



सत्यमेव जयते

GOVERNMENT OF INDIA
MINISTRY OF TOURISM



Incredible!ndia

INDIA

TOURISM MART
18th - 20th February
2021



Adventure

Towards Destination India 365

Adventure

Towards Destination India 365



Adventure tourism is a trip that includes at least two of the following three elements **physical activity, natural environment and cultural immersion**. Trips with all three elements are with complete travel experience and have “word of mouth” to ensure more visits.

As per Adventure Travel Trade Association (ATTA) Adventure Travel Overview and Market Sizing, Adventure Tourism expenditure is 683 billion USD i.e. 30% of the Global Tourism Expenditure (2.3 trillion USD). Adventure tourism is fastest growing segment under tourism. While domestic leisure tourism shows green shoots of recovery with the emergence of “Revenge Travel” during the new year, the industry expects that the consumer will move towards natural environment and in turn adventure tourism.

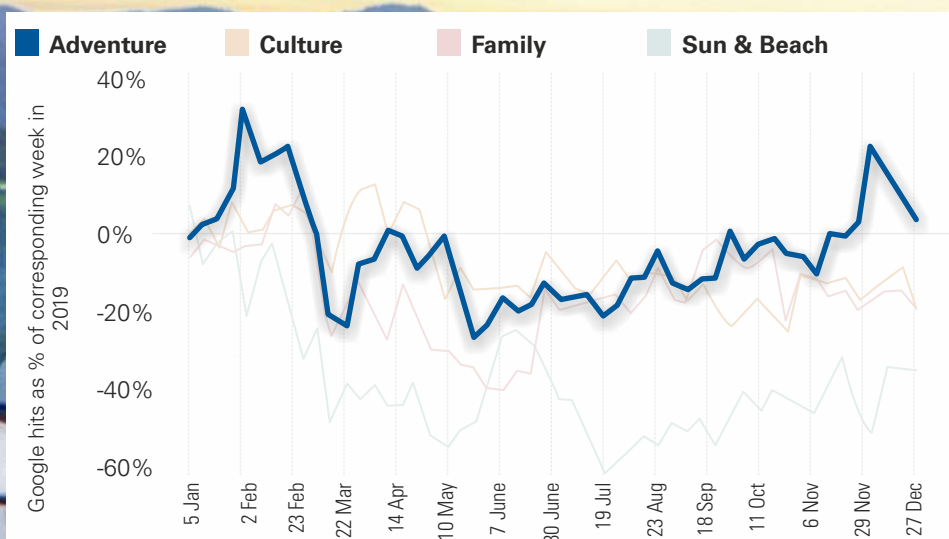
In fact, Based on the recovery dashboard of the WTTC, **Adventure segment stands out as the leading recovering segment**. Travel related google search patterns indicate that the searches witnessed a dip of 24% in the week ending 22nd March 2020 as compared to the same week of 2019. The trend has gradually shifted to positive axis and was 3% more than 2019 in the week of 27th December 2020. (Graph below)

