



2024

ATDI

Adventure Tourism Development Index



ADVENTURE TRAVEL
TRADE ASSOCIATION®

**International Institute
of Tourism Studies**

THE GEORGE WASHINGTON UNIVERSITY



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Executive Summary

The 2024 Adventure Tourism Development Index (ATDI) marks the first edition published since the onset of the COVID-19 pandemic, with the previous version released in early 2020. The intervening years have seen significant shifts in market trends, labor availability, geopolitical stability, and other factors impacting both general and adventure travel.

To reflect these changes, the ATDI underwent a comprehensive methodological review, updating its factors, pillars, and indicators. Notably, the increasing importance of sustainable and responsible tourism led to the addition of a Climate Resilience pillar. Unavailable or less representative indicators were replaced with more relevant data. These updates represent a fresh start for the ATDI, making direct comparisons with previous editions impractical. The top three countries in each economic category for 2024 are:

	Advanced Economies Country Rankings	Emerging/Developing Economies Country Rankings
1	Germany	Costa Rica
2	France	Chile
3	Switzerland	Thailand

Germany now holds the top ranking in the Advanced Economies category and overall while Costa Rica leads the Emerging/Developing Economies category. Germany's consistently strong performance across all nine pillars of the ATDI secured its top ranking. Achieving high scores in both Cultural and Natural Resources—a rare feat—significantly contributed to Germany's success, given the substantial weighting of the Resources factor. Costa Rica's success is driven by its leading position in Sustainable Development, strong rankings in Country Image (third) and Natural Resources (fifth), reinforced by expert assessments that placed Costa Rica first in Image, second in Natural Resources, and seventh in Entrepreneurship.

The ATDI remains a valuable tool for destination decision-makers, especially DMOs and trade associations. By evaluating countries' potential and capacity for adventure tourism across nine key pillars, the index provides insights into future travel trends and emerging destinations, enabling stakeholders to anticipate market shifts and plan for long-term competitiveness. Furthermore, the ATDI emphasizes the crucial link between natural and cultural resources, adventure tourism, and sustainable development, and consequently promoting responsible growth in the adventure travel industry.

Introduction

Introducing the 2024 Adventure Tourism Development Index (ATDI), a collaborative effort between The George Washington University International Institute of Tourism Studies (GW) and the Adventure Travel Trade Association (ATTA). The ATDI is a valuable resource for destination decision-makers involved in tourism development and management, particularly Destination Management Organizations (DMOs) and other public entities as well as trade associations. Individual travel companies may find it offers useful perspective when evaluating new markets or while considering new areas to explore in destination offerings.

The ATDI evaluates countries' potential and capacity to participate in the global adventure tourism sector by analyzing their performance across nine key pillars. This potential may not coincide with current trends, and for this reason the ATDI can offer a perspective on the hit destinations of tomorrow. The ATDI's pillars gauge country-level proficiency in aspects crucial to planners, policymakers, and tourism professionals.

Current Tourism Context

The travel industry is well on its way to recovering from the setbacks associated with the COVID-19 pandemic. With tourism numbers continuing to increase,¹ the travel community expects an overall recovery by the end of 2024.² However, recovery is uneven, with some countries, especially in Europe, superseding their 2019 growth and with many others still catching up to their 2019 numbers. For example, Asia Pacific countries including Australia, Japan, and New Zealand have observed a slower rebound due in part to the later opening of their borders.

Markets are also changing. Many travelers from the US, Canada, Europe, and New Zealand are staying closer to home to explore domestic experiences.³ This overlaps with the rise in sustainable and responsible travel.⁴ Additionally, India and China are emerging as significant outbound markets,² meaning destinations will need to adjust their offerings to accommodate the increasing numbers of Asian travelers who often have different requirements than Western travelers.

New stressors on the travel industry include difficulties attracting and retaining workers, geopolitical tensions, cost-of-living influences, and extreme weather events. Russia's war against Ukraine and conflicts in the Middle East dent traveler confidence in these locations as well as in surrounding countries, since safety and security are essential for tourism.² Flights to and from China are also impacted by Russia's war against Ukraine.

Impacts of overtourism are a major strain on destination resources and local infrastructure. Particularly in national parks and in other protected areas, high numbers of travelers can deplete or damage land, water, and cultural resources. Many countries are actively working to mitigate the negative impacts of tourism, shift their current tourism strategies, and restore compromised resources. To counteract overtourism, some countries have implemented approaches such as visitor caps, higher taxes and visitor fees, promoting lesser-known destinations, and marketing off- or shoulder-seasons.³

In light of escalating global challenges and major threats, ranging from natural disasters and climate change to health pandemics and safety concerns, it's evident that only destinations boasting robust health in natural and social resources, including sustainable management strategies, will be able to maintain competitiveness.

Importantly, the ATDI highlights the power of natural and cultural resources to drive tourism success. Travelers' visits and spending bolster a country's ongoing sustainable development efforts. The high value placed on these natural and cultural resources showcases the potential of adventure tourism to in turn foster sustainable development.

1 ATTA Adventure Travel Trends 2023, <https://www.adventuretravelnews.com/adventure-travel-trends-2023>

2 OECD Tourism Trends and Policies 2024, https://www.oecd.org/en/publications/oecd-tourism-trends-and-policies-2024_80885d8b-en.html

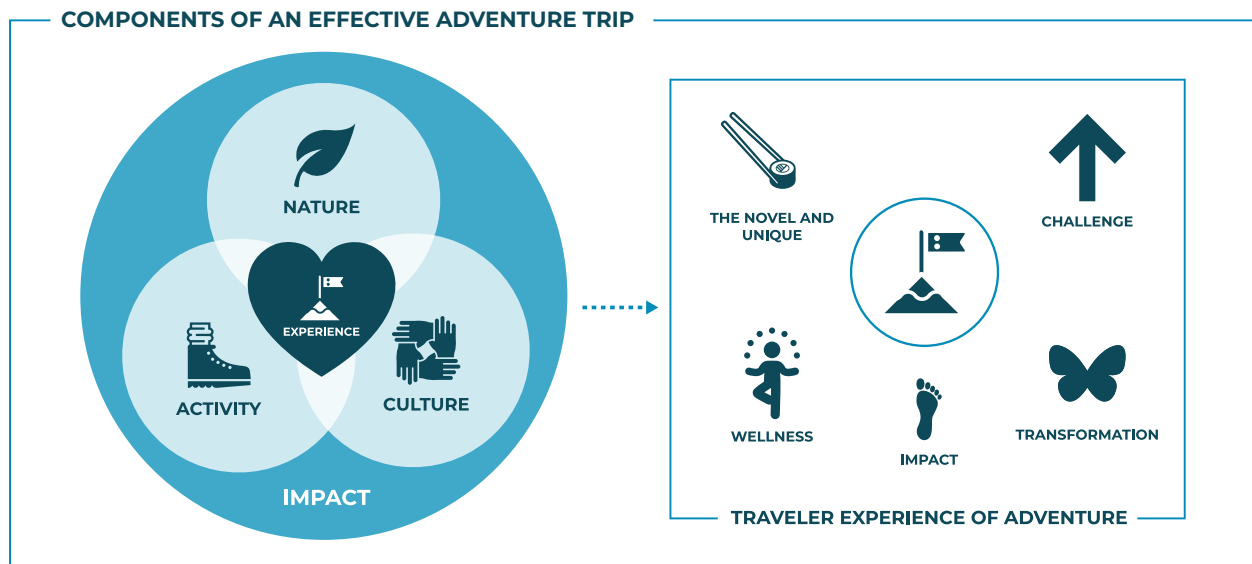
3 United Nations World Tourism Organization, www.unwto.org

4 ATTA, www.adventuretravel.biz

Adventure Tourism Defined

Adventure tourism comprises fundamental elements—nature, culture, and activity—which combine to result in the traveler’s full experience (Figure 1). The travel industry employs these three elements to validate whether a particular offering qualifies as ‘adventure travel.’ The elements converge to provide distinct experiences tailored for travelers driven by objectives such as transformation, challenge, and uniqueness. While countries provide the mainstays of nature and culture, tour operators and advisors weave them together to offer curated tours and an adventure- or activity-based experience.

Figure 1: Components of Adventure Travel



Definition of adventure travel based on original research led by Dr. Paige Viren for the Adventure Travel Trade Association⁵

Adventure travel is more than just a trip; it’s a rich tapestry woven from the threads of nature, culture, and activity, as shown in the left side of the graphic above. Successful providers of adventure travel experiences understand how these elements intertwine to create a fulfilling experience, respecting their individual significance while ensuring their harmonious integration. This entails thoughtful consideration of activity sequencing and duration, along with providing space for reflection about the experience. Because adventure travel relies on healthy communities, natural resources, and protected cultural heritage within a destination, sustainability is crucial to the adventure travel industry and considered to be an intrinsic part of developing experiences. Best practices for sustainability within tourism are based upon the Sustainable Development Goals as defined by the United Nations.⁶

From the traveler’s viewpoint, depicted in the right side of the graphic, studies suggest adventure travel is driven by an array of aspirations and desires that shape how individuals engage with and understand their journey. Adventure travelers aim to achieve mental and physical well-being, encounter novel and unique experiences, confront challenges—be they physical or cultural—and frequently cite personal transformation as a key objective for traveling. Additionally, adventure travelers increasingly desire to make a positive impact on both the environment and local communities.⁵

For a journey to qualify as adventure travel, it must involve an individual traveling outside of their usual environment for at least 24 hours but not extending beyond one year. (Trips exceeding one year are not classified as ‘travel’ within the research framework). Importantly, the trip must incorporate at least two of the following three experiences: engaging in a physical activity, exploring a natural environment, and immersing oneself in a cultural experience.

