



Adventure Tourism Development Index 2009 REPORT

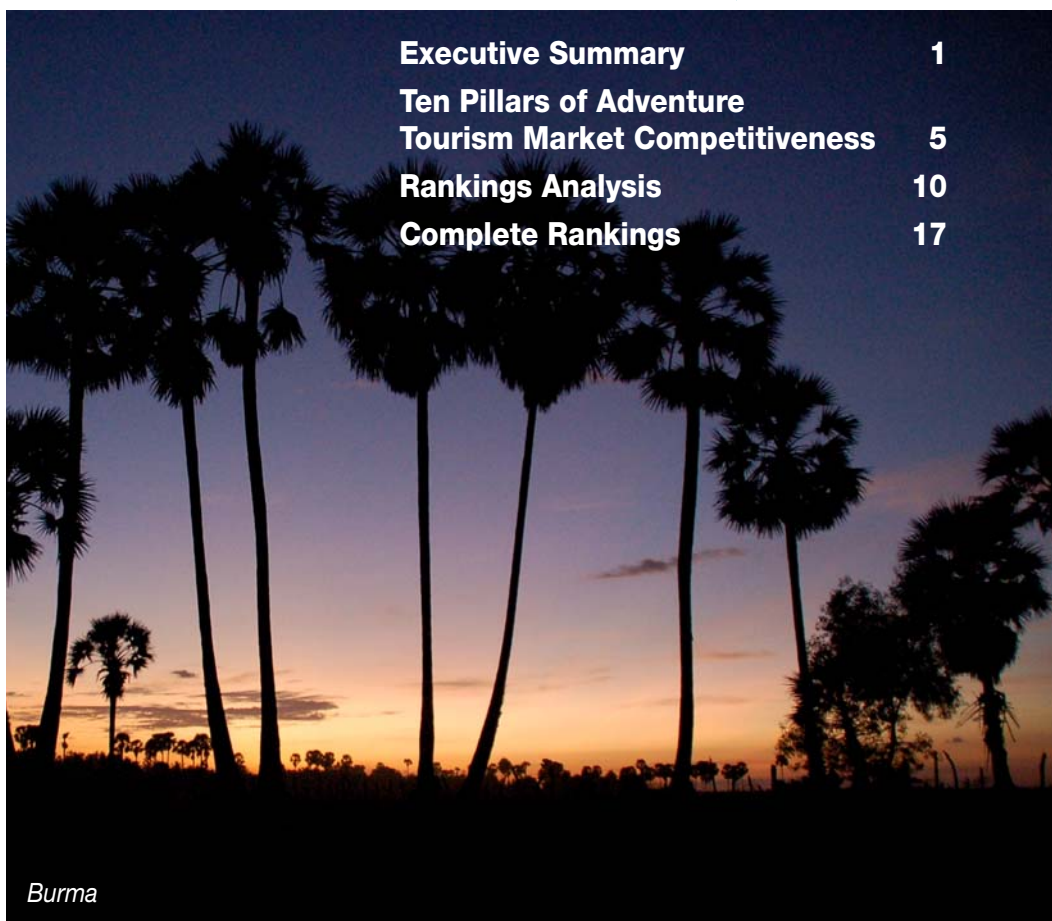


Garibaldi Lake, Canada; photo by Natasha Martin

Adventure Travel Trade Association / The George Washington University

2009 ADVENTURE TOURISM DEVELOPMENT INDEX REPORT

Executive Summary	1
Ten Pillars of Adventure Tourism Market Competitiveness	5
Rankings Analysis	10
Complete Rankings	17



Burma

Photo: Adam Vaught

ATDI 2009 Executive Summary

The Adventure Tourism Development Index (ATDI) is a joint initiative of The George Washington University and The Adventure Travel Trade Association (ATTA).

The ATDI offers a ranking of countries around the world based on principles of sustainable adventure tourism and is calculated through a combination of survey and quantitative data gathered from international indices. It seeks to gauge the potential of a country to host an adventure travel market and examines ten factors (10 pillars of Adventure Market Competitiveness) in three categories:

1. Safe and Welcoming
2. Readiness
3. Adventure

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

ATDI Background

The ATDI ranks countries based on the 10 Principles of Adventure Market Competitiveness. These principles were proposed by Xola Consulting based on observations about the unique characteristics of adventure tourism products and markets in 2007. At that time, Xola proposed that the adventure industry promote the consistent application of such basic principles and initiated conversations with the George Washington University and the ATTA.

