

KEYS TO THE FUTURE OF OUTDOOR ADVENTURE TOURISM IN SPAIN

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Abstract: In the search for an all-round tourist offer, rural spaces have to look to provide comprehensive tourist products, and outdoor adventure tourist are becoming a key issue in this respect. So much so that from being a complementary activity they are moving to centre stage in many places.

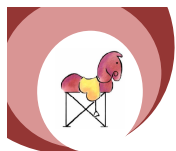
Our presentation is a study of what the future prospects of and new trends emerging in outdoor adventure tourism in Spain are. This is a topic that we consider to be of special interest for the professionals working in this sector, as well as for professionals from other areas searching for a comprehensive management of tourist resources. In the future prospects section, we have look at a series of topics of great interest, such as sector regulation, quality distinctions; the taxonomy of the

activities that are being developed; and the new professional prospects that are opening up.

With regard to new trends, we show how by definition an enterprise code, the need to establish cooperation among the companies in this sector can be satisfied, finishing with two practical examples of special interest: *Laredo Activo* in Cantabria and *Montenmedio* in Andalucía.

Keywords: adventure tourism and recreation, sport tourism, management.

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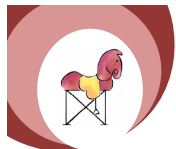
1. INTRODUCTION

Within the wide range of tourist options on offer in the rural space, two star products stand out: rural tourism and outdoor adventure tourist.

Traditionally, outdoor adventure tourist have been associated with the development of rural tourism, as well as being a possible formula for diversifying the Spanish tourism supply because of the valuable natural and sociocultural resources they offer. They have a series of specific advantages that can be summarize as: (Vote 1988, 1992; Reyna 1992, Fuentes 1995).

- They are a key issue for the survival and revival of farming areas: improving the quality of life of the local population, conserving and restoring natural resources and the sociocultural and historical heritage, as well as preserving traditional craft, folk and gastronomic activities...
- They promote the generation of new complementary economic activities: the region benefits from the hotel business, restaurant industry, traditional commerce, services, communications, building...
- They help to stop rural depopulation, the ageing of the local population and the abandonment of agricultural activities with its ensuing economic and environmental consequences.

However, we should point out (and here we can see the adventure tourism- rural tourism link) that the quality of tourism in a rural area depends not only on



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accommodation, but also on what and how original the activities is offers tourist sare (Vote 1988).

In the search for an all-around tourist offer, rural space must try to put together a comprehensive package of tourist products, and adventure tourism is a key aspect in this respect. So much so that from being a complementary activity, it is now moving to centre stage in many places (Vote 1988).

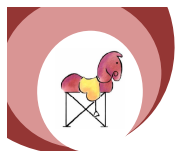
The change in tourists' traditional habits involves a greater tendency to divide their holidays into shorter periods, leading to a larger number of journeys of a shorter duration; to look of a better quality-price ratio, and, above all, to spend their holidays actively (Vogeler 1999).

Nonetheless, and before we start with our presentation true, we would like to point out that it is not quite right in our view to refer to these activities as active tourism, because this would make anyone undertaking an activity out of doors on holiday.

Other labels for these activities are: new sports, adventure sports, technological sports, freedom sports, Californian sports, sliding activities in nature, fun sports, challenge activities in nature; risk sports; extreme sports and even wild sport (VV.AA 1995).

The term employed by the Catalanian Regional Government's Department of Commerce, Consumer Affairs and Tourism, "Leisure Sporting Activities and Adventure Tourist Activities", is more appealing, as is the name used by Javier Olivera (1995): "Physical Adventure Activities in Nature" (*AFAN*) (VV.AA 1995).

Nevertheless, several questions, such as, for example, the fact that this kind of activities are performed within open spaces in built-up areas, many entrepreneurs view these activities as physical not sporting activities and that the word *adventure* implies risk, all bring problems to bear on the definition. In view of this, we have



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finally opted to use the, supposedly official, term *outdoor adventure tourism* in our paper.

Our presentation is a study of what the future prospects and the new trends emerging in outdoor adventure tourism in Spain are, which is a topic that we consider to be of special interest for professionals working in this sector, as well as for professionals from other areas looking for the all-round management of tourist resources.

In the future prospects section, we look at a series of topics of great interest, such as sector regulation, quality distinctions; the taxonomy of the activities that are being developed and the new professional prospects that are opening up.

