment-planningarchitecture/griffith-school-environment/staff/professor-ralf-buckley (24-09-2014).

3 Buckley, R. (2010), Adventure Tourism Management, Elsevier Ltd., Oxford.

4 Thomas Cooper: http://www.thomascooperlaw.com/ (02-10-2014).



8 Sector Challenges, Opportunities and Initiatives

While the future of the adventure tourism sector has many challenges, including carrying capacities, environmental fragility and limitations, and climate change, the sector is equally ripe with opportunities for growth. This chapter discusses important obstacles as well as initiatives that will support adventure tourism's sustainable growth in the future.

Market Challenges

Carrying Capacity

Tourism capacity and planning has always been crucial for sustainable tourism markets. Officials and stakeholders must strategically address the impacts of adventure tourism—additional consumption, traffic and waste caused by non-residents, potential deterioration of natural and historical sites, cultural impacts, and pressures for host destinations to develop infrastructure for the benefit of tourists rather than local needs—to prevent degradation and negative effects. These issues are only multiplied as billions more consumers enter the global tourism market. Further complexity is added by the complications of climate change, which is having immediate and direct effects on both popular and emerging tourist destinations all over the globe.

Environmental Fragility

The tourism sector at large operates at the intersection of business and the environment, but this is especially true of Adventure Tourism. Thus, well-managed environmental resources are crucial for both tourists and local stakeholders.

Adventure Tourism commonly occurs in or near natural environments, social environments with distinct culture, and/or sites inhabiting historical artefacts. As such, adventure tourism destinations are often fragile and in need of protection from overcrowding. While significant numbers of visitors can offer a financial incentive to conserve attractions, they also increase threats to destination integrity through overuse, uneven resource distribution, and pressures to develop in non-sustainable ways in order to capture and maximize profits. Governments, business owners, and community stakeholders must work cooperatively and strive to provide authentic and meaningful experiences to tourists that satisfy commercial objectives while also maintaining the integrity of the cultures, sites, land, and wildlife around which the adventure travel attractions are centered.

Climate Change

In mass leisure tourism settings, such as Disney World and other theme parks, Dubai, and Las Vegas, man-made environments are the central attraction. In contrast, adventure tourism's nature settings are thoroughly exposed to even the slightest environmental changes. Adventure tour operators, with products and services that depend on healthy natural environments, have a regular and direct connection to important environmental issues such as climate change.

There are two dimensions of risk concerning climate change and tourism. The first is that tourism potentially exacerbates the effects of climate change already occurring from other causes. UNWTO research shows that tourism accounts for an estimated 5% of global CO2 emissions. Air transport accounts for 40% of all tourism emissions, car for 32% and accommodation for 21%.

The second dimension of risk is that faced by destinations as traditional sites experience changes that make them less attractive or accessible to tourists. For example, there is a concern that loss of snow coverage on summits such as Mount Everest and Mount Kilimanjaro could make climbing tourism less attractive if travelers feel that the experience is no longer as special or unique. Climate change can also erode natural sites or routes and interrupt traditionally popular hiking and sightseeing routes.

> "Stakeholders must work cooperatively and strive to provide authentic and meaningful experiences to tourists that satisfy commercial objectives while also maintaining the integrity of the cultures, sites, land, and wildlife."

Sadly, communities which are the most economically reliant on tourism and adventure tourism often find themselves the most vulnerable to climate change and its negative effects. Government responses to climate change vary worldwide, but even in nations and regions where policies exist, adventure operators vulnerable to changing conditions must take action individually in order to prevent and ameliorate disruption. Adventure travel companies' success is reliant on core competencies related to the environments in which they operate as well as the activities they offer. Climate change threatens their ability to operate those activities in those environments, which makes it an even larger threat than niche sector competition. Rather than take a reactionary approach, some adventure tourism companies are now focusing on the issues raised by climate change, including identifying the challenges, developing coping and adapting strategies, determining how to further develop and innovate their business, and attempting to mitigate any contributions to climate change that may be caused by their operations.

Likely faced with the need to incorporate climate change adaptation at an organization level more quickly than the work being done at a national level, adventure companies are encouraged to work across three major areas immediately: strategy, operations, and marketing.

