Louisiana Nature-Based Tourism

An Overview

Louisiana Sea Grant College Program

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Cover Illustration by John Brown

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Background on Nature- Based Tourism in Louisiana

The Louisiana Office of Tourism, Department of Culture, Recreation and Tourism contracted with the Louisiana Sea Grant College Program to conduct research regarding nature-based tourism (NBT) in the state. The intent was to characterize this particular sector of the state's tourism industry and identify opportunities and challenges for its continued development.

It is noteworthy that the lion's share of this research was conducted prior to the summer of 2005 before hurricanes Katrina and Rita devastated a large portion of far southeastern and southwestern Louisiana. Both of these areas had large concentrations of NBT enterprises that were heavily impacted by the catastrophic events. The damages to coastal and marine habitats and physical infrastructure – essential components of NBT – have been estimated in the hundreds of millions, if not billions, of dollars. The estimated infrastructure damages to the state's recreational fishing sector alone ranges from approximately $121 million to $331 million, according to Louisiana State University's Center for Natural Resource Economics and Policy. The recovery will be slow and it will take years before the situation returns to pre-Katrina levels of activity.

In order to characterize the NBT sector, Louisiana Sea Grant completed four tasks as follows:

(1) conducted an inventory of existing secondary information such as studies, reports and data files regardingNBT in Louisiana. The information was incorporated in the various sections of this report;

(2) prepared a general profile of out-of-state visitors who participated in outdoor activities in 2003 and 2004;

(3) analyzed hunting and fishing activities in Louisiana by out-of-state residents, and;

(4) compared current swamp tour operations with those present in 1997.

Why the term "nature-based tourism" and not the more popular, "ecotourism"? The terms are often used interchangeably, but there is a distinct difference between the two concepts. The most currently accepted definition of "ecotourism" was coined in 1999 by Martha Honey. In her book, *Ecotourism and Sustainable Development*, she wrote that ecotourism is "...travel to fragile, pristine and usually protected areas that strive to be low impact and (usually) small scale."

This type of travel is seldom the case in Louisiana. The state as a whole, and particularly Louisiana's coast, is a working environment and thus very few locales can be labeled as "pristine." Furthermore, whereas the state's coastal wetlands have been characterized as being fragile and endangered, under proper management and with the implementation of adequate conservation and restoration measures, much can be done to rehabilitate that particular environment. Too, only a few Louisiana NBT activities can be referred to as "low impact and small scale."

The interest in non-consumptive forms of recreation–birding, walking, hiking, photography, etc. – is a relatively recent phenomenon in the state, while Louisiana's long-standing nickname of "Sportsman's Paradise" is legendary and refers to the excellent hunting and fishing (consumptive) opportunities that have appealed to residents and visitors alike.

NBT is an evolving concept that was first segmented as a tourism sector in South Carolina in the early 1990s. The premise is that successful NBT programs promote a balanced approach to conservation that leads to public appreciation of an area's natural and cultural heritage. This appreciation, in turn, results in conservation of those resources while providing an economic alternative for businesses. Inherent in this concept is also the notion that all parts of a visitor's quality experience can be supplied without compromising the authenticity, the heritage resources or the quality of life of the host community. In the true sense of the word, tourism becomes sustainable. Entrepreneurs are motivated to invest, protect and prolong their financial well-being and think strategically rather than opportunistically. Resource management agencies, in turn, can stress conservation practices.

In this broader context, Louisiana's marshes, swamps, the Gulf of Mexico, Atchafalaya Basin, Toledo Bend, north Louisiana (referred to as the "Sportsman's Paradise Region" in tourism marketing literature) and many historic and cultural places have been the focal point of NBT. The tourism industry has responded and provided diverse products such as swamp tours, recreational fishing, waterfowl hunting and visiting historic places and cultural attractions.

But after a number of years of success and a distinct growth pattern, at the turn of the 21st century, Louisiana's NBT enterprises began experiencing business discomforts. They stemmed from stagnant, and even declining, attendance and revenues resulting from national and regional changes in consumer preferences, changing demographics, a more demanding regulatory environment and competition, both within the state and outside. Arguably, in early 2005 there were more NBT attractions than in years past, but the customer base had grown little, many public attractions offered facilities and services at reduced costs to the public and there was a general dilution effect from the additional attractions. One distinct exception, however, was recreational fishing that has continued to grow in size and participation, and presents an outstanding opportunity for continued NBT development, particularly if the saltwater recreational fishing infrastructure is rebuilt throughout coastal Louisiana.

Overview

The statistics from the Travel Industry Association of America's (TIA) *TravelScope* survey were used to complete this report. The following is TIA's description of its database:

> The TIA Domestic Online Database includes current and historic domestic travel information, including purpose of trip, transportation, trip duration, spending and traveler demographics. The data are captured via TIA's *TravelScope* survey, conducted since 1994. *TravelScope* is a monthly survey of 25,000 U.S. households and captures trip information for up to three trips per month.

It is important to note that the *TravelScope* survey only includes people who traveled more than 50 miles from home and/or stayed one or more nights at their destination. It is a survey not just about tourism, but travel in general. NBT can, and often does, occur as a side trip to a business trip and this occurrence is seen repeatedly in the Louisiana data analyzed for this report. This analysis focused on the following *TravelScope* data:

- data from years 2003 and 2004
- travel to Louisiana
- reported activity codes defined as one or more of the following

    1. Outdoor (e.g. hunt, fish, hike, bike, camp) (*TravelScope Activity Code = 5*)
    2. Beach activities (8)
    3. National/state park (9)
    4. Water sports/Boating (12)
    5. Golf (13)

[1] http://www.tia.org/Travel/dom_db_main.asp

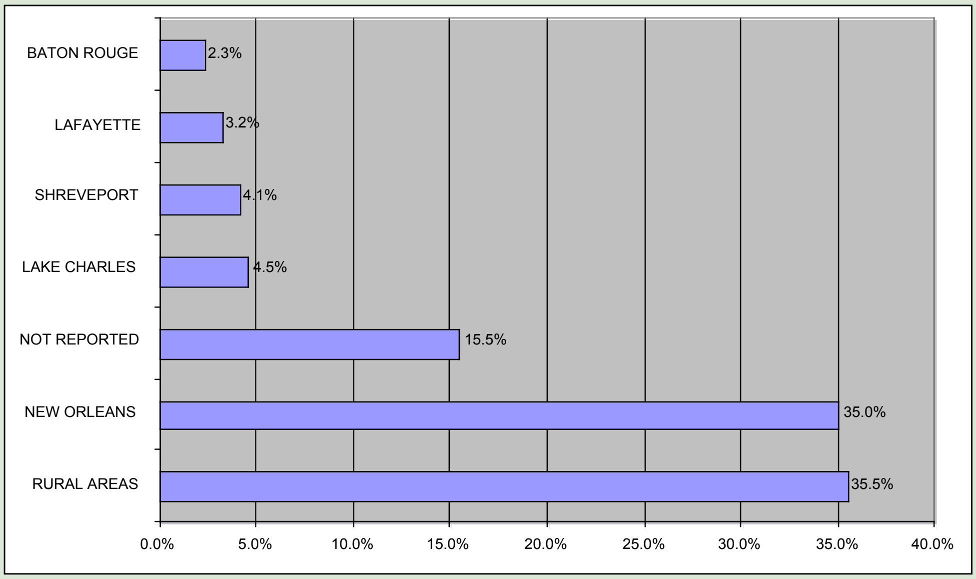
This filtering of data resulted in the extraction of 220 records/NBT-related trips taken in Louisiana. Ninety-seven (97) occurred in 2003 and 123 in 2004. They described the visits of 498 travelers to Louisiana.

TIA uses a system of weights to extrapolate from its 25,000 household samples to establish the larger estimates of U.S. travel. TIA does this at the state level as well. However, TIA's weighting model is designed for portions of the TravelScope survey that are much larger than the Louisiana NBT cross section discussed here.

Louisiana NBT: Destinations

Considering the city's pre-Katrina appeal to business and leisure travelers, it is not surprising New Orleans was the second most visited location by the NBT cross section (35 percent by household). Figure 1.

Figure 1: 2003-2004 NBT Places Visited

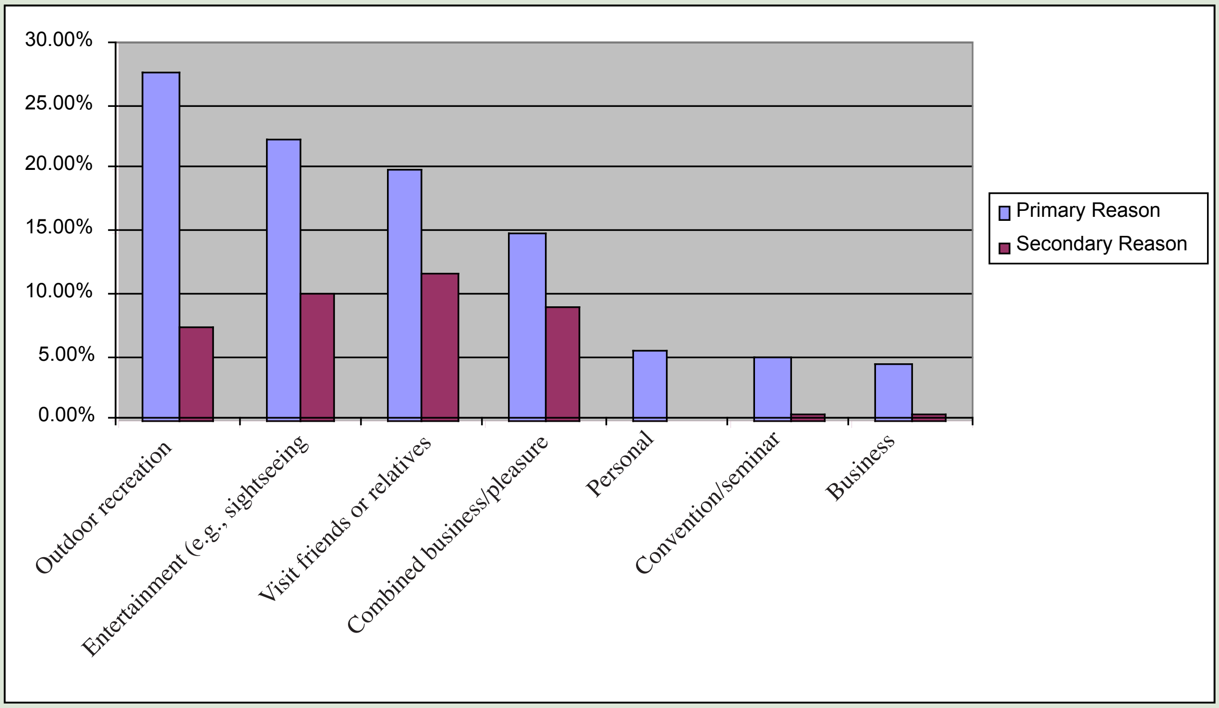


Relatively undeveloped land and water, however, surround New Orleans. This was evident in the 35 percent of Louisiana NBT visitors whose destination was New Orleans and also reported a primary purpose unrelated to NBT (91 percent). Nevertheless, they engaged in NBT at some point during their trip. The same can be said for other metro areas in the state. The proximity of these cities to water, golf courses and state parks make them excellent places to enjoy the outdoors as well as urban amenities.