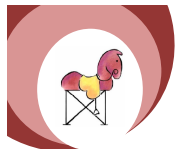
With regard to new trends, we show how, by defining an enterprise code, the need to establish cooperation among the companies in this sector can be satisfied, finishing with the presentation of two practical examples with special interest: *Laredo Activo* in Cantabria and *Montenmedio* in Andalusia.

2. FUTURE PROSPECTS FOR OUTDOOR ADVENTURE TOURISM

2.1 DEVELOPING THE LEGAL FRAMEWORK

Though, due to its difficulty, no exhaustive study has as yet been conducted to count how many outdoor adventure tourist companies there are in Spain, a simple search of internet sites, regional tourist brochures or attendance at a specialized fair on the issue reveals that the number is quite high, company representation being quite significant nationwide. By way of an example, we might note that there are more than 131 specialized enterprises in the Madrid region alone, growing in number year by year... (Jiménez 2003).

In spite of the sizeable number of companies we have nationwide, there is, paradoxical, only seven Autonomous Communities have a specific regulation on outdoor adventure tourism: Catalonia (Decree 81/1991, March 25th); Galicia (Decree 116/1999, April 23rd); Aragon (Decree 146/2000, July 26th); Andalusia



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(Decree 20/2002, January 29th); Asturias (Decree 9272002, July 11th); La Rioja (Decree 111/2003, October 10th); and Navarre (Foral Decree 288/2004, August 23rd) (Aspas 2000; Nasarre, Hidalgo and Bernard 2001; Jiménez 2004).

Why is it so important to establish a legal regulation for outdoor adventure tourism? Besides filling what could be a legal void, the advantages areas as follows (Aspas 2000; Nasarre, Hidalgo and Bernard 2001):

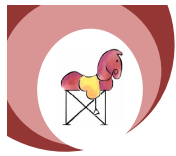
1) Organise the sector, specifying what rules any company specialized in this kind of services has to comply with and the general conditions for entry in the tourist agency register.

2) Boost entrepreneurial stability: unfortunately, this kind of activities is all too often offered through the submerged economy, outside a business setting. Noteworthy in this respect are a lot of leisure associations or sport clubs, which are supposedly non-profit, but in actual fact are not, generating unfair competition for agencies acting within the legal framework and according to fair trade regulations.

3) Protect consumer physical integrity and rights, because, as we know, the performance of these activities involves some amount of risk, and their regulation should assure a minimum guarantee of cover at insurance level in the event of an accident, as well as of specialised staff training and experience.

4) Assure quality of service: the regulations should define what criteria an agency should meet to gain official recognition, as well as establishing what the minimum quality levels are.

5) Protect the natural heritage: the activities of outdoor adventure tourist companies are carried out in nature and, in many cases, areas of special ecological interest and outstanding beauty. The regulation of this sector can help to get the companies to assume their responsibility in the care and preservation of the spaces they are using.

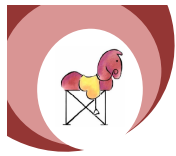


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In face of all this evidence, a nationwide regulation of outdoor adventure tourism is likely to be established in the near future. This regulation can also be expected to develop some key aspects in depth, such as: (Aspas 2000; Nasarre, Hidalgo and Bernard 2001).

- The specification of regulations placing companies under the obligation to preserve the natural space in which they carry out their activities and what minimums that need to comply with at this level.
- The extension of the regulations to what are considered non-profit clubs and associations that offer these kinds of activities without the involvement of a service agency.
- The specification and development of the content that has to be included in company safety protocols for each activity they perform (Jiménez 2004).
- To specification of some minimum materials per activity, the specialised client-staff ratio to be respected in each activity, ages, discrimination-free admission requirements the need to submit medical certificates for some activities...
- The clarification of the conditions and obligations for hiring specialised and ordinary staff, specifying minimum competencies, functions and responsibilities according to their degrees and diplomas.
- The unification of the criteria in relation to the public liability and accident insurances demanded of companies nationwide, having in mind the amounts of present accident awards, and including possible damages to the environment.

2.2 QUALITY DISTINCTIONS



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One of the major initiatives that are being developed in Spain to foster its competitiveness as a tourist destination nationally and internationally are the so-called plans for quality development.

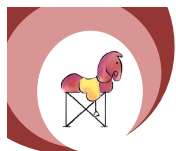
One important action under development at this level is the so-called *Comprehensive Plan for Quality in Spanish Tourism* (PICTE), known as “Q” for quality, developed by the *Institute for Quality in Spanish Tourism* (ICTE), which now embraces such sectors as hotels and tourist apartments, travel agencies, restaurants, camp sites, rural tourist accommodation and skiing and mountain resorts, to which tourist office, conference centres, convention bureaux, natural protected areas, time-sharing agencies, and tourist coaches are being added.

