

Research Note

Adventure Tourism and the Clothing, Fashion and Entertainment Industries

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In its practical operations on the ground, adventure tourism is very closely allied to ecotourism, and under some definitions may even be considered as part of the ecotourism sector. But from a financial perspective, adventure tourism is also tightly tied to the clothing, fashion and entertainment industries. Particular clothing companies use sponsored athletes and specialist lifestyle entertainment media to sell clothing and accessories at both a high volume and a high mark-up to nonsporting, but fashion-conscious urban consumers, and adventure tourism is one of the links in the marketing chain. The surfing industry provides a particularly good example, but the same process applies for skiing and snowboarding, rock-climbing and other outdoor adventure activities. The process is directly comparable to the sale of sports shoes and sports utility vehicles in cities and suburban markets.

Keywords: Adventure; fashion; clothing; surfing

Introduction

Adventure travel is commonly considered as part of, or closely allied to the ecotourism sector, as recognised by terms such as adventure, culture and ecotourism, ACE (Fennell, 1999) or nature, eco and adventure tourism, NEAT (Buckley, 2000a). The Adventure Travel Society (2003) has run an annual World Congress of Adventure Travel and Ecotourism for over two decades.

From a financial perspective, however, adventure tourism might equally be considered as part of the rag trade. There seem to be some strong links between the commercial adventure travel sector and the clothing, fashion and entertainment (CFE) industries. My aim here is to identify and explore such links, and examine how significant they might be for the ecotourism sector.

The link between adventure tourism and the CFE sectors does not seem to have been raised previously in the academic tourism literature, apart from a brief mention by Buckley (2000b). I am not sufficiently familiar with academic analysis of the fashion industry to identify whether it refers to adventure tourism. I argue here that commercial practice in the CFE sectors makes use of adventure activities, professionals and imagery, but it is perhaps unlikely that the CFE sectors have any specific interest in tourism, even adventure tourism.

What is Adventure Tourism?

The distinctions between nature tourism, ecotourism, adventure tourism, adventure travel, commercial expeditions, outdoor recreation and outdoor education are blurred (Buckley, 2000a; Fennell, 1999; Manning, 1999;

Newsome *et al.*, 2002; Weaver, 1998). Here I shall use the term adventure tourism to mean guided commercial tours where the principal attraction is an outdoor activity which relies on features of the natural terrain, requires specialised sporting or similar equipment, and is exciting for the tour clients. This definition does not require that the clients themselves operate the equipment: they may simply be passengers, whether in a dogsled, a whitewater raft or a tandem parachute harness.

As with most aspects of tourism, this is an artificial definition in the sense that it identifies one particular set of human behaviours from a broad multidimensional continuum, with no prior evidence that it corresponds to an empirically identified clumping within that continuum. Individual people have many different expectations and experiences from outdoor activities, and excitement is only one of these. The same tour can mean different things to different people. The distances people travel, and the times they spend in outdoor activities are continuously variable. Levels of individual skill, self-sufficiency and equipment ownership, as compared with commercial support, also vary continuously. There is no definitive distinction between adventure and nonadventure, between commercial tourism and individual recreation, between remote and local sites, and so on. Such distinctions may or may not be significant from the various perspectives of, for example, an economic statistician, an outdoor equipment manufacturer, a tour operator and equipment rental agency, a protected area management agency, a public liability insurer, or an individual person planning a holiday trip.

Whilst the boundaries of adventure tourism are not well defined, its core activities are. An archetypal example, perhaps, would be a multiday whitewater rafting tour, where the tour operator provides all the equipment, the clients need no prior skills, and the principal attraction is running rapids rather than riverside scenery. Climbing, abseiling, sea-kayaking and whitewater kayaking, skiing and snowboarding, caving, ballooning, skydiving and parapenting, mountain biking, diving and snorkeling, surfing and sailboarding, snowmobiling and off-road driving, heliskiing, and many similar activities may also form the basis for adventure tourism.