Louisiana NBT: Incidental or Intentional?

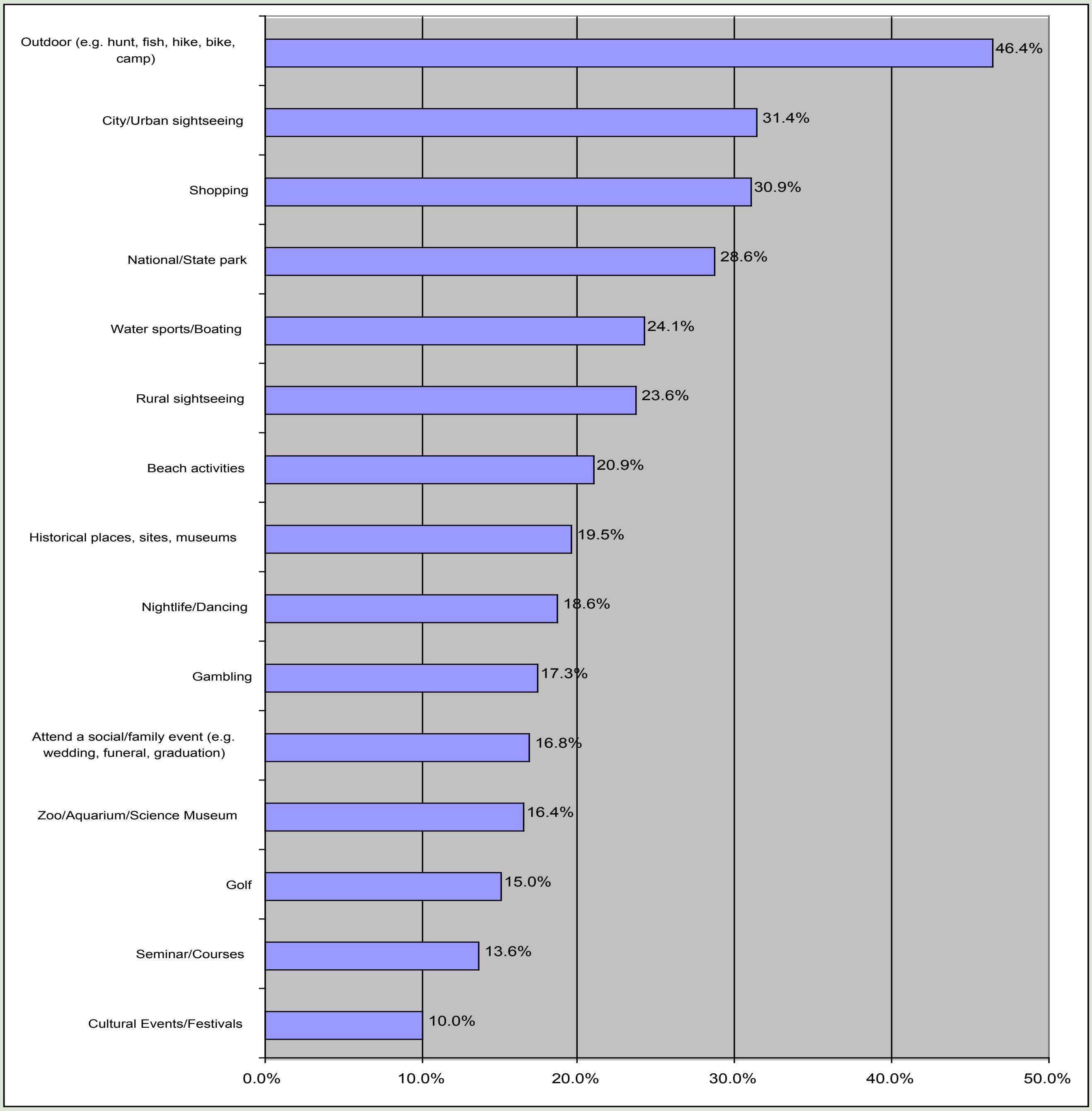
As seen with the trend of visitors to metropolitan areas, NBT activities are also pursued during travel for other reasons. When looking at other variables, "Primary" and "Secondary Purpose of Travel," it is evident that not all NBT is incidental (Figure 2). Over one third of the cross section was intending on NBT from the outset. Only 39.2 percent reported it as a secondary purpose.

Figure 2: 2003-2004 NBT Purpose of Visit



Estimates of intentional NBT trips could be higher than one-third if more than two priority categories were offered. Predictably, outdoor activities such as hunting, fishing, wildlife viewing, playing golf and sightseeing, in general, were the primary activities of more than 70 percent of those reporting participation in NBT activities (Figure 3) in 2003-2004. Shopping, the single most popular activity by all travelers, and visits to state and/or national park sites were also of worthwhile note.

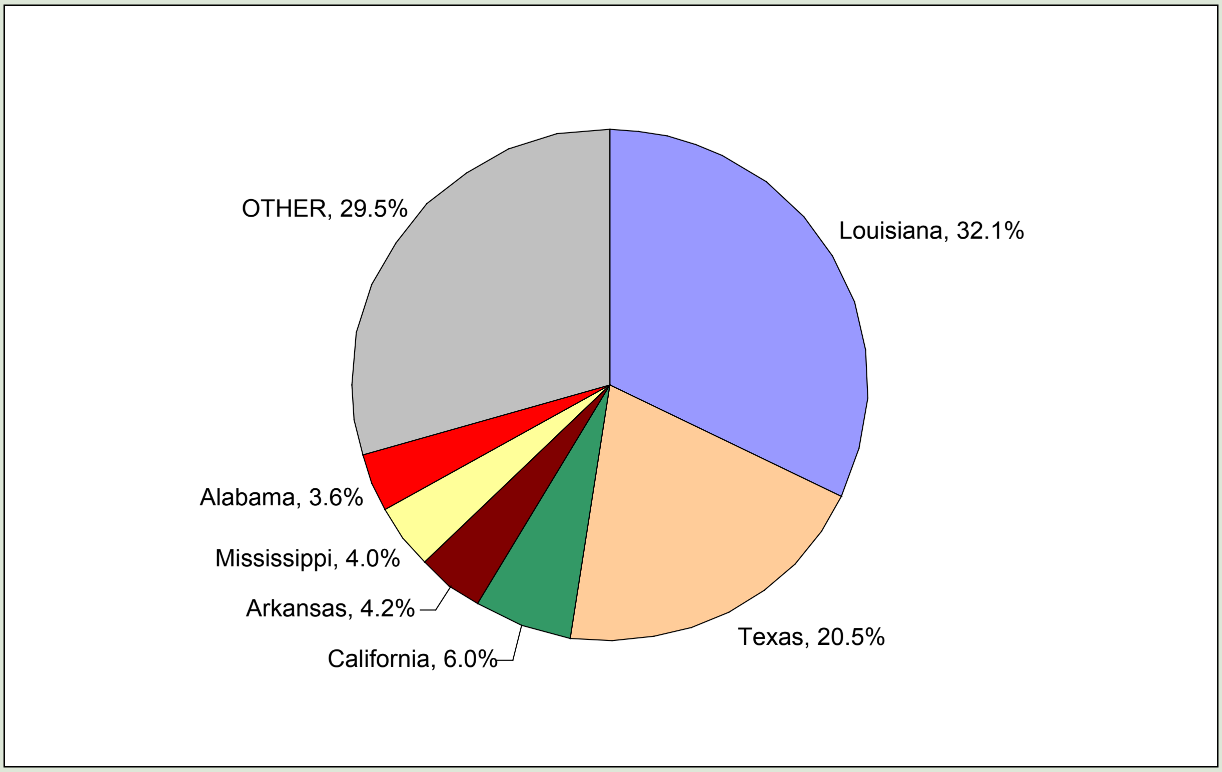
Figure 3: 2003-2004 Louisiana NBT Activities



Louisiana NBT: Origins

It is common to find that most TIA survey travelers (distances of greater than 50 miles from home, and/or greater than or equal to one overnight stay) originate in the same state. Louisiana NBT travelers are not an exception (Figure 4). Thirty-two percent (by persons) of the state's NBT travelers were Louisianans enjoying their home state. Second were Texans at 20 percent, with many traveling from either Dallas or Houston. Other southern states – including Mississippi, Arkansas, Alabama, Florida and Georgia – made up 16 percent of the NBT visitors.

Figure 4: 2003-2004 NBT State Origins

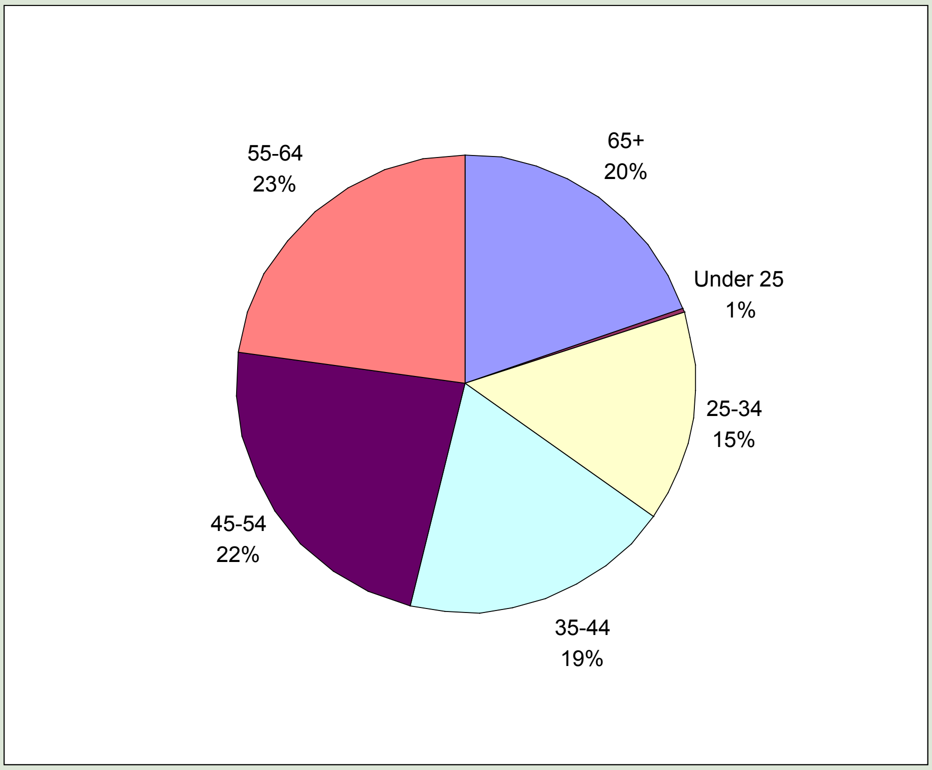


Roughly a third originated from elsewhere in the country. Worth noting was California, that registered 6 percent of Louisiana's NBT travelers. This is likely attributable to that state's relatively large population and thus large number of travelers.