The troubled development of the “Q” quality seal for outdoor adventure tourism, or more specifically, adventure and sporting tourism, has been planned as part of the project before 2006, establishing the following priority lines: its regulation by the Autonomous Communities, the articulation of the products about activities plus accommodation, and the search for suitable channels for commercialisation.

Although the above-mentioned initiative is not yet underway, it is evident that the creation of a quality seal for outdoor adventure tourism nationwide has a whole load of advantages, because not only would it develop and standardise the sector as regards service parameters, but it would also open up an opportunity to promote and commercialise Spain internationally as a quality destination in this respect.

Of the few specific initiatives that have been developed nationwide to promote the quality of outdoor adventure tourism, worthy of note is the *total quality seal*, elaborated by the *Association of Adventure Tourism Companies and Hostels of Asturias* (ATAYA), whose aim is to guarantee safety, risk prevention at work, an environmental management system, service quality and customers information, process quality systems and quality procedures for activities.

A project was developed over a six-month period in six different phases as follows:



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Phase 1: Previous quality diagnosis, safety, risk prevention and environmental management systems with the preparation of individualized confidential reports and improvement proposals.

Phase 2: Intensive training course in total quality (quality, risk prevention and environmental management).

Phase 3: Second individualized audit to prioritise the execution and timing of the agreed improvement actions.

Phase 4: Good total quality practices manuals (quality, risk prevention at work and environmental management) for hostels and for outdoor adventure tourism.

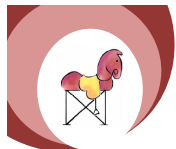
Phase 5: Establishment of permanent on-line and personal phone assistance for three months.

Phase 6 : Final approval audit for the award of the total quality seal (quality, risk preventions and environmental management).

Another local initiative is the EROSKI Group-led nationwide telephone survey on the quality of outdoor adventure tourist companies.

Lastly, we should mention that, apart from the stipulations in the specific regulations on outdoor adventure tourism in its region, the Outdoor Adventure Tourist Agencies and Adventure Sports Association of Catalonia set a series of compulsory quality standards for entitlement to membership, including the following parameters:

- Legal person incorporated to produce, organise and commercialise physical activities in nature.
- Have registered for the respective section of the tax on economic activities and be up-to-date with payment
- Be in possession of the respective municipal license.



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- Have taken out an insurance policy with the following minimum and compulsory covers: public liability insurance with a cover of a hundred million pesetas (about 601011 euros), accident insurance, covering death or disablement, worth two millions pesetas (about 12022 euros), health-care insurance, with a cover of five hundred thousand pesetas (about 3006 euros).
- Employ professionals, who have been properly instructed and qualified by the respective sport federations, the Catalanian School of Sports, university colleges, the National Institute of Physical Education and others.
- Submit TC1 and TC2 national insurance documents for employed staff.
- A commitment to respect the environment, minding its preservation.

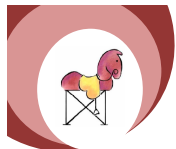
Bearing in mind that quality distinctions offer such enormous advantages as listed above, to which we might add a better match of services to customer expectations and needs and a decrease in uncertainty concerning the choice of service agency and even the actual service guarantee, it is only logical that initiatives in this direction will be developed at both the regional and national levels in the medium and long term.

However, the main problem presented at this level is how to answer the following question. Which quality minima should be and will be demanded?

2.3 ACTIVITIES TAXONOMY

In general terms, outdoor adventure tourism can be said to stretch to a whole group of what can be assumed to be “traditional” activities and would be classed as air, land and water activities.

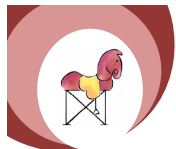
However, if we examine this sector at greater length, we find that the taxonomic framework of activities that are now being developed in Spain is much wider, and is composed of the following elements: *Traditional outdoor adventure tourism*,



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understood as the group of sporting/physical adventure activities carried out in the natural environment that would be included within the classification of: aerial activities (hand-gliding, para-gliding, paramotoring...), aquatic (rafting, hidrospeeding, kayaking, windsurfing, kitesurfing, light sailing...) and terrestrial (trekking, orienteering, climbing...) (Olivera and Olivera 1995; Alarcón 1996; Bastart and Navarro 2000).