⁵ ATTA, <https://learn.adventuretravel.biz/research/north-american-adventure-travelers-seeking-personal-growth-new-destinations-and-immersive-culture>

⁶ United Nations 17 Sustainable Goals, <https://sdgs.un.org/goals>

From an activity standpoint, the traveler’s interpretation of ‘adventure’ is continually evolving. A diverse array of activities associated with adventure travel might involve: participating in an archaeological or citizen science expedition, backpacking, birdwatching, camping, caving, climbing, cooking, cycling, engaging with the local community, hiking, horseback riding, kayaking, language immersion, orienteering, rafting, safaris, sailing, scuba diving, snorkeling, skiing, snowboarding, surfing, trekking, walking, wildlife viewing, as well as other niche activities combined or as standalone experiences.

About the ATDI & Changes to 2024 Edition

The ATDI scorecard is the only country-level ranking index that assesses destinations’ competitiveness and potential for adventure tourism across 186 countries. It combines comprehensive, objective data from a diverse set of reputable global databases with subjective expert insights collected through surveys conducted among a panel of industry experts.

For 2024, the ATDI underwent a comprehensive update, reflecting the industry’s evolving landscape since its launch in 2008. We restructured and renamed the three main factors that form the core areas of analysis: Enabling Environment, Resources, and Readiness. In previous versions these categories were Safe & Welcoming, Adventure, and Readiness, respectively. The new names more accurately reflect the industry in 2024 and the composition of each also has been modified since 2020 (Tables 1 and 2).

Table 1: 2020 Factors (3) and Pillars (10)

(Italicized pillars changed from 2020-2024)

Safe & Welcoming	Adventure	Readiness
Sustainable Development Safety Natural Resources Health	Entrepreneurship <i>Adventure Resources</i>	<i>Humanitarian</i> Infrastructure Cultural Resources Image

Table 2: 2024 Factors (3) and Pillars (9)

(Italicized pillars changed from 2020-2024)

Enabling Environment	Resources	Readiness
Sustainable Development Safety Health <i>Climate Resilience</i>	Natural Resources Cultural Resources	Entrepreneurship Infrastructure Image

We streamlined the framework by reducing the number of pillars from ten to nine, each representing specific assessment areas under the revised factors. The Humanitarian pillar was removed because its indicators were replaced with more robust ones and placed in the Sustainable Development pillar. The Adventure Resources pillar was removed because the Natural and Cultural Resources pillars now encompass the relevant indicators. The Climate Resilience pillar was added to address the importance of environmental sustainability in adventure travel.

Additionally, the number of indicators used to measure these pillars were expanded from 19 to 23. Notably, 17 new indicators were used to address emerging industry trends. We added indicators on inclusion and digitalization to better reflect the adventure travel industry in 2024, as well as several infrastructure indicators. Furthermore, the weighting of factors, pillars, and indicators was thoroughly revised to enhance accuracy and relevance. The full list of indicators and their weighting is available in the downloadable Excel file on www.adventureindex.travel. Figure 2 illustrates the updated ATDI framework.

Figure 2: 2024 ATDI Framework at a Glance



Methodology

New ATDI Weighting System

Three main factors make up the ATDI. They are weighted to reflect their relative importance (Table 3).

Table 3: Three main factors of the ATDI

Enabling Environment	Resources	Readiness
30%	40%	30%

Each of the three factors is made up of specific pillars, which are also assigned weights based on their importance within the factor. For example, within Enabling Environment, the pillars include Sustainable Development, Safety, Health, and Climate Resilience, each contributing 25% of the factor’s weight. Finally, to measure various dimensions within each pillar, indicators are assigned weights based on their relevance and reliability. For example, the Sustainable Development pillar is based on the Human Development Index (HDI), the World Happiness score, and the Berkeley Inclusiveness Index and each are weighted at 33% of the pillar.

The new weighting system ensures a balanced and comprehensive assessment across all levels of factors, pillars, and indicators (Figure 2). Details of the weighting, including the relative contribution of each indicator, pillar, and factor toward the ATDI index are available in the downloadable Excel file on www.adventureindex.travel.

Each of the nine pillars are assessed using multiple indicators, capturing various dimensions of the pillar's focus area. To ensure comprehensive evaluation, every pillar includes at least two carefully selected indicators/expert opinion questions, based on the following criteria:

- **Relevance:** A strong, direct connection between the indicator and the specific pillar it measures.
- **Data Coverage:** Availability of data for at least 100 countries to ensure broad global applicability.
- **Accessibility:** Indicators must be publicly available, allowing transparent evaluation.
- **Credibility:** The indicator must be sourced from reputable organizations and widely recognized by industry experts.
- **Timeliness:** The data used should be recent to reflect current conditions and trends.
- **Consistency:** Indicators should have a reliable update cycle, ideally refreshed annually or biennially.

Indicators are drawn from a wide range of respected global sources, including the Human Development Index, World Health Organization, UNESCO, Environmental Performance Index, World Bank, and Foreign and Commonwealth Travel Warnings. Additionally, the ATDI includes expert input from a panel of adventure travel industry professionals, whose assessments contributed to six of the nine pillars: Safety, Natural Resources, Cultural Resources, Infrastructure, Entrepreneurship, and Country Image.

To ensure equitable comparisons, the ATDI presents rankings based on country groupings. Countries are grouped according to the International Monetary Fund World Economic Outlook⁷ as either 'Advanced Economies' or as 'Emerging and Developing Economies.' The ATDI 2024 edition covers 39 Advanced Economies and 147 Emerging and Developing Economies.

Country scores were initially calculated using a scale of 0-1 (0 being low and 1 being high), and this score is presented on the [accompanying dataset](#). Then, for ease of reading and comprehension and to maintain consistency with previous years, the scores were converted to a scale of 0-10 (0 being low and 10 being high) simply by multiplying by ten.

Expert Survey Panel

The ATDI relies on a panel of industry experts to assist in determining scores for six of the nine pillars in the index. These experts each possess at least three years of experience in the adventure travel industry and provide insights on countries they have sent at least one trip to in the last three years. Each expert may offer opinions on multiple countries. The ATDI utilizes an average of expert survey results, which combines feedback from multiple industry experts to create a more well-rounded and reliable score for each country. Each country's score is based on input from at least three different experts to provide a balanced evaluation. If zero, one, or two experts rated a country, Expert Opinion was excluded for that country.

In 2024, the panel comprised 329 experts, with 47 percent being women and 52 percent being men, and the remainder choosing not to disclose. Women experts evaluated a median of six countries, while men evaluated a median of two countries. On average, these experts had 23 years of experience in tourism, with 18 years specifically in adventure tourism. The ATDI expert panel included: 214 tour operators, 67 travel advisors (including agents, consultants, planners, and designers), 13 developers, 7 travel writers, and 28 other professionals (travel business owners, marketers, tourism boards, etc.). Expert opinion ratings were included for 121 countries in the 2024 index.

Managing Missing Data

Countries with missing data points were given an ATDI score equivalent to the average of their geographical region for that specific indicator. There are three indicators for which regional averages were not taken: Economic Freedom Index, Hotel beds per 1,000 population, and Country Brand Index. These indicators are highly specific to each country's context and cannot be accurately estimated using regional data. Similarly, if a country is missing data for the Expert Opinion indicator, it also does not receive a regional average score for this component. Furthermore, if a country is missing data for more than one pillar, it is excluded from the ATDI rankings.

⁷ IMF World Economic Outlook Database Groups and Aggregates Information, <https://www.imf.org/en/Publications/WEO/weo-database/2023/April/groups-and-aggregates>



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How to Use the Index

The ATDI serves as a valuable tool for tourism destination managers and key players in the industry to evaluate their destination's readiness and competitiveness in the adventure tourism market. Although the index aims to track a country's progress over time, significant updates to the 2024 ATDI have altered the framework, limiting direct comparisons with previous editions, including the most recent 2020 ATDI.

The complete dataset groups countries into three performance categories: high, medium, and low, based on their pillar scores. In the downloadable Excel file at www.adventureindex.travel, the average score for each category is highlighted in blue. The top-performing countries, in the highest 25%, are part of the "high" cluster and marked in green (Q1 or Quartile 1). Those in the lowest 25% are in the "low" cluster and highlighted in yellow (Q4 or Quartile 4). Countries in the "medium" or "low" clusters are encouraged to take guidance from the ATDI results to strengthen their adventure tourism offerings and move their scores into the "high" category, where the most competitive adventure tourism destinations are found.