Louisiana NBT: Age and Other Characteristics

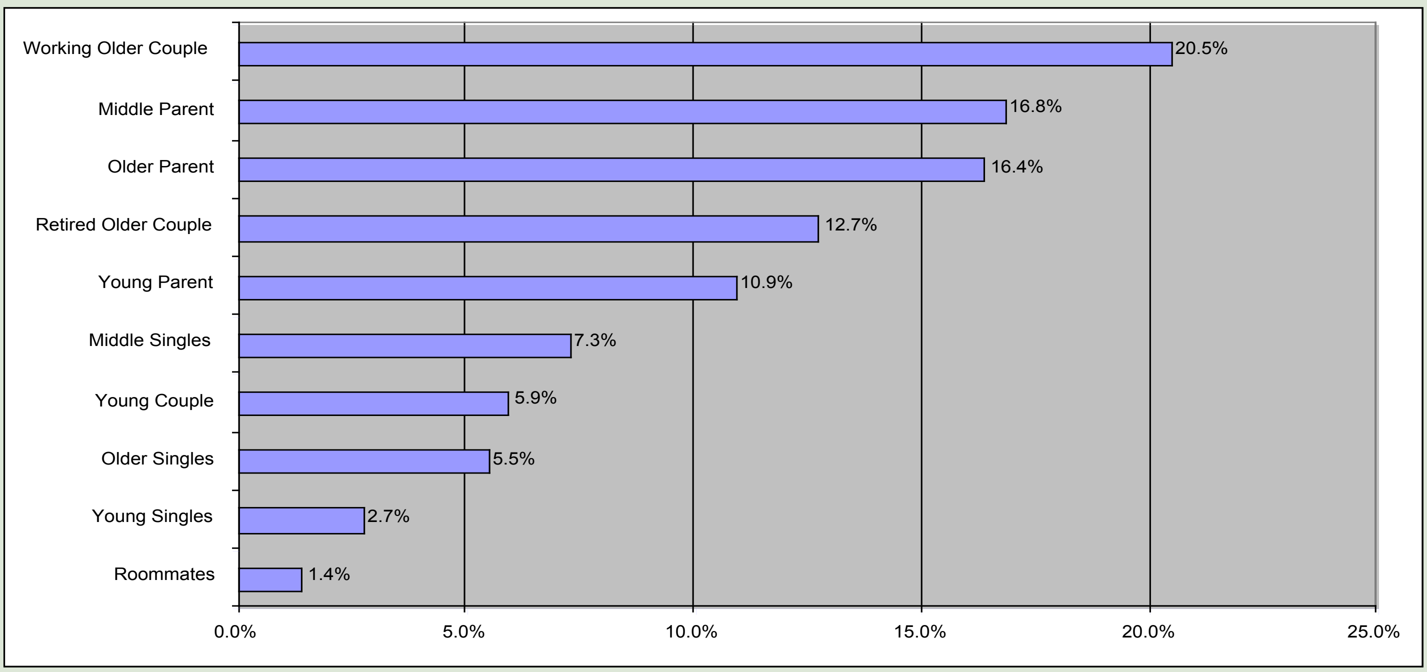
Head of households are categorized by age groups in Figure 5. This categorization is based on the assumption that the head of household is most likely to be in charge of some or all of the travel arrangements. The distribution across age groups is fairly even with the exception of the under-25 group. The median and average age of household heads making NBT decisions was in the early 50s. It is worth noting that of the people in this cross section, 22 percent were children accompanying parents.

Figure 5: 2003-2004 NBT Head of Household's Age



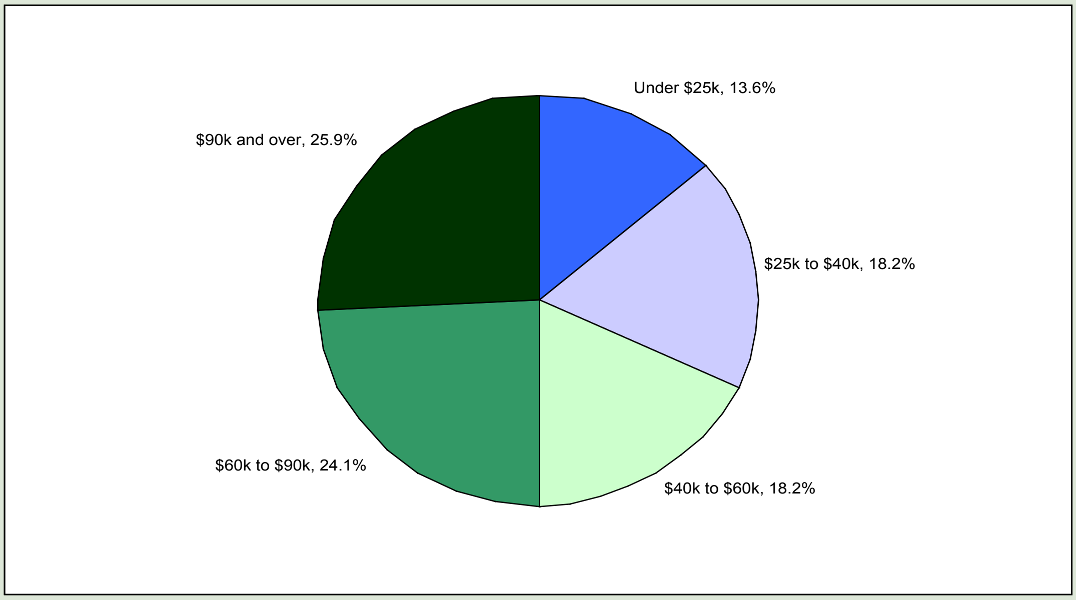
The life stage of visitors is concurrent with the median age of household head mentioned above; half being working/retired older couples and older parents (all three over age 45). See Figure 6. Single member households of all ages registered only 16 percent of respondents. Forty-four percent of Louisiana NBT visitors were parents.

Figure 6: 2003-2004 Louisiana NBT Head of Household's Lifestage



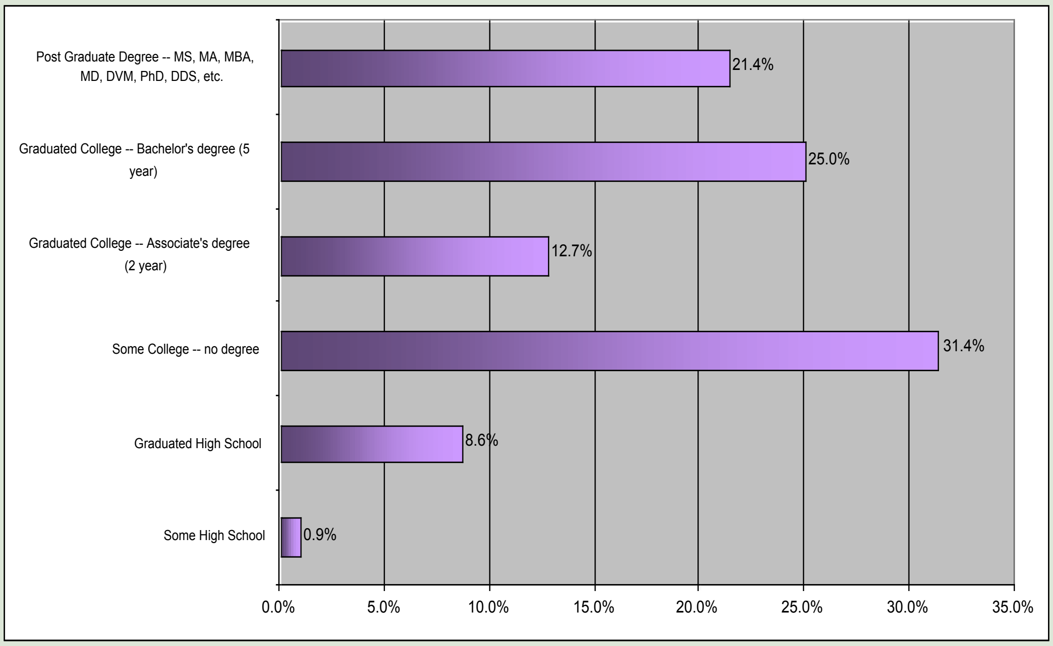
The race of Louisiana NBT was predominantly (90 percent) white with 5.5 percent selecting black as their race. The median household income of Louisiana NBT was around $60,000 per year making these travelers a wealthy cross section in relation to the median household income of Louisiana which was $33,300 in 2000-2002.[2] (Figure 7).