- Expeditions, a lot of outdoor adventure tourist companies are also offering, as part of their activity range, the chance to travel to “exotic” destinations abroad (Nepal, India, Tibet, Mongolia, China, Miammar...) to carry out activities such as trekking, rafting, scuba diving, climbing...in what are so-called adventure expeditions (Weber, 2001).
- *Outdoor pursuits*. This product refers to the use of the physical-sporting adventure activities in the natural environment to satisfy the instructional needs and interests of big enterprises. Two main features have been exploited within this area: the *outdoor event*, in the form of “activity parties”, whose aim is to celebrate an achievement, special date or award in the enterprise; and *outdoor training*, whose aim is to use such activities to train members of the management or department staff (Jiménez and Gómez, 2005)
- *Raids*. This group has been defined by some authors as the *21st Century Sport*. It involves the staging of multi-adventure team competitions in both nature and urban space, where the participants have to carry out different outdoor adventure tourism based on orienteering. More than 40 raids are now held in Spain (Masson 2000; Capdevilla and Aguilera 2001).
- *Complementary activities*. We have included this section in the classification because, besides developing the above-mentioned



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activities, almost all outdoor adventure tourist companies in this country are now also taking advantage of resources such as camps, using sports halls, visits to theme parks, contact with local culture through craft activities, manufacture of products, parties... (Fuentes 1995; Vote 1988, 1992; Martínez and Solsona 2000).

Having outlined the activities that are being developed in the sector, it is not hard to see that future prospects will be directed at the constitution of a bigger number of specialized companies in each sector and even the expansion of existing companies to cover the missing taxonomy areas on offer to customers.

2.4 NEW PROFESSIONAL PROSPECTS

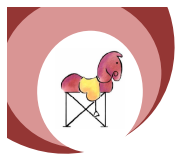
Since the introduction of the pursuits classed as outdoor adventure tourism in Spain during the 80s, driven by nautical and winter sports, especially windsurfing and downhill skiing, and their consolidation in the 90s thanks to the new values of post-industrial societies..., there can now be no doubt that this sector represents an emerging reality (Laraña 1986; Salent 1991; Puig and Heineman 1991; Olivera 1995; Lagardera and Martínez 1998).

Evidence of this is the development of several new job opportunities that are opening up in this area and that go beyond the mere practice of the activity, such as:

- The creation of adventure clubs in sports complexes.
- Business creation through outdoor adventure tourism.
- The use of outdoor adventure tourism in the training of professional teams.
- The appearance of special-purpose departments at travel agencies...

The factors contributing to this include:

- The taxonomic growth of the areas covered by outdoor adventure tourism, where new more economically profitable sector are emerging.



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- The view of the tourist market as a whole, where outdoor adventure tourism are starting to be seen as just another part of tourism, going against the traditional idea of outdoor adventure tourism as a separate market.
- Greater staff specialization, from the point of view of tourist business behaviour.
- Bigger economic involvement of the business sector that sees these activities as a source of drive and attraction.

It is to be expected, therefore, that, in the not too distant future, this sector will offer new professional opportunities for both physical activities and sports professionals and the tourist professionals specialized in this sector.

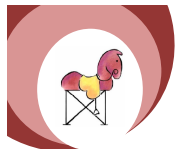
3. NEW TRENDS IN OUTDOOR ADVENTURE TOURISM

From the entrepreneurial viewpoint, outdoor adventure tourist companies in Spain fall almost exclusively into what we can be classed as the small and medium-sized enterprise (less than 50 employees) or microcompany (less than 10 employees).

Generally, the major weaknesses that characterize this SME-dominated sector are:

- No special-purpose business training.
- Day-by-day management that obstructs reflections on future perspectives.
- Shortage of time to locate up-to-date information on decrees, rules, grants or training courses.
- Inefficient marketing plan.
- Limited capability to gain access to international markets...

According to the above, outdoor adventure tourist companies have to develop a good business code and, above all, foster cooperation at the business level to reduce costs, penetrate new markets, share risk on investments..., as a key aspect, for securing their survival competitively in the future.



3.1 BUSINESS CODE

Business code is understood to mean the purposes and goals with which a company is set up, that is, the entrepreneur's idea of what the company should be, its specialization, its philosophy and, above all, what will be used to differentiate it from other companies and present it to customers as a unique and attractive product.

