

# Entering the European market for adventure tourism

Selling adventure tourism products on the European market is highly competitive. There are many thousands of tour operators, OTAs (Online Travel Agents) and travel agents offering a wide range of adventure activities. They are bound by strict regulations and expect their buyers to comply with those regulations. Increasing numbers of Fully Independent Travellers (FITs) are buying directly from OTAs, which is the fastest growing sales channel for adventure tourism experiences.

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## 1. What requirements must adventure tourism travel products comply with to be allowed on the European market?

European adventure tourism tour operators are bound by strict regulations to ensure the safety of their travellers while travelling overseas and to protect them financially. This means that they will expect their foreign suppliers to adhere to their own codes of conduct and/or terms and conditions. As you will be selling your adventure travel product to them, it is important that you understand what these requirements are.

### What are the mandatory and additional requirements that buyers have?

The mandatory and other requirements for adventure tourism are common across the tourism sector.

These requirements include:

- The European Package Travel Directive
- General Data Protection Regulation (GDPR)
- Liability Insurance and Insolvency Protection
- Sustainability

You should read the CBI's [What requirements must tourism services comply with to be allowed on the European market](#) and familiarise yourself with comprehensive details of legal, non-legal and common requirements. The sub-section entitled COVID-19 outlines measures taken by the European Commission (EC) to help support the relaunch of travel and tourism across Europe and how to keep abreast of travel advice being given to European residents across the continent.

### COVID-19 and Adventure Tourism

The effects of the COVID-19 pandemic continue to have a considerable impact on the tourism industry worldwide. Tourism has begun a slow recovery, but confidence among European travellers remains low, and many national governments continue to advise against all but essential travel.

In September 2020, the World Travel & Tourism Council (WTTC) launched a new set of measures to rebuild consumer confidence, reduce risk and encourage the resumption of travel. The measures were developed in collaboration with other partners including the Adventure Travel Trade Association (ATTA), which regularly undertakes research among its membership base and global community of operators in the field of adventure tourism. Some of the measures developed include:

- Reducing participant capacity to allow for social distancing
- Ensuring that activity difficulty levels do not exceed ability, to decrease the need for rescue services
- Providing clear, consistent and up-to-date communication on health and hygiene protocols
- Providing clear information on protocols such as wearing of face masks, hand hygiene guidance and social distancing requirements in advance and on arrival
- Encouraging online purchases wherever possible
- Encouraging guests to handle their own equipment for the duration of the trip
- Limiting queuing and physical contact wherever possible

You can download WTTC's [Leading Global Protocols for the New Normal – Adventure Tourism](#) for more details about the measures and decide whether to apply for the 'Safe Travels' Stamp Application.

ATTA's insights and frameworks to address the COVID-19 pandemic for adventure tourism niches were developed in collaboration with several leading adventure tour operators, including Abercrombie & Kent and Intrepid Travel, to support the reopening of adventure tourism safely and responsibly. There are several reports in the [Adventure Travel COVID-19 Health & Safety Guidelines](#) series that cover several individual niches: [Rafting](#), [Cycling](#), [Trekking](#), [Cultural Tours and Sightseeing](#), [Wildlife Experiences](#) and [Culinary Experiences](#), along with [Overarching Guidelines](#).

To succeed as a local operator in adventure tourism following the pandemic, you must carefully consider what measures you should take to encourage adventure travellers from Europe back to your business and keep them and your staff safe.

For the remainder of this report, all discussion, insight and advice has been provided on the basis of travel in normal circumstances.

## What are the requirements for niche markets?

### Managing risk

Managing risk is a key factor for adventure tourism providers. Ensuring the safety of adventure travellers is of paramount importance and as the adventure tourism sector is constantly evolving, managing risks can be challenging. Ensuring that your adventure travel tourism products comply with international or local adventure tourism standardisation regulations are not mandatory requirements but if your products comply, your buyers will be more likely to do business with you.

The International Organisation for Standardisation's (ISO) international standard for adventure management was developed in 2014 and enables adventure tourism providers to develop their professionalism around the management of adventure tourism activities. The standard [ISO 21101:2014](#) provides a basis for adventure tourism activity providers to plan, communicate about, and deliver adventure tourism activities as safely as possible. The [ISO 21103:2014](#) specifies the minimum requirements for information to be provided to participants before, during and after adventure tourism activities. The [ISO 20611:2018](#) outlines sustainability good practices related to adventure tourism that will help mitigate the negative environmental, economic or social impacts of tourism and enhance the positive ones.

Recently published (August 2020), the [ISO 21102:2020](#) establishes requirements and expected skills for leaders in and providers of adventure tourism activities, with the exception of scuba diving, for which there are [other specific standards](#).

A new standard to cover [service requirements for hiking and trekking activities](#) is currently under development. If your business provides hiking and/or trekking activities, you should keep an eye out for when the standard is published.

The United Kingdom (UK) is one of the largest markets for adventure travel from Europe. [The British Standard for Adventure Tourism \(BS8848:2014\)](#) has been established to minimise the risk of adventure travel, developed

by the BSI, the UK National Standards Body. Most, if not all, adventure tour companies that are based in the UK ensure that their adventure travel products comply with this standard. If your services meet the BS8848 standard, you will exceed the requirements of buyers in any market, which will give you a competitive advantage. The standard remains current but is under review. Keep an eye out for any changes that may be implemented in this standard in the near future.

### **Tips:**

Carry out a risk analysis and identify all the potential hazards and risks that could be associated with the adventure tourism travel product that you offer.

Consider purchasing the ISO 21101, ISO 21103 and ISO 20611 standards, so you know what they are and are able to apply what you can to your adventure tourism travel product.

Exceed your customers' expectations and purchase the [BSI's BS8848:2014](#).

## **Quality and safety standards**

Every element of your adventure travel product must meet the required standards. So, if, for instance, you are providing a one-day excursion to see wildlife in its natural habitat, the trip might include a guide, local transportation and lunch/snack provider. Therefore, you are responsible for ensuring that the quality of each element matches what you have agreed with your buyer. Your buyer will be relying on you to establish that appropriate safety and legal standards are met, according to their Code of Conduct/Terms and Conditions, and the contract that you have agreed.

### **Tips:**

Make sure the guides you use are well trained, qualified as necessary, personable, and speak the language of the group well.

You should offer your guides additional training where possible.

If you use vehicles, ensure that the vehicles you use are modern, well maintained and safe. You should insist on proper documentation from your providers, which can offer proof to your buyer that you have contracted a reputable company to transport their clients.

If you supply equipment such as bicycles or Segways, or more specialist equipment for activities such as mountaineering or diving, you must make sure there is a firm process in place to service the equipment to legal minimum standards.

Ask for reviews from participants on your trips. Publicise the positive ones and make sure you act on any negative views and work on any suggestions.