Figure 7: 2003-2004 Louisiana NBT Household Income



As can be expected with a well-to-do sample, Louisiana NBT travelers are well educated with 92 percent having some college experience and 60 percent receiving a degree (Figure 8). This is much higher than the national data for ages 25 and up, where the 2000 Census reported that only 52 percent had been to college and 27 percent received a degree.[3]

Figure 8: 2003-2004 Louisiana NBT Head of Household's Education



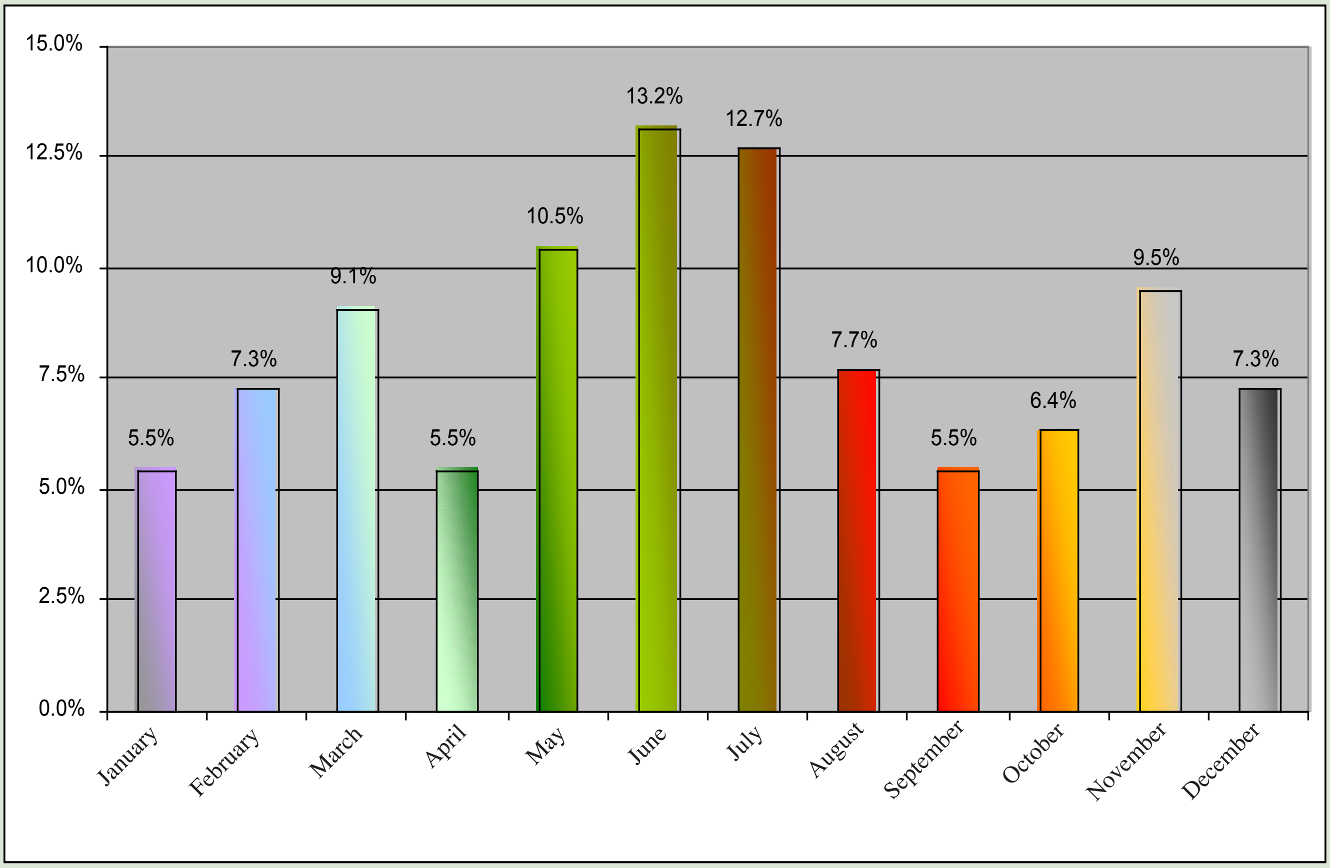
[2] http://www.census.gov/hhes/income/income02/statemhi.html

[3] http://www.census.gov/prod/2003pubs/c2kbr-24.pdf

Louisiana NBT: Seasonal?

There is a season for almost every NBT activity. Certainly most hunting and fishing are seasonal. Other seasonal activities that may induce NBT include special events such as Mardi Gras, Jazz Fest and countless heritage-based festivals that celebrate natural resources and culture. Figure 9 depicts the time of year visited by nature based visitors.

Figure 9: Temporal Visitation Period

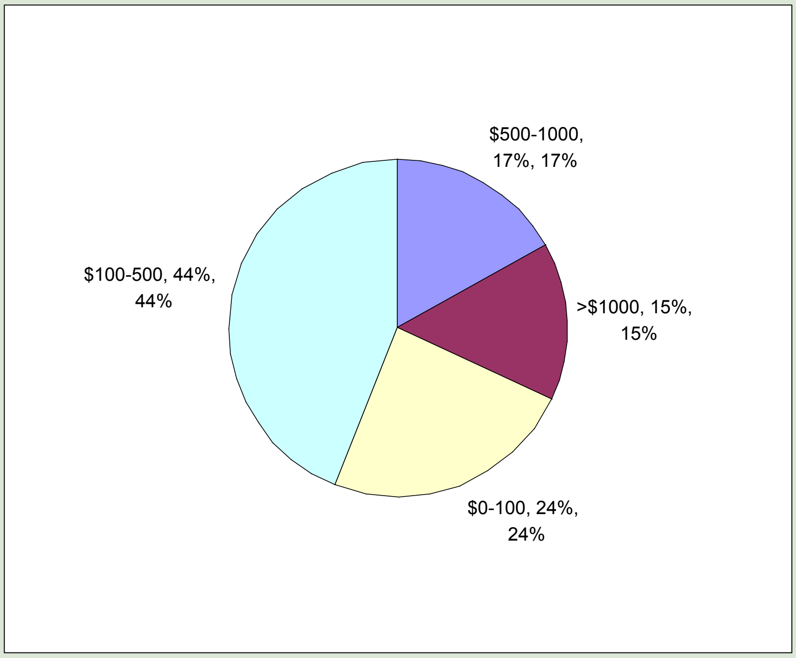


The typical summer vacationing trend and recreational fishing activities is apparent, as well as an increase around February and March that coincides with the 2003 and 2004 Mardi Gras dates of February 23rd and March 4th respectively. Late fall also marks the beginning of waterfowl and deer hunting seasons in Louisiana.

Louisiana NBT: Spending

Average spending was $500 per trip and $285 per person-trip (Figure 10). The distribution was skewed by a few substantial spenders in the survey. Those NBT travelers with children spent less ($410/trip, $128/person-trip). This behavior is expected since parents are both younger than the rest of this sample, and have more financial obligations. In-state visitors spent much less on average ($298/trip) than out-of-state visitors ($598/trip).

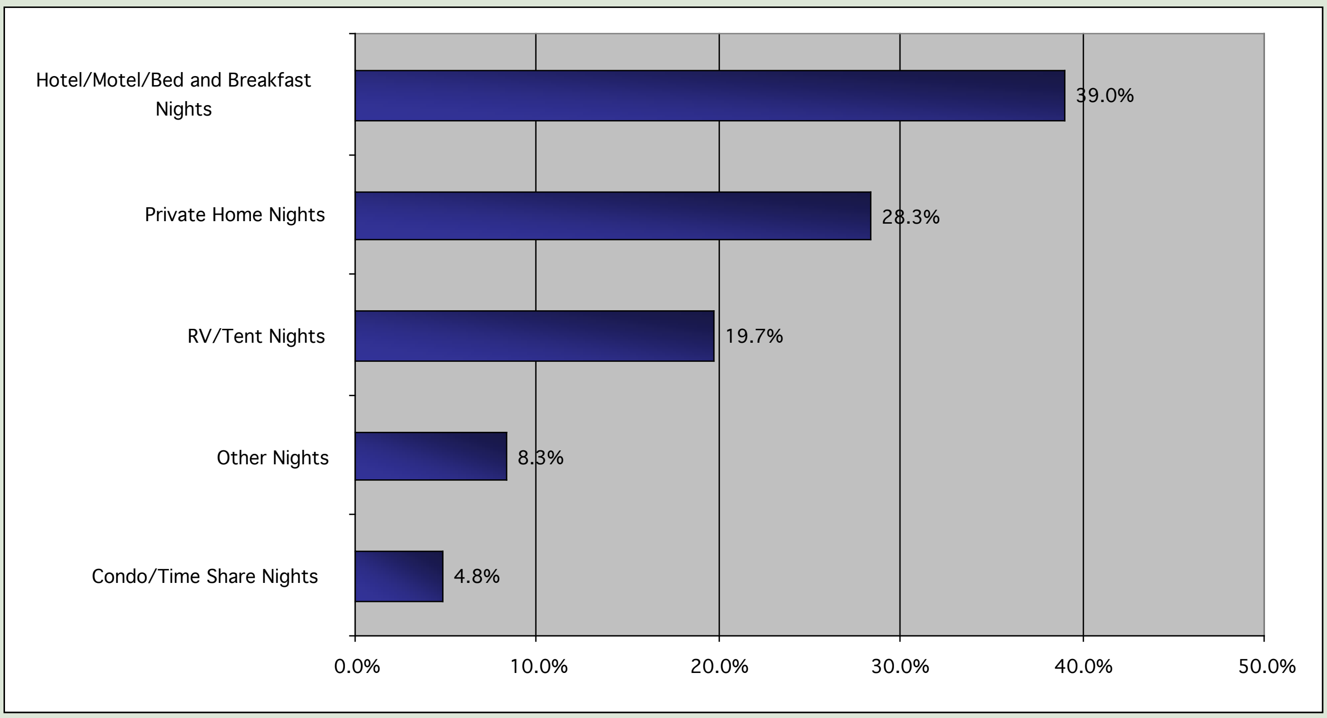
Figure 10: Average Spending per Trip.



Louisiana NBT: Nights/Lodging

Average stay was 4.24 nights and these figures were skewed as well by a few visitors spending more than one week in Louisiana. It was possible that mixed business/leisure lodging could be reported. The type of lodging used by NBT visitors appears in Figure 11 below.

Figure 11: Lodging Type.



Hunting and Fishing Activities by Out-of-State Visitors

For decades, Louisiana's motto has been the "Sportsman's Paradise." Hunting and fishing opportunities have been a major attraction for all regions of the state. The U.S. Fish and Wildlife Service (USFWS) compiles the most reliable and frequently cited trip-related statistics for fishing and hunting activities in each state. The National Survey of Fishing, Hunting and Wildlife-Associated Recreation (Survey) is conducted every five years and has been available since 1955. The state-by-state survey collects information regarding the number of anglers, hunters and wildlife-watching participants in the United States and complements it with expenditure information. Other sources that were consulted for the purpose of this study were the American Sportfishing Association and the International Association of Fish and Wildlife Agencies.

Table 1 details the nonresidents' (tourists) hunting and fishing-related expenditures for 1996 and 2001. Combined, the expenditures by nonresidents in Louisiana exceeded $95 million in 2001, a 27 percent increase from similar (not adjusted for inflation) statistics for 1996. Fishing trip-related expenditures grew by 40 percent during the same period, from $54 million to $76 million. Hunting related expenditures by nonresidents declined slightly during the period (from $21 million to nearly $20 million), in all likelihood due to uncertainty in hunting for waterfowl species. The USFWS also estimated the number of nonresident anglers and hunters to have increased by 20 percent from 173,000 in 1996 to 207,000 in 2001.