Global Scenario

Adventure Tourism

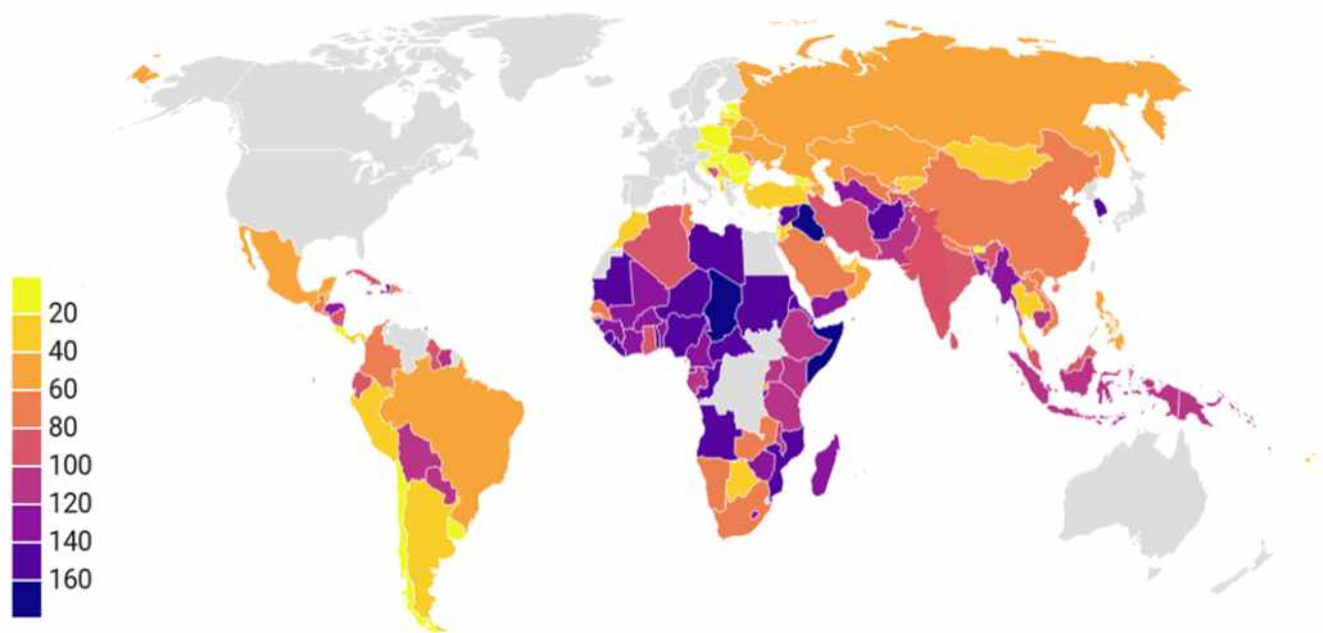
Pre-COVID, the global adventure tourism market was valued at **683 Billion USD** in 2017, and was projected to reach **USD 1,626.7 billion** in 2026, registering a CAGR of **13.3%** from 2019 to 2026.

While Europe maintains its dominant position, Asia-Pacific is growing at an impressive rate owing to faster economic growth and increase in disposable incomes.



Global Leaders in Adventure Tourism

Ranking of Developing Countries on Adventure Tourism Development Index



Source: Adventure Tourism Development Index (ATDI 2020)

10 Pillars of Adventure Market Competitiveness

Safe & Welcoming

1. Sustainable Development
2. Safety
3. Natural Resources
4. Health

Adventure

5. Entrepreneurship
6. Adventure Resources

Readiness

7. Humanitarian
8. Infrastructure
9. Cultural Resources
10. Image

Adventure Tourism Development Index (ATDI) measures elements of tourism development. The index depends on interconnected web of factors. The improvement is dependent on all stakeholders (government and private) and good governance in tourism. The countries are evaluated basis their economic development i.e. developed and developing countries.

Adventure tourism incorporates and promotes core values of responsible tourism i.e. Respect for cultural and natural assets and protection of the most vulnerable. It attracts visitors outside of peak season, highlights the natural and cultural values of a destination, thereby promoting its preservation, and creates resilient and committed travelers.

The essentials for success of adventure destination are:



- Globally, the average retail trip price was USD 3,000 per person, or USD 341 per day (excluding airfare)
- On average, 74% of trip costs are spent with local suppliers, and each guest spends about USD 206 on local handicrafts/souvenirs
- 80% of adventure travel tour operator clients are between the ages of 45-64



India Landscape for Adventure Tourism

India has significant geographical advantage owing to its rich natural & eco tourism resources

- 70 per cent of the Himalayas
- 7,000 kms of coastline
- among the one of the three countries in the world with both hot and cold deserts
- ranks 10th in total area under forest cover
- 6th in terms of number of recognized UNESCO Natural Heritage sites

However, in 2020 India slipped 10 positions and finished 96th in ATDI 2020.

As per the global rankings, India ranks much lower than its neighbors, Bhutan (14th), and Nepal (67th).

