The ABC’s of Nature-Based Tourism

© 2003 Fermata Inc.
All Rights Reserved
Sustainable Nature Tourism Strategies

Mary Jeanne Packer
Chief Operating Officer

www.fermatainc.com
Current trends in nature tourism

What do experiential tourists seek when choosing a destination?
Look at tourism trends
65 million Americans say they have taken at least one trip of 50 miles or more, one-way, away from home to visit a national or state park and/or forest in the past year.

Participating in outdoor activities (17%), including visits to national or state parks (10%), is the second most popular trip activity overall by American travelers.
However, in Louisiana currently, non-resident visitors are $\frac{1}{2}$ as likely to travel for outdoor recreation including park visits (only 4%).

And much less likely to participate in outdoor activities (3%).

2001 TravelScope Profile of Visitors to Louisiana
One Half of Americans are Adventure Travelers

46% Soft Adventure
16% Hard Adventure

TIA 2002
• **Adventure travelers** are everywhere.
• One-half of U.S. adults, or 98 million people, have taken an adventure trip in the past five years.
• This includes 31 million adults who engaged in hard adventure activities like whitewater rafting, scuba diving and mountain biking.
• Adventure travelers are more likely to be young, single and employed compared to all U.S. adults.

*TIA 2002*
Sustainable Nature Tourism Strategies

SOFT ADVENTURE ACTIVITIES
(On Trips in Last 5 Years)

- Camping: 64.7
- Hiking: 44.8
- Biking: 27.2
- Wildlife Watching: 24.3
- Horseback Riding: 24.1
- Canoeing: 22.5
- Water Skiing: 20.0

TIA 2002
<table>
<thead>
<tr>
<th>Activity</th>
<th>Millions of participants 1994-95</th>
<th>Millions of participants 2000-02</th>
<th>% change 1994-2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canoeing</td>
<td>49.93</td>
<td>20.63</td>
<td>49.93</td>
</tr>
<tr>
<td>Snowmobiling</td>
<td>51.29</td>
<td>14.81</td>
<td>51.29</td>
</tr>
<tr>
<td>View/wildlife</td>
<td>53.78</td>
<td>22.76</td>
<td>53.78</td>
</tr>
<tr>
<td>Day hiking</td>
<td>55.88</td>
<td>70.62</td>
<td>55.88</td>
</tr>
<tr>
<td>View/photo fish</td>
<td>69.93</td>
<td>26.82</td>
<td>97.84</td>
</tr>
<tr>
<td>Snowboarding</td>
<td>71.81</td>
<td>11.81</td>
<td>69.93</td>
</tr>
<tr>
<td>Jet skiing</td>
<td>77.00</td>
<td>20.31</td>
<td>119.33</td>
</tr>
<tr>
<td>View/wildlife</td>
<td>84.82</td>
<td>26.82</td>
<td>137.70</td>
</tr>
<tr>
<td>Snowmobiling</td>
<td>87.70</td>
<td>22.76</td>
<td>182.56</td>
</tr>
<tr>
<td>Canoeing</td>
<td>93.68</td>
<td>20.63</td>
<td>49.93</td>
</tr>
<tr>
<td>Snowboarding</td>
<td>97.84</td>
<td>26.82</td>
<td>97.84</td>
</tr>
<tr>
<td>View/wildlife</td>
<td>101.75</td>
<td>22.76</td>
<td>101.75</td>
</tr>
<tr>
<td>Snowmobiling</td>
<td>106.65</td>
<td>26.82</td>
<td>106.65</td>
</tr>
<tr>
<td>Canoeing</td>
<td>119.33</td>
<td>22.76</td>
<td>119.33</td>
</tr>
</tbody>
</table>
National Survey on Recreation and the Environment (NSRE) - Birdwatching

From the early 1980s to 2000-2001: a measured increase of 21 million to 70 million
Strong interest in the outdoors among Americans
44% said that they participated in some level of birding
55% view wildlife while away from home

Ducks Unlimited Survey by Responsive Management
### 2001 U.S. Fish & Wildlife Service Survey of Fishing, Hunting, and Wildlife-Associated Recreation

<table>
<thead>
<tr>
<th>Type of Participation</th>
<th>Number 1996</th>
<th>Number 2001</th>
<th>Percent Change</th>
<th>Number Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fishing</td>
<td>35,246</td>
<td>34,067</td>
<td>-3%</td>
<td>-1179</td>
</tr>
<tr>
<td>Hunting</td>
<td>13,975</td>
<td>13,034</td>
<td>-3%</td>
<td>-941</td>
</tr>
<tr>
<td><strong>Wildlife Watching</strong></td>
<td><strong>62,868</strong></td>
<td><strong>66,105</strong></td>
<td><strong>+5%</strong></td>
<td><strong>+3,237</strong></td>
</tr>
</tbody>
</table>
# Sustainable Nature Tourism Strategies

