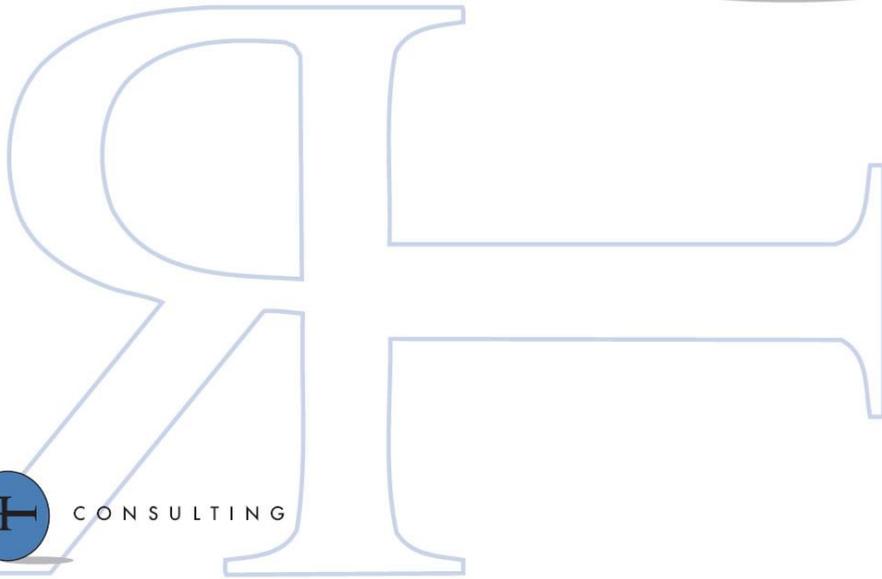


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RISPOSTE



TURISMO



**“The rapid growth
of adventure tourism”**

by Shannon Stowell

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Although tourism literature does not always include and define all the different forms of travelling, adventure tourism - one among them - is conventionally defined as a trip which includes at least two elements among physical activity, natural environment and cultural immersion. But the lack in definitions and deepening of the phenomena doesn't mean that the sectors involved and the same phenomena aren't so evolved and important. Adventure tourism, in fact, is a rising type of tourism involving different and many sectors and activities with an extended supply chain and which is able to generate tourist flows that continue to grow.

Among the many - and continue growing - possibilities for a traveller to choose a destination and the activities to do during a journey, adventure ones are more and more attractive. But the activities can't be the only element to consider when defining an adventure traveller, because many of them classified as “soft adventure” are often practiced by all tourists and, furthermore, the meaning of “adventure” usually depends on the single tourist own experiences. The characteristics of typical adventure tourists are very important to consider when analysing benefits for

communities, economies and markets. The willingness to pay a premium price for exciting and authentic experience, the average length of journeys, the common “adhesion” to sustainable environmental and cultural practices and the in-destination expenditures are all features to consider and evaluate with the right importance.

Adventure tourism, moreover, reaches many destinations not usually interested by tourism flows, so that creating new incomes for local economies and possibilities for economic development thanks to the presence of adventure tourists. A tourism supply chain is complex, and the adventure tourism chain is more complex than the mass tourism products' one: as a niche product, it often requires specialised operations and knowledge. 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.

The article, based also on the recent data contained in the last UNWTO Global Report on Adventure Tourism, released during October 2014, provide a complete and clear framework of adventure tourism sector.

“La rapida crescita del turismo d’avventura”

di Shannon Stowell⁶

Sebbene la letteratura del turismo non sempre includa e riconosca tutte le differenti forme di viaggio possibili, il turismo d’avventura - una di esse - è convenzionalmente definito come un viaggio che include almeno due elementi tra attività fisica, ambiente naturale e immersione culturale. Ma la mancanza di definizioni ed approfondimento del fenomeno non va di certo letta come indice di limitNoè importanza ed evoluzione del settore e del fenomeno. Il turismo d’avventura, infatti, è un modo di fare turismo in forte aumento capace di coinvolgere crescenti flussi di domanda e diversi e molteplici settori e attività dal lato dell’offerta.