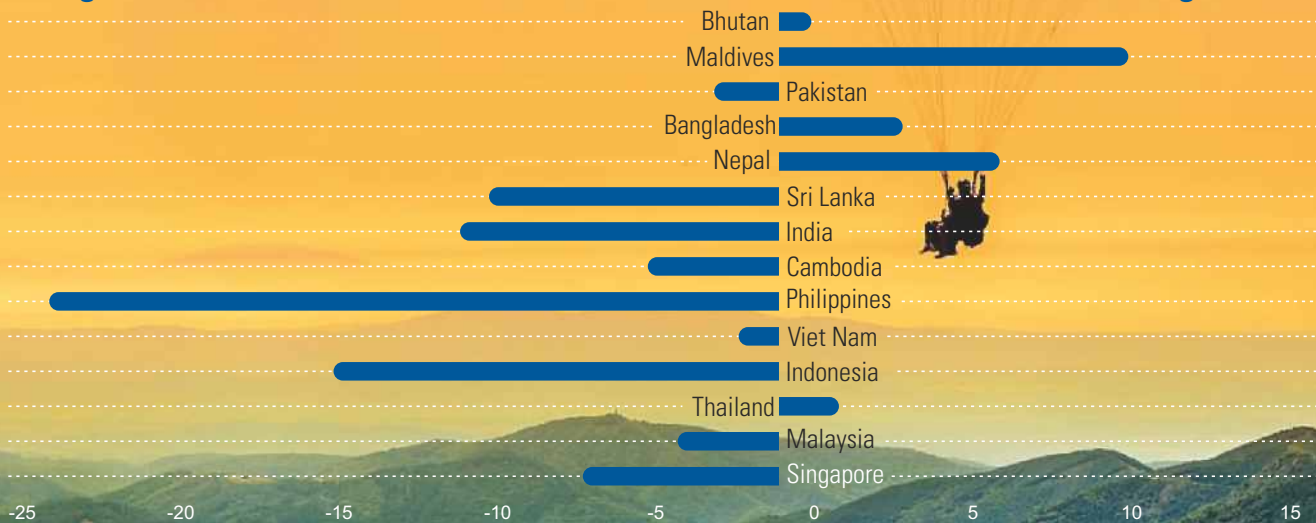
Compared to TPCI ranking of 2019 very few countries in Eastern Asia Pacific and South Asia got good ranking.

Change in ATDI Rank from 2018 to 2020 in Eastern Asia Pacific and South Asia Region

#	Eastern Asia-Pacific	TTCI Rank 2019	ATDI Rank 2018	ATDI Rank 2020
1	Singapore	17	28	34
2	Malaysia	29	95	98
3	Thailand	31	37	35
4	Indonesia	40	87	101
5	Viet Nam	63	71	72
6	Philippines	75	24	47
7	Cambodia	98	104	108

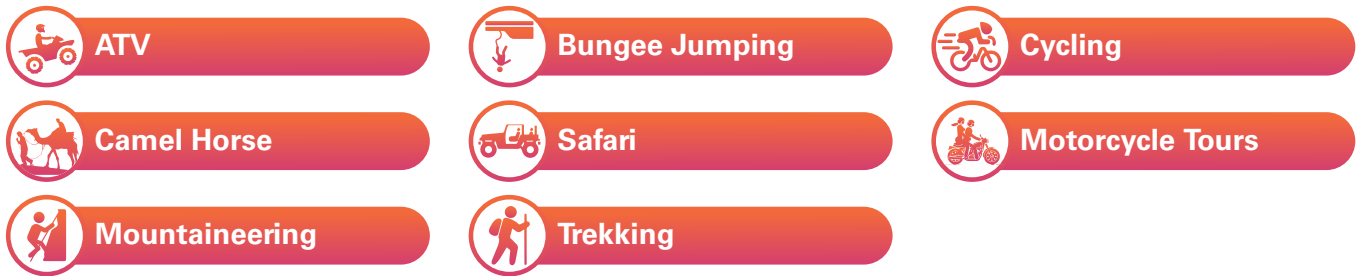
#	South Asia	TTCI Rank 2019	ATDI Rank 2018	ATDI Rank 2020
1	India	34	86	96
2	Sri Lanka	77	88	97
3	Nepal	102	74	67
4	Bangladesh	120	126	122
5	Pakistan	121	109	111
6	Maldives		93	82
7	Bhutan		15	14

Change in ATDI Rank from 2018 to 2020 in Eastern Asia Pacific and South Asia Region