Strategy[1]

In an ideal world, strategies for tourism given the existence of climate change would be conceived, evaluated, and implemented at the organizational, community, regional, and national levels to assess and mitigate risks. The reality is strategies rarely come about in such a rational manner.

Bringing in expert consultation is helpful at a regional level, with the support of governments or local associations, but not realistic for most small or medium-sized owner/operators. Companies should be able to create competitive advantage in their responses to climate change by educating and leveraging individuals or committees within the organization to assess current and future climate impacts, and help the company make informed decisions to ameliorate or innovate around related disruptions.

Ideally, an organizational strategy derived from analysis of both internal and external conditions would drive a plan dedicated to combating climate impacts and educating leadership and staff. This strategy would include systematic research to track and predict climate, weather, and physical changes encountered in the local environment as well stay abreast of the latest research, and communicate with other tour operators, academic institutions, NGOs and local communities on this topic. It means companies will address the natural environment and resource impacts on tours and what can be done ahead of time; strategic simulation exercises for coping with various degrees of climate impact are effective tools for planning and decision-making.

In the best of scenarios, measures beyond an organizational level will extend to community involvement and cooperation. Education and research on climate change and measures to adapt as a community will extend between tour operators, other value chain members, and stakeholders, so that all parties are knowledgeable about the stakes at hand. Cooperation can help create sustainable adaptation that is beneficial to all parties, and alliances between tour operators in the same regions and/or members in their value chain may reduce costs and improve adaptation results.

The overall business strategy for climate change should promote operational adaptation that responds to reduce threats whilst increasing opportunities.

Operations[2]

Necessary operational changes are very specific to location and types of activities, but organizations must have the ability to understand common themes and the flexibility in altering transportation, accommodation, resources, programs, schedules and other factors based on climate impacts. Evolving (or innovating new) activities and product offerings will be key to maintaining a customer base and revenues, because existing activities may cease to be viable over time or during certain seasons.

Operational changes such as employee training and decentralization of field operations can provide the flexibility to adjust tours on the spot and ensure customer satisfaction on-the-go. Water conservation, waste storage and removal, biosecurity and other similar practices are also strategies being employed by tour operators to mitigate further deterioration of climate-impacted areas.

Marketing[3]

Marketing strategies, which are already key to business success, will need to be adapted as temperature and weather affects desirability across global destinations. Product mix, promotion, and price are variables that can be altered to retain and increase customers, while the location of products offered and distribution tend to be fixed. Active promotional campaigns that showcase reliable and diverse itineraries in the adventure field are important. While local climate issues should be the driving force behind decisions about changing itinerary components, traveler interests and demands (in terms of both trends and seasonality) also must be considered.

Product marketing should use transparent and detailed information to set clear expectations while creating excitement in potential travelers for activities outside of the normal and popular set. Contingency planning and climate and environmental education for consumers should be employed to help set expectations. Adventure travel itineraries that include conservation activities provide an opportunity for travelers to help maintain the environment as well as the tour operator's activity base.

In regions where climate change has created or extended off seasons, some operators have been able to offset revenue losses by altering or adding target markets. Targeting local customers with packages, deals, or shorter versions of existing products during non-peak seasons has helped many operators survive with fewer global customers.

Because high-quality customer service is an integral part of maintaining and encouraging future customers via word-of-mouth promotion or other sales campaigns, adventure tour staff should be adequately prepared to deal with climate in terms of climate education and discussions with guests. Providing employees with an understanding of the reasoning behind strategic, operational, and marketing decisions can ensure increased satisfaction, job focus, and improved customer service.

Recommendations & Opportunities for the Future

As the sector continues to evolve, new partnerships and sector initiatives focused on sustainable development unite diverse stakeholders and offer a range of possibilities for improving the sector despite the risks and challenges of the future.

Environmental Investments and Ecotourism

Historically, conservation of destinations and natural ecosystems has been the territory of governments or non-profit/charity-based organizations. NGOs and charities have often attempted more aggressive conservation work when governments were unwilling or unable to take measures adequate to the conservation goals. Such campaigns frequently centered on creating distance between societal systems and the conservation targets in order to protect the encroached or endangered environments or fauna in question. Many of these efforts have made significant progress, but a new model is necessary as the world's population and resource needs grow, and technologies for transport and resource modification heighten.