Table 1
1996 and 2001 Trip and Equipment Expenditures in Louisiana for Fishing and Hunting by Nonresidents

	Amount		Anglers/Hunters		Avg. per Angler/Hunter	
Year	1996	2001	1996	2001	1996	2001
Trip-related expenditures for fishing and hunting	$75,237,000	$95,504,000	173,000	207,000	$435	$461
Trip-related expenditures for fishing	53,976,000	75,640,000	160,000	184,000	337	411
Food and lodging	24,819,000	31,023,000	137,000	156,000	181	199
Transportation	*17,849,000	18,631,000	*127,000	174,000	*140	107
Boating costs	*3,091,000	*6,393,000	*58,000	*56,000	*53	*115
Other trip costs	*2,082,000	15,438,000	*133,000	142,000	*32	109
Equipment	...	...	...	...	...	...
Trip-related expenditures for hunting	*21,261,000	*19,864,000	...	*36,000	...	$*551

…Sample size too small to report data reliably *estimate based on a small sample size
1 Includes equipment rental, guide and access fees, ice and bait for fishing, and heating and cooking oil
Note: Detail does not add to total because of multiple responses and non-responses.

Source: U.S. Fish and Wildlife Service, National Survey of Fishing, Hunting, and Wildlife-Associated Recreation , 1996 and 2001.

Of the two major NBT activities, fishing is clearly the most popular one for residents and nonresidents. Southwick Associates, in its 2005 report to the Louisiana Department of Wildlife and Fisheries, "The Economic Benefits of Fisheries, Wildlife and Boating Resources in the state of Louisiana," estimated that non-residents made over $27.4 million of hunting-related retail purchases in the state in 2003. The comparable figure for recreational fishing was $88 million.

Non-resident freshwater data appear in Table 2. According to the USFWS, the number of out-of-state freshwater anglers grew from 118,000 to 123,000 between 1996 and 2001, and they fished 60,000 more days in 2001 than 1996. This is clearly a boon for the hospitality industry located near freshwater lakes, notably Toledo Bend and the Atchafalaya Basin.

The single most popular "Sportsman's Paradise" activity engaged in by non-residents is saltwater fishing. Data collected by NOAA's National Marine Fisheries Service (NOAA-Fisheries) points this out. Figure 12 illustrates the growth that occurred in this sector pre-Katrina. According to NOAA-Fisheries, the number of tourists involved in saltwater fishing grew from 95,000 in 1997 to nearly 207,000 by 2004. A 118 percent increase during the period. The USFWS statistics for this activity approximate NOAA's. Table 3 estimates the total number of nonresident saltwater anglers in 1996 to have been 91,000. By 2001 the number had grown to 118,000. This was accompanied by a three-fold increase in the number of resident charter boat and guide services during the same period (Figure 13).

The aforementioned Southwick report estimated 2003 angler expenditures for freshwater guides and charter boats at $3.5 million and $28.2 million for saltwater charters and guides. More than 24 percent of the non-resident saltwater anglers availed themselves of charter and guide services.

Table 2: Non-Resident Freshwater Angler Data

	1996		2001	
	Number	**Percent**	**Number**	**Percent**
Total anglers	*118,000	*14	123,000	19
Total trips	*280,000	*2	266,000	4
Total days of fishing	*420,000	*2	480,000	6
Average days of fishing	*4,000	(X)	4,000	(X)
Total anglers all types of water	*118,000	*14	123,000	19
Ponds, lakes or reservoirs	*93,000	*14	*98,000	*18
Rivers or streams	...	...	*48,000	18
Total days of fishing all types of water	*420,000	*2	480,000	6
Ponds, lakes or reservoirs	*323,000	*2	*346	*6
Rivers or streams	...	...	*249	*10

Note: The percent column is the percent represented by non-resident anglers of the total number of freshwater anglers. Detail does not add to total because of multiple responses.
…Sample size too small to report data reliably. *Estimate based on a small sample size.
(X) Not applicable.

Source: U.S. Fish and Wildlife Service, National Survey of Fishing, Hunting, and Wildlife-Associated Recreation , 1996 and 2001.

Table 3: Non-Resident Saltwater Angler Data

	1996		2001	
	Number	**Percent**	**Number**	**Percent**
Total anglers	*91,000	*26	118,000	23
Total trips	*218,000	*13	315,000	8
Total days of fishing	*234,000	*11	560,000	12
Average days of fishing	*3,000	(X)	5,000	(X)

Note: The percent column is the percent represented by non-resident anglers of the total number of saltwater anglers.
(X) Not applicable.

Source: U.S. Fish and Wildlife Service, National Survey of Fishing, Hunting, and Wildlife-Associated Recreation , 1996 and 2001.

Wildlife-Watching

Many out of state travelers to Louisiana engage in wildlife viewing activities. Data are, however, lacking and only 2001 information form the USFWS, Table 4. That year some 111,000 participants took 167,000 person-trips to Louisiana, and spent an average of 2.4 days per person. This NBT sector also shows promise for development, but it too will depend heavily on ecological issues and infrastructure rebuilding.

Table 4: 2001 Non-Resident Participation, Trips, and Days Wildlife-Watching Activities in Louisiana

Participants, trips and days of participation	Number	Percent
Total participants	*111,000	*100
Observe wildlife	*73,000	*65
Photographing wildlife	...	...
Feed wildlife	...	...
Total trips	*167,000	*100
Average days per trip	*2,000	(x)
Total days	*265,000	*100
Observing wildlife	...	...
Photographing wildlife	...	...
Feeding wildlife	...	...
Average days per participant	*2,000	(X)
Observing wildlife	...	(X)
Photographing wildlife	...	(X)
Feeding wildlife	...	(X)

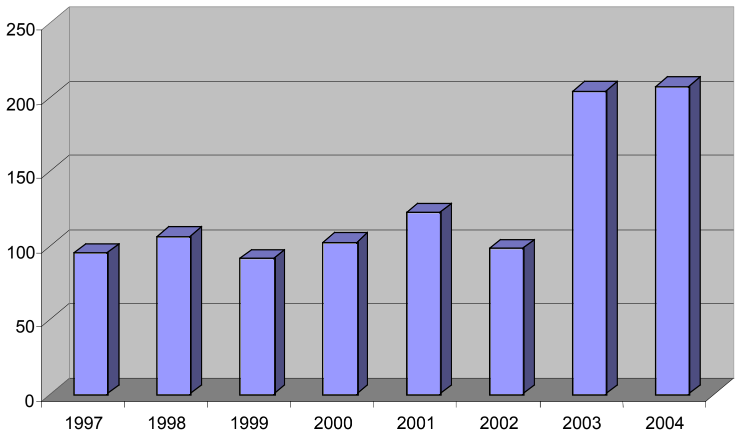
…Sample size too small to report data reliably. Estimate based on small sample size.
(X) Not applicable.
Note: Data for 1996 was not available because of unreliably small sample sizes.

Source: U.S. Fish and Wildlife Service, National Survey of Fishing, Hunting, and Wildlife-Associated Recreation , 1996 and 2001.

Figure 12

Out of State Saltwater Anglers 1997-2004

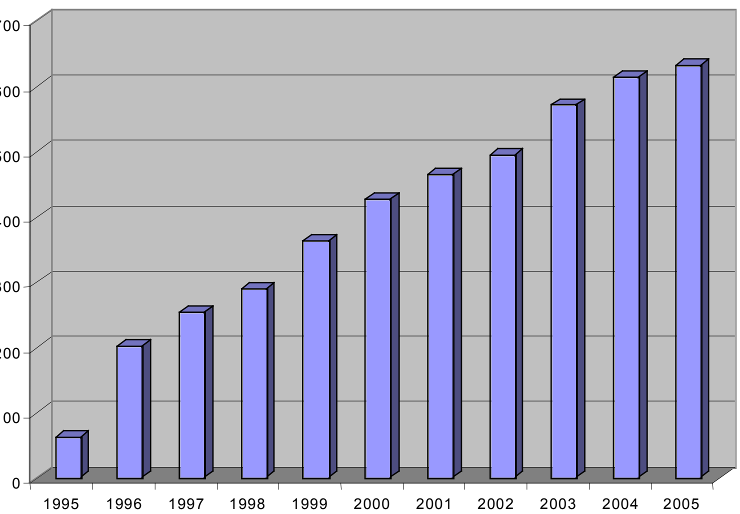
(Numbers in Thousands)



Source: U.S. Department of Commerce: National Oceanic and Atmospheric Administration, Fisheries of the United States, 1997-2004

Figure 13

Resident Charterboat and Guide Licenses 1995-2005

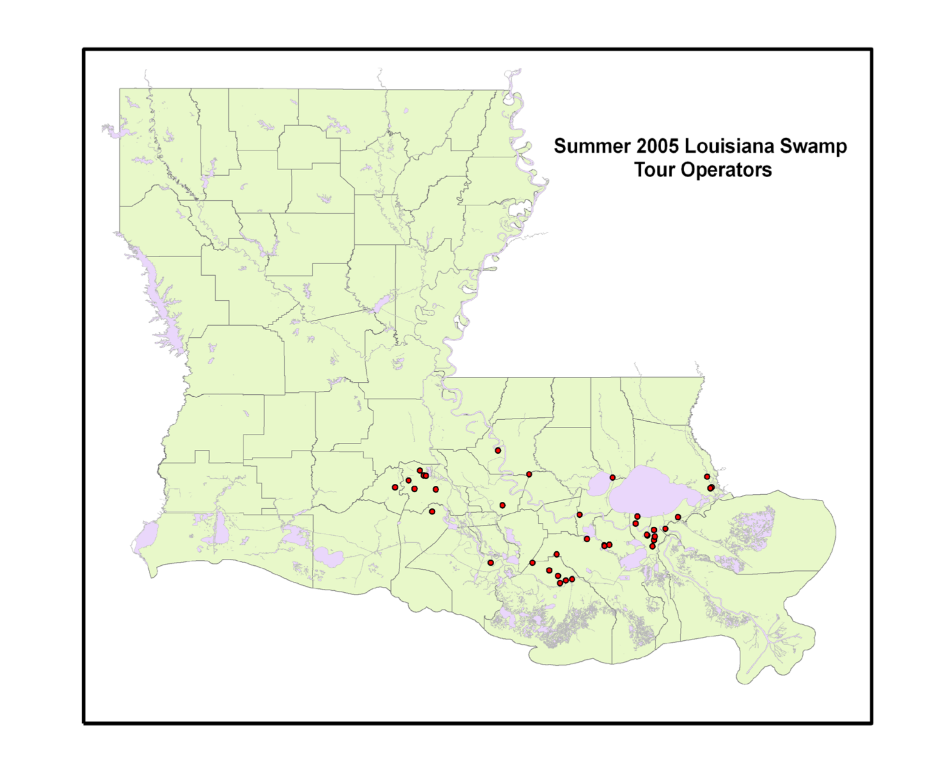


Source: U.S. Department of Commerce: National Oceanic and Atmospheric Administration, Fisheries of the United States, 1997-2004

Swamp Tour Enterprises—1997 and 2005

An additional component of the NBT research project involved updating a swamp tour enterprises study that was first conducted by LSG in 1997. Swamp tour enterprises are an example of the many travel and tourism related operations that are identified as small businesses in coastal communities. For the purpose of this study, swamp tours are defined as small businesses that are primarily engaged in nature-oriented boat tours.