Top Ten Countries for Adventure Travel

The 2024 Adventure Tourism Development Index’s top ten list (Table 4) reveals countries with high capacity for adventure tourism success. In some instances readers may notice a few countries on the list already leveraging this potential to attract desirable adventure travelers and build their international reputation, however **visitation numbers are not considered in the scoring.**

Because the 2024 index weighting system and contributing metrics have changed considerably since 2020, comparisons to past rankings are unrealistic. It is also important to note that the 2024 index groups the countries according to the International Monetary Fund (IMF) categories of **Advanced Economies** and **Emerging and Developing Economies**, which shifted country organization compared to the ‘Developed’ and ‘Developing’ categories that were used previously through 2020.

Table 4: Top Ten Ranked Countries in 2024

	Advanced Economies Country Rankings	Emerging/Developing Economies Country Rankings
1	Germany	Costa Rica
2	France	Chile
3	Switzerland	Thailand
4	Norway	Brazil
5	Austria	China
6	Spain	Peru
7	United Kingdom	Türkiye
8	New Zealand	Montenegro
9	Canada	United Arab Emirates
10	Japan	Romania

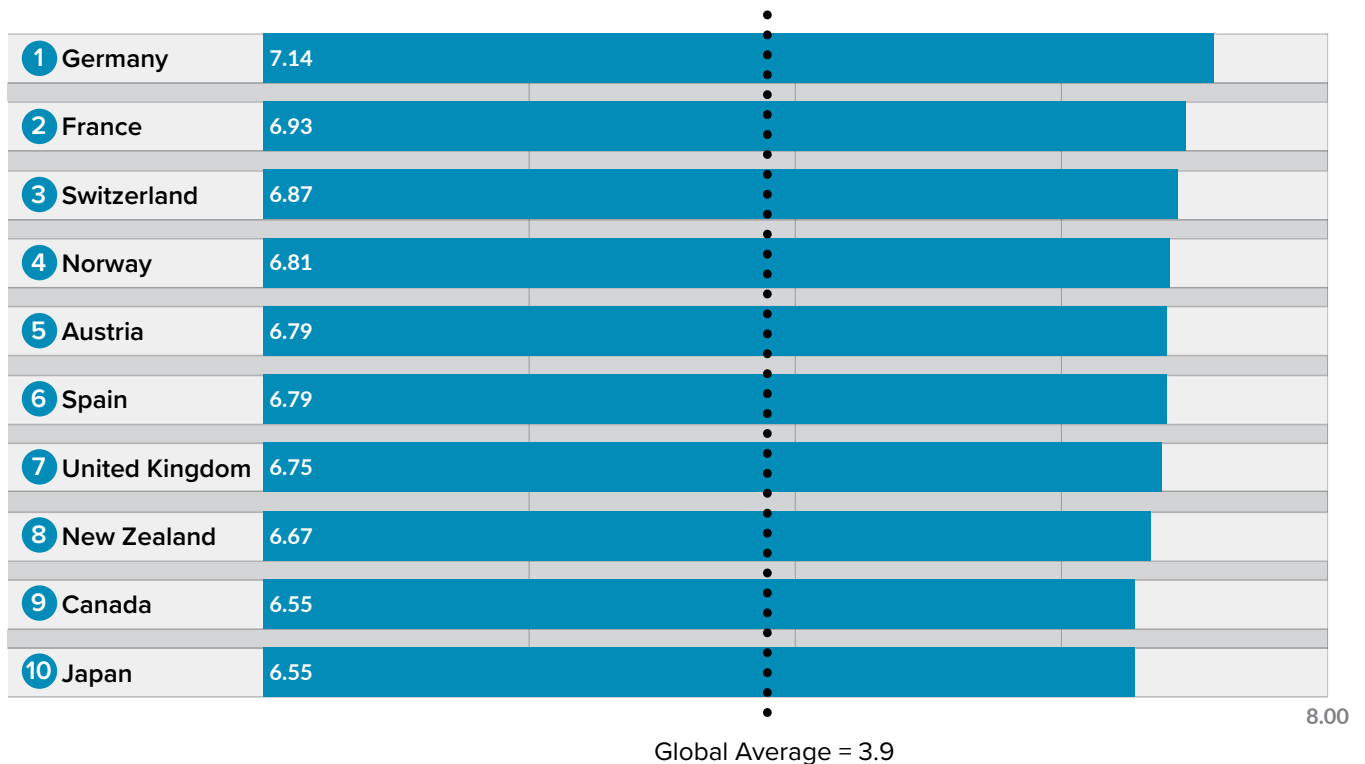


Advanced Economies

The key findings for the top ten countries with Advanced Economies as designated by the IMF are presented along with the countries' top ten finishers in each pillar.

Figure 3: Scores for Countries with Advanced Economies

This chart shows overall country scores on a scale of 0-10, with 0 being lowest and 10 being the highest rating available. The global average for all countries in the ATDI is 3.9 (out of 10), showing that the top ten countries are very prepared for adventure travelers relative to the average.



1. Germany consistently performed well across all nine pillars, securing its position as the top-ranked country both for Advanced Economies and overall. Very few countries, including Germany, rank highly in the Resources factor, encapsulating both culture and nature. The high weighting of Resources in the ATDI illustrates partly why Germany scores so highly this year.

- Cultural Resources (#4)
- Climate Resilience (#5)
- Natural Resources (#6)
- Health (#8)



2. France ranks second overall, also largely due to consistent performance across multiple pillars. Expert assessments highlight Readiness strengths of the country, ranking it in ninth place for Infrastructure and tenth place for Entrepreneurship.

- Cultural Resources (#3)
- Climate Resilience (#9)



3. Switzerland ranks third overall with particular strength in the Readiness factor. Contributing to the country's six top ten pillar placements listed below, the experts granted Switzerland second place for Infrastructure, fourth place for Image, seventh place for Natural Resources, and seventh for Entrepreneurship.

- Image (#2)
- Climate Resilience (#6)
- Entrepreneurship (#6)
- Safety (#7)
- Infrastructure (#7)
- Natural Resources (#8)



4. Norway ranks fourth overall, taking a strong stand in the Enabling Environment factor. The surveyed experts ranked Norway fifth for Image, eighth for Natural Resources, and eighth for Safety.

- Sustainable Development (#3)
- Health (#3)
- Natural Resources (#4)
- Climate Resilience (#7)
- Image (#9)



5. Austria ranks fifth among Advanced Economies with two top ten placements. The experts ranked Austria third for Natural Resources as well as fourth for Infrastructure.

- Natural Resources (#3)
- Health (#10)



6. Spain ranks sixth this year, driven by its strong performance in culture and image.

- Cultural Resources (#2)
- Image (#8)



7. The United Kingdom consistently performs well among Advanced Economies. The experts' ninth place ranking of the country's Cultural Resources contributed to the country's top ten ranking in this pillar.

- Climate Resilience (#4)
- Infrastructure (#4)
- Cultural Resources (#8)



8. New Zealand ranks eighth overall founded in six top ten pillar placements, with laudable strengths in both the Enabling Environment and Readiness factors. The expert panel granted the country first for both Cultural Resources and Image, second for Natural Resources, fifth for Entrepreneurship, sixth for Safety, and seventh for Infrastructure, most of which supported New Zealand's top ten pillar rankings.

- Sustainable Development (#1)
- Entrepreneurship (#2)
- Image (#3)
- Safety (#5)
- Infrastructure (#8)
- Health (#9)



9. Canada ranks ninth overall, with considerable aptitude in Readiness. Experts scored Canada sixth for Image and eighth for Infrastructure. In addition to aiding Canada's top ten pillar finishes, the experts also ranked Canada first for Entrepreneurship, fourth for Natural Resources, and fifth for Safety.

- Infrastructure (#3)
- Image (#4)
- Sustainable Development (#9)



10. Japan closes out the top ten with consistently high performance across the pillars. The experts ranked the country second for Cultural Resources, third for Safety, ninth for Image, and tenth for both Natural Resources and Infrastructure.

- Cultural Resources (#5)
- Image (#6)