In 2008, The ATTA embraced the project as necessary for the responsible evolution of the adventure industry; GW signed on to develop a quantitative methodology for measuring how countries are performing relative to these principles, and the scored ranking system for the ATDI was born.

In 2009 the team assembled an advisory board made up of government and private sector representatives from the around the world in the adventure travel industry to further refine the methodology. The ATDI Advisory Board members include:

- Mongolia National Tourism Board — Mongolia
- Uncharted Outposts — USA, operating globally
- Switzerland Tourism — Switzerland
- Stavanger University — Norway
- Tourism Industry Association, New Zealand — New Zealand
- Fazendin Portfolio — USA/Africa
- Explorades — Peru
- Canadian Tourism Commission — Canada
- Instituto EcoBrasil — Brazil
- Wildland Adventures — USA
- Wanderlust Consulting — USA
- Myths and Mountains — USA/Asia
- PEPY Tours — Cambodia
- DMR Consulting — Canada
- ABETA — Brazil
- Strategic Travel Consulting — USA

The ATDI rankings are currently in their second year. ATTA promotes the program to the adventure travel industry and supports its expansion; GW continues to refine the technical methodology and calculate the scores each year; Xola Consulting supports the program with project management and analysis, and continues to apply ATDI's ten principles in its adventure market development work with destinations.

Rankings

The ATDI ranks countries in two categories: developed and developing, based on the countries' UN designation. Complete rankings can be found at the end of this report.

Developing Countries

The scores for 2009 and 2008 are provided below.

2009	2008
1. Slovak Republic	Estonia
2. Israel	Chile
3. Czech Republic	Slovak Republic
4. Estonia	Czech Republic
5. Slovenia	Hungary
6. Chile	Botswana
7. Bulgaria	Bulgaria
8. Latvia	Jordan
9. Botswana	Latvia
10. Lithuania	Uruguay

Developed Countries

2009	2008
1. Iceland	Switzerland
2. Switzerland	Sweden
3. New Zealand	New Zealand
4. United Kingdom	United Kingdom
5. Australia	Spain
6. Luxembourg	United States
7. Denmark	Norway
8. Ireland	Germany
9. Germany	Iceland
10. Spain	France

Methodology

Countries as recognized by the U.N. are benchmarked in the ATDI and are represented in two groups: Developed and Developing Countries.

ATDI 2009 includes 28 developed countries and 164 developing countries.

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

- Entrepreneurship
- Adventure Activity Resources

Below depicts the 3 factors and 10 pillars.

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

Methodology Changes for 2009

In the first year of the ATDI, it was important for the partners to garner feedback from industry leaders. To this end, an advisory board and a social networking site were created. Through online discussion and conference calls, the advisory board critically examined the methodology.

Based on feedback from the advisory board, the partners made changes to better measure adventure competitiveness in 2009. The following changes were made:

1. In pillar 2, Safety, a survey question was incorporated. The question asked panelists to rate “Your perception of this destination as safe and secure for travel” on a Likert scale of -3 (very poor) to +3 (very good).
2. In pillar 4, Natural Resources, a survey question was added which asked panelists to rate their perception “regarding the variety of natural resources at the destination” on a Likert scale of -3 (very poor) to +3 (very good).
3. In pillar 4, Natural Resources, a survey question and a new indicator — ratio of coastline to landmass — was added to accommodate Canada’s vast amount of coastline. The new ratio had a positive effect for island nations; although most countries’ scores decreased with the new method. Given that most countries saw their natural resources score decline, this change had less of an effect overall on rankings.
4. In pillar 5, Cultural Resources, the ATDI added a survey question, which asked expert panelists to rate their perception of the destination as “culturally rich,” on a on a Likert scale of -3 (very poor) to +3 (very good).

Highlights from the 2009 Results and Key Shifts from 2008 Results

A comparison of the 2009 and 2008 rankings reveals some interesting changes. In the developing countries category, three new countries entered the top ten to replace three that fell out. For the developed countries category, four countries did likewise. Both of last year’s number ones relinquished their top spot.

In both indices, a lot of movement was relatively minor, with countries gaining or losing a few spots. However, some significant moves stand out. Israel’s 9 spot gain and Slovenia’s 10 spot gain pushed them both into the top ten, and Israel all the way up to number 2. Meanwhile, Hungary and Uruguay dropped 7 and 8 spots respectively, dropping out of the top ten. Egypt and Bhutan were the biggest movers from 2008 to 2009, although neither reached the top ten. Egypt moved up 19 spots and Bhutan an impressive 56 spots, from 78th to 22nd.