## **Presenting your adventure tourism travel products**

You should have a good website, as it is the public face of your business. While this is not a legal requirement, it is a vital business tool in the travel industry. Your trade buyers will use your website to decide whether your adventure tourism travel product will meet the standards and expectations of their customers. Customers in the Fully Independent Traveller (FIT) market also widely use the internet, and will rely on the information you provide to make their travel purchasing decisions.

## Establish levels of skill, activity and/or fitness for adventure tourism travel products

You must be clear what sort of adventure tourism travel product you are offering. Is it a 'hard adventure' or 'soft adventure' activity? Perhaps it combines two or more elements? You can familiarise yourself with the difference between hard and soft adventure activities by reading the [CBI's European Market Potential for Adventure Tourism Report](#), so you are clear about what you are offering.

Some tour operators indicate the level of skill that is required to take part in their trips, along with the level of fitness recommended. You may wish to consider doing something similar and assign general activity levels, like the example below.

Chart 1: Example of Activity Levels for Adventure Tourism Trips

### General Activity Levels

All of our itineraries have been graded to help you find the comfort level that best suits you:



#### Activity Level 1: Leisurely

Designed for people who are in good health, enjoy the outdoors and want a relaxing trip packed with interest.



#### Activity Level 3: Moderate

Requires a spirit of adventure and some fitness, as the trip may involve more activities or longer journeys.



#### Activity Level 5: Challenging

Fitness is imperative at this level, as the environment may be more remote and challenging.



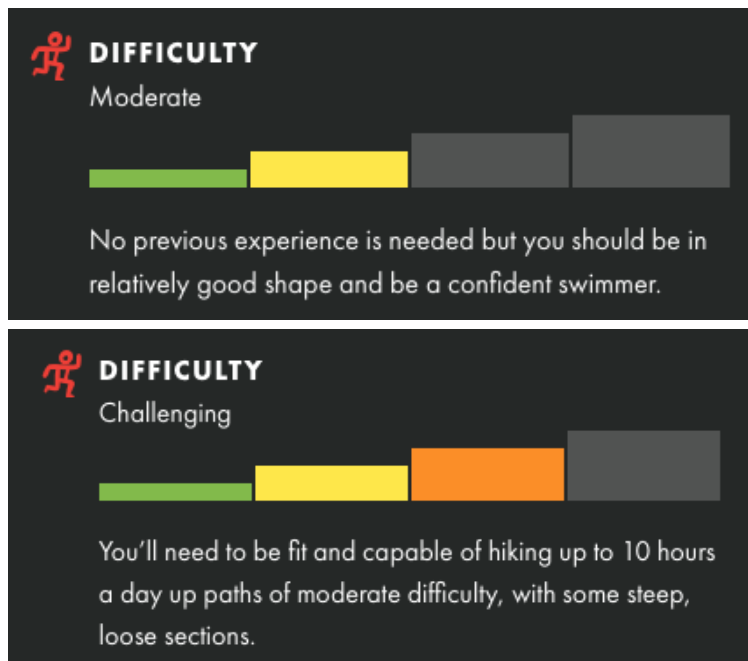
#### Activity Level 7: Tough

At this level, we recommend previous experience of the activity involved.

Source: Exodus Travels

Alternatively, you could assign more specific difficulty ratings and descriptions for your adventure tourism travel product, as per the examples below. The use of graphical images and diagrams are a good way of drawing the reader's eye to important details you want to convey.

Chart 2: Example Difficulty Ratings



Source: Much Better Adventures

## Payment terms

The contract you agree with the European tour operator to whom you are selling your adventure tourism travel product should clearly state what your payment terms are. You must be sure that you are happy with the payment terms your buyer has offered. In Europe, businesses often expect payment terms of 30 days. If this does not suit you, try to negotiate a shorter term, but be aware that this may make you less competitive.

If you are selling directly to European adventure travellers, make sure that they can easily make payments. Credit card payments are convenient and common throughout Europe and offer both you and your customer peace of mind, as payments are protected by the credit card company.

### Tips:

Create or improve your website. For detailed tips, read the CBI study, [How to be a successful tourism company online](#).

Segment your activities by type and make it appealing to different types of traveller (see [How is the end-market segmented](#) section below.)

Aim to partner with, and cross-market between, other local providers of similar or different adventure tourism travel products.

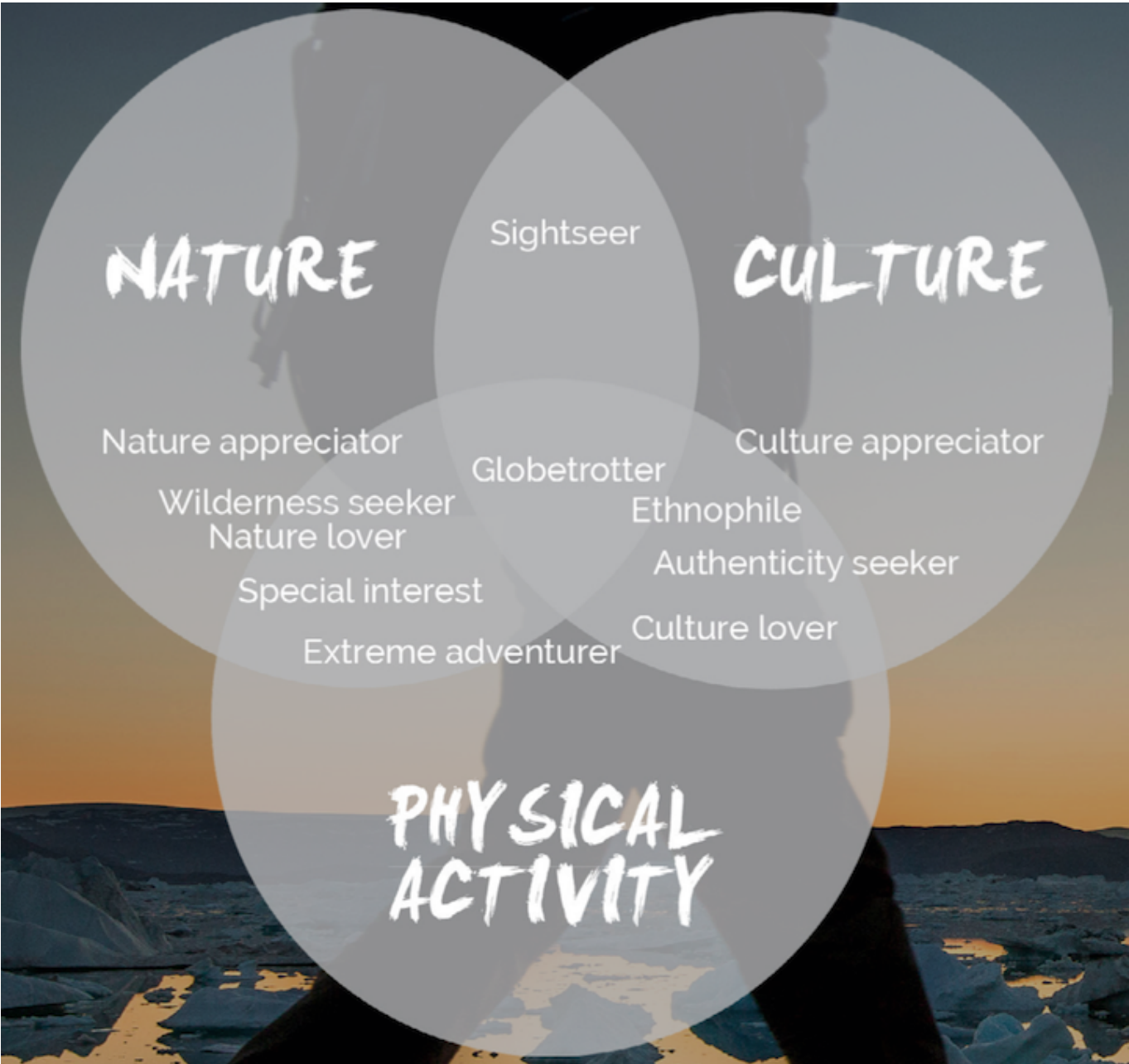
Read more about negotiating contracts and payment terms in [the CBI's Tips for organising your tourism services export to Europe](#).