Market-based attempts at conservation—where economic realities and the concerns of all stakeholders are considered and met as far as possible—are having a higher long-term success rate than purely scientific or conservation-based strategies, as was illustrated by the case study of Namibia in chapter 4. Leveraging market-influenced and outcome-based approaches for environmental protection can help minimize the risk carried by tourism businesses and destinations, and incentivize place-based environmental stewardship.

Sector Professionalization

Because the adventure tourism sector is growing at a faster rate than overall global tourism, the sector 's ability to self-manage at a local, regional, national, and international level will dictate its effectiveness at balancing inherent risks and seizing opportunities. As this report has shown, multiple governments, associations, and community-based ventures of varying sizes and scope have proactively worked to minimize risk and self-professionalize. The sector's success hinges on how well it creates, implements, and monitors standards in safety, quality, professionalism, sustainability, and environmental conservation.

Sector Initiatives

Adventure EDU[4]: AdventureEDU is a global education and training organization dedicated to assisting governments, associations, and individual companies within the adventure tourism sector . The program uses a roster of seasoned sector veterans and experts with a variety of backgrounds to facilitate interactive training modules across five major subject areas:

- Adventure Definition and Concepts
- Adventure Travel Product Development & Marketing
- Operational Excellence
- Adventure Travel Operator Safety & Risk Management
- Adventure Travel Legal Matters

Adventure Tourism Development Index (ATDI)[5]: ATDI is an initiative launched in 2008 by the Adventure Travel Trade Association, The George Washington University School of Business, and Xola Consulting. The index uses ten pillars of Adventure Market Competitiveness, which provide countries with a framework to use when devising development goals and strategies.

Global Sustainable Tourism Council (GSTC)[6]: As mentioned in chapter 6 on standards and certifications, GSTC is an international organization that creates programs centered on mainstreaming sustainability through international standards, education and training around sustainable tourism and fostering demand, market access, and accreditation.

The Code[7]: The Code (short for "The Code of Conduct for the Protection of Children from Sexual Exploitation in Travel and Tourism") is an sector -driven, responsible tourism initiative with a mission to provide awareness, tools, and support to both the tourism sector and travelers in order to prevent the sexual exploitation of children. The Code, driven by ECPAT International[8] aims to address the crime of child-sex tourism by 1) creating a highly aware and well-trained tourism sector that can recognize and prevent potential abuse, and 2) building zero tolerance environments where travelers understand that these crimes are unacceptable and offenders will be prosecuted. The Code is considered by UNWTO as a good practice in the field of Corporate Social Responsibility policies related to child protection in the tourism industry. When a tourism company joins The Code, they commit to taking six essential steps to help protect children:

1	**ESTABLISH A POLICY AND PROCEDURES** against sexual exploitation of children	4	**PROVIDE INFORMATION TO TRAVELERS** on children´s rights, the prevention of sexual exploitation of children and how to report suspected cases
2	**TRAIN EMPLOYEES** in children´s rights, the prevention of sexual exploitation and how to report suspected cases	5	**SUPPORT, COLLABORATE & ENGAGE STAKEHOLDERS** in the prevention of sexual exploitation of children
3	**INCLUDE A CLAUSE IN CONTRACTS** throughout the value chain stating a common reputation and zero tolerance policy of sexual exploitation of children	6	**REPORT ANNUALLY** on your implementation of The Code

Travelers Against Plastic[9] (TAP): An initiative created by the directors of two United States of America (the)-based sustainable tour operators, Crooked Trails and Wildland Adventures, the TAP campaign is an outreach program educating travelers on the negative impacts that disposable water bottles have on the environment and communities. It educates them on how to clean their own water, which is to be carried in reusable bottles.

World Wildlife Federation[10] (WWF): Tourism figures prominently in the conservation of priority locations around the world and in many of WWF's programs—either as a proactive conservation strategy to create incentives for wildlife or ecosystem conservation, or as a threat requiring reactive abatement efforts to mitigate unsustainable tourism practices. Shifting the balance of these practices from threat to strategies that benefit communities and conservation is critical to their mission.



Sector Perspectives

Sustainability and Adventure Travel in Cape Town

Known around the globe as a place of beauty, Cape Town has exceptional diversity in a small geographic area, making it a destination with the remarkable potential to be a leader in sustainable, responsible tourism.