This code is, therefore, a reference for what initiatives to undertake, what decisions to make, what future projects to develop... and is normally represented in a document or set of ideas of the company.

Of the different business positioning strategies that are being used in outdoor adventure tourism, we can single out: price adjustment – lower, equal or higher to the market price in the region or community in which it operates – and the focus on market segment (activity taxonomy; demand profile; geographic area...).

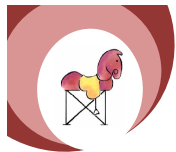
3.2 INTER-BUSINESS COOPERATION

Traditionally, the outdoor adventure tourism sector in Spain has developed amidst a strong sense of individualism, where the rest of the companies of the area represented the competition, and the information had, therefore, to be kept secret.

It could be a big mistake to take this view, because, by joining efforts through association, companies could achieve a stronger market position to foster and defend common interests, and promote and commercialise their products or services jointly...

A rationalized business association is a big advantage, as it provides the possibility of offering full-pack products to the customer who can choose terrestrial, aquatic and/or aerial activities a la carte, and it reduces advertising stand cost, furthers grant applications...

We say rationalized, because there should not be over ten companies working on the same activity in the same area. The logical approach would be though a distribution by areas and activities.



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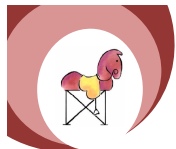
Some of the new inter-business cooperation trends that have been observed in the outdoor adventure tourism sector and that, at the same time, represent a view of business expansion are:

- *Horizontal cooperation*, entering into agreements with companies that offer the same type of services at municipal, regional or national level (outdoor adventure tourist companies), or opening up complementary services within the company's activity framework (bookshop or shop selling specialized sports equipment, equipment hire for the activities...) or even setting up agencies to provide counselling on training, activities, advertising and recycling...
- *Vertical cooperation*, setting sight upon higher-range companies that have better means and resources (skiing resorts, golf courses, yachting harbours...).
- *Symbiotic cooperation*, collaborating with complementary services to our company's activity (hostel associations, travel agencies, restaurant industry, transport companies...).
- *Conglomerations*, investing in services that have nothing to do with the agency but can be profitable...

The goals behind the idea of business expansion as regards which strategies to take to make the service the agency offers more competitive and complete are to reduce cost, to increase profits and to gain prestige.

This idea can be summarised as four product-market relationship growth possibilities:

- To grow selling the same product in the same market.
- To grow selling the same product in different markets.
- To grow offering new products to the same customers.
- To grow offering different products in different markets.



3.3 NEW TRENDS AND PROJECTS

Looking at the ideas that we have expressed in the preceding sections, we present two real examples of the integrated management of tourist resources, in which outdoor adventure tourism play a key role. We take these examples to be representative of the new trends that are developing in this sector: *Laredo Activo* and *Montenmedio*.

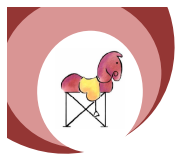
a) Laredo activo. The project kicked off in January 2001 when Laredo Town Hall went to the *Cantabrian Hostel Association* with the idea of becoming a competitive destination and generating a comprehensive tourist supply, and invited tenders.

TURYECO, a reputed outdoor tourism company in the area, went the whole hog and was awarded the *Laredo Activo* project. *Laredo Activo* is a project that integrates and coordinates accommodation, the restaurant industry and activities on the basis of contrast signed with each sector.

The project was first officially presented in Valladolid at the *National Tourist Fair* (INTUR), and was well received, but where it really succeeded was at the *International Tourist Fair* (FITUR) held in Madrid, winning the first prize in the *Fitur Active 2002* adventure tourism section.

TURYECO is an outdoor tourism company that was set up in 1989 with scant resources and has now become a sizeable complex, known as *El Mazuco Holiday Camp*, with a capacity to sleep over 300 people in log cabins and chalets, a car park, dining room, classrooms, meeting rooms, a swimming pool, a sport hall, tennis courts, a volleyball court, an archery field, outdoor and indoor playgrounds and the famous multi-adventure tower fitted out for the practice of activities such as rappelling, climbing, and Tibetan bridge in conditions of absolute safety.

They now carry out all kinds of activities (multi-adventure, horse-riding, sailing, windsurfing, canoeing, trekking, English language learning camps...) under the motto "tourism and ecology".



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Laredo Activo stands, in our view, for two fundamental things:

1) The possibility of generating the integrated management of a community's and, why not, a region's tourist resources on the basis of the concept of central reservation.