## 2. Through what channels can you get adventure tourism travel products on the European market?

As there is an incredibly wide variety of possible adventure activities, with the potential to combine different activities, the potential European adventure traveller market you can attract is diverse. High-quality, unique and inspiring experiences lie at the heart of adventure tourism trips, and this chart provides a useful visual of the

three segments. Traveller motivation plays a key role in the choice of adventure trip, and each ‘persona’ listed provides an indication of the motivation for travel.

Chart 3: The Adventure Traveller and the Cross-over of Adventure Activities



Source: Visit Greenland

Understanding the motivations of the adventure traveller is an important step to identifying your ideal target market.

**How is the end-market segmented?**

Within the European adventure traveller market, there is considerable cross-over between the major consumer groups that range from Baby Boomers (born between 1946 and 1964), Gen X (born between 1965 and 1979), Gen Y or the Millennials (born between 1980 and 1995) and Gen Z (born from 1995 to 2015). Groups of adventure travellers can also be analysed by the level of physical challenge (hard or soft adventure), how they travel (group or independent) and how much money and time they have to spend.

Table 1: Adventure Traveller Market Segmented by Demographics, Hard vs Soft, Cash and Time



Segment	Primary Demographic	Hard	Soft	Budget	Mid-Budget	Luxury	Time Rich	Time Poor
Backpackers	Gen Y, Gen Z	✓	✓	✓			✓	
FITs	BB, Gen XY	✓	✓	✓	✓		✓	✓
Small Group Travellers	BB, Gen XY		✓		✓	✓		✓
Tailor-made Group Travellers	BB, Gen XY		✓		✓	✓		✓

Source: Acorn Tourism Consulting

Notes: Baby Boomers (BB), Generation X (Gen X), Generation Y (Gen Y), Generation Z (Gen Z)

- Soft adventurers: are driven by the desire to discover new things and activities during the day, such as hiking, canoeing/kayaking, surfing, culinary and rural tourism. By night, they prefer a higher level of comfort and good food. Soft adventurers comprise the largest group of adventure tourists and cross over with all major traveller segments.
- Hard adventurers: like to take part in more specialised activities that require skill and learning and tend to be higher risk, such as rock climbing, trekking in remote, isolated places, and kitesurfing. They are less interested in comfort and often camp in wild places or stay in basic hostels. Hard adventurers are the smaller group by some margin and are more likely to share characteristics with the FIT market.
- Backpackers and budget adventure travellers: the backpacker market is dominated by younger travellers, usually from 18 years old, who have less money to spend on holidays but often have more time. Many of them will be travelling after leaving school and starting university during a period that is sometimes referred to as a 'gap year'. They usually travel on a tight budget and will be looking for good-value travel experiences. As a market, they are keen on experiencing interesting and exciting adventures and spend their money locally.
- Fully independent travellers (FIT): the concept of FIT is 'independence' – FITs almost always design their own itineraries and make their own travel plans. They do not travel with group tours or follow schedules imposed by others. When choosing adventure travel products, they may research and book suitable experiences before they leave home and/or when they are at their destination. FITs are usually small groups of couples or friends/family, and retirees. Much of their travel planning and booking will be done online in advance and they often use a variety of sources when designing their trip. They may book flights directly with an airline or through a travel agent; accommodation directly with the provider or through an OTA; and adventure experiences directly with local operators.
- Small group package travellers: this traveller segment usually books pre-packaged trips through dedicated adventure tour operators. They like to travel in small groups, meeting like-minded people, and their trips are usually guided. The operator makes all the bookings for the various elements of the trips (flights, local transport and accommodation, adventure experiences). In some trips, there may be an element of self-guiding, such as self-guided cycling or following a marked trail, but this is often supported, such as delivering luggage to the dedicated overnight accommodation. Groups by definition are small, usually between 8-16 participants. Such travellers range in age from singles, couples, families and retirees, and trips are usually for one to two weeks.
- Tailor-made group travellers: this traveller segment likes to work with a specialist tour operator to design a holiday that specifically meets their needs. These needs could include specified start and finish destinations; custom dates; luxury accommodation; safari and/or beach elements for a specific duration; child-friendly activities; experiences chosen for their relevance/interest such as a culinary or wine tour. They may also

specify high levels of sustainability through their choice of transport and/or accommodation, and pick experiences that directly benefit communities. This type of traveller is more likely to be a high-end, wealthy consumer and demand high quality throughout the trip.