In the developed countries index, Australia, Denmark, and Ireland posted big gains, moving up 12, 15, and 15 spots respectively. All three made it into the top ten. The biggest drops were seen from Sweden and the United States, dropping 15 and 18 spots respectively, both moving out of the top 10 and the US out of the top 20.

What’s behind these big changes?

As mentioned above, the methodology for the 2009 index was modified from the 2008 Index to reflect suggestions from the Advisory Board designed to improve performance. These changes explain most of the moves in rank from 2008 to 2009.

The Safety pillar was modified with an additional question asking panelists to rate their perception of safety in a particular country. This change boosted the scores of Bhutan, Egypt, Ireland, Israel, Romania, and Slovenia.

The Cultural Resources pillar was also modified with a question asking panelists to rate their perception of a country as being culturally rich. This had a dramatic effect on scores this year. The Cultural Resources scores for Australia, Bhutan, Denmark, Egypt, Ireland, Israel, Romania, and Slovenia increased by 2 to 4 points out of 10, a sizeable increase.

Changes in the methodology of the Natural Resources pillar acted to bring down scores. Most countries saw their score decrease, although to varying degrees. In 2008, this pillar was composed of urban population and population density. A survey question and a ratio of coastline to landmass were added for 2009, and most countries' scores decreased with the new method. This had less effect on rankings than the other methodology changes due to the fact that most countries saw their natural resources score decline.

Two more notable changes:

- ▶ Bhutan showed the biggest movement in the index, moving up from 78th ranked to 22nd. Large gains in its Safety and Cultural Resources skills helped, but its biggest gain was its Entrepreneurship score, where it gained almost 6 points. The Entrepreneurship score is based on the Index of Economic Freedom. Bhutan did not appear in last year's index and thus was automatically scored a 1 on last year's ATDI. Bhutan is included in the latest Index of Economic Freedom, and this boosted its Entrepreneurship score tremendously.
- ▶ The United States fell 18 spots, one of the larger drops in the index. This is predominately due to a decrease in the Infrastructure and Image scores. Both of these scores are determined by survey questions given to a panel of industry experts.



Photo: Christina Heyniger

Paro, Bhutan

10 Pillars of Adventure Tourism Market Competitiveness

This section describes the 10 pillars in detail and provides information on how the quantitative scores for countries were derived for each pillar. For most of the pillars data was gathered from publicly available databases and scores were assigned. In some cases survey data was used and values assigned based on respondents' answers. To discuss the methodology in detail, join the ATDI online forum by sending an email to info@xolaconsulting.com or to ATDI@gwu.edu.

Photo: Adam Vaught



Ruun, Cambodia

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

1. Sustainable Development Policy

Government policies that support and foster sustainable and rural tourism development are crucial to adventure tourism market competitiveness because they safeguard the destination's natural, heritage and cultural resources and provide a positive investment climate for the private sector. When public and private sector actions are coordinated, the private sector flourishes, attracting investment and development to a region. To assign a quantitative value to government policies supportive of sustainable tourism, the team used the following two indicators:

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

2. Safety and Security

With respect to safety, the ATDI numerical benchmarks gauge how safe it is to travel in a country. The Safety pillar is made up of two indicators:

1. The Transparency Index
2. Foreign and Commonwealth Travel Warnings

Rationale: Countries with high levels of transparency and low or no travel warnings issued are safer for adventure travelers.

When the 10 pillars are applied diagnostically in destinations, the Safety and Security pillar assesses the degree to which adventure operators provide for the safety of travelers, and also whether facilities exist to cope with travel-related injuries. For example, in destinations where scuba diving is a popular draw, do hyperbaric chamber facilities for decompression exist? In destinations where mountaineering is prevalent, are rescue operations available? Do guides have first aid training? Generally, does the level of client safety offered meet internationally accepted standards?

Additionally for 2009, the ATDI incorporated a survey question that was put to the expert panel. The question asked panelists to rate "Your perception of this destination as safe and secure for travel" on a Likert scale of -3 (very poor) to +3 (very good).



Near Petra, Jordan

Photo: Shannon Stowell

3. Tourism Infrastructure

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

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

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

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

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

When the ATDI’s ten pillars are used diagnostically in countries or destinations, the team examines both hard and soft infrastructure as it pertains to adventure travelers.



