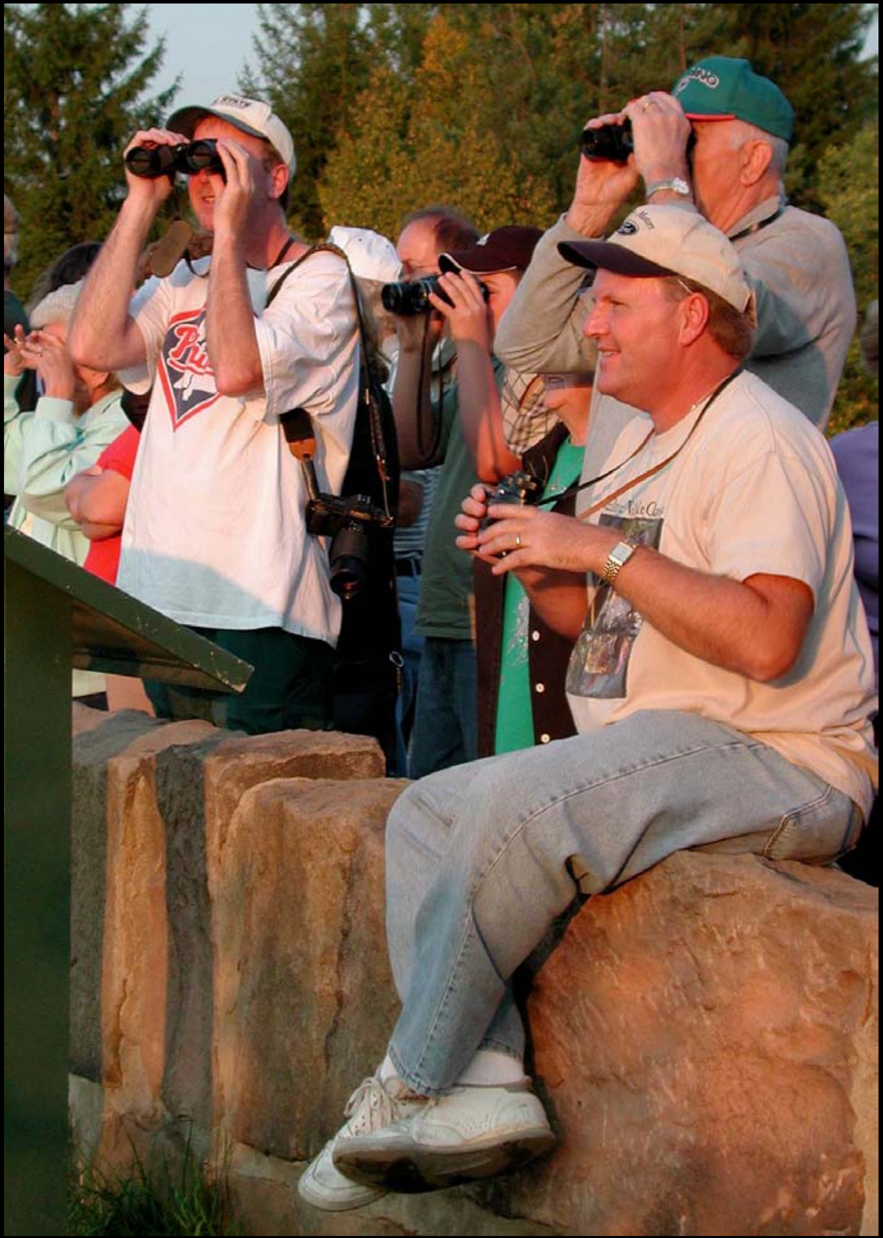
The ABC's of Nature-Based Tourism



Sustainable Nature Tourism Strategies

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Chief Operating Officer

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Current trends in nature tourism

What do experiential tourists seek when choosing a destination?

Look at tourism trends

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

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Trends

- However, in Louisiana currently, non-resident visitors are ½ 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

Trends

One Half of Americans are Adventure Travelers

46% Soft Adventure

16% Hard Adventure

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Trends

- 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.