Tra le possibili attività a disposizione di un turista durante una vacanza, quelle dal carattere avventuroso sono sempre più attrattive. Ma l’attività svolta durante una vacanza non è il solo elemento da considerare nel definire un turista d’avventura, poiché molte attività classificate come soft adventure sono spesso praticate da qualunque turista ed, inoltre, il significato del concetto “avventura” dipende abitualmente dalle esperienze di ciascuno.

Le caratteristiche di un tipico turista d’avventura sono molto importanti da considerare nel momento in cui si analizzano i benefici per le comunità e per il mercato. La disponibilità a pagare un prezzo più alto per esperienze autentiche ed eccitanti, la durata

media del viaggio, il comune uso di pratiche sostenibili, sia verso l’ambiente che verso la cultura, e le spese effettuate in loco sono tutte caratteristiche da considerare e valutare con il giusto rilievo.

Il turismo d’avventura, inoltre, coinvolge molte destinazioni non tipicamente meta di flussi turistici, creando in tal modo nuove fonti di entrata per le comunità locali e, di conseguenza, opportunità per lo sviluppo economico. Posto inoltre che la catena dell’offerta turistica è complessa, quella relativa al turismo d’avventura lo è ancor di più rispetto a quella dei prodotti turistici definibili come di massa: come nicchia di mercato, infatti, essa richiede spesso servizi specializzati e una buona conoscenza del settore. Le relazioni della catena del valore del turismo d’avventura con la singola destinazione, infatti, sono molto profonde: proprio questa è una delle principali ragioni che spingono ad affermare come il turismo d’avventura apporti elevati benefici a livello locale.

L’articolo, basato anche sui dati contenuti nell’ultimo UNWTO Global Report on Adventure Tourism presentato nell’Ottobre 2014, fornisce un completo e chiaro quadro del settore del turismo d’avventura.

⁶Presidente, ATTA - Adventure Travel Tourism Association

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1. Introduction

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 prioritising adventure tourism for market growth because they recognise its ecological, cultural and economic value.

To date no definition of adventure tourism exists in UNWTO literature, however the Adventure Travel Trade Association¹ (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 encouraging all three tend to afford tourists the fullest adventure travel experience.

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. Although enthusiasts' spending is on par with other types of adventure travellers, 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 specialised needs, and they seek out locations that are difficult to access or are upcoming but not yet popular. But extreme adventurers are not as much tourists as independent travellers 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 typically require attention from tourism policy makers. Regardless of how tourism professionals organise adventure travel, adventure will always be a subjective term for travellers themselves, because it is related to one's individual experience.

¹ The Adventure Travel Trade Association, established in 1990, serves more than 900 members in 80 countries worldwide. Members include tour operators, tourism boards, agents and accommodations with a vested interest in the sustainable development of adventure tourism.

Tab. 1 - Tourism activities and their adventure classification

SOFT			HARD	OTHER
Archaeological expedition	Fishing/fly-fishing	Safaris	Caving	Attending local festivals/fairs
Backpacking	Hiking	Sailing	Climbing	Cruise
Bird watching	Horseback riding	Scuba diving	Trekking	Cultural activities
Camping	Hunting	Snorkelling		Getting to know the locals
Canoeing	Kayaking/sea/whitewater	Skiing/snowboarding		Learning a new language
Eco-tourism	Orienteering	Surfing		Walking tours
Educational programs	Rafting	Volunteer Tourism		Visiting friends/family
Environmentally sustainable activities	Research expeditions			Visiting historical sites

Source: ATTA (2013).

2. Brief history of adventure tourism

Humans have been engaging in adventurous travel for hundreds of year via exploration, however commercial adventure travel is a relatively new phenomenon, in which travellers hire a professional guide to provide a range of technical support and equipment, as well as culture and nature interpretation. 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, owned-operated businesses led by entrepreneurs with a drive to share their favourite 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 expenditures.

3. 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 natural capital. Protection and promotion of these resources is important, and the continued development of this sector must seek to protect these valuable assets. 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 can also be defined by what is not mass tourism. Mass tourism includes large-ship leisure cruises, "sun and sand" package vacations, bus tours around city centres that stop only at iconic attractions, theme parks such as Disneyland, or casino resort such as those found in Las Vegas, Nevada.