Northern Montenegro

Photo: Christina Heyniger

4. Natural Resources

Adventure travelers want untrammelled and well-managed natural resources. Destinations with unusual or rare natural resources, which are well-managed and not exploited, will earn high praise from adventure travelers and sustained market competitiveness. The Natural Resources pillar is made up of two components:

1. Urban Population
2. Population Density

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

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

An additional indicator, ratio of coastline to landmass, was added to accommodate Canada's vast amount of coastline.



In the Cordillera Blanca, Peru

Photo: Christina Heyniger

5. Cultural Resources

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

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

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

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



Photo: Adam Vaught



Photo: Lisa Araki

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

In this category the ATDI recognizes a destination's competitiveness relative to its ability to support specific adventure sports such as cycling, climbing, hiking, rafting, etc. With obvious connection to the Natural Resources Pillar, the Adventure Activity

In this category the ATDI recognizes a destination's competitiveness relative to its ability to support specific adventure sports such as cycling, climbing, hiking, rafting, etc. With obvious connection to the Natural Resources pillar, the Adventure Activity Resources pillar identifies specific opportunities for specialized adventure sports. Adventure sports span a range of outdoor, nature-based activities — from bird watching to mountaineering; whitewater rafting to rock climbing; caving to paragliding. Destinations with resources lending themselves to the development of a particular

sport, for example, cliffs excellent for ice climbing, or forests with a wealth of bird species, may find themselves with a market opportunity and sustained competitive advantage. The Adventure Activities Resources pillar is made up of two indicators:

1. Protected Species
2. Forests, Grasslands, Drylands

Rationale: High number of endangered species and presence and growth of forests, grasslands and drylands indicates resources for adventure activities.



Kampala, Uganda

7. Entrepreneurship

Adventure travel's vitality and strength originate from the so-called “fringe” — those pioneering businesses with unusual offerings that would seem to appeal only to a small subset of niche enthusiasts. Those activities that begin outside the mainstream, or that seem too eccentric to appeal to a broader adventure travel market, reliably seem to end up as mainstream activities: the surging popularity of snowboarding is a case in point.

Given this reality, the ATDI looks for and acknowledges destinations in which entrepreneurship in the business sector is thriving — any destination in which young businesses can start up and gain traction is likely to be

fertile ground for adventure tourism entrepreneurs with innovative ideas and therefore more likely to become competitive in the adventure travel market. The Entrepreneurship pillar is made up of one component:

1. 2008 Index of Economic Freedom

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

8. Humanitarian

The Humanitarian pillar is concerned with human development in a country — the presence of basic services, such as sanitation, and with the potential for blended adventure and volunteering trips. In their quest for authentic, unscripted experiences, adventure travelers frequently seek out opportunities to volunteer in the destinations they visit. Tour operators find themselves looking for non-governmental organization (NGO) and aid organization partners through which they can offer their visitors a short term opportunity to contribute to relevant causes and also have the chance to see real people in un-manufactured situations.



Photo: Adam Vaught

Krahlan, Cambodia

The ATDI sees this trend toward volunteer tourism and its appeal to adventure travelers as continuing to build and find destinations in which volunteering is available to adventure travelers as competitive in the larger market for adventure tourism.

The Humanitarian Pillar is made up of three indicators:

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

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

9. Health

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

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

The Health Pillar is made up of two indicators:

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

Rationale: High number of beds and physicians per 1,000 people suggest higher levels of healthcare.



Photo: Adam Vaught

Chanleas Dai, Cambodia

Photo: Jess Reilly



Galapagos

10. Image

A country's image can be one of the most malleable aspects of market competitiveness, but it is also frequently mismanaged as a way of guiding sustainable market development. A country's image for sustainability and adventure opportunity will attract travelers who value these aspects. Through their visitation and expenditures, these people will support the country's ongoing sustainable development strategies. The ATDI examines a destination's adventure travel image; technical assistance using the ten pillars can go further to identify ways in which it could be strengthened and branded to attract visitors.

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

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



Photo: Christina Heyniger

Rankings Analysis

Market in Cairo, Egypt

This section discusses the scores for a selection of countries chosen for either their rank or their significant movement from 2008 to 2009. Country briefs have been compiled with data from the ATDI ranking scores and background information from the CIA World Factbook.