Definitional Issues

There are three commonly drawn distinctions that are particularly difficult to apply in the case of adventure tourism. The first is that for the purposes of economic statistics, a leisure activity only qualifies as tourism if it includes an overnight stay and/or travel away from the participant's place of residence. In Australia, the minimum threshold travel distance is set at 40 km, but this does not apply worldwide. Many commercial adventure activities are single-day tours. Most of their clients, however, are holidaymakers who are already far from home and so qualify as tourists. In addition, many single-day adventure tours travel more than 40 km from the pick-up point in the nearest gateway town, to the location of the day's activity itself. Hence it is reasonable to consider these 1-day activities as tours, which is indeed how they are marketed.

The second difficult distinction is between adventure tourism, where a client pays a tour operator to provide an adventure experience, and adventure

recreation, where individual participants carry out the same activity on their own. From a legal perspective, for example, in regard to liability insurance or access and operating permits for a particular site, this distinction is clear and very significant. As noted earlier, however, in terms of practical logistics there is considerable overlap. A private recreational group, particularly nonprofit groups such as schools, may be much larger than a small commercial tour. A commercial tour may provide all the equipment and specialised clothing that participants need, so they can arrive in street clothes with no prior skills. At the other extreme, the tour company may provide only a guide, with participants expected to arrive with all their own equipment and the skills to use it. So-called tag-a-long 4WD tours operate this way, for example, and so also do some hiking tours and mountaineering expeditions. The distinction between a group of skilled and well-equipped people led by a paid guide, by a volunteer guide whose expenses are paid, by one of their own number who is particularly experienced, or by a process of consensus, is a rather fine one. To complicate matters even further, a private group with a private leader may contract an outfitter to provide equipment, guides, and catering for a private trip. Again, the distinction between a private group which charters a tour company to guide and outfit them, and a similar group which makes a group booking on a scheduled, but otherwise identical tour, is also a fine one; especially where the tour operator is the same in each case, and their tours are irregular and depart only if a large enough group signs up by a specified predeparture date. A dive tour company which runs several 300-seater high-speed wave piercing catamarans to the Great Barrier Reef every day is a very different operation from one which takes a single small group of highly experienced divers under the ice in the Arctic or Antarctic.

A third significant distinction is between fixed-site and mobile activities. Again, the dividing line is not clear. A ski resort, for example, has a fixed site, whereas a backcountry ski tour is mobile. But heliskiing, for example is a mobile activity with a fixed base. Similarly, a dive boat on the Great Barrier Reef is mobile, but it relies on a fixed wharf or marina to load passengers and supplies, and some boats journey routinely to elaborate pontoon facilities moored permanently on the outer reef. Some surf tours operate entirely from live-aboard boats; others operate from lodges or resorts near particular surf breaks. Skiing and snowboarding are certainly excitement-based outdoor leisure activities that require specialist skills and equipment and rely on features of the natural terrain: i.e. an adventure activity. Tourist expenditure at ski resorts makes up a large component of Mallett's (1998) estimate of the economic scale of adventure tourism in North America; and the figure increases enormously if associated real-estate development is also included (Johnson & Barrie, 2003). Corresponding attractions for resort-residential development in subtropical areas, however, such as marinas and golf courses (Warnken & Buckley, 1997), would not be considered as adventure tourism, even if some of the boats based at the marinas do operate adventure tours.

Social Trends and Emerging Markets

As societies in developed western nations become increasingly urbanised, increasing numbers of people have lifestyles that lack any outdoor component,

except during leisure activities. Many of these people are relatively well off but have little leisure time: they are cash-rich, time-poor. They see wilderness environments and wildlife through television programmes and travel magazines, perhaps without appreciating just how much time, equipment and expertise is required to make a wildlife documentary film. They also see athletes engaging in a variety of outdoor sports and recreational activities, perhaps without appreciating that these are a select and sponsored few who have made a career in the outdoor sport concerned. These factors have created a cohort of people who have the desire, money and basic fitness for outdoor recreation in remote areas, but not the time, skills, equipment or experience. In addition, there is an older cohort of people who have prior experience and skills, but no longer have the time to organise their own expeditions, no longer have their full former strength and skills, or simply prefer to pay for support services rather than organising their own trips. It is these groups that provide the increasing market for commercial adventure tourism.