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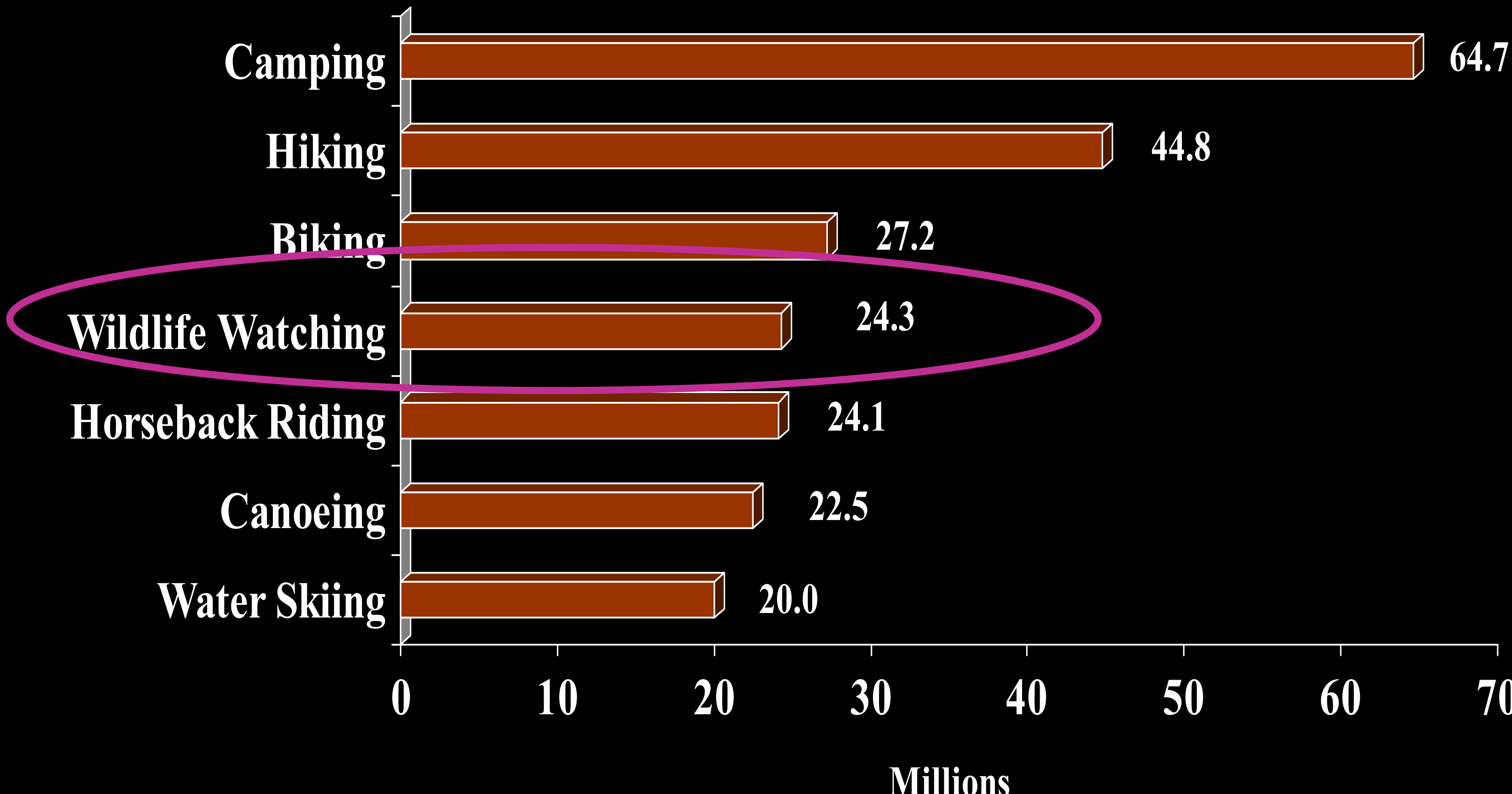
SOFT ADVENTURE ACTIVITIES (On Trips in Last 5 Years)