Key Verticals in Adventure Tourism

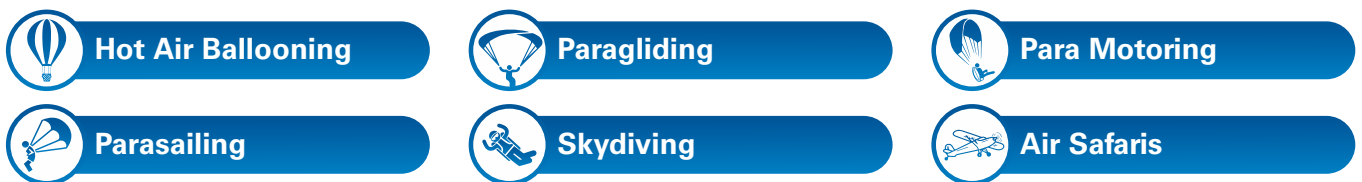
LAND



WATER



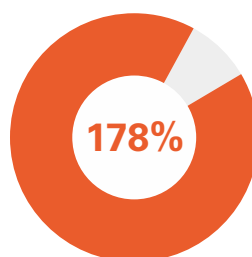
AIR



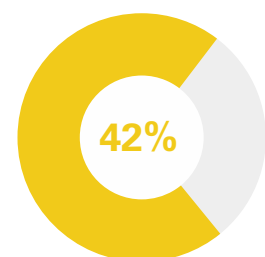
Indian adventure travelers profile

- Indian adventure travelers belong to a wide spectrum of economic backgrounds and demographics indicating two clear segments the time-poor and rich travelers
- The average duration of trips involving adventure travel is 8.65 days
- The average spend on adventure travel is INR 8900 (150 USD) per day {excluding flights and visas}

India witnessed an exponential growth in adventure tourism industry during the recent years. Adventure tourism and activity travel market was estimated to grow at a **CAGR of 17.4% from 2017 to 2023**