Attractions such as Table Mountain, Cape Point and Kirstenbosch National Botanical Garden form a significant part of the greater Cape Floral Kingdom; an area holding approximately 9600 species of indigenous plants, of which 70 % are endemic and 1406 are listed in the Red Data Book. It is one of Conservation International's Global Hotspots of Biodiversity, placing an international responsibility on our government and ourselves to ensure its conservation.

Programs designed to successfully mitigate negative impacts of tourism

Tourism has acted as a facilitator of nature conservation in Africa for decades with the economic benefits of tourism safeguarding land against alternative uses such as urbanization, agriculture, deforestation and industrialization. As a result, almost 16% of the total land area in Southern Africa is designated as protected areas, which is considerably higher than the 10% minimum recommended by the World Conservation Union and United Nations Environment Programme (SLA Ferreira, Sustainable Tourism in Post-colonial Southern Africa, Africa Insight Vol. 33 No 1/2.)

Cape Town Tourism CEO, Enver Duminy, says: "Adventure tourism is a central facet of Cape Town's tourism offering and an authentic reflection of the lifestyle actively enjoyed by its own citizens. Few cities are able to offer a mix of outdoor lifestyle pursuits and urban culture at such close proximity to one another.

From mountain biking to hiking and climbing, mountain trail runs to paragliding and abseiling, New7Wonder Table Mountain is a focal point for adrenalin seekers. On the other hand the ocean offers endless adventure with everything from big sea fishing and boat races to surfing, kitesurfing and body boarding.

Adventure tourism greatly assists in maintaining and preserving Cape Town's natural offering and is a healthy income generator for many people in Cape Town and a key factor in defying seasonality for tourism in Cape Town."

CAPE TOWN TOURISM
www.capetown.travel

Buy in from national and local governments with guidelines on development, environmental impact assessments and environmental practices assist in minimising the negative effects of tourism.

Travel decisions are increasingly being based on environmental considerations, and self-regulation organizations that operate at an international level like Blue Flag, Green Globe and at a national level like Fair Trade in Tourism South Africa (FTTSA) play a vital role by aiding the environmentally aware consumer during their decision making process.

In addition, international accolades recognizing destinations for their efforts on sustainable and responsible tourism play an important role too.

Cape Town was acknowledged by the Etisphere Institute of New York as 'One of ten cities in the world most likely to become centres of sustainability by 2020', made the list as one of the 'Top Ten Ethical Destinations in the World 2010' by Ethical Traveler, and was the first urban centre to receive the coveted 'Best Destination' Virgin Holidays Responsible Tourism Award in 2009. In 2002, representatives from tourism sectors across the board in twenty countries attended the Cape Town Conference on Responsible Tourism in Destinations, at which a declaration on responsible tourism was agreed upon.

Responsible Tourism Policy and Action Plan

In 2009, the City of Cape Town adopted the Responsible Tourism Policy and Action Plan, which commits to adopting Responsible Tourism, in large part as an approach to destination management, to bring about positive economic, social, cultural, and environmental influences. It facilitates the city-wide adoption and implementation of responsible tourism actions and serves as a decision-making reference point for divisions within the City, as well as for external stakeholders.

The policy entails using six “levers” to achieve sustainability, including:

- Planning for economic development, transport and all other areas
- Regulation, including land-use approvals, rezonings, licensing and building plan approvals
- Using buildings and other immovable property owned by the City of Cape Town
- Requiring organisations funded by the City to adhere to Responsible Tourism principles in contractual arrangements
- Managing the City’s supply chain in a Responsible manner, including transport and travel, meetings and conferences, and events
- Integrating Responsible Tourism principles within the City’s Performance Management framework

The Responsible Tourism Policy and Action Plan is designed to fit in with the City’s policies and programmes aimed at the development of a sustainable and successful city, including a biodiversity strategy; an electricity-saving campaign; green building guidelines; water and waste management bylaws; Smart Living and Smart Events Handbooks; a new public transportation system, and more.