In addition, in the past people interested in outdoor recreation would commonly buy their own equipment, and learn relevant skills gradually either from friends or through clubs. Both for social and financial reasons, therefore, this led them to focus on one particular activity. As equipment has become more sophisticated and expensive, the option of renting it as part of a commercial adventure tour product has become more attractive financially. If people no longer need to buy their own equipment, however, and if they can rely on guides for trip planning, leadership, safety and basic skills training, then they no longer need to focus on a single outdoor recreation activity.

It therefore appears that outdoor recreation is now treated much more as a purchasable short-time holiday experience than as a gradually acquired life-time skill with its own set of social rewards and responsibilities.

Although commercial adventure recreation has absorbed a proportion of the outdoor recreation market, individual outdoor recreation has continued to grow at the same time. For most of these activities, individual adventure recreation is probably still many times larger than commercial adventure tourism, though there does not yet seem to be any published quantitative analysis either of the number of people involved, or patterns of expenditure. Of course, the same individual may take part in the same activity sometimes as an individual, sometimes as part of a private group, and sometimes as part of a commercial tour.

Links to Clothing, Fashion and Entertainment

Over the past few years, quite strong and mutually reinforcing business links have arisen between adventure tour operators, clothing manufacturers, and the entertainment industry. These business ties are essentially mediated by fashion, rather than any fundamental logistic links, so in the longer term they may well prove ephemeral. Currently, however, they are strong enough to have quite significant financial implications for the adventure tourism sector.

The way it works is similar for many different activities, but can be illustrated well by the surfing subsector as below. There are similar patterns for other types of adventure tourism. Snowboarding, for example, is used to sell

winter street clothing. Rockclimbing provides adventure images used to advertise a wide range of lifestyle consumer goods, from mobile phones to chewing tobacco. Manufacturers of expensive recreational equipment, especially motorised equipment such as snowmobiles, personal watercraft (jet skis), off-road and all-terrain vehicles, and sport utility vehicles rely heavily on adventure imagery to maintain sales. Even ancient activities, such as yoga, have been adopted as fitness fashions with their own clothing brands (Lululemon, 2002).

Historically, the hunting and fishing industries have also promoted their own clothing styles, but these have not penetrated mass urban streetwear markets to the same degree as modern adventure-style clothing. The closest historical analogue is the highly successful use of sports athletes, such as professional basketballers, to market specialised sports shoes as mainstream urban streetwear; but this lacks the commercial tourism component.

Surfing Industry Case Study

There are estimated to be about 10 million surfers worldwide, though not all of these are active (Buckley, 2003). Most of them are young recreational surfers, and surfing is a very high priority for their disposable income and leisure time. A significant proportion is older, with established careers and families, very short of time but with greater financial resources. Currently, most active surfers are male, but the number of female surfers is increasing, particularly in younger age groups.

The number of full-time professional surfers is quite small. The peak professional international surfing competition, the World Championship Tour, is limited to the world's top 44 surfers. Some of these are fully sponsored, whilst some live on a combination of sponsorship and prize money. The tour consists of a series of surfing competitions held at different locations worldwide during the course of the year, each contributing ranking points as well as prize money. The World Championship Tour includes both men and women, but they compete separately and there are separate men's and women's rankings. There are additional competitions, many of them by invitation only, which are not part of the Tour, but may carry considerable prize money or status; and a separate World Qualifying Series that feeds new members into the top 44. Many of the surfers in all these competitions are sponsored to some degree; but not all of them, and not necessarily with cash. In addition, there are a small number of individual surfers who are sponsored not for their competition rankings, but for their skills and reputation in big-wave riding or aerial manoeuvres, both useful in advertising.