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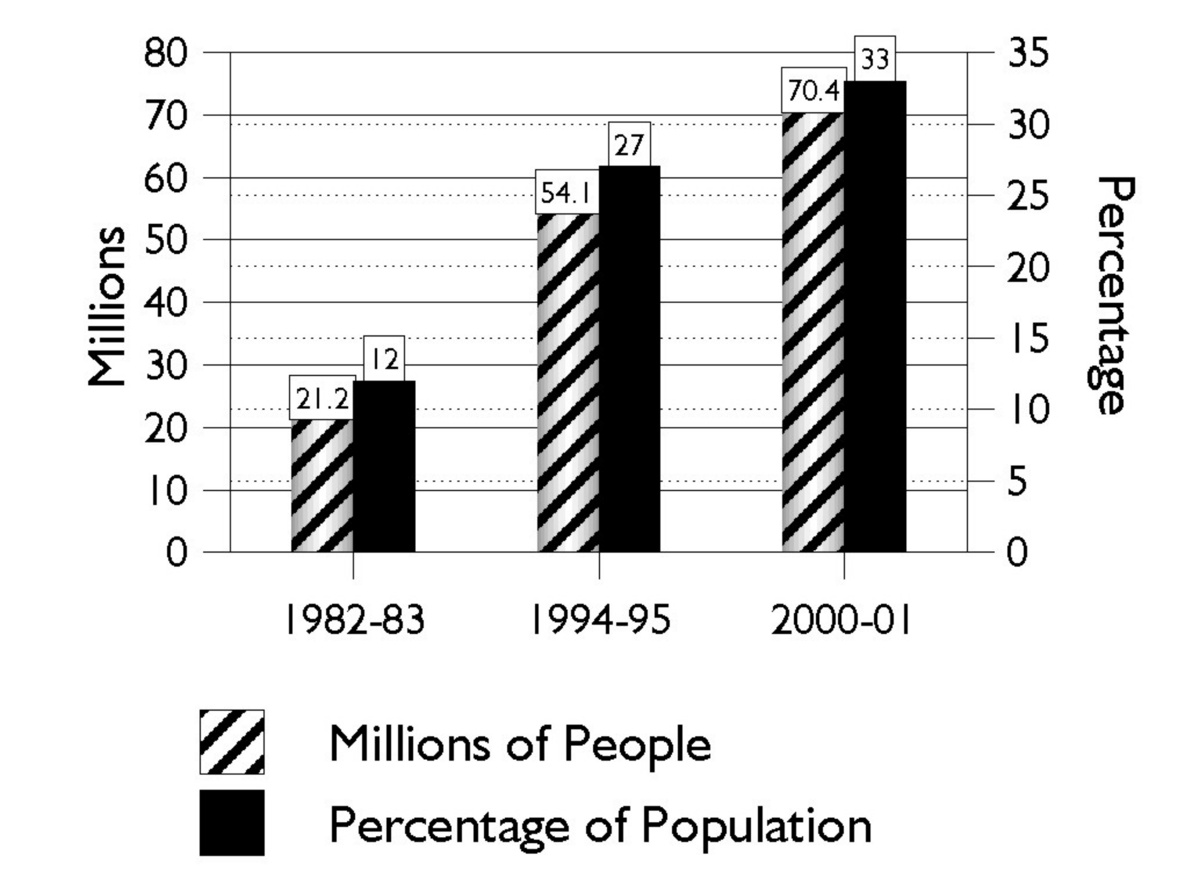
NSRE Participation Trends

Activity	Millions of participants 1994-95	Millions of participants 2000-02	% change 1994-2002
Kayaking	2.58	7.29	182.56
Snowboarding	4.43	10.53	137.70
Jet skiing	9.26	20.31	119.33
View/photo fish	26.82	53.06	97.84
Snowmobiling	6.95	11.81	69.93
View wildlife	61.11	95.26	55.88
Backpacking	14.80	22.76	53.78
Day hiking	46.68	70.62	51.29
Canoeing	13.76	20.63	49.93