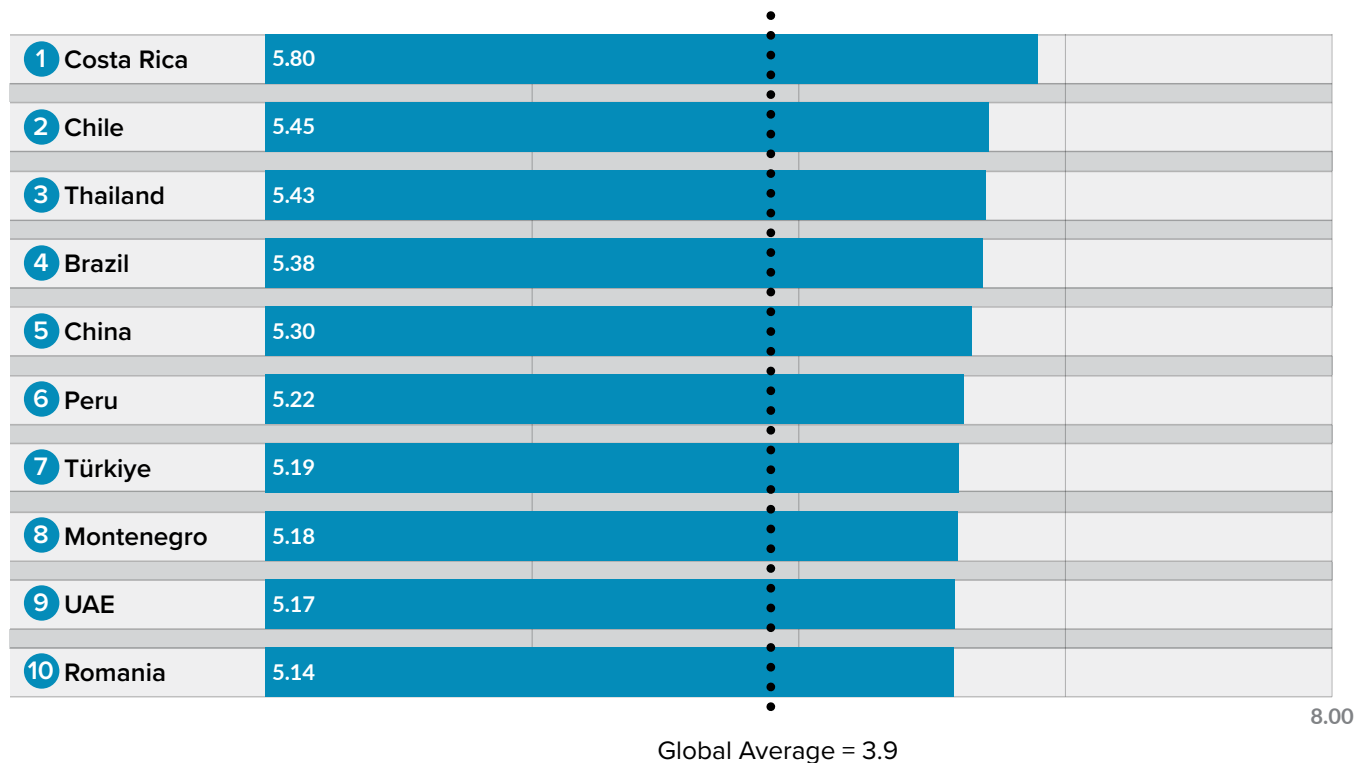


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Emerging and Developing Economies

Here we present key findings for the top ten countries with Emerging and Developing Economies as designated by the IMF.

Figure 4: Scores for Countries with Emerging and Developing Economies



As with the above figure, this chart shows overall country scores on a scale of 0-10, with 0 being lowest and 10 being the highest rating available. The global average for all countries in the ATDI is 3.9 (out of 10), demonstrating that these countries with emerging and developing economies are quite well prepared for adventure travelers, even if they do not score as highly as those in the Advanced Economies category.



1. Among Emerging and Developing Economies, **Costa Rica** ranks first overall in adventure market competitiveness. Expert assessments contributed to Costa Rica's top ten pillar placements by ranking the country first in Image and second in Natural Resources. Experts also lauded Costa Rica's readiness in Entrepreneurship, ranking it sixth.

- Sustainable Development (#1)
- Image (#3)
- Natural Resources (#5)



2. **Chile** ranks second among Emerging and Developing Economies, demonstrating strong performance across several pillars, especially those in the Enabling Environment factor. The expert panel contributed to the high ranking of the country in Entrepreneurship, ranking it seventh. Experts also highlighted other strengths, ranking Chile second in Image, fourth in Infrastructure, and sixth in Natural Resources.

- Sustainable Development (#3)
- Safety (#6)
- Entrepreneurship (#6)
- Climate Resilience (#10)



3. Thailand ranks third, with remarkable performance in the country's Readiness. The expert panel rated Thailand highly, placing it third for Infrastructure in addition to ninth for Cultural Resources.

- Image (#2)
- Infrastructure (#3)
- Entrepreneurship (#9)



4. Brazil places fourth among Emerging and Developing Economies.

- Natural Resources (#7)
- Infrastructure (#7)



5. China ranks fifth. The expert panel rated China second in Infrastructure.

- Cultural Resources (#1)
- Infrastructure (#1)



6. Peru ranks sixth in this economic category, with consistently high performance across the pillars. The experts ranked the country third in Cultural Resources and ninth in Image.

- Cultural Resources (#6)
- Image (#10)



7. Türkiye ranks seventh overall. The expert panel ranked the country fifth for Cultural Resources and ninth for Infrastructure.

- Image (#1)
- Cultural Resources (#2)
- Infrastructure (#10)



8. Montenegro ranks eighth due to its consistent performance across the pillars even without any top ten finishes. The experts ranked Montenegro second for Entrepreneurship, sixth for Safety as well as for Natural Resources (tied with Chile).



9. The United Arab Emirates is in ninth place this year. Experts ranked the country first for both Infrastructure and Entrepreneurship.

- Entrepreneurship (#1)
- Infrastructure (#2)
- Safety (#3)
- Sustainable Development (#7)



10. Romania lands in tenth place with steady performance across the pillars.

- Sustainable Development (#2)

ATDI Rankings by Pillar

A description of each of the ATDI's nine pillars is included in this section.

The top five ranked nations in Advanced and in Emerging and Developing Economy groups for each pillar are presented.

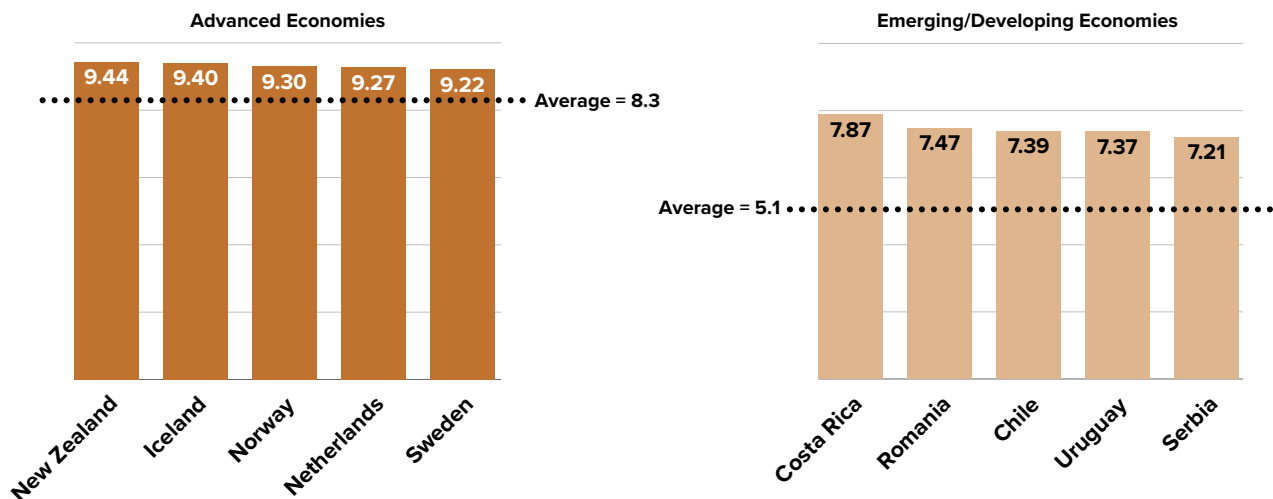
Enabling Environment

1. Sustainable Development

The Sustainable Development Pillar focuses on three indicators of human development within a country. The Human Development Index and the Global Happiness Ranking gauge the lifespan, health, education, GDP, and metrics of standard of living of a country's citizens. The Berkeley Inclusiveness Index evaluates a country's degree of inclusiveness across a range of social dimensions, including gender, race/ethnicity, religion, disability, and sexual orientation.

- 1.1. *Human Development Index (United Nations Development Programme)*
The HDI gauges a country's average attainment of human development, including enjoyment of a lengthy and healthy life, fostering education, and maintaining a respectable standard of living.
- 1.2. *Global Happiness Ranking (Sustainable Development Solutions Network)*
This index is based on six variables, including gross domestic product (GDP) per capita, social support, healthy life expectancy, freedom, generosity, and corruption.
- 1.3. *Inclusiveness Index (Berkeley)*
Six domains are reflected in this index: out-group violence, political representation, income inequality, anti-discrimination laws, rates of incarceration, and immigration or asylum policies.

Figure 5: Top Countries in Sustainable Development in 2024



Given a shift in the last several years in how Sustainable Development is viewed as well as the brand new methodological approach of the 2024 ATDI, these are the countries that now excel in focusing on the future through sustainable human development. Top countries within each economic category score closely together for Sustainable Development relative to other pillars.

Beyond doing no harm, many destinations now favor adventure travel experiences based on a high standard of sustainable tourism. For example, many organizations, such as the Global Sustainable Tourism Council⁸ advocate for and include restoration, regeneration, conservation, and community integration as part of tours. Travelers are increasingly sustainability minded and are drawn toward destinations that value sustainable human development.