Developing Countries Analysis

As in 2008, Central and Eastern European countries dominate the top ten. These countries benefit from an abundance of natural resources, reflecting lower levels of development compared to western Europe. While traditional tourists may shy away from these countries due to a perception of backwardness or underdevelopment, adventure tourists will appreciate the low population density and natural resources, which suggests these countries would benefit by capitalizing on potential branding as adventure travel destinations. Only three of the top ten countries are found outside of Europe. Chile and Botswana made the top ten last year, thanks to their natural resources and good reputation. The appearance of Israel in the number two spot is the biggest shake-up in the new ranking, boosted by an appreciation of its cultural resources by our panel of experts.

A discussion of eight significant developing countries follows. To discuss in detail any of the information provided in the following sections, join the ATDI online forum by sending an email to info@xolaconsulting.com or to ATDI@gwu.edu.

Slovak Republic

Sustainable Development	7.88
Safety	7.50
Health	5.61
Natural Resources	6.56
Cultural Resources	6.60
Adventure Resources	7.40
Entrepreneurship	7.94
Humanitarian	3.74
Infrastructure	8.10
Image	9.05

The Slovak Republic, a landlocked country in Central Europe, has developed significantly since its separation from the



Czech Republic in 1993. Its terrain is rugged and much of the country is mountainous. The Tatra Mountains offer excellent adventure resources in the north and are interspersed with many scenic lakes and valleys. The capital, Bratislava, is a vibrant cultural center that has retained its unique character while resisting western-style commercialism. The stunning Bratislava Castle is a highlight of the city.

Israel

Sustainable Development	8.04
Safety	6.09
Health	4.58
Natural Resources	6.36
Cultural Resources	6.91
Adventure Resources	7.57
Entrepreneurship	7.76
Humanitarian	4.41
Infrastructure	9.52
Image	8.81

significantly on the Index this year due to positive perceptions of its safety and cultural resources.

Israel's reputation as a tourism hotspot continues to grow, despite its small size and a reputation for political unrest. Located in the Middle East adjacent to the Mediterranean Sea and bordering Lebanon, Syria, Jordan and Egypt, Israel boasts a varied geography. There are 273 kilometers of coast line, deserts, plains, highlands and mountains. This variety provides terrain for numerous adventure activities, ranging from camel safaris to snow skiing and from scuba diving to hang-gliding. Israel moved up



Czech Republic

Sustainable Development	8.16
Safety	7.27
Health	5.25
Natural Resources	6.41
Cultural Resources	6.97
Adventure Resources	7.40
Entrepreneurship	7.94
Humanitarian	4.29
Infrastructure	7.76
Image	7.62

Like its former partner, the Slovak Republic, the Czech Republic is a landlocked country in Central Europe with a varied geography. Bordered by Germany, Poland, Slovakia and Austria, the landscape of the Czech Republic includes mountains, low hills, plains and numerous lakes and rivers. Popular adventure activities include cycling, horse riding, fishing, skiing and all manner of water activities.



Estonia

Sustainable Development	6.04
Safety	7.59
Health	4.31
Natural Resources	6.52
Cultural Resources	7.13
Adventure Resources	7.56
Entrepreneurship	8.64
Humanitarian	3.28
Infrastructure	8.57
Image	8.10

Estonia, a small country in Eastern Europe, gained its freedom in 1991 with the collapse of the Soviet Union. Since then it has turned to Europe and has been integrated into the EU and NATO. Although small, Estonia boasts dramatic landscapes attractive to the adventure tourist. Almost half of the country is covered in forest, providing a multitude of opportunities for hiking, camping, and observing wildlife. Estonia also has the lowest population density in Europe, giving the adventure tourist plenty of room to roam.



Slovenia

Sustainable Development	8.72
Safety	8.17
Health	3.62
Natural Resources	6.24
Cultural Resources	5.51
Adventure Resources	7.49
Entrepreneurship	7.29
Humanitarian	4.41
Infrastructure	8.93
Image	8.93

Slovenia moved up significantly in this year's assessment thanks to favorable opinions on its safety and cultural resources. Located in Central Europe, Slovenia is mostly landlocked, bordering Croatia, Hungary, Austria and Italy, but it does have 43 kilometers of coastline along the Adriatic Sea. Around half of the country is forested, and the country is mostly hilly and mountainous, including sections of the Alps. Adventure activities abound among this dramatic scenery.