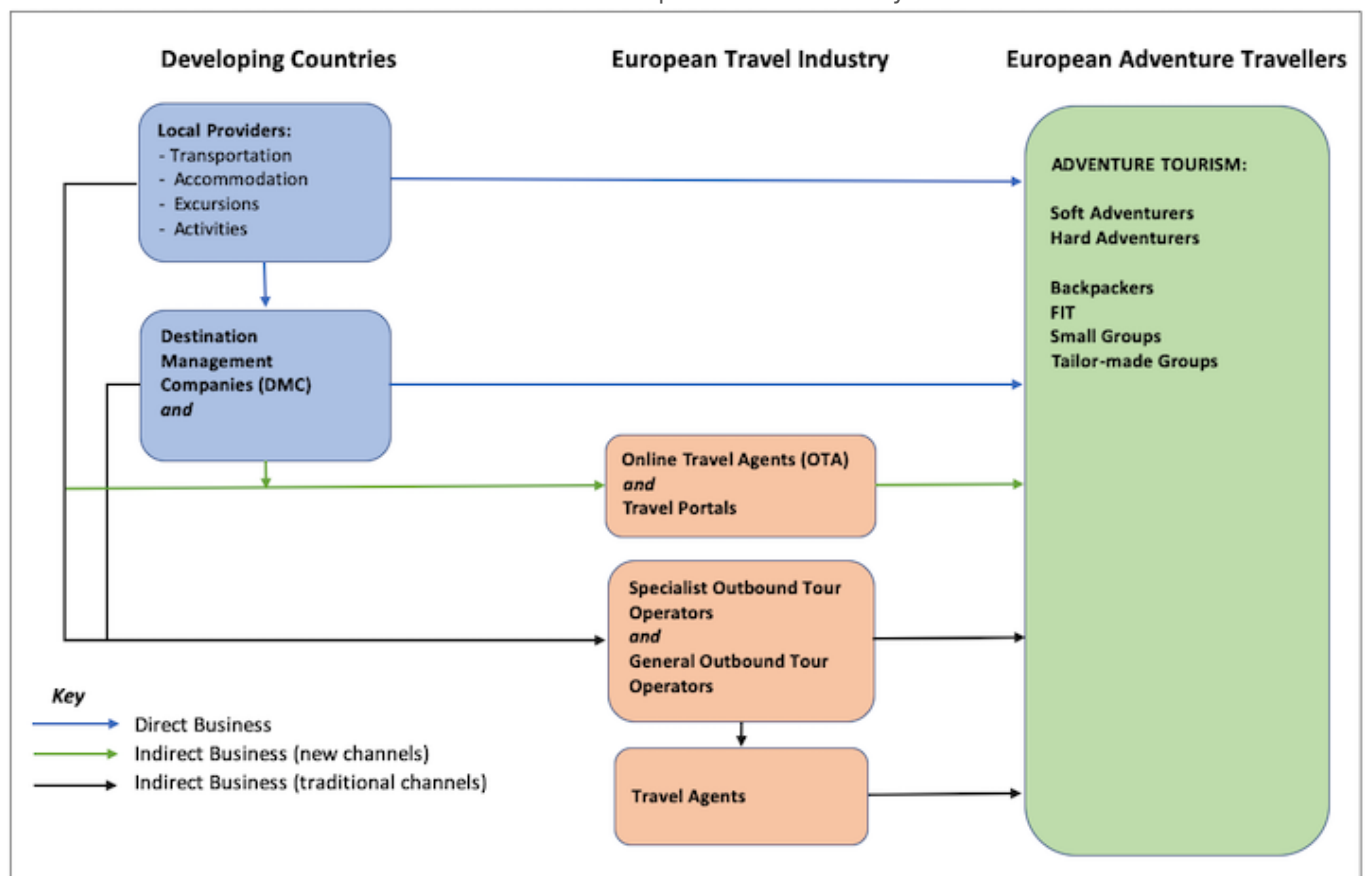
### Tip:

Read more about these groups. The CBI has published several studies about promising traveller markets, including the [FIT Market](#), the [Gen Y Market](#), [Multi-Generational Market](#), and [Solo Tourism](#).

## Through what channels do adventure tourism travel products end up on the end-market?

European tour operators, travel agents and online travel agents (OTAs) comprise the main structure of adventure travel tourism products for the European market. A further strand are the direct sales from local providers and Destination Management Companies (DMCs) to adventure travellers.

Chart 4: Flow of Adventure Tourism Sales via the European Travel Industry



Source: Acorn Tourism Consulting

The European tour operator market for adventure tourism is vast and there are many hundreds of companies targeting European travellers. The [European Travel Agents' and Tour Operators' Associations \(ECTAA\)](#) estimates that there are more than 31,000 tour operators and travel agents in Europe. Germany has the largest number (9,000) followed by Spain (5,600), the UK (4,400) and France (4,000).

However, the structure of the travel industry is undergoing major change on account of technological advances and digital trend, and more travellers are choosing to book their holidays, trips and experiences online. It is now



possible to book almost anything online using laptops, computers, tablets and smartphones, which the manufacturers are constantly adding new features to and upgrading. Research indicates that [48% of 'experiences' or activity bookings now happen once travellers have arrived at their destination](#).

To summarise the main sales channels in the adventure tourism segment:

- Specialist tour operators target adventure tourists across a range of different niches. They usually offer a broad range of trips and holidays to destinations where they have developed specific expertise and knowledge. They usually offer a range of activities and experiences. Some operators focus on the 'gap year' market, others on the small group and tailor-made market. Larger operators target all three. [Globetrotter Abenteuer \(Germany\)](#) and [KE Adventure Travel \(UK\)](#) are examples of specialist tour operators.
- General tour operators cover several market segments in addition to the adventure market. For instance, alongside adventure holidays, they may also sell general package holidays to a beach resort, or flights and accommodation in a city destination. German-owned TUI is Europe's largest general tour operator, and its brand TUI Blue offers active adventure. [DER Touristik](#) has several brands that cover many different holiday experiences. [Kuoni](#) is one of its adventure travel brands.
- Online Travel Agents (OTAs) that specialise in selling trips, guided tours and experiences have become the fastest growing sales channel for this type of travel product. OTAs that sell the widest range of experiences and trips around the world include [TripAdvisor Experiences](#), [Viator](#) (which is part of TripAdvisor) and [Airbnb Experiences](#). In a market that is relatively new and dynamic, it is important that you keep abreast of developments in the sector, and make sure you understand the merits and disadvantages of working with an OTA (see Table 2 below).
- Travel Portals are online marketplaces that offer comparisons of travel-related services from a wide range of companies. Travel services include holidays, flights, accommodation, car rental and experiences. Many of them also publish numerous articles, tips, blogs to help the traveller decide where to go and what to do. [Responsible Travel](#) in the UK and [Bonogo](#) in France are two such examples in Europe.

Table 2: The Pros and Cons of Working with OTAs

Pros	Cons
Helps to expand your audience, provide global reach	High commission rates, at least 20% now (2019)
You will be seen as a professional operator in your region	Rates will increase as OTA market share and volume of bookings grow
Reach new markets without investment/marketing costs	Limited information about or connection with your customers
OTA support to help make listing stand out, plus translation services	Less brand exposure if OTA removes your company name from listing
Lucrative source of bookings/income	Reliance on OTAs may be a problem if they change rates/terms

Source: Trekkssoft

### Tips:

Find out more about working with OTA's in the Treksoft report, [How to work with OTAs](#).

Download the guide, [95 Places to List Your Tours](#) and investigate suitable OTAs for you to work with.

## What is the most interesting channel for you?

As a local provider of an adventure tourism travel product, specialist tour operators and OTAs are likely to be the most interesting channels for you to pursue.