⁸ Global Sustainable Tourism Council, <https://www.gstcouncil.org>

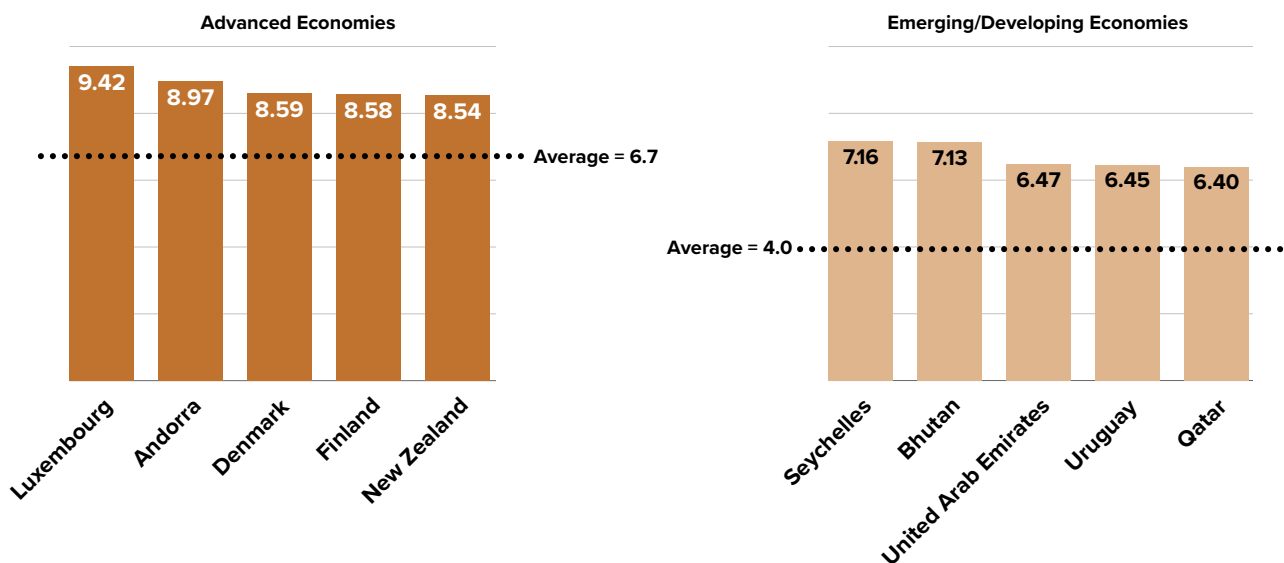
2. Safety

This pillar assesses the safety of travel within a country. Nations characterized by peacefulness, high levels of transparency, low corruption, and minimal or absent travel advisories offer safer environments for travelers.

The Safety Pillar consists of three indicators as well as survey responses from experts.

- 2.1. *Global Peace Index (Vision of Humanity)*
Evaluation of 23 quantitative and qualitative peacefulness measurements contribute to this index. The state of peace across three domains was assessed using 2023 data: Level of societal safety and security, Extent of ongoing domestic and international conflict, and Degree of militarization.
- 2.2. *Corruption Perceptions Index (Transparency International)*
Ranking 180 countries and territories around the world by their perceived levels of public sector corruption, this index uses scoring based on a scale of 0 (highly corrupt) to 100 (very clean).
- 2.3. *Threat Level Reported (United Kingdom Foreign & Commonwealth Office Travel Advice)*
Travel advice from the UK government includes the latest information on safety and security, travel warnings, coronavirus, and entry requirements.
- 2.4. *Expert Opinion* based on the prompt, "In your opinion, how safe and secure for travel is [country]?"

Figure 6: Top Countries in Safety in 2024



Scores in Safety drop off faster for Emerging and Developing Economies than for Advanced Economies, whose scores cluster more closely together. Most Advanced Economies are considered to be very safe. An exception is Israel with an outlying score of 0.3, due to ongoing conflict in the region. Notably, Seychelles and Bhutan score higher than the Advanced Economy average.

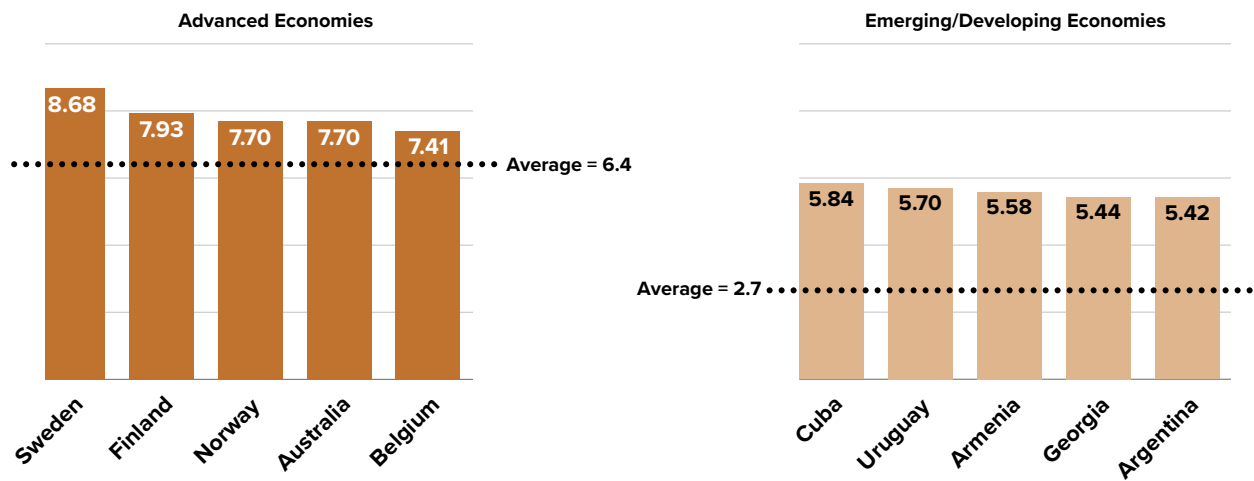
3. Health

The Health Pillar quantifies healthcare availability and preparedness as well as environmental health related to human well-being in a country. A high number of medical doctors indicates a better standard of healthcare. This pillar relies on the rationale that destinations with healthy populations are better able to host and nurture new businesses and to care for their resources sustainably. Adventure travelers also value the availability of good healthcare and clean environments.

The Health Pillar is made up of three indicators.

- 3.1. *Medical Doctors (World Health Organization)*
Medical doctors (per 10,000 people) are quantified.
- 3.2. *Global Health Security Index*
This assessment includes the capacities of 195 countries to prepare for epidemics and pandemics. The GHS Index compares health security alongside other crucial factors essential for combating outbreaks, namely political and security risks, the overall robustness of the healthcare system, and a country's adherence to global standards.
- 3.3. *Environmental Health Indicators of the Yale Environmental Performance Index (EPI)*
Part of a data-derived summary of the state of sustainability around the world, the environmental health assessment evaluates air quality, waste management, water and sanitation, and presence of heavy metals for 180 countries.

Figure 7: Top Countries in Health in 2024



While Advanced Economies excel in their Health scores and sustain a high average, Emerging and Developing Economies have a lot of potential to improve their scores. Countries can consider how prepared they are to face health crises. Additionally, improvements in air and water quality, waste management and sanitation will also raise Health scores and reassure travelers who remain uneasy about traveling post-pandemic.

4. Climate Resilience

The capacity of a country to mitigate the effects of climate change and natural disasters reflects their commitment to manage the biggest environmental threats. Reducing current and future greenhouse gas (GHG) emissions is a critical component of climate change mitigation efforts. Many adventure travelers hold climate and disaster management in high regard and choose destinations accordingly.

Two indicators comprise the Climate Resilience Pillar.

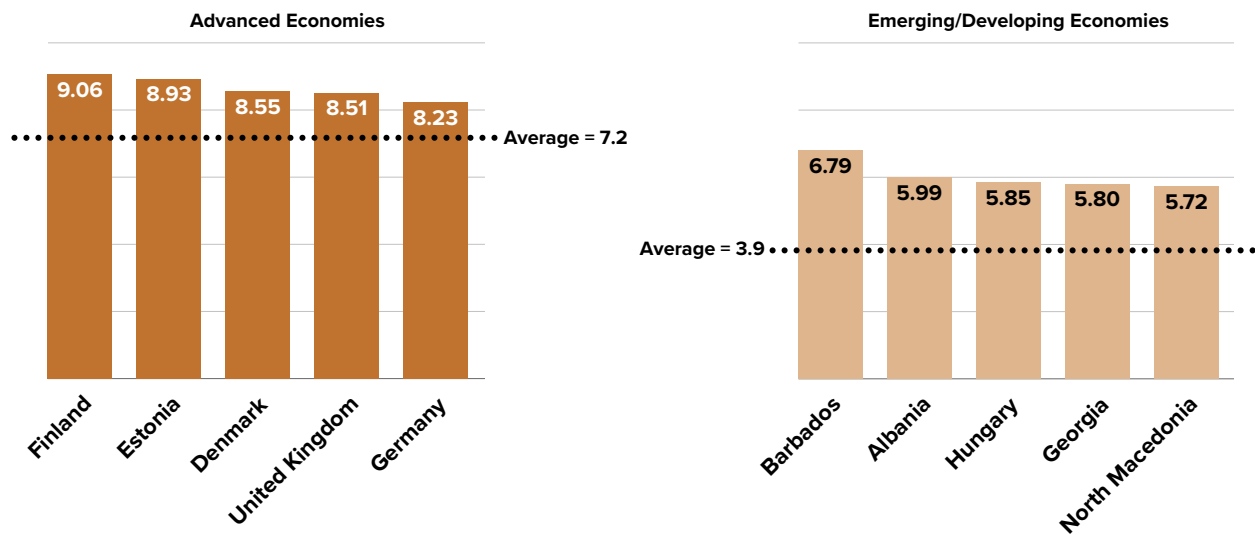
4.1. *Climate Mitigation Indicators of the EPI*

Environmental metrics associated with climate change mitigation are evaluated, including GHG growth rates of CO₂, N₂O, CH₄, F gas, and black carbon, and projected future GHG emissions. The lower the growth rates and future projections of GHG, the higher ranked the country.