Industry players working together to confront realities such as over-development, pollution, and climate change in vulnerable sites and regions

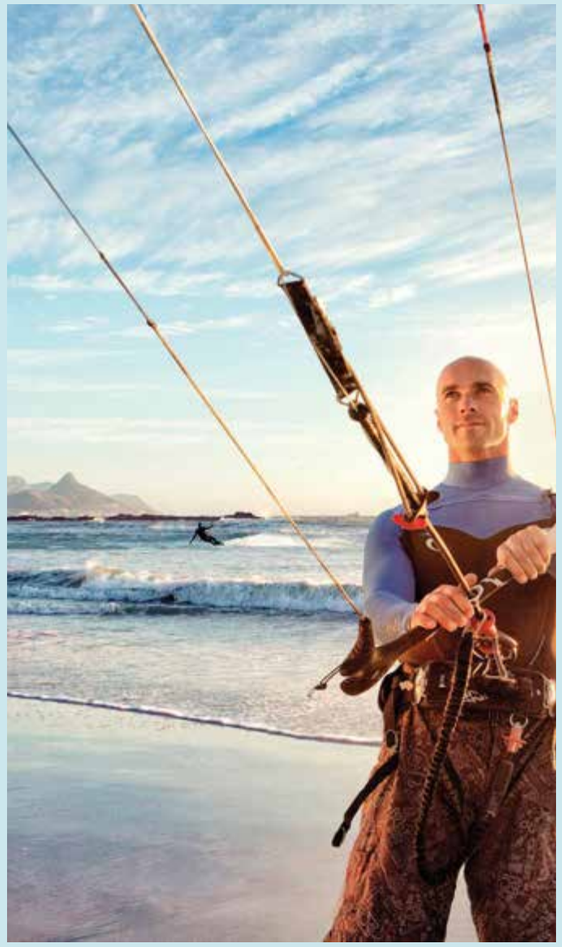
In 2009, the City also signed a Responsible Tourism Charter with leading trade associations; the Federated Hospitality Association of South Africa (FEDHASA), the Southern Africa Tourism Services Association (SATSA), the South African Association for the Conference Industry (SAACI) and Cape Town Tourism. This Charter commits each signatory to work actively on the priority issues for Responsible Tourism and report on progress.

In September 2011, the City of Cape Town launched the Responsible Tourism Pilot Project with approximately twenty Cape Town Tourism member businesses, in order to make a start on the monitoring of responsible tourism practices in-destination. The pilot project was completed in September 2013 and useful results are expected to guide the practice of Responsible Tourism and establish measuring and monitoring systems for these practices going forward.

In addition, tourism businesses and attractions in Cape Town play a hand in realising sustainable tourism in the city:

Table Mountain National Park is a very significant aspect of Cape Town’s landscape that runs through the centre of the City (and the greater Cape Town Peninsula). The natural biodiversity of the area is protected by the combined efforts of the Table Mountain Aerial Cableway, area-specific attractions, environmental organisations and South African National Parks; a well organised and respected organisation that looks after many of South Africa’s official national parks .

Known as the Big Six, Cape Town’s other top attractions include Kirstenbosch National Botanical Garden, Robben Island, Cape Point, the V&A Waterfront and the Constantia Vineyards. The management committees of these attractions work together to alleviate the negative effects of tourism on the environment.



Information supplied by Cape Town Tourism, unless otherwise stated

Sector Perspectives

Karen Kohler, Research Manager at Tourism Kwazulu-Natal Speaks Out

The three biggest industry challenges facing adventure tourism in the next 25 years will be the following:

1. Destruction of natural environments including the development of inappropriate infrastructure and increased access,

2. lack of appreciation for the critical nature of the balance between a pristine environment and the number of human beings who can experience it before it is negatively affected,

3. Lack of government interventions on the part of the natural environment. Too often it is seen merely as a source of income, which leads to its exploitation, which in turn leads to its destruction.



CHAPTER 8 END NOTES

1 Stowell, S. and Heyniger, C. (2013), ‘Adventure Travel’s Response to Climate Change: A Success Story from India’, Meeting the Challenges of Climate Change to Tourism: Case Studies of Best Practice, Cambridge Scholars Publishing, Newcastle upon Tyne.