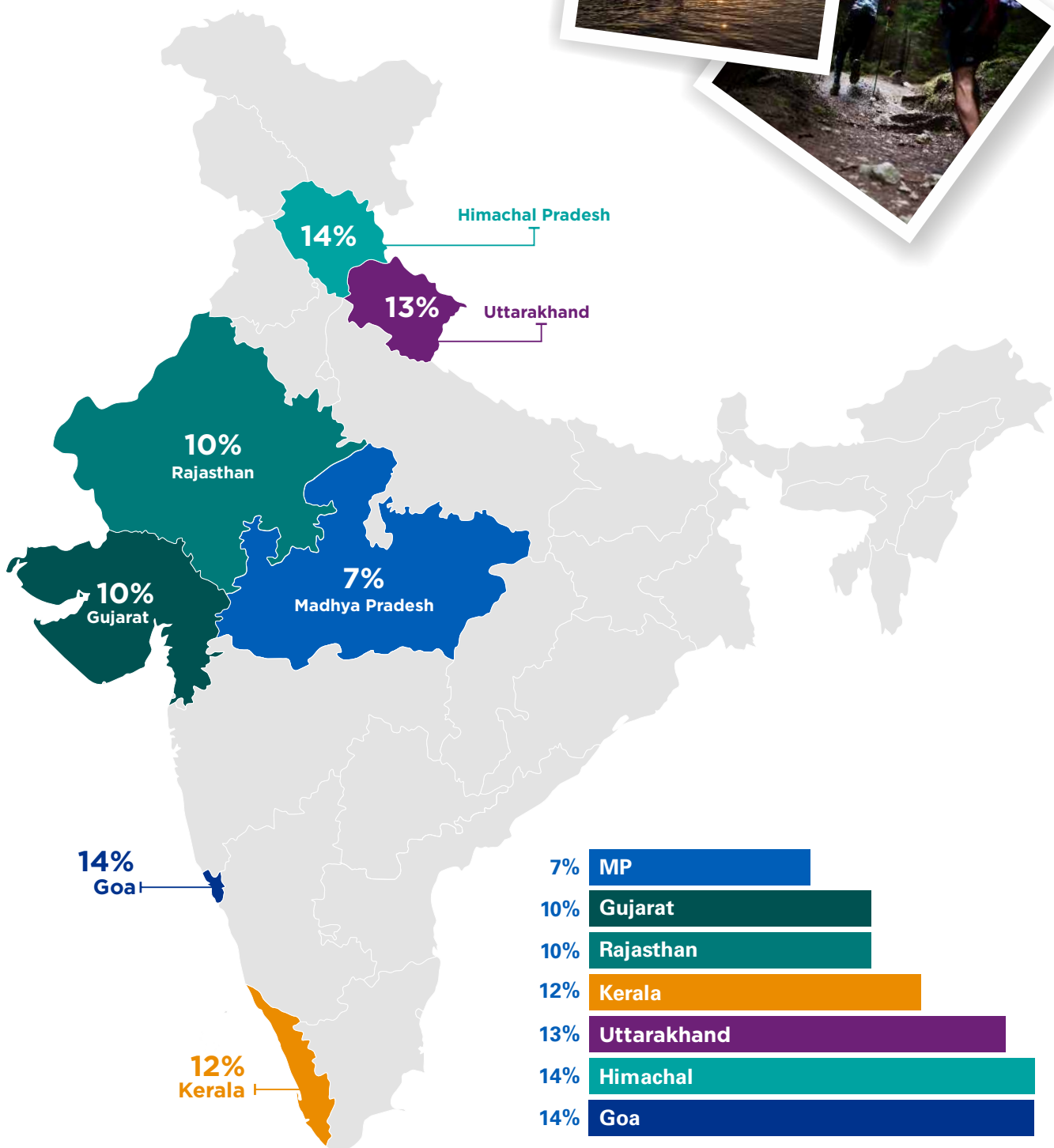


INCREASE IN DEMAND FOR
ACTIVITIES AND LOCAL
EXPERIENCES



INCREASE IN THE POPULARITY OF
HIGH-ALTITUDE REGIONS AMONG
ADVENTURE TRAVELERS

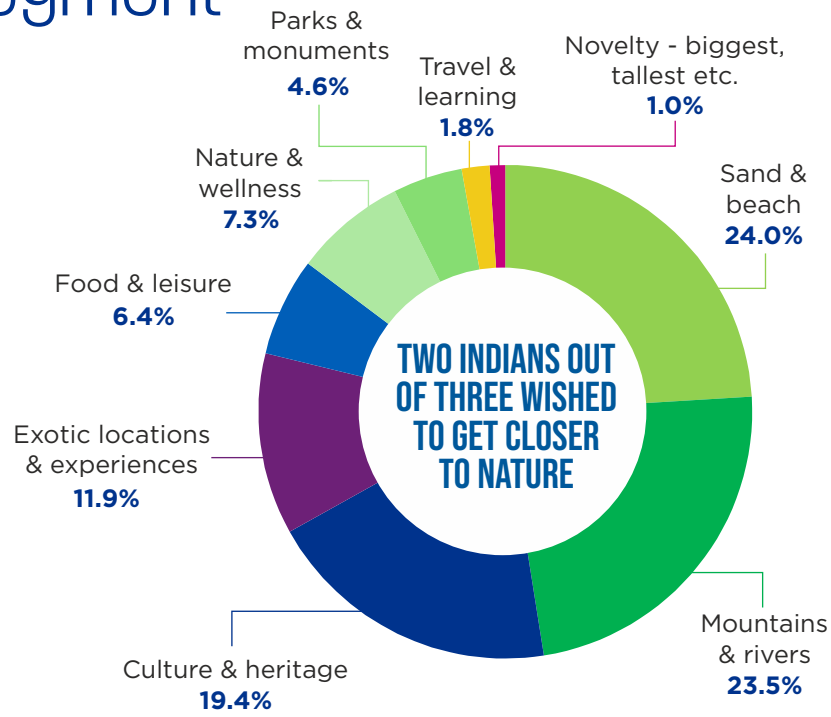
Top Adventure Tourist Destinations



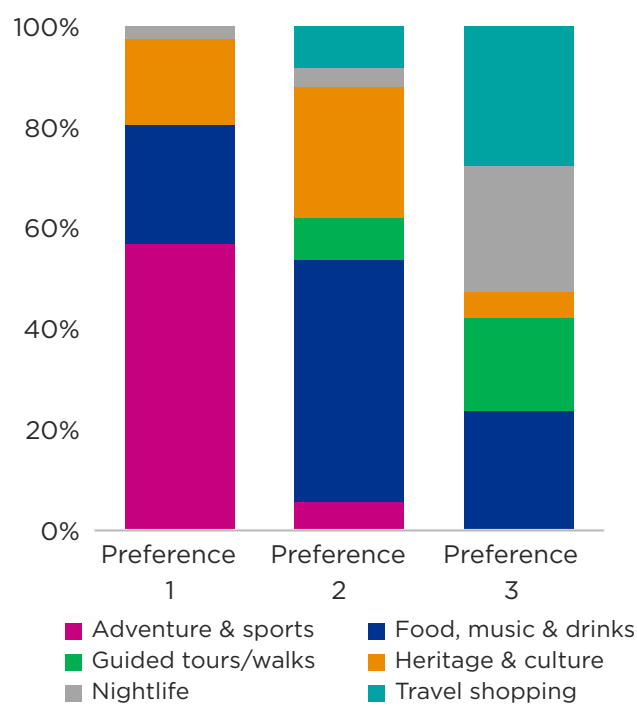
Outlook for the segment

The pandemic has brought about a shift in **consumer preferences**. As per an online travel maker, **“There has also been a noticeable dispersal of travel and tourism away from urban centers to less populated nature destinations.”**