Specialist Tour Operators usually create itineraries that feature a range of experiences during the trips. This could range from visits to a local community or heritage centre, activities like white-water rafting or game drives in safari parks. Other experiences could be gorilla trekking, bird watching trips, 4WD dune bugging or a cycle ride/hike on a marked trail. These are the sorts of experiences that specialist operators are looking to source in the destinations that they travel to.

To access the FIT market, OTAs offer a good opportunity. FITs are keen users of technology and are most likely to book an experience online. However, it is important that you weigh up the pros and cons of working with an OTA (see table above) and consider other routes to market as well. If FITs book directly with you, it will reduce the commission you have to pay third parties, but you will need to invest in a professional website with good [SEO \(search engine optimisation\)](#) and keep it up-to-date and well maintained. Consult the CBI report on [How to be a successful tourism company online](#) for tips on building your own website.

### Tip:

To help you find the most suitable buyers in Europe, see the [CBI's Tips for Finding Buyers in the European Tourism Sector](#). It provides useful tips on researching tour operators in the market and visiting the relevant trade and consumer fairs to make connections with specialist tour operators and other relevant organisations.

## 3. What competition do you face on the European adventure tourism market?

### Which countries are you competing with?

The COVID pandemic has temporarily altered the landscape for long-haul travel from Europe to developing countries. The resumption of travel will be slow and European travellers are likely to travel to domestic and short haul destinations in the short term. Options are wide and varied within Europe, but are likely to be to places that are remote, including mountainous destinations such as the Alps, so they can be sure they are able to socially distance, and to places where their governments allow them to travel to.

Building consumer confidence is absolutely key to rebuilding adventure tourism. UK tour operator Much Better Adventures has grouped a range of [Post Lockdown Adventures](#) in European destinations, including hiking in Slovenia and coasteering and wild camping in Cornwall. The operator also offers 'risk-free' bookings for trips and assures customers that it is only offering trips to places on the UK government's approved travel list.

Nevertheless, as tourism recovers, competition among developing countries to attract European adventure

travellers will increase as destinations prepare to welcome visitors once more.

According to their needs as either soft or hard adventurers, adventure travellers look for destinations that appeal to them in terms of reputation for adventure, accessibility and affordability. The top competitors in the adventure tourism niche in developing countries are currently considered to be India, Jordan, Kyrgyzstan, Morocco, Peru and Zambia.

There is a much wider list of top competitors however and you must consider other destinations as key competitors in your region. For instance, neighbouring countries such as Nepal, Uzbekistan, Ecuador, Zimbabwe and Egypt also provide exceptional adventures for the adventure tourist and you should consider them as competing destinations. You should keep up to date with the travel press with regularly publish listings like [Lonely Planet's Hottest Destinations for Adventure](#).

Table 3: Top Competing Destinations in Developing Countries

Developing Country	Region
India	South Asia
Jordan	Middle East
Kyrgyzstan	Central Asia
Morocco	North Africa
Peru	Latin America
Zambia	Sub-Saharan Africa

Source: Acorn Tourism Consulting

## India

The adventure travel market in India is extremely large, very diverse and in 2016, there were about 2,800 local adventure tour operators. Studies into the sector show that most states offer numerous adventure travel activities. The Ministry of Tourism estimates that almost 500,000 foreign adventure tourists visit India every year, with the most popular states being Uttarakhand, Himachal Pradesh, Jammu & Kashmir, Goa and Rajasthan. The most popular activities, by type and in order of popularity, were:

- Land-based: Wildlife/Jeep Safaris, Trekking, Camping, Elephant/Camel/Horse/Yak Safaris, Cycling, Motorbike Tours, Rock Climbing, Artificial Wall Climbing
- Water-based: Water Rafting, Boat safaris, Houseboat Stays, Kayaking, Scuba Diving
- Air-based: Parasailing, Hot-Air Ballooning, Paragliding

## Jordan

Jordan has some of the best natural and cultural resources in the world, and it has been working hard to create a solid foundation to compete in the global adventure tourism sector. Mountaineering and associated activities including hiking, rock climbing, canyoneering, climbing, cycling, mountain biking and caving have all been identified as key areas with development potential. There are around 60 local tour operators working in the adventure tourism sector. At the end of 2019, a project to develop and promote sustainable adventure tourism

was launched in conjunction with the Jordan Inbound Tour Operators Association (JITOA), known as the [MEDUSA project](#), in partnership with the Tourism Ministry and Jordan Tourism Board.

The Mediterranean climate allows for year-round tourism, which offers a significant advantage. Its topography of mountains, wadis and deserts are excellent for such activities, and Jordan is within easy reach for European travellers. In addition, its small size means that day trips from Amman and longer overnight trips are all easy to arrange.

## Kyrgyzstan

Hiking, horse riding, CBT (community-based tourism) and homestays are the predominant forms of adventure tourism in Kyrgyzstan. It has an exceptionally strong cultural product, steeped in nomadic tradition. Mountain villages have begun to transform into tourism hubs with homestay guesthouses and yurts, and activities such as back country skiing and snowshoeing in the winter, and horse riding and hiking in the summer. In 2012, Kyrgyzstan implemented a visa-free scheme for 45 countries, including Germany, France and the UK. This was expanded to an e-visa scheme for other countries in 2016 to speed up the application process. This helps to make Kyrgyzstan a good contender as a top destination for adventure tourism.

## Morocco

The Atlas Mountains are an ideal destination for adventure tourism and hiking, trekking and homestays are typical activities. The Moroccan culture is strong in the cities of Marrakech, Fez and Casa and many trips start or end in one of them. Morocco's climate gives it an advantage as a year-round destination for activities at varying times of the year. April to October is the best time for hiking in the mountains, while surfing is good during the summer months on the coast. Morocco is another destination that offers easy access for the European traveller.

## Peru

Peru's adventure tourism product is particularly strong in cultural and heritage tourism, and also in the nature segment, which usually involves hiking and trekking. In recent years, the tourism sector has worked to strengthen the partnership between tourism, culture and communities, building the CBT segment. [Hiking the Inca Trail](#) is possibly the best-known adventure activity. The classic trail takes around four days, and there are many operators in the market.

## Zambia

Soft and hard adventure activities are common pursuits for adventure travellers to Zambia. The Victoria Falls and the South Luangwa National Park are the major destinations for European travellers, and activities range from bungee jumping, white-water rafting and traditional and walking safaris, which originated in Zambia. On account of the Zambezi River, Zambia is also known for its water-based adventure activities such as river-based safaris and river boarding and hydrospeeding, a form of bodysurfing using an inflatable surfboard.

### Tips:

Keep abreast of the competition in less visited destinations, as they will be working hard to raise their profile in the adventure tourism market. Secondary competitors in developing countries include Uzbekistan, the Philippines, Bhutan, Nepal, Sri Lanka and Rwanda.