2 Ibid.

3 Ibid.

4 Adventure Travel Trade Association: www.adventuretravel.biz/education/adventure-edu/ (24-09-2014).

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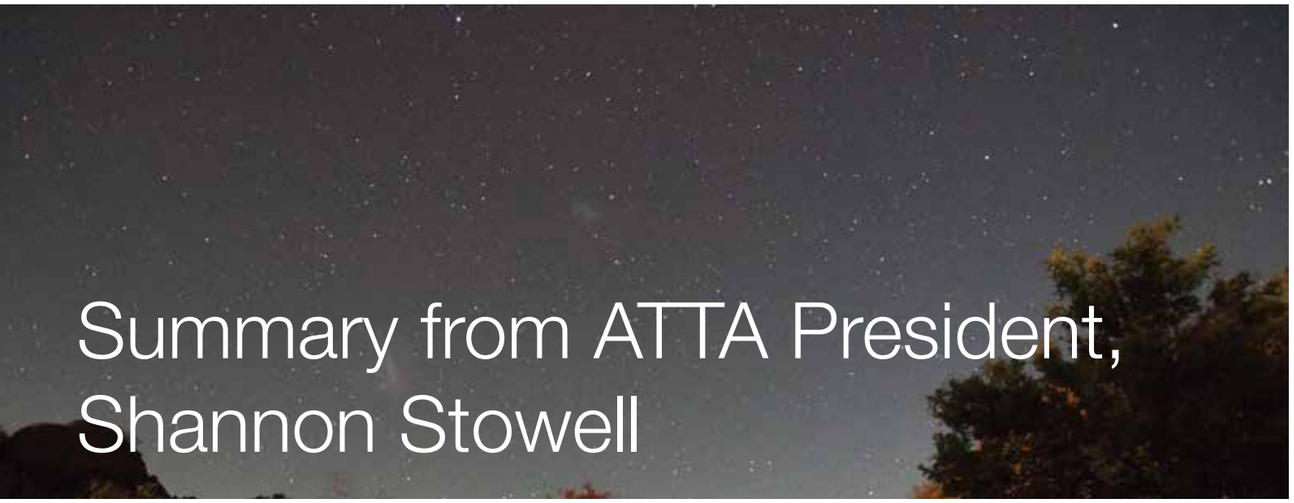
6 Global Sustainable Tourism: www.gstcouncil.org/about/learn-about-gstc.html (24-09-2014).

7 The Code: www.thecode.org (24-09-2014).

8 ECPAT International: www.ecpat.net/ (24-09-2014).

9 Travelers Against Plastic: www.travelersagainstplastic.org/ (24-09-2014).

10 World Wildlife Fund: www.worldwildlife.org/ (24-09-2014).



Summary from ATTA President, Shannon Stowell

ADVENTURE TRAVEL TRADE ASSOCIATION
www.adventuretravel.biz

What top-level conclusions can be drawn from this report and industry trends? What considerations exist for the industry in light of tourism's forecasted growth rate of four to 5% a year and more specifically, the adventure travel sector's aggressive and sustained, double-digit growth phase?

Adventure Tourism used to be a relatively fringe or small niche of the overall tourism sector but today, it has become more mainstream as a USD 263 billion global market.[1] In 2014, tour operators noted that the top four trends in adventure tourism were the softening of adventure travel, customization of trip experiences, multi-generational groups, and cultural experiences.[2] In other words, the trends indicate the broadening of adventure as a choice of travel by the larger market. This data came from more than 300 companies in 69 countries. Governments acknowledge this trend as well. Prior to 2007, 52% of the tourism boards surveyed (91 in total) noted that they did not recognize adventure tourism as a stand-alone sector in their destination. That number sharply decreased to a mere 8% in 2011 out of that same group of tourism boards/ministries.

Rapid growth represents both opportunity and peril. As noted by many, if not most, scientists, experts, and academics around the world (from within and outside the tourism industry), the global community is facing many significant challenges including but not limited to climate change, environmental degradation, habitat loss, language and cultural erosion and loss, and social justice issues and poverty.