Chile

Sustainable Development	8.02
Safety	7.87
Health	2.85
Natural Resources	7.47
Cultural Resources	5.39
Adventure Resources	7.20
Entrepreneurship	8.83
Humanitarian	4.31
Infrastructure	5.15
Image	9.61

Chile is located in South America, bordering the Pacific Ocean, Argentina and Peru. Its unusual, long, narrow shape gives it a varied climate, ranging from arid desert in the north, through a Mediterranean climate in the center, to a rainy and temperate climate in the south. Terrain ranges from low coastal mountains to a fertile central valley and the rugged Andes to the east. Over twenty years of sound economic policies have led to steady growth and rising income levels, as well as a stable democratic government. Tourism in Chile has grown steadily, and adventure tourists have



a range of activities from which to choose. Many gravitate to the country's extremes, exploring the Atacama Desert and hiking in Patagonia.

Egypt

Sustainable Development	7.18
Safety	5.69
Health	2.76
Natural Resources	6.18
Cultural Resources	6.26
Adventure Resources	8.26
Entrepreneurship	6.80
Humanitarian	3.72
Infrastructure	8.93
Image	9.17

Egypt, located in northeastern Africa, borders Libya, Sudan, the Red Sea, Israel, and the Mediterranean Sea. The country moved significantly upwards in the 2009 rankings, benefiting from high evaluations of its safety and cultural resources. Egypt's rich history of ancient civilizations and the long-standing symbols of those empires are world-renowned and form the backbone of the tourism industry. Its geography is dominated by the Nile River, with the vast majority of its population



clustered along its banks. Most of the country is arid desert. Adventure tourists enjoy camel excursions in the desert, sailing the Nile River, and scuba diving in the Red and Mediterranean Seas.

Bhutan

Sustainable Development	7.08
Safety	7.56
Health	1.52
Natural Resources	6.19
Cultural Resources	6.88
Adventure Resources	7.42
Entrepreneurship	6.77
Humanitarian	3.76
Infrastructure	9.21
Image	9.64

Bhutan is a small, landlocked country in Southern Asia, bordered by India and China. The country is extremely mountainous, dominated by the Himalayan Mountains in the north, but there are subtropical plains in the south. For years Bhutan was one of most isolated countries in the world, but modernization is occurring. The country is known for being considered one of the happiest in the world, according to a global survey in 2006.



The government has taken an active role in reducing tourism's affect on the environment by encouraging quality over quantity. The country attracts adventure tourists seeking hiking and mountain climbing opportunities in a pristine, isolated environment. Bhutan showed the most upward movement in the index, boosted by improved safety and cultural resources scores and a large increase in its entrepreneurship score.



Marin, California from Mt. Tamalpais

Photo: Christina Heyniger

Developed Countries Analysis

As in 2008, the majority of the top ten developed countries are located in Europe. Some shifts occurred from the last ranking, with new scores reflecting the changes in methodology. Regardless, they all benefit from high scores in sustainability, safety, entrepreneurship, infrastructure, and image. Europe has long led the world in addressing sustainability issues, so it is unsurprising to see these countries' rankings benefit from their intelligent, long-term environmental policies. They are also all capitalist societies that encourage entrepreneurship in a friendly business climate, an important consideration as many tourism businesses are small-to-medium sized. The only two countries in the top ten not located in Europe are New Zealand and Australia. Both have traditionally positioned themselves as adventure destinations with attractive and varied landscapes coupled with abundant natural resources and modern infrastructure.

The most obvious change to the new top ten is the departure of the United States, which fell 18 spots. The USA saw its score drop precipitously in the natural resources and image pillars and especially in the infrastructure pillar. Each of these pillars has a survey component to it, and it appears that the United States fared more poorly this year when analyzed by the panel of experts.

Iceland

Sustainable Development	9.08
Safety	9.45
Health	4.41
Natural Resources	7.55
Cultural Resources	4.72
Adventure Resources	8.84
Entrepreneurship	8.59
Humanitarian	6.90
Infrastructure	9.55
Image	9.64

Iceland moved into the number one spot this year, aided by top scores in sustainability, safety, infrastructure, and image. An island nation located in the northern Atlantic Ocean, Iceland has been ruled by either Norway or Denmark for much of its history. Autonomy arrived in 1944, and Iceland has since prospered and boasts some of the highest standards of living in the world. The majority of the island is tundra, and although temperatures

are relatively low throughout the year, the warm North Atlantic Current keeps the island warmer than other locations of similar latitude. Tourism is a growing sector of the economy, and adventure tourists flock to explore the diverse geological landscape, including glaciers, fjords, geysers, waterfalls, hot springs, and lakes.