Subjective 'best of' lists are constantly changing, so conducting your own searches on a regular basis will keep you up to date with new developments. The best thing to do is type 'Best Adventure Destinations in Developing Countries' into your browser and click on a few of the suggested links. You will see blogs and articles such as this, [Top 20 Adventure Travel Destinations 2019](#) from [Zegrahm Expeditions and International Expeditions](#).

## ADTI 2020 Index - ATTA's analysis of the competition

The Adventure Travel Trade Association (ATTA) produces a number of market studies and is an important contributor to the global tourism sector's understanding of the adventure tourism segment.

The ATTA publishes the Adventure Tourism Development Index (ATDI) annually, which ranks adventure destinations according to their potential and readiness to compete in the global adventure tourism market. It assesses countries against 10 benchmarks, or pillars, across three factors: Safe and Welcoming, Adventure, and Readiness. The ATDI is a useful tool destinations can use to measure their adventure competitiveness against competing nations and allows them to analyse their strengths and weaknesses. The pillars are:

- Government Policy that Supports Sustainable Development
- Safety and Security
- Health
- Natural Resources
- Cultural Resources
- Adventure Activity Resources
- Entrepreneurship
- Humanitarian
- Tourism Infrastructure
- Brand Image

The ranking is segmented by both Developed and Developing nations and in the 2020 Index, the highest ranked developing countries by region can be found in table 4.

Table 4: ADTI 2020 Index: Ranking of Most Competitive Adventure Destinations by Region

Region	Developing Countries
Eastern Europe & Central Asia	Georgia Kyrgyzstan
East Asia & Pacific	Philippines
Latin America & Caribbean	Costa Rica Uruguay Dominica Peru
Middle East & North Africa	Jordan
South Asia	Bhutan Nepal India Sri Lanka

Sub-Saharan Africa	Botswana Rwanda Zambia
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Source: ADTI 2020, ATTA

### Tip:

To find out more about the Index and pillars, consult the [ATDI 2020 Report](#).

## Tour Operator Research

Key findings from research among specialist adventure tour operators in 2019, also conducted by ATTA, found that:

- For operators based in Africa, Asia and Europe, European adventure tourists are their major market.
- The following five regions are considered 'hot', showing significantly increased interest over the past year: Scandinavia, South America, North Africa, Southern Africa and the Middle East.
- The Middle East was noted by many operators as a destination of renewed interest.

## Word of Mouth

European travellers like to research adventure trips and experiences in advance. They are avid users of the internet and social media, and are more likely to be inspired by word of mouth and personal research than statistics. As a result, analysis of 'best of' lists can also provide an indication of the major competition. Between 2017 and 2019, the following destinations were the most mentioned in an internet search of 'best adventure destinations in developing countries':

- Costa Rica
- Uzbekistan
- Morocco
- Kyrgyzstan
- India
- Sri Lanka

## Which companies are you competing with?

Europe is one of the worst-hit areas by the COVID-19 pandemic, and although Europeans are keen to travel again, they will need strong and encouraging reassurance. To stay ahead of the competition, you must advise them of measures you are taking to keep them safe when they use your services. To do this, it is essential that you include a prominent link and/or message on the Homepage of your website, and you should list all the measures you are taking to keep them safe.

European tour operators already feature very detailed information about how they will keep their customers safe, and you should research how they are communicating with their customers. For instance, [Intrepid Travel](#) (UK) provides a link on its homepage and uses the message, 'Your safety remains our priority'. [Globetrotter Abenteuer](#) (Germany) immediately draws your eye to the 'Current Situation'. [TUI](#) (Global) uses the website's top navigation to promote its 'Travel with Confidence Hub', which provides all the information customers need to make their holiday decisions. OTAs are also very strong on their messages to keep customers safe. [Viator](#) provides a direct link to detailed safety procedures under its Homepage message, As the world reopens.

The market for local tour operators offering adventures in developing countries is crowded, particularly in places like India, which has a long history of adventure tourism.

## Companies in India

With such a vast industry, there is no shortage of adventure tour operators in India. [Snow Leopard Adventures](#) specialises in river rafting, trekking, mountain biking, sea kayaking and trans-Himalayan jeep safaris. It is an ISO9001:2015-certified organisation (which specifies requirements for a quality management system) and states prominently that it has been BS8848 compliant since 1990 on its website.

[White Magic Adventure Travel](#) appeals to mountain adventure travellers of all abilities in the Himalayas. First-time adventurers can choose from its 'discover adventure trips', those with more experience can go on a trek, while experienced adventurers can join a more challenging climb. As a result, it is capturing a wide range of potential customers. Its USP (Unique Selling Point) is strong, offering trips only in mountainous destinations including India, Nepal and Bhutan.

[Encounters Asia](#) is an established family-operated local tour operator that has been operating in India, Nepal, Bhutan and Sri Lanka for more than 30 years. Their primary motivation is creating exclusive and private journeys with a focus on experience-based travel, such as visiting lesser-known festivals and tracking elusive animals like the snow leopard. The company owns and operates camps and lodges in remote locations and wilderness areas. Encounters Asia has worked hard to build relationships with its buyers and is a member of ATTA. It is also pro-active about marketing its travel experiences, and has been mentioned in several blogs of international publications including Forbes Life and Outside Magazine.

Its sustainability credentials are also good, and the company works closely with the Tiger Trust, an organisation actively involved in the conservation of the tiger and its natural habitat. It also supports the TOFT (Travel Operators for Tigers) campaign of training field guides, which contributes to improving the standards of field guides, in turn enriching the wildlife experience for clients.

[Kalypso Adventures](#) provides Active and Authentic Travel Experiences in India including birding, trekking and walking and youth travel, and is a nominee in the 2020 World Travel Awards. It has an immediate call to action through a pop-up window inviting customers to sign up for the latest updates and offers. The home page provides a direct link to a blog outlining [7 Things to Know about Post-COVID Travel in India](#). The website is notable for the large amount of content in the form of copy, images and videos, along with plenty of links, which gives it authority and suggests expertise. This offers reassurance to European Adventure travellers, particularly those customers in the youth adventure sector.

## Companies in Jordan

[Terhaal Adventures](#) is a DMC that specialises in adventure travel. The company was established by a Jordanian couple in 2005. The name 'Terhaal' was an appealing choice, meaning 'to be in a state of constant travel' in Arabic and refers to the nomadic lives of Bedouin Arabs. This gives the company an authentic, evocative feel. The activities it offers are hiking, biking, trekking, canyoning, tours of Petra and Wadi Rum. Trip durations range from day trips, weekend trips, multi-day tours and complete holiday packages. All trips are created under sustainable and responsible principles, and groups are small to minimise the impact on the environment. Customers are actively encouraged to adopt best practices to protect the environment. Its website also features a blog, information about travel to Jordan and booking conditions.

[Jordan Direct Tours](#) specialises in tailor-made tours of Jordan and clearly states the reasons customers should choose the operator – local, convenient, excellent reputation, multi-lingual staff and peace of mind 24/7. These are all very appealing to the European FIT adventure traveller. Its 'trip ideas' provide useful guides on pricing, giving a basis upon which to plan.