4.2. *ND-GAIN, Notre Dame Global Adaptation Initiative*

Assessed as part of the Notre Dame Environmental Change Initiative, the ND-GAIN Country Index evaluates a country's vulnerability to climate disruptions as well as its readiness to leverage private and public investment for adaptive actions. The index is comprehensively based on 40 components.

Figure 8: Top Countries in Climate Resilience in 2024



A higher number of Advanced Economies have the resources to remain competitive in this pillar, while a quick drop in Climate Resilience scores is observed among the top Emerging and Developing Economies. Because travelers are focused on environmental sustainability, destinations can draw them in by boosting efforts to mitigate and adapt to climate change. For example, many tour operators exhibit climate-awareness by enticing travelers with their climate-related actions, such as purchasing from sustainable suppliers, educating tour participants about climate conscientiousness, and reducing their emissions.⁹

9 ATTA, <https://www.adventuretravelnews.com/atta-releases-2024-annual-state-of-the-adventure-travel-industry-snapshot-report>

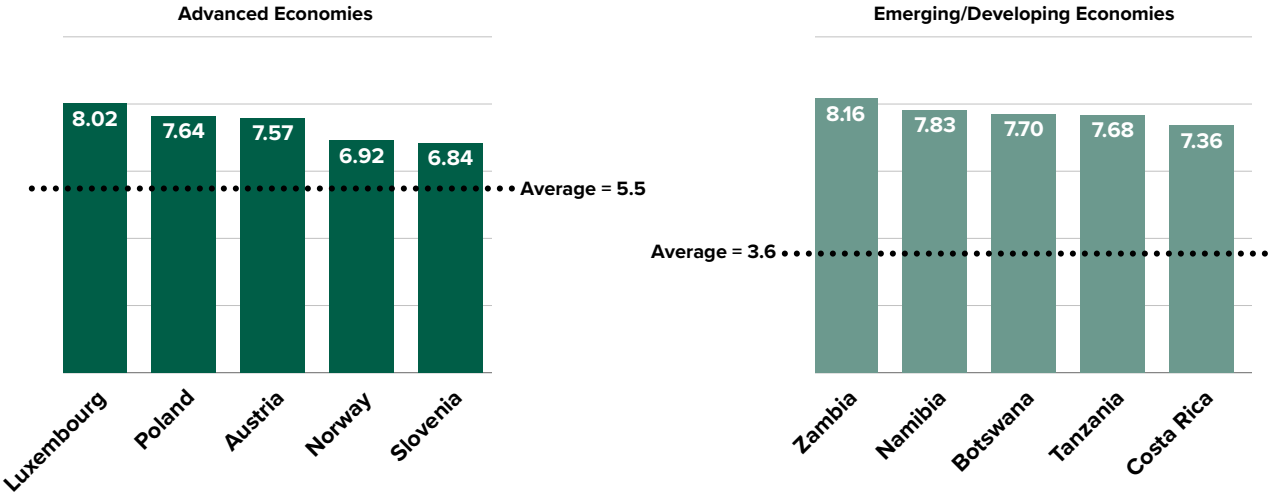
5. Natural Resources

Adventure travelers seek pristine landscapes and responsibly managed natural resources. Destinations boasting an abundance of natural assets that are effectively managed and conserved will garner commendation from adventure travelers and enhance their likelihood of maintaining market competitiveness.

The Natural Resources Pillar is based on two EPI-based indicators, a World Bank indicator, and expert opinion. These assessments include how well a country’s protected areas represent the ecological diversity of a country.

- 5.1. *Protected Areas Representativeness Index (PARI)*
This EPI indicator measures how well protected land areas represent the ecological diversity of a country.
- 5.2. *Species Protection Index (SPI)*
This SPI index measures how well a country’s protected land areas overlap with the ranges of its vertebrate, invertebrate, and plant species. A high score demonstrates complete coverage of all species’ ranges by protected areas within a country while a low score indicates no coverage.
- 5.3. *Territorial and marine protected areas (% of total territorial area)*
World Bank Development Indicators are based on the World Database on Protected Areas, which is compiled and managed by United Nations Environment World Conservation Monitoring Centre in collaboration with governments, non-governmental organizations, academia, and industry.
- 5.4. *Expert Opinion* based on the prompt, “In your opinion, the quality of natural resources in [country] is?”

Figure 9: Top Countries in Natural Resources in 2024



Unlike for the majority of pillars, the top five Emerging and Developing Economies in this pillar have correspondingly higher scores than the top five Advanced Economies. This is despite the much lower average for Emerging and Developing Economies compared to Advanced Economies. Also interesting is how much the scores decline across the top five Advanced Economies while they remain relatively higher across the top five Emerging and Developing Economies. Working to maintain and expand natural resources can boost a country’s ranking and appeal to travelers regardless of economic development.

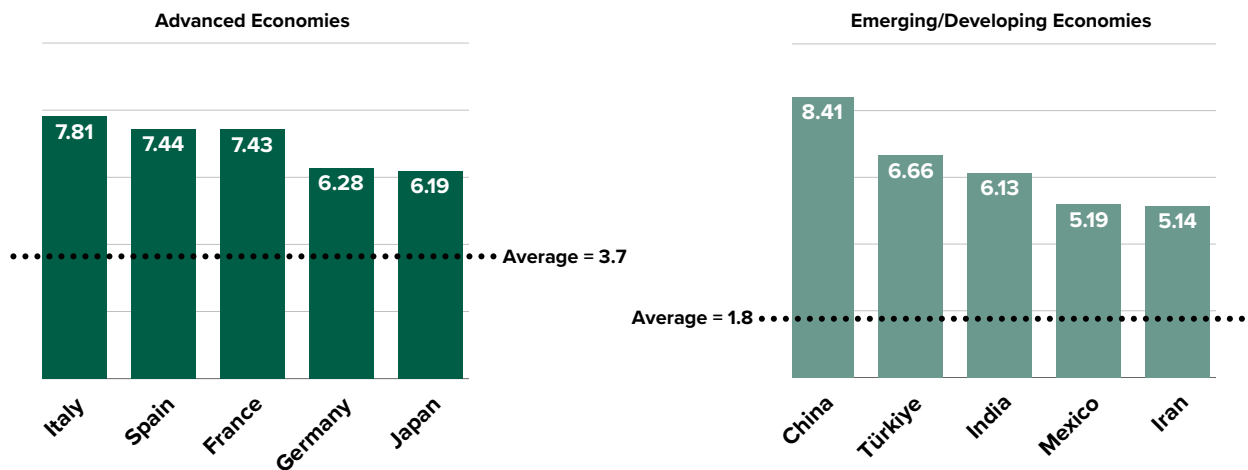
6. Cultural Resources

Adventure travelers enjoy engaging with local cultures through immersive experiences. Places that promote cultural preservation while embracing modern influences that shape and enrich traditional customs are highly regarded by visitors.

The Cultural Resources Pillar is made up of two indicators and expert opinion.

- 6.1. *Number of UNESCO World Cultural Heritage Sites [United Nations Educational, Scientific, and Cultural Organization (UNESCO)]*
- 6.2. *Number of intangible heritage practices (UNESCO)*
Because cultural heritage includes more than monuments and collections of objects, intangible heritage diversity is quantified with this index. The estimate includes traditions or living expressions such as oral and culinary traditions, performing arts, social practices, rituals, festive events, knowledge/practices concerning nature and the universe, and knowledge/skills to produce traditional crafts.
- 6.3. *Expert Opinion based on the prompt, "In your opinion, the quality of cultural resources in [country] is?"*

Figure 10: Top Countries in Cultural Resources in 2024



Similarly to the Natural Resources Pillar, a country can have rich Cultural Resources regardless of economic category, exhibited by China with the highest ranking here. Across levels of economic development, the Cultural Resources indicator scores decline markedly within the top ranked countries. Many local traditions, customs, and arts could be elevated by curating and offering educational tours, exhibits, culinary experiences, and cultural engagement to highlight the rich intangible heritage that exists in many countries and is not yet marketed to travelers.

7. Entrepreneurship

Small businesses lie at the heart of the adventure travel sector. Enthusiastic entrepreneurs are constantly refining their offerings. Supportive business environments for entrepreneurial endeavors allow straightforward establishment of small and medium-sized tourism ventures.