## 2001 U.S. Fish & Wildlife Service Survey of Fishing, Hunting, and Wildlife-Associated Recreation

<table>
<thead>
<tr>
<th>Expenditures</th>
<th>1996 ($)</th>
<th>2001 ($)</th>
<th>% Change</th>
<th># Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fishing</strong></td>
<td>42,710,679</td>
<td>35,632,132</td>
<td>-17%</td>
<td>-7,078,547</td>
</tr>
<tr>
<td><strong>Hunting</strong></td>
<td>23,293,156</td>
<td>20,611,025</td>
<td>-12%</td>
<td>-2,682,131</td>
</tr>
<tr>
<td><strong>Wildlife Watching</strong></td>
<td>29,062,524</td>
<td>33,730,868</td>
<td>+16</td>
<td>+4,668,344</td>
</tr>
</tbody>
</table>
Sustainable Nature Tourism Strategies

Demographics

Who is a nature tourist?
**Fermata Research - Who is a nature tourist?**
Combined five surveys (n=2787)

<table>
<thead>
<tr>
<th>Age</th>
<th>52.1 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>48.3% male, 51.7% female</td>
</tr>
</tbody>
</table>
### Fermata Research - Who is a nature tourist?

Combined five surveys (n=2787)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Age</strong></td>
<td>52.1 years</td>
</tr>
<tr>
<td><strong>Gender</strong></td>
<td>48.3% male, 51.7% female</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td>$61,962</td>
</tr>
<tr>
<td><strong>Household Size</strong></td>
<td>2.45 persons</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td>16.36 years</td>
</tr>
</tbody>
</table>
### Fermata Research - Who is a nature tourist?

Combined five surveys (n=2787)

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>52.1 years</td>
</tr>
<tr>
<td>Gender</td>
<td>48.3% male, 51.7% female</td>
</tr>
<tr>
<td>Income</td>
<td>$61,962</td>
</tr>
<tr>
<td>Household Size</td>
<td>2.45 persons</td>
</tr>
<tr>
<td>Education</td>
<td>16.36 years</td>
</tr>
<tr>
<td>Frequency of Trips</td>
<td>10.36 trips per year; 3.31 days per trip, 2.38 nights per trip</td>
</tr>
<tr>
<td>Origin</td>
<td>28.9% urban, 47.6% suburban, 4.3% rural (farm), 19.1% rural (nonfarm)</td>
</tr>
<tr>
<td>Distance from home</td>
<td>6 hours or less drive - one way</td>
</tr>
</tbody>
</table>
Fermata Research - Expenditures
Combined five surveys (n=2787)

Total expenditures - last trip $467.63/person
Daily spending - last trip $138.45/person

Travelers spent most of their money on food, lodging, and transportation.
■ **Weekend trips** by Americans jumped by a dramatic 70% between 1986 and 1996 (in comparison, non-weekend travel increased by only 15% during the same period).

■ Weekend trips now account for more than half of all U.S. travel.

*TIA 2002*
Top Louisiana non-resident markets: Houston (12%), Dallas – Fort Worth (11%), San Antonio (2%) and Austin (2%)

Average age – 49; and median income $58,200.

2001 TravelScope Profile of Visitors to Louisiana
“The Creative Class prefers active, authentic and participatory experiences which they can have a hand in structuring” (Florida 2002).

38 Million Americans!
They value: Individuality, Merit, Diversity and Openness.
Creativity index (Share of workforce, innovations, high-tech industries, and diversity and openness to ideas and people):

Large cities (over 1 million)

#4 nation wide – Austin
#10 – Houston
#34 – San Antonio
Creativity index:
Medium cities (500,000 - 1 million)
#8 nation wide – Little Rock
#21 – Mobile
Creativity index:
Small cities (250,000 - 500,000)
#12 nation wide – Jackson
#22 – Pensacola
#51 – Biloxi
#56 – Beaumont
PRIZM, geodemographic neighborhood segmentation – the top group of visitors to Louisiana are from *Elite Suburbs* (12%), with high education and high income, mostly white collar professions.

Also with high income and education levels, are visitors in the Upward Bound group from *2nd Cities* (3%).

2001 TravelScope Profile of Visitors to Louisiana
Market Segmentation in Nature Tourism
Sustainable Nature Tourism Strategies

70.4 million NSRE birders
46 million USFWS bird observers
40.3 million residential bird observers
18.3 million nonresidential bird observers
1 million Nature Conservancy members
600-700 thousand NAS members
400 thousand purchased Sibley
30 thousand Cornell Lab supporters
22 thousand ABA members
**Market Segmentation in Nature Tourism**

**The Avitourism Example**

<table>
<thead>
<tr>
<th>Avid</th>
<th>Active</th>
<th>Casual</th>
<th>Uninitiated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Recreationist</td>
<td>Secondary Recreationist</td>
<td>Peripheral Recreationist</td>
<td>Incidental Recreationist</td>
</tr>
<tr>
<td>Avitourist</td>
<td>Nature Tourist</td>
<td>Experiential Tourist</td>
<td>General Tourist</td>
</tr>
<tr>
<td>Committed Birder</td>
<td>Naturalist</td>
<td>Adventure Traveler</td>
<td>Leisure Traveler</td>
</tr>
<tr>
<td></td>
<td>Wildlife Viewer</td>
<td>Cultural/Historical Traveler</td>
<td>Business Traveler</td>
</tr>
<tr>
<td></td>
<td>General Nature Traveler</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Market Segmentation in Nature Tourism