[Discover Jordan](#) is based in Amman and specialises in inbound tourism and destination consultancy. The



operator offers a wide variety of organised day trips, family tours, private tours, self-drive tours, hiking, camping and other adventure tours. Travellers can book trips online and it also features its tours on TripAdvisor, with reviews displayed prominently on their own website.

## Companies in Kyrgyzstan

[Ecotour](#) is operated by two sisters as 'one family, all Kyrgyz, and from the regions we show you'. Established in 1993, it has three main principles: pride for the country and its heritage; the need to operate on sustainable principles; and the prevalence of community-based tourism so that local people benefit from tourism. Europe is a target market and the website is translated in several languages (Dutch, English and German) – testimonials from European clients feature prominently on the site. Ecotour has a [Green Globe Commendation Award](#). Its tours are aimed at small groups from four to 10 people and they are all operated at a local level – renting yurts and horses from local communities, using locally sourced produce and encouraging the purchase of local handicrafts. The operator offers a wide range of tours over different timescales. The operator has temporarily stopped arranging trips for 2020 and plans to return in 2021.

As an emerging destination, there are opportunities for Kyrgyz nationals to get involved in their tourism sector. Several Kyrgyz guides promote their personal guiding services on OTAs such as [Tours by Locals](#), a website that has been connecting travellers with local guides around the world since 2008. In response to the pandemic, the OTA has published its [health and safety guidelines](#) along with cancellation policies.

## Companies in Morocco

[Moroccan Active Adventures](#) specialises in personalised, small group tours to provide authentic experiences. It covers a wide range of tour types including luxury camps, desert tours, mountain trips, camel rides, quad biking adventures in the Sahara, and various combinations of activities. Blogs from travellers feature prominently on the site along with links to social media pages. It has published its Best Active Itinerary for 2020 on its home page which helps to keep the operator current and up to date in the minds of potential customers.

[Plan-It-Morocco](#) offers a range of tours and experiences that are authentic, unique and with a focus on cultural immersion. This gives the company a strong USP upon which to build its tours. An example of an immersive experience includes a culinary gourmet 'treasure hunt'. Guests are separated into teams who explore souks with a shopping list, budget and set time to gather ingredients to cook a Moroccan dish. This is a good example of a specialist operator offering something different in order to stand out.

[Ocean Vagabond](#) specialises in adventure water sports such as kite surfing in a number of beach destinations. The company has achieved a TripAdvisor Choice award in 2018 and has [Clef Verte](#) certification, a French sustainable certification scheme.

## Companies in Peru

Several companies promote themselves as operators for the Classic Inca Trail, which usually takes four days/three nights. It is hard to stand out in this crowded market. [Sam Travel Peru](#), a '100% Peruvian company', has a five-star TripAdvisor rating and makes itself available to global markets via specific national contact telephone numbers. This is especially appealing to foreign buyers. The website has a broad choice of products. For 2020, the operator has committed to private treks with small groups of up to six people only, in response to the pandemic. Another operator that seeks to reassure customers about their safety procedures during the pandemic is [Viva Peru Tours](#), which features a strong message on its homepage.

[Alpaca Expeditions](#) has some of the best ratings on TripAdvisor and has achieved certificates of excellence

every year since 2013. The top bar has a strong call to action stating: 'Plan your 2020 Inca Trail Trek Today!'. This is an encouraging stimulus for potential travellers.

## Companies in Zambia

[Going Places](#) prominently features its adventure tourism travel products in Zambia on its home page – helicopter rides, walking safaris, white water rides and canoe safaris. The company also offers many other adventure travel products through a range of tours, resorts and adrenalin activities. The tour operator has diversified its activities through the provision of transfers, accommodation, excursions, coach and holiday packages and air ticketing.

There are a number of specialist safari operators in Zambia including [Wilderness Horizon Safaris](#), and they categorise their safari offers by type: wildlife, mobile, walking, photography, bird watching, canoeing and fishing trips. They also offer cultural tours, scenic tours, adventure activities and qualified guides. This broad offer caters to the widest possible audience of adventure tourists, which helps them stand out in the market.

### Tips:

Thoroughly explore the websites of these local operators to see how your website compares with theirs. Analyse how they promote their adventure experiences and identify what you might be able to learn from them.

Conduct your own internet research, so that you can be sure who you are competing with locally.

Aim to achieve high Tripadvisor rankings and ratings to help you stand out from the competition. Find out more about [Tripadvisor Ranking and Ratings](#).

While the pandemic continues to affect the tourism industry, it is a good idea to feature information about COVID-19 and the measures you are taking to keep your staff and customers safe as a prominent link on your website. [Sam Travel Peru](#) and [Tours By Locals](#) are good examples of operators that do this well – messages are detailed, reassuring and clear. Also look at [Top Desert](#) in Morocco, which prominently offers a 10% discount with free cancellation/rescheduling in the event of flights or border closures.

## What products are you competing with?

The adventure travel sector is one of the industry's largest sectors. It has such a wide range of activities associated with it that they can all be considered competing products. The challenge for you as a local operator is to identify the competing products in your own region or area and target your own products appropriately.

It is important therefore that you study the niche activities, so that you are clear on what an adventure activity is. You will then be well positioned to identify your competition. You can then decide whether your offer is best described as 'adventure', 'hard', 'soft', or decide to create it as a more specific activity. This is important, so your potential customer has a clear understanding of what you are offering. You can find out more about soft and hard adventure in the [CBI's European Market Potential Report for Adventure Tourism](#).

Adventure activities fit into numerous categories, and many will cross over between one another. Categories may also be widened or condensed as appropriate for a visitor profile. In addition, adventure tourism travel products may also be segmented by Tour Type. The table below provides a guideline to the sort of competing adventure experiences that are commonly available in developing countries.