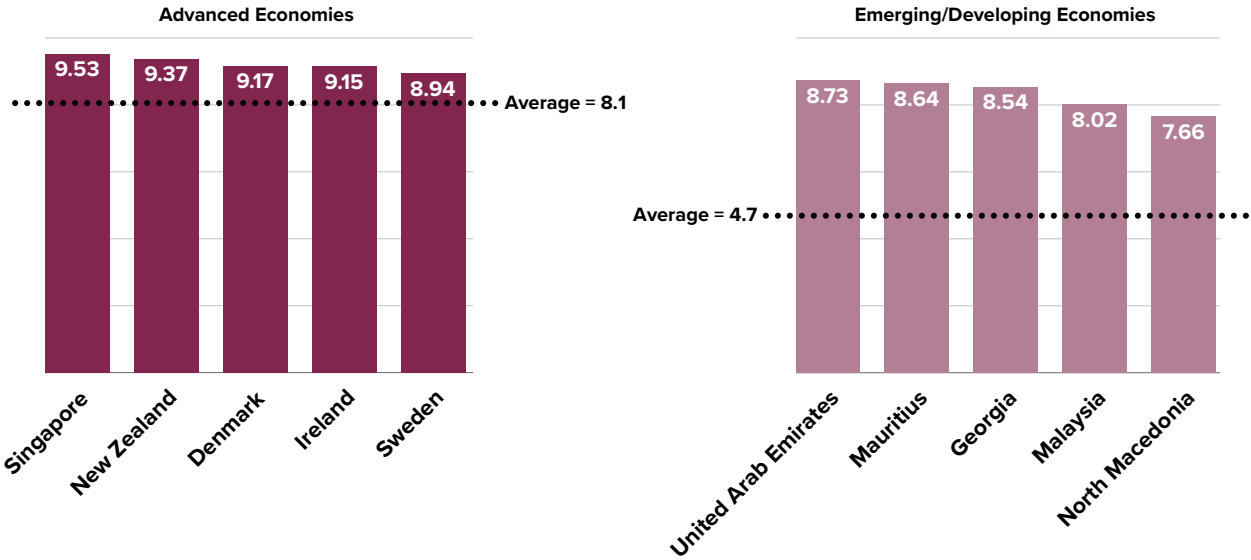
The Entrepreneurship Pillar is based on two indicators and on expert opinion.

- 7.1. *Index of Economic Freedom (The Heritage Foundation)*
 Assessment of economic freedom based on 12 quantitative and qualitative factors, which are grouped into four broad areas of economic freedom:
 - Rule of Law (property rights, government integrity, and judicial effectiveness)
 - Government Size (government spending, tax burden, and fiscal health)
 - Regulatory Efficiency (business freedom, labor freedom, and monetary freedom)
 - Open Markets (trade freedom, investment freedom, and financial freedom)

- 7.2. *Ease of Doing Business (World Bank)*
 Economies are ranked on their ease of doing business, from 1-190. A high ranking means the regulatory environment is more conducive to starting and operating a business. The rankings are determined by aggregating scores on ten topics, each consisting of several indicators, and giving equal weight to each topic.

- 7.3. *Expert Opinion* based on the prompt, “In your opinion, how much opportunity for entrepreneurship is there in [country]?”

Figure 11: Top Countries in Entrepreneurship in 2024



While doing business in Advanced Economy countries is easier than in Emerging and Developing Economy countries, abundant opportunities exist for entrepreneurs to operate in countries across economic categories. Scores among the top five decline more quickly among Emerging and Developing Economies than for Advanced ones, a trend which is reflected in the overall category averages.

8. Infrastructure

Adventure travelers, in contrast to mainstream tourists, may not be as influenced by shortcomings in hard tourism facilities, yet they are important destination features to consider.

Tourism infrastructure includes:

- Hard infrastructure, including roads, airports, lodging, and trails
- Soft infrastructure, such as trail maps and information on heritage and culture
- Ground operators and outfitters
- Training programs for adventure tourism providers such as guides, interpreters, and ecolodges

This pillar uses data from four indicators and one expert opinion question.

8.1. *Fixed Broadband Subscriptions per 100 people (World Bank)*

More broadband accessibility typically means a more connected population, which can significantly improve quality of life and economic opportunities for individuals and communities.

8.2. *Logistics Performance Index: Quality of Trade and Transport-related Infrastructure (World Bank)*

The perception of a country's quality of trade and transport-related infrastructure (e.g., ports, railroads, roads, and information technology) is appraised by logistics professionals. Infrastructure is rated on a scale from 1 (very low) to 5 (very high) and scores are averaged across respondents.

8.3. *Bed-places per 1,000 inhabitants (United Nations World Tourism Organization)*

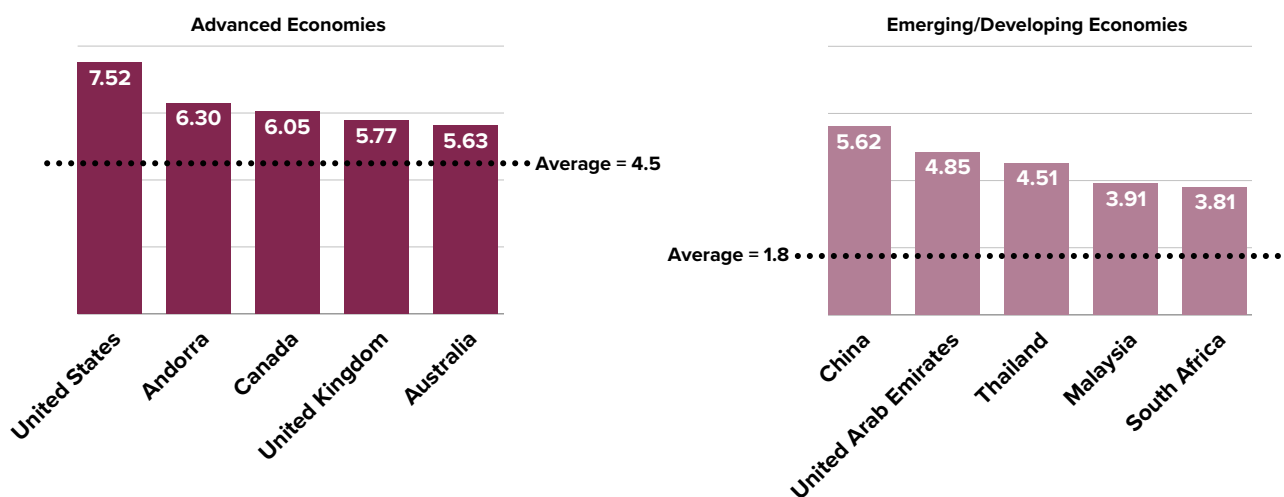
A high ranking for this indicator shows a high density of hotel beds in a country.

8.4. *Air Connectivity Index Score (International Air Transport Association)*

Measures the degree of integration of a country into the global air transport network. The score is a composite measure reflecting the number and economic importance of the destinations served from a country's major airports and the number of onward connections available from each destination.

8.5. *Expert Opinion* based on the prompt, "In your opinion, how would you rate the level of infrastructure (air connectivity, ease of getting around, number of beds) in [country]?"

Figure 12: Top Countries in Infrastructure in 2024



Unsurprisingly, Advanced Economies offer more infrastructure than Emerging and Developing Economies. The top five Advanced Economies all score above the top five Emerging and Developing Economies. Within both economic categories, scores diminish markedly with ranking. Building hard infrastructure demands significant investment and time so cannot be expected to shift quickly. However, soft infrastructure including destination guidebooks, trail maps, and education on heritage and culture is highly useful for adventure travelers and can often be established with minimal financial input.

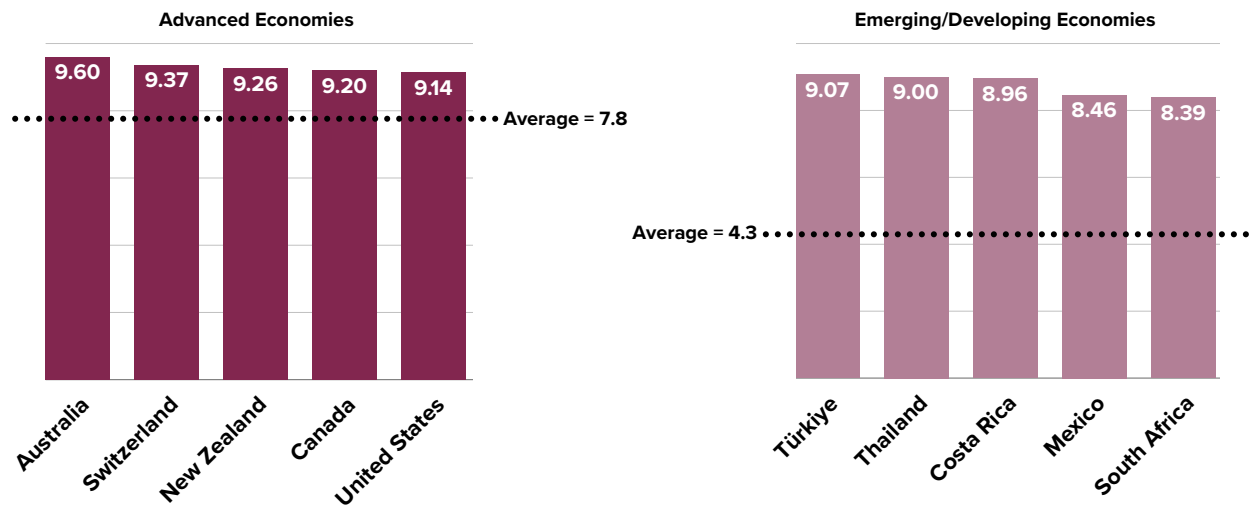
9. Image

International perception of countries holds significant influence over their competitiveness on the adventure travel market. Thus, investment in a destination's brand appeal offers ample opportunity for shaping market growth. Countries can increase their attractiveness to consumers with a well-crafted image that emphasizes sustainability and adventure, which will entice the many travelers who prioritize these values.