We believe that this idea, which is reflected in the very notion of yachting station, is still not sufficiently developed, but that it represents a futuristic view of what quality management of the Spanish tourist product can involve.

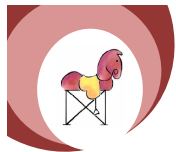
2) This initiative demonstrates how an outdoor tourism company, in this case TURYECO and was able to structure this project, has adopted a philosophy of business openness that reflects a new working philosophy in the sector towards a break with the isolation that has characterized it to date.

b) Monteenmedio country estate. This ambitious project launched by a completely private initiative represents an out-and-out stake for sport tourism.

Situated between the villages of Barbate and Vejer de la Frontera in the region of Cadiz, and now covering about 500 hectares, the *Montenmedio* country estate was an old game preserve that was turned into an integrated project of sport tourism and outdoor adventure tourism in 1991.

The spectacular list of activity offer is:

Horse-Riding: This is the star product and the estate has the capacity to stable 1500 horses. Its facilities include eight grass courses, several sand courses and three special-purpose areas for classic dressage. Around 30 weeks of competitions are organised throughout the year at the local, regional and national level, covering such disciplines as dressage, jumping, eventing and driving. These activities include: *the Sunshine Circuit, the Moonshine Circuit and Star Circuit* and international driving competitions. They are preparing to cover raid, reining and dressage competitions in the future as well.



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Golf: The estate has an 18-hole course, at which trophies such as Volvo Klassics, OKI Telepizza or Isolux are disputed. Three more 18-hole courses are planned to be built, next to a 9-hole Picht&Putt.

Multi-Adventure: The estate's facilities also include a multi-adventure area, offering activities such as climbing, rappelling, archery; two 4x4 jeep circuits and, at the planning stage, a mountain bike circuit.

Others: Apart from the above, there are several tennis and paddle tennis courts, a swimming pool, football pitches for professional teams, an area for archery hunting and, at the planning stage, deep-sea or currican fishing hire services at Barbate harbour.

The above services are supplemented by five restaurants: Casa club, Café de Kurupay, Il Giardinetto, Meeting Point and Las Jaimas del Desierto. Another four hotels are to be built next to the 50-room Montenmedio Hacienda.

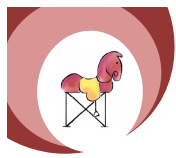
Montenmedio is another example of the integrated management of tourist resources, on a private and personal level in this case. Sizeable economic resources have been invested in this project, whose rich variety of activities makes it as a fairly attractive and competitive product.

4. CONCLUSION

It is more than enough acquaintance that Spain represents one of the most important tourist destinations to world level. In front of the saturation of the denominated "tourism of sun and beach" is beginning to improve at national level the development of new tourist products guided toward the rural space.

This work has been good to show that outdoor adventure tourist represents a key issue to keep in mind in the search for an all-around tourist offer in the rural space.

Nevertheless, there are still to develop in Spain important aspects if we want to establish a bigger stability to this sector and to endow from a bigger degree of competitiveness.



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We consider that a nationwide regulation of outdoor adventure tourism is likely to be established in the near future; an action that will suppose among other aspects: organising the sector, protecting consumer physical integrity and rights, and assuring quality of service and protect the natural heritage.

In the same way, we believe that one of the major initiatives that will be develop in Spain to foster its competitiveness as a tourist destination nationally and internationally are the so-called plans of quality development.

It is also of waiting that future prospects will be directed at the constitution of a bigger number of specialized companies in each sector and even the expansion of existing companies to cover the missing taxonomy areas on offer to customers.

From the point of view of management, it is important to have present the new trends that are beginning to appear in Spain, and that have been expressed in this work in the projects of *Active Laredo* in Cantabria and *Montenmedio* in Andalucía.

The first one, because it shows us a very profitable form of integrated management of a region's tourist resources on the basis of the concept of central reservation, and the second, because in this same process of integrated management of tourist resources it supposes an extremely competitive project and fairly attractive for the company

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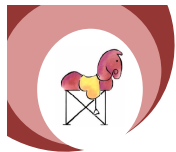
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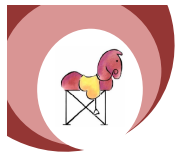
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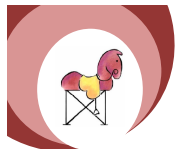
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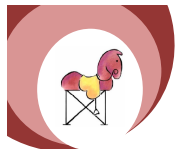
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