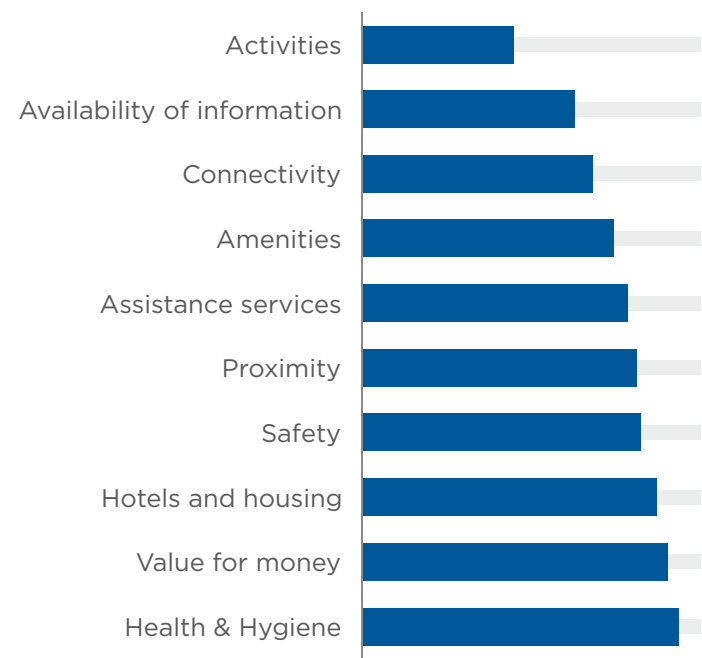
KPMG in India conducted a limited primary study to understand **“How do Indian’s travel? Preferences and trends in the Indian domestic tourism industry”**. Some of the key findings relevant for Adventure tourism segment includes:



Activity preferences of weekend travelers



Factors affecting destination choices



ADVENTURE TOURISM FITS THE CHANGING PREFERENCES OF INDIAN TOURISTS MAKING IT ONE OF THE EARLY REBOUNDERS., PROVIDED STRATEGIC INTERVENTIONS ARE INTRODUCED PROACTIVELY.

Way forward for Adventure Tourism

The Ministry of Tourism has recognized Adventure Tourism as a Niche Tourism product to promote India as a 365 days destination and attract tourists with specific interest.

Below are discussed some of the strategic interventions to augment the adventure tourism segment.

01

Strategic Guidance

Task Force on Adventure Tourism has been set up (Octo 2016)

Resolving issues related to development and promotion

Secretary (Tourism) as chairman

Adventure tourism shall be given a status as sub-brand under "Incredible India"

02

Financial Support

Central Financial Assistance (CFA) to various State Governments / Union Territory Admins for Eco Tourism Development and Infrastructure development

03

Standardization & Safety standards

Guidelines for approval of Adventure Tour Operators. Nidhi Portal for voluntary registration

Creating brand equity/ monetization, awareness to prefer registered ATOAI (Adventure tour operators Association of India) with MoT

Regulatory framework for registration

04

Mapping the Landscape

Mapping of destinations by offerings (Land, Air and Water based activities) in Soft, Hard and Other categories

Carrying capacity analysis, environmental safeguard and sustainability aspect consideration



**CREATION OF SAFE ADVENTURE TRAVEL DESTINATIONS,
CATERING ALL AGE GROUPS AND IMPROVED ACCESSIBILITY.**



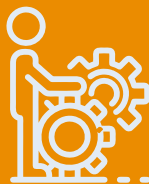
Policy Enablers

- Improve connectivity through time saving and cost-effective means (Chopper and Sea Plane Connectivity)
- Exploring National Water Ways for Cruise and Water based activities
- Facilitate private sector investments (PPP) in Eco-tourism
- BIS and MoT to join hands for Adventure Tour Operator guideline and strict implementation



National Rescue and Communication Grid

- A national rescue and communication grid for tourism with immediate access to air evacuation whenever needed to ensure quick response time in case of any unfortunate event.
- Inter ministry and state government communication needs to be initiated for functioning and RR of each stakeholder. (SoS and rapid response)
- Allowing limited use of satellite phone and drone (with permissions)



Responsible Tourism and Skill Development

- Awareness of over tourism impacts, environmental impact and concept of carrying capacity
- Community participation
- Atmanirbharta through indigenous solutions and tourism offerings
- Entrepreneurship and community development initiatives at local level (Vocal for Local)

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