The ATDI evaluates a destination's travel image based on one indicator and on expert opinion.

- 9.1. *Country Brand Index Tourism Edition Ranking (Bloom Consulting)*
Country ranking in this index includes the effects of how governments handled response to the pandemic. This measure also reveals how digital identity is an increasingly critical component of country appeal. Trends through 2022 and 2023 are included.
- 9.2. *Expert Opinion* based on the prompt, "In your opinion, how would you rate [country]'s overall image as an adventure travel destination?"

Figure 13: Top Countries in Image in 2024



The top five Advanced and top five Emerging and Developing Economies have remarkably high Image scores. Advanced Economies achieved high scores across the board in 2024.

Perhaps associated with their high ranking in country image, Costa Rica and Mexico have seen higher Tourism GDP post-COVID compared to other countries that are still lagging behind 2019 Tourism GDP levels.²



Regional Outlook

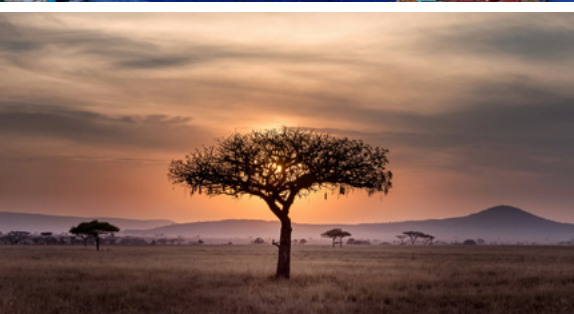
The ATDI provides separate rankings for countries with Advanced Economies and for those with Emerging and Developing Economies. Here, however, rankings are reported based on region (Table 5). Individual countries are often influenced by regional factors. For this reason a regional view of country competitiveness is offered. This may be helpful for destinations wanting to know how they compare to their closest neighbors.

Table 5. Top Five Countries Ranked by Region for 2024

Regardless of economy category, these are the top five countries for adventure travel for each region in 2024.

The total number of countries in the region are in parentheses after the region name.

	EAST ASIA & PACIFIC (27)	EASTERN EUROPE & CENTRAL ASIA (19)	EUROPE & NORTH AMERICA (34)	LATIN AMERICA & THE CARIBBEAN (33)	MIDDLE EAST & NORTH AFRICA (18)	SOUTH ASIA (9)	SUB-SAHARAN AFRICA (46)
1	New Zealand	Croatia	Germany	Costa Rica	United Arab Emirates	Bhutan	Botswana
2	Japan	Türkiye	France	Chile	Israel	India	Namibia
3	Australia	Montenegro	Switzerland	Brazil	Morocco	Nepal	Zambia
4	Singapore	Albania	Norway	Peru	Jordan	Maldives	Tanzania
5	South Korea	Russia	Austria	Mexico	Oman	Sri Lanka	South Africa



Regional Highlights

- **New Zealand** leads the East Asian and Pacific region in Enabling Environment pillars of Sustainable Development and Safety and also has very high Entrepreneurship and Image scores. **Japan** leads in Climate Resilience and also ranks highly in Cultural Resources. **Australia** holds top ranks for Health, Infrastructure, and Image. **Singapore** ranks highest for Entrepreneurship.
- **Croatia** is the one country considered an Advanced Economy in the Eastern Europe and Central Asian region and it outpaces its regional counterparts in Sustainable Development, Safety, Climate Resilience, and Natural Resources pillars. **Türkiye** rises to the top in Cultural Resources, Infrastructure, and Image. **Armenia** boasts the highest Health ranking and **Georgia** holds the highest Entrepreneurship ranking. **Albania** and **Russia** stand out for relatively high scores across several pillars.
- Among Western European and North American competitors, the countries here mirror the top five of the overall 2024 ATDI ranking described above.
- The top four countries in Latin America and the Caribbean also appear in the top ten for Emerging and Developing Economies shown above. **Mexico** joins the other top ranking countries in the region with its high score for Cultural Resources and Image.
- Across Sub-Saharan African countries, The **United Arab Emirates** scores highly due to competitive scores in Enabling Environment and Readiness, easily outranking its neighbors in Safety and also scoring high in Natural Resources, Entrepreneurship, and Infrastructure. **Morocco** ranks highest in Cultural Resources and Image. **Israel**, the one Advanced Economy in the Middle East and North Africa, is top in Climate Resilience and also ranks highly in Sustainable Development and Health despite ranking low in Safety, which is not surprising given the ongoing conflict in the region. **Oman** and **Saudi Arabia** have consistent scores across the board earning them spots in the region's top five this year.
- In the South Asian region, **Bhutan** excels in Safety and Natural Resources, while **India** scores highest in Cultural Resources and in all three Readiness pillars, Entrepreneurship, Infrastructure, and Image. **Maldives** has the regionally highest rankings in Sustainable Development and Health. **Sri Lanka** is ranked highest in the region for Climate Resilience.
- **Botswana** is a highly competitive destination for adventure travel in Sub-Saharan Africa, with the third highest ranking in Natural Resources among Emerging and Developing Economies as well as high regional scores in Safety and Entrepreneurship. **Zambia** leads in Natural Resources, yet scores in this pillar are also high for **Namibia** and **Tanzania**. **South Africa** scores highest in the region in the Enabling Environment pillars, Sustainable Development, Health, and Climate Resilience, as well as in the Readiness pillars of Infrastructure and Image. Notably, **Tanzania** also ranks highly in image.

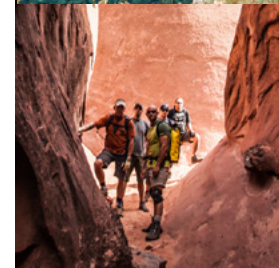
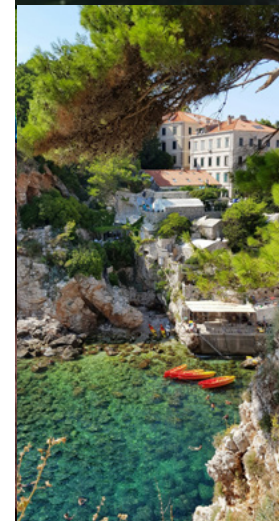
2024 ATDI Rankings

Table 6. Advanced Economies

Rank	Country	Rank	Country
1	Germany	21	Belgium
2	France	22	Netherlands
3	Switzerland	23	Slovenia
4	Norway	24	United States
5	Austria	25	Czech Republic
6	Spain	26	Estonia
7	United Kingdom	27	Iceland
8	New Zealand	28	Greece
9	Canada	29	Singapore
10	Japan	30	South Korea
11	Australia	31	Slovakia
12	Italy	32	Bulgaria
13	Ireland	33	Malta
14	Finland	34	Cyprus
15	Poland	35	Lithuania
16	Sweden	36	Latvia
17	Denmark	37	Andorra
18	Luxembourg	38	Israel
19	Croatia	39	San Marino
20	Portugal		

Table 7. Emerging and Developing Economies

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



Conclusion

The 2024 Adventure Tourism Development Index (ATDI) offers a robust framework for evaluating a country’s potential competitiveness in the adventure tourism market. By analyzing performance across nine key pillars that encompass wide-ranging areas such as sustainability, safety, infrastructure, and image, the ATDI provides valuable insights for destination managers and partners seeking to enhance their competitiveness. While the updated methodology prevents direct comparisons to previous editions, it allows for a more modern understanding of a country’s current strengths and weaknesses, enabling targeted improvements.

The ATDI rankings paint a diverse picture of adventure tourism destinations worldwide. Advanced Economies like Germany, France, and Switzerland demonstrate consistent excellence across all pillars, while Emerging and Developing Economies such as Costa Rica, Chile, and Thailand leverage their unique strengths in sustainable development, natural resources, and image, respectively.

A regional perspective further illuminates the diverse opportunities and challenges facing adventure tourism. Each region possesses distinct advantages, from the breathtaking landscapes of East Asia & Pacific to the rich cultural tapestry of South Asia. However, addressing region-specific challenges, such as safety concerns in the Middle East & North Africa and infrastructure limitations in Sub-Saharan Africa, is crucial for ensuring the sustainable growth of adventure tourism. By understanding their regional context and prioritizing key areas for improvement, destinations can enhance their appeal to adventure travelers while promoting sustainable and responsible development.

Ultimately, the ATDI emphasizes that success in adventure tourism hinges on a complex interplay of factors, which requires a holistic and collaborative approach. By embracing sustainable practices, investing in infrastructure, and fostering strong public-private partnerships, countries can unlock the full potential of this dynamic sector. As the global travel industry continues to evolve, the ATDI serves as a valuable compass, guiding destinations towards a thriving and responsible adventure tourism market that preserves natural and cultural heritage for generations to come.



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