The study was conducted during the early part of summer 2005 and thus does not reflect the long-term, post-Hurricane Katrina outlook for the industry. Attempts were made to contact these enterprises during the fall of 2005 and some of their responses/observations appear at the end of this report.



Methods

The existing swamp tours were identified from the following sources:

- Internet
- Coastal Louisiana newspapers
- *Louisiana Tour Guides*
- Attraction magazines
- Swamp tour brochures
- Parish tourist commissions and convention and visitor bureaus; economic development departments; welcome centers
- Louisiana Office of Tourism

A questionnaire was the primary data collection tool. The instrument had a few changes from the one used for the 1997 Swamp Tour Survey. The questionnaire was intended for in-person or phone interviews or for self-completion. Swamp tour operators were initially contacted by mail via a letter and a sample questionnaire. Of the 46 swamp tour enterprises identified to be currently (June-July 2005) operating, 27 participated in the study. Of the 27 participants, 17 self-completed and returned via mail or fax the questionnaire, six were interviewed in person and four were interviewed by phone.

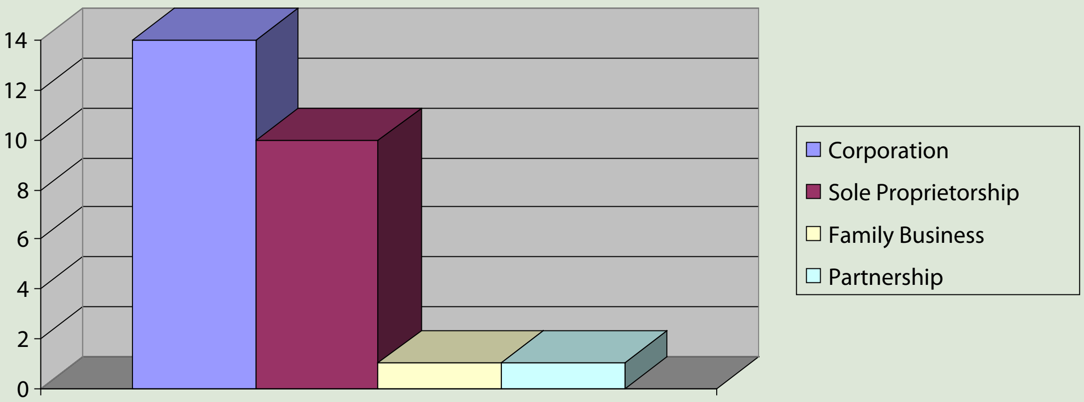
Analysis

Of the 46 identified swamp tours operators, 27 participated in the study. Twenty-three other tour enterprises were identified to have existed at some point; however, were not in business when the study was conducted. The figures display the most salient responses to the survey questions.

Swamp tours may operate through public and/or private lands. Of the 27 swamp tour operators who participated in the study, 56 percent navigate through private and public lands while only 15 percent operate through private land. Seventy-two percent of swamp tour operators reported leasing the land through which they conduct their tours. Eleven percent indicated that they own the land. Eleven percent responded that they both own and lease while 6 percent neither own nor lease. Fifty-five percent of swamp tour operators conduct their business from an office separate from their homes while 45 percent use their homes as a business base. The majority of swamp tour operators employ two or less persons.

Fifty-eight percent of the swamp tour operators described their businesses as year-round. The majority of respondents identified spring and fall as their peak seasons due to increased alligator activity, more temperate weather and abundant wildlife and vegetation. Tours are offered at a variety of times such as in the early morning, mid-day and at sunset. The average tour duration runs two to three hours.

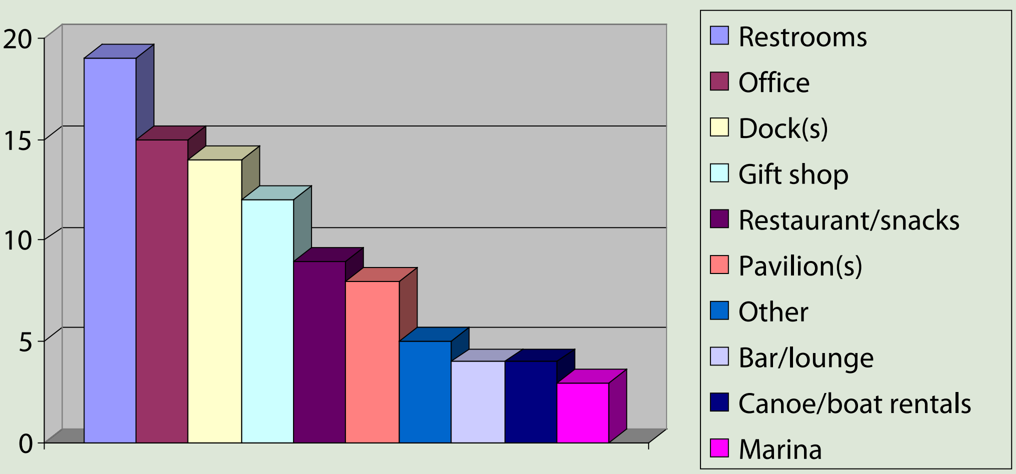
Figure 14: Is Your Business a:



A large majority of the responding swamp tours are either corporations or sole proprietorships.

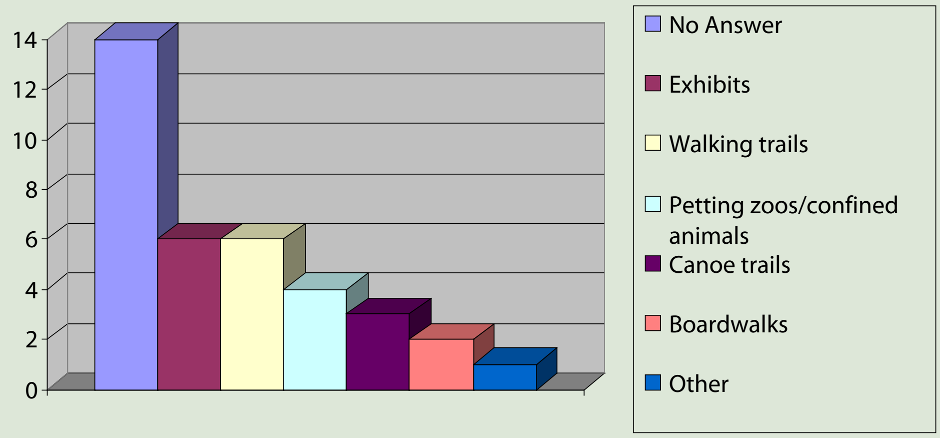
Figure 15 lists various on-site facilities and services offered by the swamp tour businesses. The majority have restrooms, an office and dock.

Figure 15: What Types of Facilities/Services Do You Have On-Site?



The "other" category includes the following notable responses: bed and breakfast, camping, transportation, covered porch and floating cabins.

Figure 16.: What Other Attractions Do You Have On-Site?



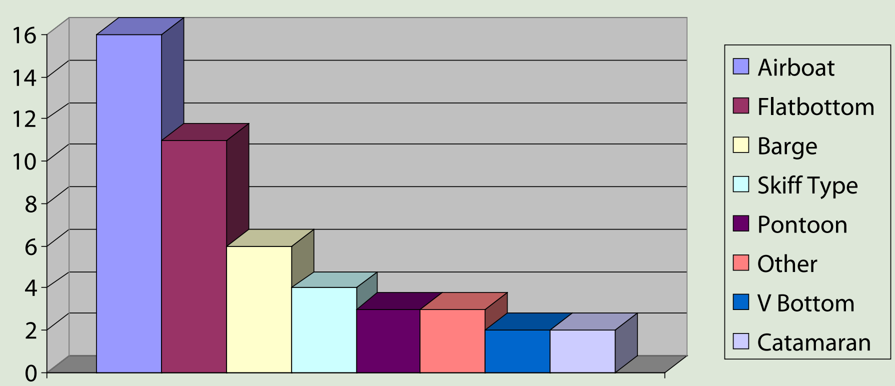
Most respondents have no other attractions on site (Figure 16). Of those responding, exhibits and walking trails were the most common and two swamp tours noted having a Cajun cabin and hosting a college program on Cajun culture.

Swamp tour prices vary depending on patron age, trip duration and transportation options to tour site(s). Prices ranged from $10 - $75 per person. The average trip lasts 2.5 hours with tours ranging from one to six hours. The majority of tour operators have set tour schedules. There is variety of tour types from which to choose. Services can accommodate larger groups of 70 people or intimate groups of two to six persons. Eighty-eight percent of swamp tour operators provide "specialty tours" or charters for birders, duck hunters, anglers, photographers, school groups and those individuals seeking history/culture or sunset cruises.

Depending on the size and style of the tour operation, swamp tour vessel types range from barges to canoe-type paddle boats (Figure 17). Airboats and flatbottom boats are the most common types of boats used by swamp tour operators. Fifty-six percent of swamp tour boats have handicap access.

The average percent of out-of-state clientele is 84 percent. This clientele includes international travelers as well. Seventy-three percent of the tours offer multi-lingual guides. Four percent do not offer multilingual guides through their staff but can arrange them if requested. In addition to English, enterprises offer the following languages in descending order: French, Spanish, German and Italian.

Figure 17: What Type of Vessel Do You Operate?



The “other” category includes a johnboat.

Survey participants were asked to rank order the groups that make up their clientele. Senior citizens were reported to be the largest single clientele group with families, young couples, school aged groups, equally mixed groups and others following in descending order.

Fifty percent of those surveyed stated that the number of patrons taking their tours has increased since the late 1990s. Nineteen percent reported no change, seven percent reported a decrease and 4 percent reported that the numbers vary. The average number of patrons reported for 2004, ranged from 160 to 40,000 with the average being 7,209 patrons. Particularly noteworthy is that 12 operators did not answer this question.

Swamp tour operators were asked what their visitors seemed to most enjoy from their tours. The most common responses were alligators, tour personality, staff knowledge, scenery and birds. In response to a question regarding what visitors seemed to dislike or complain about, a significant amount reported litter. Other complaints concerned heat and impolite boaters. A few respondents have received complaints regarding insects, lack of alligators in winter and poor highway signage.