It relies on economy of scale, the replication of standardise products and the reduction of costs. Mass tourism includes little cultural immersion or education and often takes place on warm climate where tourists enjoy the three "S"s - sun, sand, sea. Mass tourism can also be classified by the sheer number of people in one destination. For example the Mediterranean receive an average of 230 million tourists per year, while the Galapagos, popular adventure destination, received just 180,831 visitors in 2012.

4. Who is the adventure tourist

According to the adventure tourism market study 2013², 57% of adventure travellers were male and 43% were female. However, the 2014 annual global trade study, which is specific to tour operators, reflected that 53% of their travellers were female and 47% of them male.

The 2013 study further revealed that 37% of adventure travellers have at least a four-year degree, 11% have a professional degree and the average individual income of an adventure traveller is USD 46,800 per year. Adventure travels continue to value international ones, with 71% of all adventure travellers (79% hard adventure travellers) having a valid passport. A small portion of them travel alone, 21% with friends, 37% with a spouse or partner and 30% with the family, including children. Adventure travellers rank areas of natural beauty as the most important factor in choosing a destination, followed by the activities available and the climate.

Non-adventure travellers ranked having friends and family at the destination as the most important factor, followed by areas of natural beauty and climate.

² The Adventure Tourism Market Study is a barometer for the size and characteristics of the adventure tourism market. The report provides a view of adventure travel market in Europe, North America and South America, estimated using the results of a representative survey of 838 international travellers. The 2013 edition of the report was realised by ATTA and the George Washington University.

Graph 1 - How did you prepare for your last trip? (Adventure travellers)



Source: ATTA (2013).

5. 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 and Xola Consulting. It found that the global value of adventure tourism was USD 89 billion. The study was repeated in 2013 and found that 42% of travellers departed on adventure trips, making the sector worth USD 268 billion -an increase of 195% in two years. This remarkable growth

was attributed to an increase in international departures of travellers going on adventure trips and in average spending.

Between 2009 and 2010, South America’s adventure hard travel population grew from 1.4% of all departures to 8%; the same period saw a 5% increase in the soft adventures population. In fact, the UNWTO Tourism Highlights 2014 notes that “with rising level 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.” Additionally, the report notes that Chinese

travellers are the top spenders while on vacation. Developed economies will benefit from the favourable exchange rate for Russian and Chinese travellers 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 Latina American travellers will be changing the shape of leisure traveller demographics in the years to come. In the adventure tourism sector, the trend has been towards disintermediation, meaning the removal of the middle-man -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 traveller can access information and trusted consumer reviews online, he is more likely to go straight to the provider. 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.

6. Structure of the adventure tourism sector and supply chain

Tourism is a complex sector with many players contributing to the final consumer product. 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.

that allow them to plan their trips and ultimately book them. Factor influencing the demand for adventure tourism include:

- ~ the cost of an adventure tour;
- ~ the cost of related products;
- ~ the capacity or income of target markets;
- ~ marketing, which appeals to the preferences or motivations of travellers.

Tab. 2 - The six typical stages of travel of adventure tourists

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 holtels and activities"
Booking	"I need to pay for my trip to Italy"
Experiencing	"Italy is amazing"
Sharing	"Look at this amazing trip I am just got back from!"