Travel patterns

- **Fall**:
  - Uninitiated: 50
  - Casual: 30
  - Active: 20
  - Avid: 10

- **Summer**:
  - Uninitiated: 40
  - Casual: 20
  - Active: 20
  - Avid: 20

- **Spring**:
  - Uninitiated: 30
  - Casual: 20
  - Active: 10
  - Avid: 0

- **Winter**:
  - Uninitiated: 20
  - Casual: 20
  - Active: 20
  - Avid: 20
What else do we know about experiential travelers?
Sustainable Nature Tourism Strategies

• **Green travel** is important to travelers.
• Eighty-three percent of travelers are inclined to support "green" travel companies
• They are willing to spend, on average, 6.2 percent more for travel services and products provided by environmentally responsible travel suppliers.

*TIA 2002*
• About one in five (21%) total domestic person-trips includes an historic/cultural activity,

• with volume up 10 percent since 1996 (from 192.4 million to 212 million).

TIA 2002
### Sustainable Nature Tourism Strategies

<table>
<thead>
<tr>
<th></th>
<th>Historic/cultural travelers</th>
<th>Other U.S. travelers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average age</td>
<td>48</td>
<td>46</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>4.7 nights</td>
<td>3.4 nights</td>
</tr>
<tr>
<td>Graduate degree</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>Use hotels, motels, B&amp;Bs</td>
<td>62%</td>
<td>56%</td>
</tr>
<tr>
<td>Trip includes shopping</td>
<td>44%</td>
<td>33%</td>
</tr>
<tr>
<td>Spend more than $1,000</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Take group tour</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Air travel as primary mode</td>
<td>22%</td>
<td>18%</td>
</tr>
</tbody>
</table>
What are experiential travelers seeking – Consider motivations
"What we're all really seeking is an experience where we can feel the rapture of being alive."  
Joseph Campbell
• 76% of U.S. travelers state that they “would like to visit someplace they have never visited before.”
• 48% are interested in a destination that is “remote and untouched.”
• 57% are attracted by an area’s “culture.”
• 44% would like to “learn a new skill or engage in a new activity” during their trip.

Source: Travel Industry Association of America
Motivations

2001 U.S. Fish & Wildlife Service Survey of Fishing, Hunting, and Wildlife-Associated Recreation

1. To enjoy sights, smells, sounds of nature
2. To be outdoors
3. To see wildlife species not seen before
4. To get away from the demands of life
5. For family recreation
“In addition to enjoying great scenic beauty and outdoor activities, ecotourists like to learn about local indigenous peoples and their cultures. Authentic crafts, and craft-making demonstrations combined with credible cultural performances heighten the tourist experience.”

Bobos as travelers seek to be differentiated from passive tourists, sightseers, and bus-tour participants.

They don't just want to see sights, they want to "try on other lives". *Bobos in Paradise*, David Brooks (2001)
Bobos want to get away from their affluent worlds and seek "spiritually superior worlds" and more authentic native/local culture, foods, and crafts.

Bobos want to go to uncrowded, undiscovered places where "simple people live in abundance."
What does the future hold?
TYPES OF TOURISM LIKELY TO GROW

• Visit Friends/Relatives (VFR)
• Intergenerational/Grand-Travel
• Combined Business and Leisure Travel
• Enrichment Tourism
• Health/Revitalization/Enhancement Tourism
• Eco-Tourism and Soft Adventure
• “Legacy” Travel

Source: Travel Industry Association of America
Sustainable Nature Tourism Strategies

What do we need to do to support experiential tourists?
What can we do to support experiential tourists?

Develop experiential trails

**thematic itineraries** - a means of arraying **experiences** along a linear path…
Sustainable Nature Tourism Strategies

The trail is the **mechanism** by which we orchestrate the nature experience.
Sustainable Nature Tourism Strategies

And moves markets to messages.
What can we do to support experiential tourists?

*Creative Class* traits:

• They work long hours

• Flexibility and interweaving

• Front-loaded career and deferred life

Speed up activities
Substituting activities
Multi-tasking
Detailed time planning - especially for recreation
What can we do for experiential tourists?

Develop and promote authentic local products made from local natural materials.
“Handcrafts can be integrated into a site through permanent retail outlets, temporary displays and festivals.

They should be offered in a balanced mix of expensive museum-quality genuine artifacts, affordable utilitarian products that are authentic and traditional, and fun inexpensive impulse buys.

The authenticity and high quality of the **products**, and how that information is conveyed in the retail setting, are the keys to consumer enthusiasm and strong sales.”

V. Lederman (2001) in the *International Ecotourism Society Newsletter*
Trails also serve to move markets to merchandise.
Sustainable Nature Tourism Strategies

Benefits to local communities from experience-based tourism

- Economic Development
- Recreation
- Education
- Communication
- Conservation
Sustainable Nature Tourism Strategies

www.fermatainc.com