Sixty percent of swamp tour operators reported involvement in other types of businesses in addition to swamp tours. Responses included the following businesses:

- Crawfish industry
- Grocery store
- Alligator hunting guide
- Plantation/city tours
- Environmental protection
- Engineering firm
- Restaurant
- Bed and breakfast
- Cultural and eco-tours
- Tourism publication
- Antiques

Additionally, operators were asked what types of business(es) they were involved with prior to working with swamp tours. Responses included the following:

- Airboats
- Commercial fishing
- Appliance repair
- Guiding
- Education
- Consulting
- Contract work
- Crawfishing
- Oil operations
- Computer programming
- Education
- Boat building
- Department of Transportation and Development

The majority of swamp tour businesses have been operating between 16 and 29 years; however, the next largest group has been in business for less than five years, indicating the swamp tour industry is perhaps still growing (Figure 18). The average number of years swamp tour operators reported being in business was 13 years. Operators were also asked, “…taking into account past and present owners, how long had their swamp tour(s) existed?” The average response to this question was 17 years.

Figure 18: How Many Years Has Your Swamp Tour Business Been in Operation?

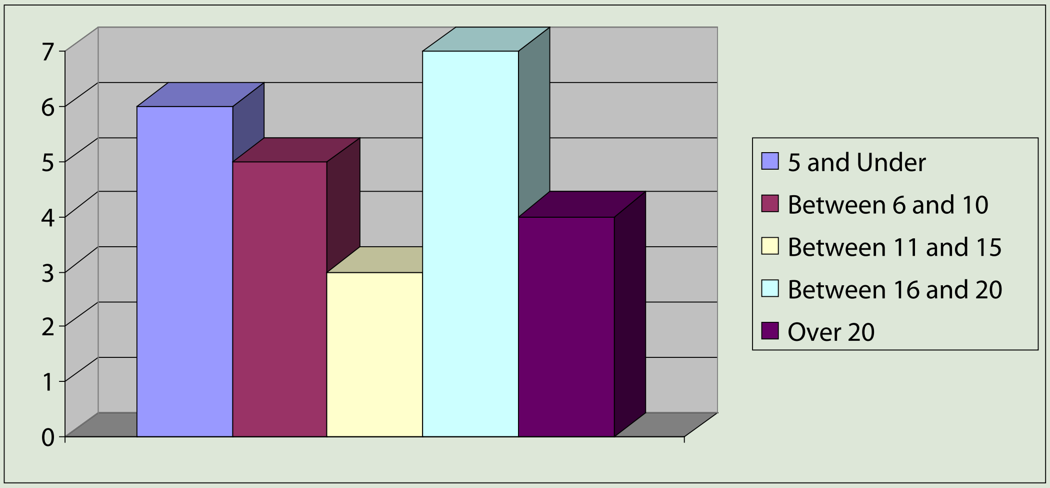
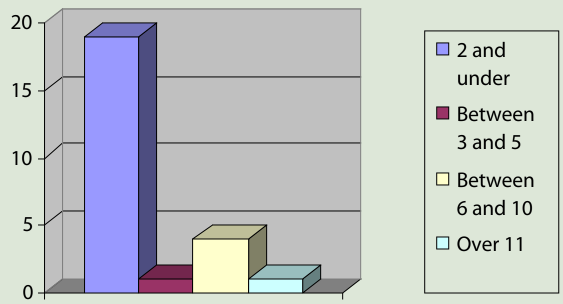
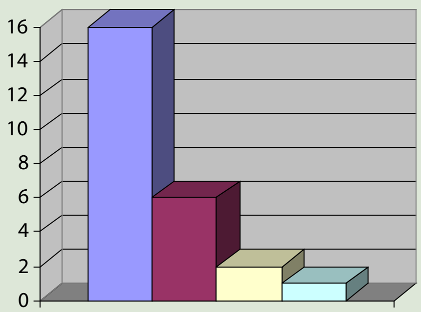


Figure 19: Including Yourself, How Many People Did Your Business Employ in 2004?

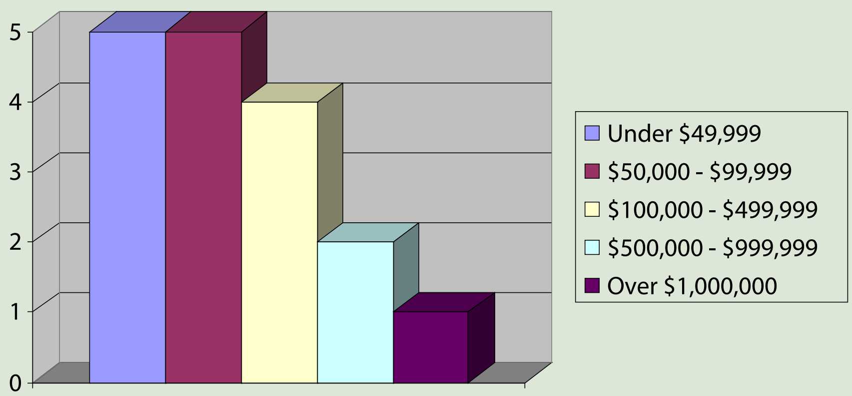




Full Time **Part Time**

Swamp tours are not significant employers and are largely operated by the owner/captain. Most employ less than two full-time and part-time employees. (Figure 19)

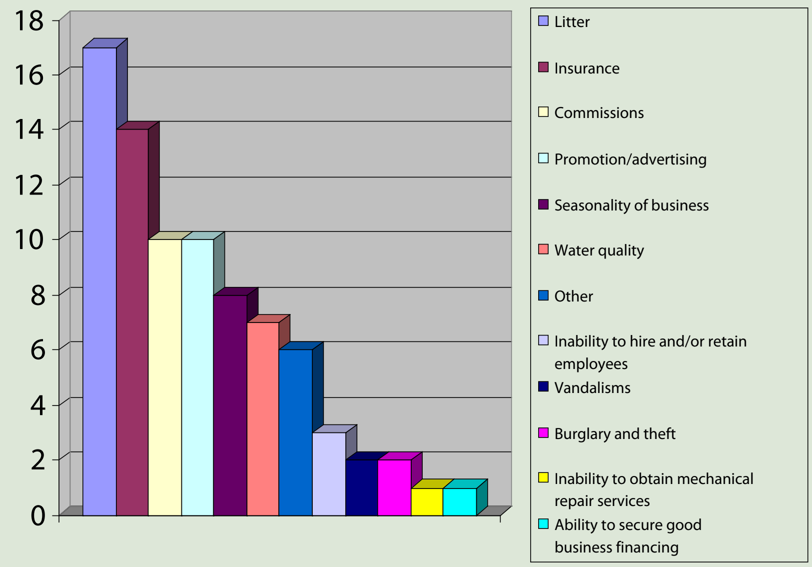
Figure 20: What Is the Estimated Market Value of Land, Building, Equipment and Inventory Owned by Your Business in 2004?



Most tours were small and not heavily capitalized (Figure 20). The average market estimate of land, building, equipment and inventory was $316,000.

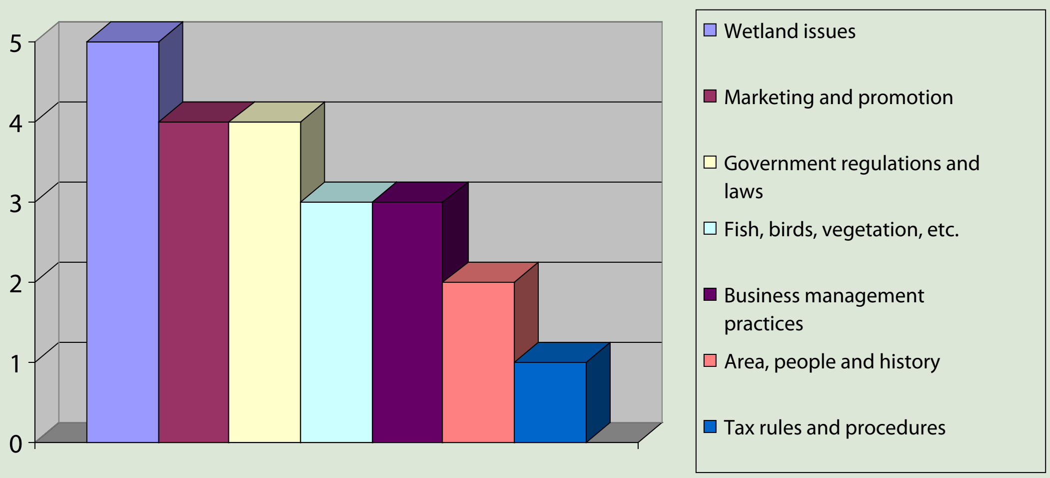
Swamp tour operators were questioned about the management problems they face, as listed in Figure 21. Litter was identified by 63 percent to be a problem despite the many attempts to promote cleaner communities. Fifty-two percent cited insurance issues as a significant problem. Many operators also expressed increasing concern regarding the commissions charged by hotel concierges who assist in arranging tours.

Figure 21: What Are the Top Five Management Problems that You Face in Your Business?



Overall, swamp tour operators felt confident that they are well informed regarding Louisiana's coastal resources, culture and history (Figure 22). Few indicated that they or their employees need additional training and many cited their native ancestry as contributing to their knowledge. Five operators needed more training and information regarding wetland issues. Additionally, survey participants were asked about information sources used by captains and other hosts. Seventy-seven percent reported their knowledge derives from experience; 35 percent indicated from books and 15 percent reported from college.

Figure 22: In What Areas Do You Feel that the Captains and Other Hosts Need More Training and Information?