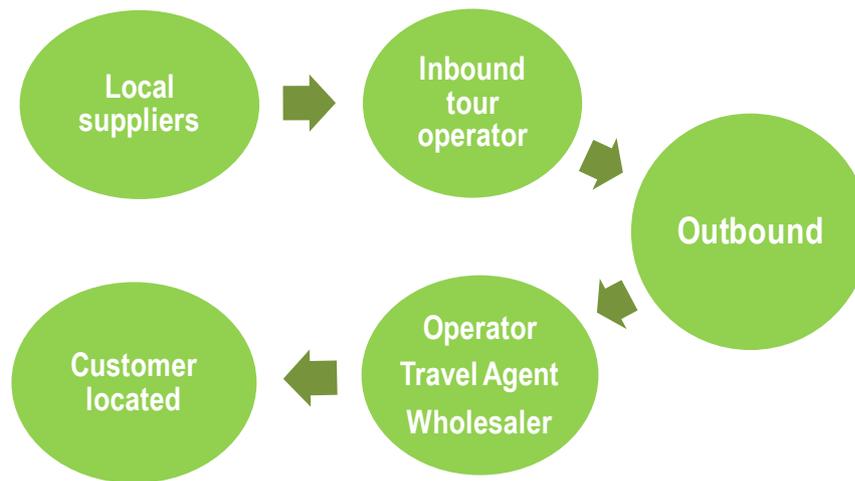
Fonte: ATTA (2013).

People must be motivated to travel, and they must have access to information and resources. A tourism supply chain is complex, a 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 adventure tourism is more complex than the mass tourism products' one: niche products often require specialised 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, but the makeup of the most involved adventure tourism supply chain is typically as in the figure below. The adventure tourism supply chain does not always follow this traditional pattern. Parts of the chain might be minimised 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.

Fig. 1 - Adventure tourism supply chain



Fonte: ATTA (2013).

7. The potential benefits of adventure tourism to local economies, communities and the environment

A decade ago, the International Ecotourism Society (TIES) launched a public awareness campaign that emphasised “your travel choice makes a difference”. That sentiment is still true today and further exemplified by the joint 2013 UNWTO, UNODC³ 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. 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 safe guarding 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 under-taken 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.

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 consumers beyond their iconic spots. An example of this could be Rio de Janeiro: Adventure tourism has the potential to solve this problem by providing the customers with opportunities to venture beyond Rio and visit the Atlantic rainforest for sea kayaking, cultural activities and more. Adventure tour operators can play a

³ United Nations Office on Drugs and Crime.

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.

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.

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.

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 maximise 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 centred. In an ideal world, strategies for tourism given the existence of climate change would be conceived, evaluated and implemented at the organisational, 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 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 organisation to assess current and future climate impacts, and help the company make informed decisions to meliorate or innovate around related disruptions. Ideally, an organisational 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, non-governmental organisations 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 organisational 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.

As the sector continues to evolve, new partnership and sector initiatives focused on sustainable development unite diverse stakeholders and offer range of possibilities for improving the sector despite the risks and challenges of the future. Historically, conservation of destinations and natural ecosystems has been the territory of governments or non-profit/charity-based organisations. 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 centred 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 are having a higher long-term success rate than purely scientific or conservation-based strategies. Leveraging market-influenced and outcome-based approaches for environmental protection can help minimise the risk carried by tourism businesses and destinations, and incentivise place-based environmental stewardship.

Because also 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.

Multiple governments, associations and community-based ventures of varying sizes and scope have, during the years, proactively worked to minimise risk and self-professionalise. The sector’s success hinges on how well it creates, implements and monitors standards in safety, quality, professionalism, sustainability and environmental conservation.

9. Conclusions

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. In 2014, tour operators noted that the top four trends in adventure tourism were the softening of adventure travel, customisation of trip experiences, multi-generational groups and cultural experiences. In other world, the trends indicate the broadening of adventure as a choice of travel by the large market. This data came from more than 300 companies in 69 countries and governments acknowledge this trends as well. Prior to 2007, 52% of the tourism boards surveyed (91 in total) noted that they did not recognise adventure tourism as a stand-alone sector in their destination. That number sharply decreased to a mere 8% in 2011 out of the same sample group. Rapid growth represents both opportunity and peril. As noted by many, if not most, scientists, experts, and academics around the world 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, commoditised, and devalued; some of which will never fully recover. The adventure industry, specifically, needs to pursue better risks 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 destination by pursuing the desired outcomes of the Global Sustainable Tourism Criteria, thus demonstrate sustainable destination management, maximise economic benefits to the host community and minimise negative impacts, maximise benefits to communities, visitors and culture, minimise negative impacts and maximise benefits to the environmental and minimise negative impacts on it.

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