Switzerland

Sustainable Development	9.31
Safety	9.50
Health	4.56
Natural Resources	6.71
Cultural Resources	6.72
Adventure Resources	7.53
Entrepreneurship	8.94
Humanitarian	5.84
Infrastructure	9.56
Image	9.19

Switzerland is a landlocked country located in Central Europe, east of France and north of Italy. It is a mostly mountainous country with a central plateau of rolling hills, plains and large lakes. The climate varies with cold cloudy, rainy/snowy winters and cool to warm, cloudy, humid summers with occasional showers. Adventure tourists visit Switzerland for its alpine climate and landscapes, and the country is famous for its mountaineering and skiing.



Australia

Sustainable Development	8.43
Safety	9.21
Health	3.87
Natural Resources	7.81
Cultural Resources	6.54
Adventure Resources	6.52
Entrepreneurship	9.27
Humanitarian	4.38
Infrastructure	9.90
Image	9.59

Australia moved into the top ten this year, unsurprising for an advanced country with high standards of living, a multicultural society, and high ratings of economic freedom, civil liberties, and education. The country also boasts a dramatic range of landscapes. Australia is the world's smallest continent and home to the world's largest coral reef. Much of the west and interior is dry desert or semi-arid land known as the outback. The northern coast enjoys a wetter, tropical climate, and the most temperate region is the south-eastern coastline. Adventure tourists find opportunities for a range of activities, and the country is a popular destination for backpackers.



Luxembourg

Sustainable Development	8.66
Safety	8.97
Health	5.30
Natural Resources	6.39
Cultural Resources	5.79
Adventure Resources	7.42
Entrepreneurship	8.52
Humanitarian	6.22
Infrastructure	9.64
Image	7.86

Luxembourg is a small, land-locked country of Western Europe, bordered by Belgium, France, and Germany. The landscape is hilly with low mountains in the north descending to a flood plain the southeast. Popular outdoor activities include hiking and bicycling.



Denmark

Sustainable Development	8.73
Safety	9.65
Health	3.77
Natural Resources	6.86
Cultural Resources	5.31
Adventure Resources	7.59
Entrepreneurship	8.97
Humanitarian	5.48
Infrastructure	8.04
Image	7.32

Denmark lies in northern Europe, bordered by Germany, the Baltic Sea and the North Sea. The country is a large peninsula and a collection of numerous islands. Denmark is a flat country, with much of it barely above sea level, and the character of Denmark has been highly influenced by its proximity to the sea. Popular adventure activities include biking, boating, kayaking, hiking and sailing.



Ireland

Sustainable Development	8.55
Safety	8.80
Health	4.12
Natural Resources	6.51
Cultural Resources	5.40
Adventure Resources	8.09
Entrepreneurship	9.22
Humanitarian	4.87
Infrastructure	8.47
Image	8.88

Ireland is an island nation in northwestern Europe, surrounded by the Atlantic Ocean and just across the Irish Sea from Great Britain. One-sixth of the island is comprised of the province of Northern Ireland, which is part of the United Kingdom. The remaining parts of the island comprise the Republic of Ireland. The island features a ring of coastal mountains surrounding low central plains. It has a mild climate with frequent rainfall, resulting in lush vegetation. Ireland is an attractive destination for adventure tourists, offering numerous activities including hiking and sea kayaking.



Sweden

Sustainable Development	8.87
Safety	9.53
Health	3.65
Natural Resources	7.07
Cultural Resources	6.16
Adventure Resources	7.37
Entrepreneurship	8.05
Humanitarian	5.36
Infrastructure	9.05
Image	8.75

Sweden is a northern European country bordered by the Baltic Sea, Norway, and Finland. Its terrain is mostly flat or rolling plains in the east bordering the long coastline and mountainous in the west with the Scandinavian mountain chain separating Sweden from Norway. Although the country is classified as having a temperate climate, the temperature varies considerably from north to south and from the coast to the interior. The south, where the population is densest, has cold, cloudy winters and cool summers. Sweden has a large number of lakes and forests, attracting adventure tourists looking for opportunities to hike, kayak, and fish. Sweden's rank in the ATDI fell considerably due to lower scores in safety, health, and natural resources.



United States

Sustainable Development	8.46
Safety	7.46
Health	3.34
Natural Resources	7.07
Cultural Resources	6.14
Adventure Resources	5.67
Entrepreneurship	9.07
Humanitarian	4.59
Infrastructure	5.57
Image	7.86

Located in North America, the United States borders the Atlantic Ocean, Mexico, the Pacific Ocean, and Canada. As the fourth largest country in the world, the United States' climate and geography vary widely.