Swamp tour operators were asked an open-ended question regarding what they considered to be the "one most positive" factor that would enhance the likelihood of business success in the future. Responses included the following:

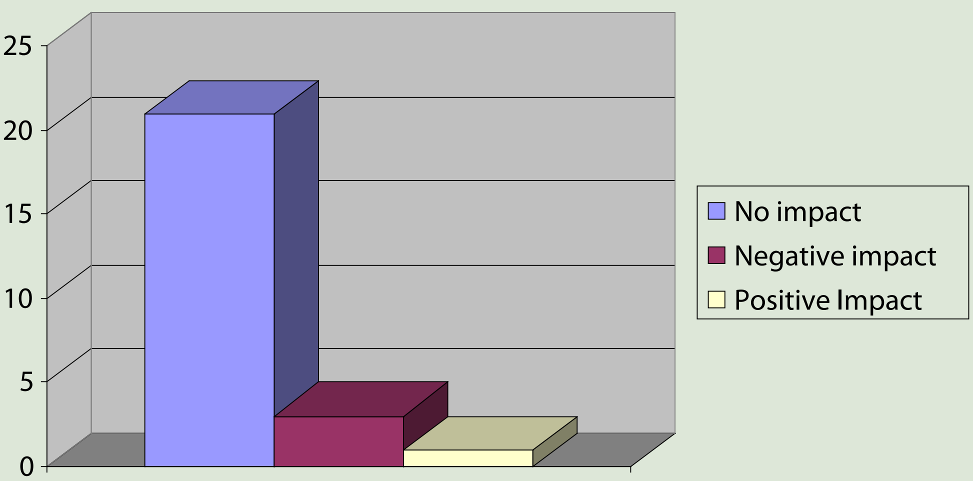
- Location and facility
- Good equipment
- Personality
- Knowledge
- Area airboat can cover
- Caring owner
- Strong standing with industry leaders
- Attitude
- Uniqueness of tour
- Good value
- Small tour group size
- Personal, intimate tour
- Repeat business

Additionally, they were asked the "one most negative" factor that could potentially hinder business success. Operators responded with the following answers:

- Decline in tourists
- Lack of planning
- Lack of personal time
- Insurance
- Gas prices
- State bureaucracy
- Poor economy
- Negative press from airboat accidents
- Saltwater intrusion
- Inconsistent clientele
- Crime in New Orleans
- Lack of knowledge among other operators
- Tour companies paying too much commission

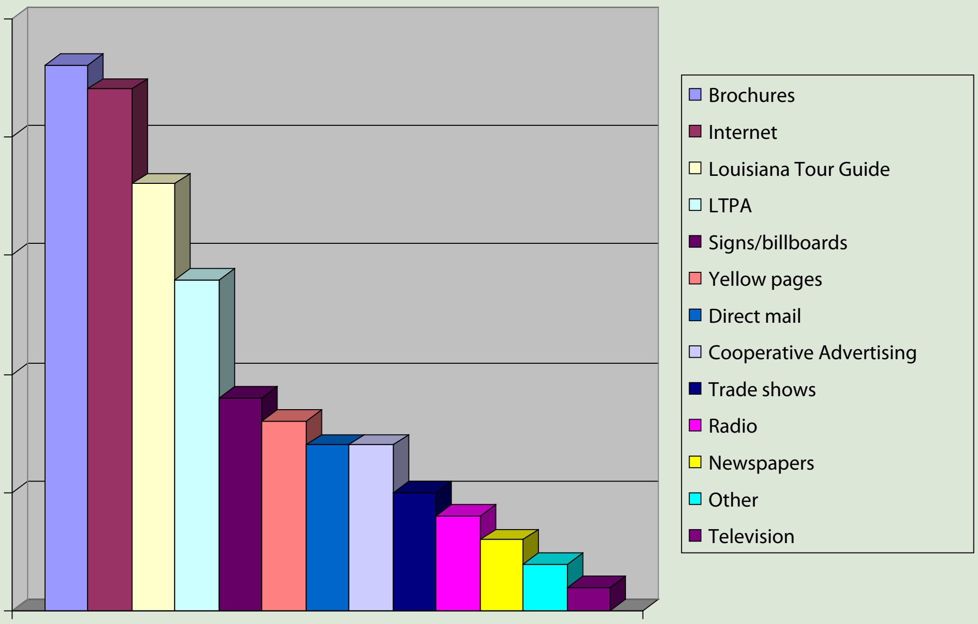
The "other" responses included concierge commission, violation of wake zones and political apathy. Swamp tour operators were also asked about what type(s) of tourist attractions could or should be developed to attract visitors. Operators indicated that historical and cultural attractions and nature trails would be most helpful to their business. Approximately 10 percent of respondents reported that boardwalks, restaurants, waterfront attractions and wildlife attractions would be desirable. Less than 10 percent indicated that amusement parks, boat rentals and gift shops would attract more visitors.

Figure 23: In The Last Five Years, What Impact Has the Loss of Louisiana's Coastal Wetlands Had on Your Swamp Tour Business?



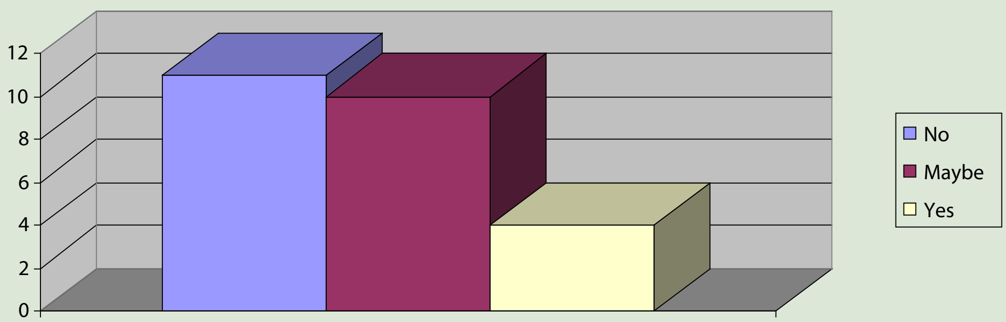
Swamp tour operators provided other information regarding Louisiana’s coastal wetlands loss. Figure 23. For example, 80 percent of tour operators reported that they share information with patrons about wetlands loss. Eighty-eight percent of tour operators have heard of Louisiana’s initiative, *America’s Wetlands*; while 12 percent reported not having heard of it.

Figure 24: What Type(s) of Advertising Do You Currently Use to Promote Your Business?



Brochures and other Websites are the most common types of advertising (Figure 24). An interesting observation is that quite a few respondents neither appeared in the Louisiana Tour Guide nor were members of the Louisiana Travel Promotion Association (LPTA).

Figure 25: Do You Think an Association/Organization of Swamp Tour Operators Would Be Helpful?



From Figure 25 one can discern that there is little interest in a swamp tour group association or equivalent.

Three-quarters of respondents reported that they are members of their local parish’s Convention and Visitors Bureau or Tourist Commission. More than 75 percent felt that their community supports local tourism business.

The survey gave swamp tour operators the opportunity to share other comments regarding tourism issues or areas that they felt need to be addressed for the continued success of their businesses. Some operators expressed significant concern about the need to limit the amount of commission hotel concierges charge for tours and this was particularly the case for the New Orleans area. Others cited needing more advertising in and out-of-state by Louisiana Office of Tourism. Many noted the lack of adequate signage and highway improvements. The majority called for better management on a whole to prevent future problems. Some respondents added that operators should be licensed, insured and educated in the disciplines related to their respective tours.

Similarities and Changes between 1997 and 2005 Studies

To facilitate assessing changes over the eight year period, the questionnaire used for the 2005 study was very similar to the one used for the 1997 study. The following is a brief summary of the industry's most notable changes.

• Thirty-seven of 43 identified swamp tour operators participated in the 1997 study whereas 27 of 46 identified operators partook in the 2005 study. In 1997, the majority were personally interviewed; however, the majority in this study self-completed and returned the questionnaires.

• In 1997, the majority of swamp tour operators categorized their businesses as sole proprietorships (49 percent) whereas in 2005, the majority selected corporations (52 percent).

• In both studies, the majority of operators reported navigating through both public and private lands.

• In both studies, the majority of on-site facilities and services included restrooms and an office. In 2005, more than half the enterprises had a dock as well.

• Swamp tour prices ranged from \$10.00 - \$50.00 per person in 1997 and similarly ranged from \$10.00 - \$75.00 in 2005 depending on patron age, trip duration and transportation options to tour site(s).

• Between the two study years, tour operators reported out-of-state visitors as making up 14 percent more of clientele. The number increased from 70 percent to 84 percent.

• In both studies, the most frequent responses to what tour patrons seemed to enjoy the most were alligators, scenery, wildlife/birds and culture. Complaints in both studies concerned litter.

• Forty-six percent of the 1997 participants indicated their swamp tour operations as their only business whereas in 2005, 60 percent were involved in another type of business.

• The reported estimated market value of land, building and inventory owned by swamp tour operators increased between 1997 and 2005. For example, 35 percent of business owners reported value under \$50,000 in 1997. In 2005, 19 percent reported value under \$50,000. In the first study, 5 percent of owners indicated value over \$500,000; however, in the second study, 4 percent indicated value surpassing \$1,000,000.

• The top three management problems in both studies were litter, insurance and commissions given to hotel concierges who arrange tours.

• In both studies, the majority of operators felt confident that they are well informed regarding Louisiana's coastal resources, culture and history. Few indicated that they or their employees need additional training and many cited their native ancestry as contributing to their local knowledge.

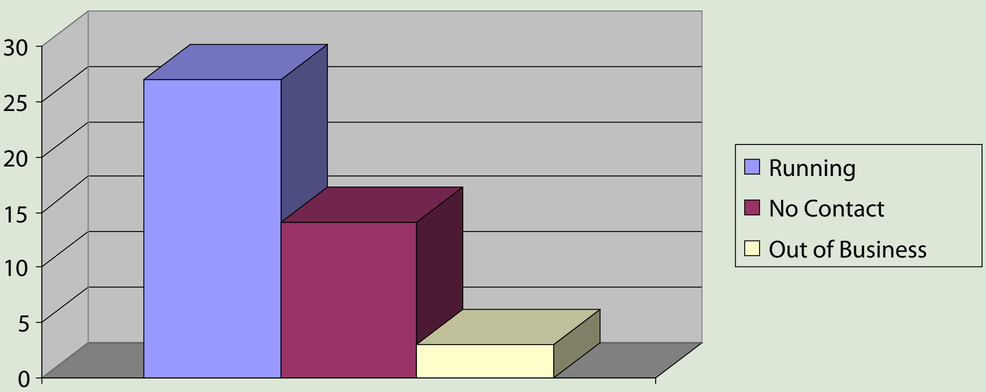
• The Internet has become a significant advertising tool, and participation in the Louisiana Tour Guide and membership in LTPA has declined since 1997.

• Approximately 25 percent of the 1997 study participants thought that an association/organization of swamp tour operators would be helpful. That number decreased to 16 percent in the 2005 study.

Post Hurricane Katrina: Louisiana Swamp Tours

Three weeks following Hurricane Katrina and Rita, efforts were made to contact all 46 swamp tour establishments. In the fall of 2005, 27 were operating and taking reservations. We also established that three of the 46 were completely shut down without intentions of rebuilding. These three establishments were located near the New Orleans area. The remaining 16 establishments could not to be contacted.

Figure 26: Post Katrina Swamp Tours



The 27 operators were asked about the condition of their operation, the amount of customers they were receiving, and asked to provide any other comments. An overwhelming amount of operators claimed that the largest problem they were seeing was the amount of litter and debris within their touring area. They were unable to safely maneuver around their tour sights, and the natural beauty is temporarily lost. Also, the numbers of tours had declined significantly and jeopardized their future success. The infrastructure damage was not extremely high. Most of the operators claimed they had moved their boats and equipments north to prevent significant damage.

The main concern of the operators is whether Louisiana will continue to be a highly toured state. They hope that the state will rebuild rapidly so that they may continue to operate in the long run. Many of the operators that were called claimed they were taking reservations, but were not averaging more that one to two tours per week