Each of the major surf clothing and equipment manufacturers sponsors a team or stable of individual surfers, under arrangements that range from occasional free equipment, to an 11-year contract. Where the same companies also manufacturer clothing for other adventure sports such as snowboarding, they may also sponsor team riders in those activities. They sponsor major competitions, both within the World Championship Tour and independent events with different judging criteria, such as big-wave or aerial events. Critically for the surf tourism sector, they sponsor surf trips for their own pro

teams, with world-class surf photographers, to remote locations with high-quality surf.

All this sponsorship is a marketing exercise, and a very effective one. It only works, however, if (1) it reaches potential customers, and (2) it persuades them to buy the sponsors' products. Such persuasive communication is achieved through high exposure in specialist magazines and dedicated websites, plus less frequent but broader exposure in generic lifestyle magazines and TV adventure shows, i.e. the lifestyle entertainment sector.

Historically, the main lifestyle marketing medium for specialist surf clothing companies has been specialist surf magazines, and these are still a key component. In recent years, however, both individual corporate websites, and broader mass entertainment, have become critical in expanding sales to customers who are not surfers themselves. Specialist surfing magazines aimed at recreational surfers have existed for decades, but were few in number and low in circulation. In recent years, new magazines have proliferated, and circulation has become much more mainstream, e.g. through city newsagents worldwide, as well as through specialist surf shops. The original surfing magazines have also spawned a series of specialist subsector magazines, e.g. for bodyboarders and longboarders. At least one of these is specifically aimed at surf travel, including commercial surf tourism.

There are three main components to these magazines. There is trade information on competitions, competitive rankings, recent sponsorship deals, personality profiles and so on. There are advertisements for surfboards, wetsuits, accessories, clothing, surf tours, videos and so on, and sometimes also for snowboards, skateboards, 4WD vehicles, etc. The main bulk of these magazines, however, consists of heavily illustrated articles, most of them featuring sponsored surfers at locations visited by surf tour operators, photographed by professional surf photographers. Video footage from the same trips is used to make surf videos and DVDs, which are advertised through the same magazines.

These magazines help to sell surfing equipment and surfing tours, and the equipment advertisements and surf tour stories help to sell the magazine. That works fine, but in financial terms it is only a small part of the picture. The big money, as noted earlier, is in selling surf-branded clothing and accessories to non-surfers, few of whom are likely to read surfing magazines. To reach these broader markets needs communications channels with a wider reach, which convey four messages: surf clothing is cool; particular brands are coolest; here's what you need; here's how you get it.

This is very much a fashion message, and indeed, the big surfwear companies see themselves as being in the 'fashion apparel business' (Billabong, 2002). Note that whilst selling surfwear to actual surfers certainly involves an element of fashion, it does also require underlying functionality: boardshorts whose pockets are streamlined for paddling, wetsuits which keep you warm with minimum restriction, reef booties which save you from coral cuts but still let your feet feel the board, bags which let you carry your gear and your board on your bicycle or an airplane. For the urban streetwear market, none of this matters – clothing can be identical to no-name equivalents, and the brand alone makes for many times the mark-up.

On the basis of simple statistics rather than stereotypes, there are still relatively few female surfers. There seems to be no published information on actual numbers. My impression is that the proportion is increasing, but is still well below the proportion of women in other adventure sports, such as rock climbing, whitewater kayaking or mountain biking. One of the main reasons why the major surfwear manufacturers have grown so fast over recent years, however, is that they have successfully created a fashion market for surf clothing and accessories as urban streetwear, for both women and men who do not surf and live far from the ocean. Indeed, both the degree of brand consciousness, and the number of items purchased, is probably higher for non-surfers than for actual surfers.