The tourism industry can either do its best to combat and prevent these issues or, by negligence, can do even further damage. There are numerous examples of destinations that are overrun, commoditized, and devalued; some of which will never fully recover. The adventure industry, specifically, needs to pursue better risk management, community inclusion in projects, and sustainability in order to be both healthy and productive.The adventure sector can serve as an example of how tourism should be conducted. Because it relies on cultural and natural capital as its primary assets, adventure tourism can be used as a model to create, develop, and sustain profitable businesses and thriving destinations by pursuing the desired outcomes of the Global Sustainable Tourism Criteria to:

- Demonstrate sustainable destination management;
- Maximize economic benefits to the host community and minimize negative impacts;
- Maximize benefits to communities, visitors, and culture; minimize negative impacts; and,
- Maximize benefits to the environment and minimize negative impacts.

"Adventure tourism is what tourism should be today and definitely what tourism will be tomorrow."

UNWTO Secretary-General Taleb Rifai, 2012 address in Switzerland to Adventure Travel World Summit

Destinations should consider the following when looking at adventure tourism:

- **Adventure tourism is on the front lines of climate change issues:** This is born out of need—it is daily and starkly apparent to adventure travel companies that if they lose their local environments, wildlife, and human cultures, their businesses have no future in the short-term, much less the long-term. Interestingly, because the majority of adventure travel businesses are small-to-medium business enterprises and entrepreneurial, innovative ideas and products often emerge from this segment; this is where many trends start. There is not much status quo to protect, so businesses in this space quickly jump to incorporating initiatives such as composting, recycling, alternative energy sources, reclaiming land, etc. This is affecting how mass tourism has to look at its own development, and an increasing number of non-adventure tourism companies are starting to add adventure products to their portfolios. Not only are the adventure travel companies themselves on the front lines of climate change issues, they take customers there to see it first hand—to where the polar bear is losing its habitat because of climate change or to Mexico to learn about the effects of climate change on the Monarch butterflies or coral reefs, for example.

- **Adventure travel transforms consumers into active advocates:** A night in the jungle, a week on the trail, a day in the mountains, or an afternoon at an archaeological site—interacting closely with nature and culture has an impact on a traveler that is impossible to replicate any other way. And it will take transformation and disruption to change unconsciously destructive and consumptive traveler behaviors, which are so deeply ingrained and increase carbon footprints worldwide. Adventure travel bridges the gap between the problem and the consumer. The more that people see, feel, and interact, the more they will understand what is happening to the world around them. They must, and will, take this important learning back to their lives and businesses. Consumer demand for responsible tourism will help give destinations and businesses a reason to pursue change in their own operations.

- **Adventure travel protects the important "lungs of the earth" (i.e. forests and jungles):** Unlike waste reduction or carbon offsetting efforts, this is market-driven preservation. A key element of adventure travel is that it takes place in nature and often in rural locations. The adventure travel industry is among the most vocal and self-interested in protecting the world's forests and jungles. Tropical forests absorb 18% of all carbon output by fossil fuel emissions and must be protected.[1] It is important that private industries, communities, NGOs, and governments protect the forest together. If travelers stop coming into a region and delivering important income, people will extract every last bit of value from the land—either directly or by selling to non-local parties who care primarily about profit instead of the negative environmental impact. Ironically, the tourism industry will likely be the champion to save species such as Indian tigers, Namibian elephants, and Rwandan gorillas.

- **Adventure travel requires less development than traditional industry:** Paved roads, large airports, and expensive infrastructure are not always required by the adventure customer or product. This is especially ideal for emerging economies who can maximize what they already have.

- **Adventure travel keeps revenue in the destination:** It gives alternatives to extractive one-use industries (e.g. mining) and pushes revenue to the rural outreaches—66% of revenue spent stays in the local destination.[2]

- **Adventure travel gives people a reason to stay rural and be proud of their cultures:** Migration to overcrowded megacities is a problem in many emerging economies, and adventure tourism can be used as a tool to give young people and entrepreneurs a way to create products that attract high-value, low-impact customers.

"I believe that if we know how to find, through adventure travel, the ability to employ those who own the land, woods, rainforests or deserts, the lakes or lagoons, that we will find a path to correcting the terrible inequalities of our country and the world."

Former Mexican President, Felipe Calderon - October, 2011



SUMMARY END NOTES

1 Stowell, S. and Heyniger, C. (2013), 'Adventure Travel's Response to Climate Change: A Success Story from India', Meeting the Challenges of Climate Change to Tourism: Case Studies of Best Practice, Cambridge Scholars Publishing, Newcastle upon Tyne.

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