Generally speaking, the eastern section has low mountains that give way to a vast central plain, followed by a mountainous west. Adventure activities in the United States are endless, and the country is famous for its national parks. However, the United States fell steeply in its ranking, penalized by low scores in natural resources, image, and infrastructure.



Developing Country Rankings

ATDI Benchmark	Country	ATDI Benchmark	Country	ATDI Benchmark	Country	ATDI Benchmark	Country
1	Slovak Republic	42	Trinidad and Tobago	83	Oman	124	St. Kitts and Nevis
2	Slovenia	43	China	84	Mali	125	Congo, Dem. Rep.
3	South Africa	44	Vanuatu	85	Mongolia	126	Montenegro
4	Botswana	45	United Arab Emirates	86	Mauritius	127	Burundi
5	Turkey	46	Cambodia	87	Sudan	128	Mauritania
6	Bhutan	47	Lithuania	88	Jamaica	129	Senegal
7	Bulgaria	48	Tajikistan	89	Tonga	130	Congo, Rep.
8	Estonia	49	Fiji	90	Cuba	131	Honduras
9	Czech Republic	50	Suriname	91	Timor-Leste	132	Comoros
10	Egypt, Arab Rep.	51	Dominican Republic	92	Romania	133	Haiti
11	Chile	52	Kenya	93	Morocco	134	Saudi Arabia
12	Israel	53	Uzbekistan	94	Gambia, The	135	Libya
13	Albania	54	Ethiopia	95	Lesotho	136	Samoa
14	Swaziland	55	Bosnia and Herzegovina	96	Cote d'Ivoire	137	Mexico
15	Belize	56	Dominica	97	Ecuador	138	Guinea-Bissau
16	Barbados	57	Lebanon	98	Antigua and Barbuda	139	Mozambique
17	Tunisia	58	El Salvador	99	Benin	140	Philippines
18	Uruguay	59	Kuwait	100	Zimbabwe	141	Panama
19	Argentina	60	Kazakhstan	101	Peru	142	Qatar
20	Bahamas, The	61	Azerbaijan	102	Malawi	143	Grenada
21	Tanzania	62	Gabon	103	Cameroon	144	Nicaragua
22	Croatia	63	India	104	Greenland	145	Myanmar
23	Georgia	64	Korea, Rep.	105	Togo	146	Djibouti
24	Jordan	65	Somalia	106	Guyana	147	Iraq
25	St. Lucia	66	Solomon Islands	107	Central African Republic	148	Moldova
26	Armenia	67	Colombia	108	Namibia	149	Liberia
27	Algeria	68	Bolivia	109	Chad	150	Serbia
28	Vietnam	69	Brazil	110	Nepal	151	Guam
29	Zambia	70	Venezuela, RB	111	Poland	152	Korea, Dem. Rep.
30	St. Vincent and the Grenadines	71	Turkmenistan	112	Macedonia, FYR	153	Paraguay
31	Syrian Arab Republic	72	Angola	113	Bermuda	154	Micronesia, Fed. Sts.
32	Thailand	73	Lao PDR	114	Guatemala	155	Papua New Guinea
33	Bahrain	74	Madagascar	115	Singapore	156	Kiribati
34	Uganda	75	Bangladesh	116	Guinea	157	Malaysia
35	Costa Rica	76	Ghana	117	Maldives	158	Seychelles
36	Hungary	77	Rwanda	118	Afghanistan	159	Niger
37	Ukraine	78	Burkina Faso	119	Eritrea	160	Palau
38	Kyrgyz Republic	79	Indonesia	120	Russian Federation	161	Nigeria
39	Latvia	80	Brunei Darussalam	121	Equatorial Guinea	162	Sierra Leone
40	Sri Lanka	81	Belarus	122	Pakistan	163	Mayotte
41	Yemen, Rep.	82	Iran, Islamic Rep.	123	Cape Verde	164	Sao Tome and Principe

Developed Country Scores

1	Iceland
2	Switzerland
3	New Zealand
4	Finland
5	Australia
6	United Kingdom
7	Luxembourg
8	Germany
9	Ireland
10	Spain
11	Austria
12	Denmark
13	Norway
14	France
15	Japan
16	Canada
17	Sweden
18	Netherlands
19	Belgium
20	Italy
21	Cyprus
22	Greece
23	Portugal
24	United States
25	Malta
26	Andorra
27	Liechtenstein
28	Monaco