The growth, decline and social implications of such fashions are themselves an interesting topic in human behaviour, but beyond the scope of this contribution. The critical issue for surf tourism is that the major sponsors for the world's top surfers, the world's top-ranked competitions, and the world's most spectacular surfing trips and stories, are clothing manufacturers who make most of their money not from selling functional surfwear to surfers, but by selling surf-branded fashion clothing to nonsurfers. The total economic scale of these surf clothing businesses is around US\$ 6.3 billion p.a. (Buckley, 2003). Indeed, the scale and significance of the surf clothing industry is such that it was recently the subject of a cover article in *The Bulletin* magazine (Gliddon & Syvret, 2002). The release of the mainstream feature movie *Blue Crush* (Universal Studios, 2002), with the lead characters clad ostentatiously in Billabong clothing, marks another step in surfwear marketing.

Websites for companies such as Voodoo Dolls (2002), ostensibly a women's surfwear manufacturer, incorporate a range of lifestyle images with little connection to surfing as such, and sell a range of fashion accessories as well as clothing. 'Young, free and single' is the tagline, and the top banner says 'ask your sex question here'. The website sells make-up packs and 'girlie stuff' (their words not mine!), with barely a surfboard in sight. The mainstream surfwear companies all have girls' lines, and separate websites: Roxy, Rip-CurlGirl, BillabongGirls. They offer girls' street gear in demure pastels with flowers and butterflies and understated logos, as well as more lurid lines. There's even a second-hand internet market for Mambo Goddess clothing. Most recently, the major surfwear manufacturers have developed separate product lines for children in various age groups: the Roxy Teenie Wahine line is now repositioned for under-7s, and the Ripcurl European site features gear for 'mini-girls', i.e. 5-15-year-olds (Buckley, 2003). Even more surprisingly, the surf industry seems to have successfully created surf fashion for male surfers and their street imitators, with rapidly changing style factors, such as the precise length and pattern of boardshorts, tabs or cord loops on pockets, ankle strings or zips on cargo pants, and so on. This constant market repositioning has kept surfwear share prices rising rapidly until late 2002, when shares of at least one major manufacturer took a sharp downturn. Even this, however, may have been a strategic move by one major shareholder.

The economic significance of surf tourism depends on how it is defined. Broadly, there are perhaps four major components. Probably largest in traditional travel-industry terms, but not identified specifically as surf tourism,

are experienced surfers who travel to surf, but using mainstream transport and accommodation. Relatively small, but still part of the surf tourism sector, are low-budget surf safaris, which take organised groups of surfers to a series of sites, typically by bus. Also small, but perhaps significant for the future of the industry, are surf schools where backpackers can take a day's surfing lesson as part of their travel experience, even though few will subsequently become serious surfers.

Icons of the surf tourism industry, however, are specialist surf tour companies that run scheduled tours to prime surfing locations worldwide, often using charter live-aboard boats and/or specialist surf resorts. These companies form the core of the surf tourism industry, and it is this sector that links most closely with clothing manufacturers and competition surfing. Companies with names such as Atoll Travel (2002), Great Breaks International (2002), Indies Trader (2002), Surf The Earth (2002), Surf Travel Company (2002), World Surf Safaris (2002), and more take so-called cash-rich time-poor surfers to relatively inaccessible and hence uncrowded waves worldwide, especially in the islands of the Pacific and Indian oceans. It is these companies that take pro teams and photographers on magazine photoshoots. It is these that contribute most to the clothing, fashion and entertainment (CFE) sector of the surf industry, by providing its marketing materials. It is also these that gain most from the CFE sector, which indirectly markets their destinations and attractions.

Conclusions

The use of athletes and similar cult heroes in lifestyle advertising is far from new. Cowboys have long been used to sell cigarettes, basketballers to sell shoes, rally drivers to sell cars. Even surf fashion isn't new: by the 1960s 'surf chic was a cultural phenomenon' as the Quiksilver website says. What is new this decade is the growth in 'adventure' imagery: in lifestyles, clothing and accessories, and entertainment. Adventure is fashionable. Adventure tourism may have grown from outdoor recreation, but both have now become inseparable from the clothing, fashion and entertainment sector. This is not immediately apparent to consumers and tourists; but a glance at corporate financial figures tells the story loud and clear.

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