Table 5: Categories and Related Activities of Competing Adventure Tourism Travel Products

Category	Example Activities
Land-based sports and outdoor activities	Hiking, cycling, mountain biking, skating, sledding, sandboarding, volcano boarding, rock climbing, mountaineering, caving, trekking
Water-based sports and outdoor activities	Paddle boarding, surfing, white-water rafting, kayaking/canoeing, sailing, scuba diving, coasteering
Air-based activities	Small aircraft, helicopter, hot-air ballooning, sky diving, paragliding, parasailing
Nature and wildlife	Animal encounters, safaris, horseback riding, fishing, beekeeping, hiking, trekking, dolphin/whale watching, hot springs, walking safari, animal tracking, bird watching, turtle watching
Day cruises	Island cruise, night cruise, dinner cruise, sunset cruise, snorkelling, shipwrecks, reefs, glass-bottom boat tours, submarine tours, sea caves, river cruise
Culture, history and heritage	Architecture, historical sites, street art, archaeology, ruins, art, sightseeing, literary, city tours, guided tours in museums/galleries/attractions, music
Community-based tourism	Visits to villages and communities, homestays, immersive experiences with community groups, farming, harvesting, cooking meals, volunteering, conservation
Culinary and wine	Tastings, local markets, eat with locals, chocolate making, wine trails, wine tastings, coffee/tea tours, street food, visits to distillers/brewers, visits to local producers
Learning	Cooking, handicrafts, dancing, painting, pottery, yoga, art, language, singing, heritage tours
Wellness	Mud baths, spas, fitness/boot camp, hot springs, Zen experiences, Tai Chi, yoga, meditation

Tour Types	City tours, classic car tours, full-day tours, half-day tours, tours by horse and carriage, motorcycle tours, train tours, photography tours, skip-the-line tours, sustainable tours, volunteer tours, walking/hiking tours, overnight tours, multi-day tours, eco-tours, 4WD/ATV tours
Festival themed tours	Christmas, National Holidays, New Year, Valentine's Day, Day of the Dead (Mexico), Chinese New Year, Diwali (India), festivals

Source: Acorn Tourism Consulting

Understanding how to use categories so you can compete effectively is useful as a marketing tool, allowing you to target your trips to the most appropriate buyer or traveller. For instance:

- FITs in a city destination may choose to take a cultural and historical tour of the major attractions, so they can be sure to see the top sights.
- Family groups may be interested in a water-based activity, such as a kayaking trip, or land-based safari, which suits all age groups and has an educational element.
- OTAs like to promote 'experiences' that are historical, cultural, sporting and nature-based, which all have wide appeal across many consumer groups.
- A wine tasting and culinary experience might be appealing to specialist operators in the luxury market.
- Conversely, a street food tour may appeal to a specialist operator conducting small group trips, and FITs.

#### 4. What are the prices for adventure tourism travel products on the European market?

Package holidays were devised as a way of achieving high sales volumes and reducing unit costs by allowing tour operators to purchase different elements of a holiday in bulk, passing on some of the savings to their customers. They usually contract their suppliers and providers well in advance and set their prices 12-18 months before the holiday season, which helps them secure lower prices for services.

However, to be profitable, European tour operators must operate at high levels of capacity, usually around 95% in terms of number of holidays sold. To help reach these sales, the travel industry in Europe typically adopts a dynamic pricing strategy. This means that prices increase when demand is high, such as during school holiday periods, and decrease during other periods, which helps to stimulate demand.

Essentially, a package holiday is a perishable product – it has no value unless it is sold, and the European operator takes on almost all the risk of any contracted service that remains unsold. This means that, while the prices of their holidays may appear to be high, their margins are relatively low. Specialist tour operators publish their holiday prices either with or without the airfare depending on the destination. They have little control over the airfare prices, which are subject to dynamic pricing strategies, and in cases where they travel to less-visited destinations, it may be more cost effective for the traveller to source their own flights.

Therefore, the main components of a packaged adventure holiday usually include:

- Accommodation, this is the largest component and could account for as much as 60% of the overall cost, depending on the type of accommodation
- Excursions, which usually includes entry fees to attractions/national parks, guides/porters
- Local transportation

- Food and beverages (where included)

Table 6: A Selection of Prices for Adventure Experiences, Trips and Holidays on the Market in 2020

Adventure	Country	Duration	Guide Price Per Person (€)
<i>Day/Part-Day Experiences</i>			
Explore the Highlights of Varanasi	India	2 to 4 hours	16.40
Rainbow Mountain - Adventure All Included	Peru	12 hours	28.40
Authentic Food Experience in Amritsar - Cook and Dine with a Local Family	India	2 to 4 hours	29.10
Paradise Valley Day Trip	Morocco	5 hours	36.80
Lima Walking City Tour	Peru	3.5 hours	39.80
Discover Fez and its Hidden Secrets	Morocco	5 to 6 hours	51.10
Victoria Falls Tour from Livingstone	Zambia	3 hours	68.90
Taj Mahal Day Tour	India	1 day	70.50
Wadi Rum Tour	Jordan	11 hours	72.50
Ala-Archa National Park and Kyrgyz Cooking Show	Kyrgyzstan	6 hours	82.50
Amman to Petra Day Trip	Jordan	8 to 10 hours	84.40
Burana to Kegety Gorge to Kol-Tor Lake Trip	Kyrgyzstan	8 to 10 hours	103.40
Zambezi Whitewater Rafting	Zambia	4 to 5 hours	120.60
<i>Short Trips (2-5 days)</i>			
Wadi Rum Bedouin Experience	Jordan	2 days	25.50

Horse Riding to Kol Ukok Lake	Kyrgyzstan	2 days	121.50
Trekking in Atlas Mountains and Berber Villages	Morocco	3 days	132.80
Lake Titicaca Homestay	Peru	2 days	146.40
Sightseeing Tour of Jodhpur and Udaipur	India	3 days	162.30
Tour to Lower Zambezi National Park	Zambia	3 days	281.50
Kerala Tour	India	5 days	539.60
Short Trip to Petra	Jordan	4 days	581.20
Wildlife Adventure in Ranthambore National Park	India	3 days	656.50
<i>Adventure Holidays (1-2 weeks)</i>			
Petra and Wadi Rum Group Tour	Jordan	7 days	712.60
Lima, Cusco, Machu Pichu and Puno	Peru	8 days	942.50
Kyrgyzstan Adventure around Issikul Lake	Kyrgyzstan	7 days	1,104.54
Road of Thousand Kasbahs	Morocco	9 days	1,464.60
Highlights of the Peruvian Andes	Peru	14 days	3,876.90
Highlights of South Luangwa and Lower Zambezi Safari	Zambia	7 days	5,562.40

Source: Acorn Tourism Consulting

Notes: Research conducted online in September 2020 with various tour operators. Guide Prices exclude international airfares.

### Tips:

When setting your prices, research what your competitors' prices for similar products. Only set a higher price if you believe you are offering a better service than your competitor. Read [CBI's](#)

[Organising your Tourism Services Export](#) for more information on setting prices, and this guide, [Pricing your tourism product](#), published by Destination NSW.

Undertake your own research to find out what your competitors are charging for adventure trips. Currently, many are offering discounts and risk-free booking options with generous cancellation/rescheduling policies to attract adventure tourists. If you decide to do this, be sure that your systems are set up to enable this and live up to your promises.


Be upfront about your fees with your buyer. Be fair – remember, the margins are small and if you can offer a discount for bulk bookings, it could lead to a stronger relationship.


You can do your own research into adventure experiences and trips that are currently on the market. Examples of OTAs and travel portals to research include [Airbnb Experiences](#), [Responsible Travel](#) and [Viator](#).


This study has been carried out on behalf of CBI by [Acorn Tourism Consulting Limited](#).

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