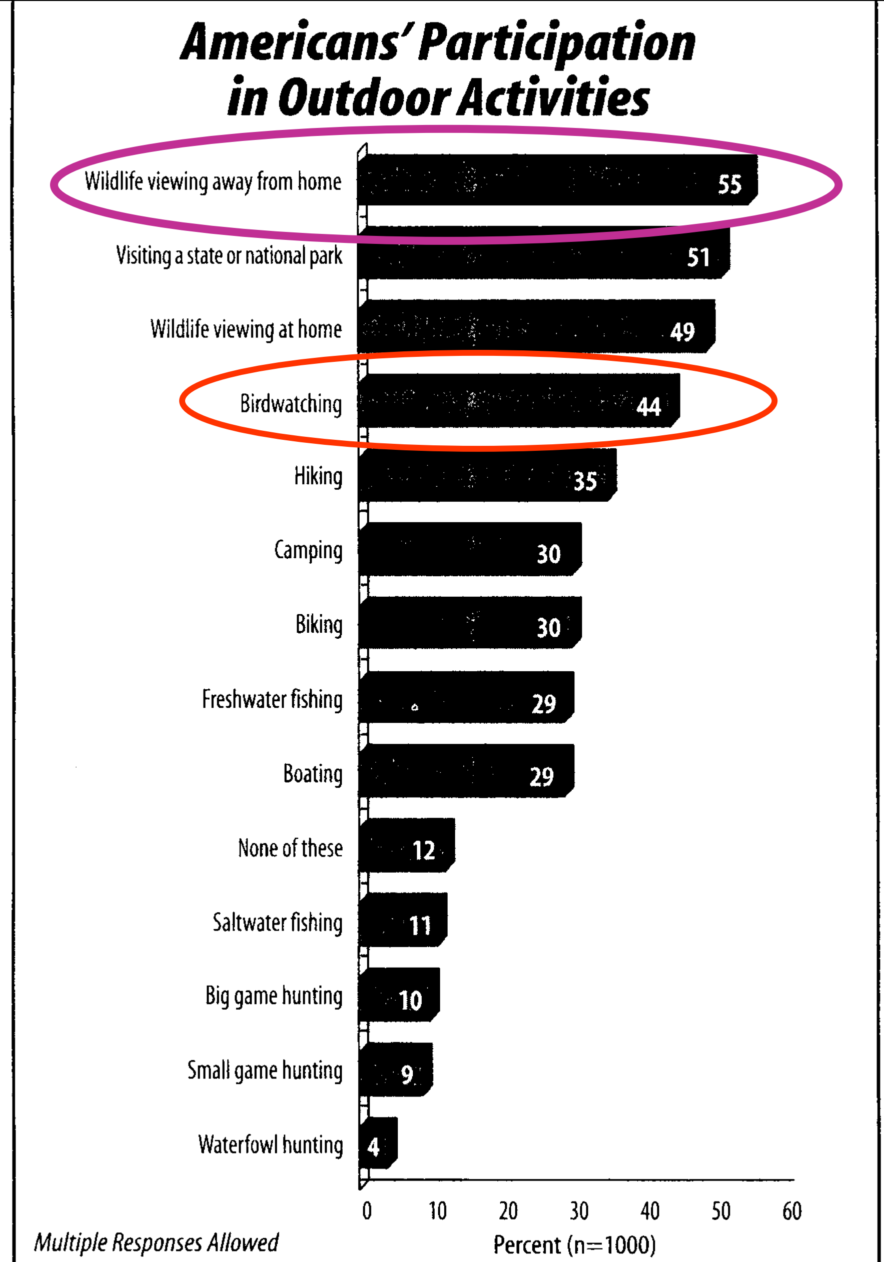
National Survey on Recreation and the Environment (NSRE) - Birdwatching

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

Type of Participation	Number 1996	Number 2001	Percent Change	Number Change
Fishing	35,246	34,067	-3%	-1179
Hunting	13,975	13,034	-3%	-941
Wildlife Watching	62,868	66,105	+5%	+3,237

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

Expenditures	***1996 $***	***2001 $***	***% Change***	***# Change***
Fishing	42,710,679	35,632,132	-17%	-7,078,547
Hunting	23,293,156	20,611,025	-12%	-2,682,131
Wildlife Watching	29,062,524	33,730,868	+16	+4,668,344

Demographics

Who is a nature tourist?

Fermata Research - Who is a nature tourist?

Combined five surveys (n=2787)

Age	**52.1 years**
Gender	**48.3% male, 51.7% female**

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Fermata Research - Who is a nature tourist?

Combined five surveys (n=2787)

Age	52.1 years
Gender	48.3% male, 51.7% female
Income	$61,962
Household Size	2.45 persons
Education	16.36 years

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Fermata Research - Who is a nature tourist?

Combined five surveys (n=2787)

Age	52.1 years
Gender	48.3% male, 51.7% female
Income	$61,962
Household Size	2.45 persons
Education	16.36 years
Frequency of Trips	10.36 trips per year; 3.31 days per trip, 2.38 nights per trip
Origin	28.9% urban, 47.6% suburban, 4.3% rural (farm), 19.1% rural (nonfarm)
Distance from home	6 hours or less drive - one way

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.

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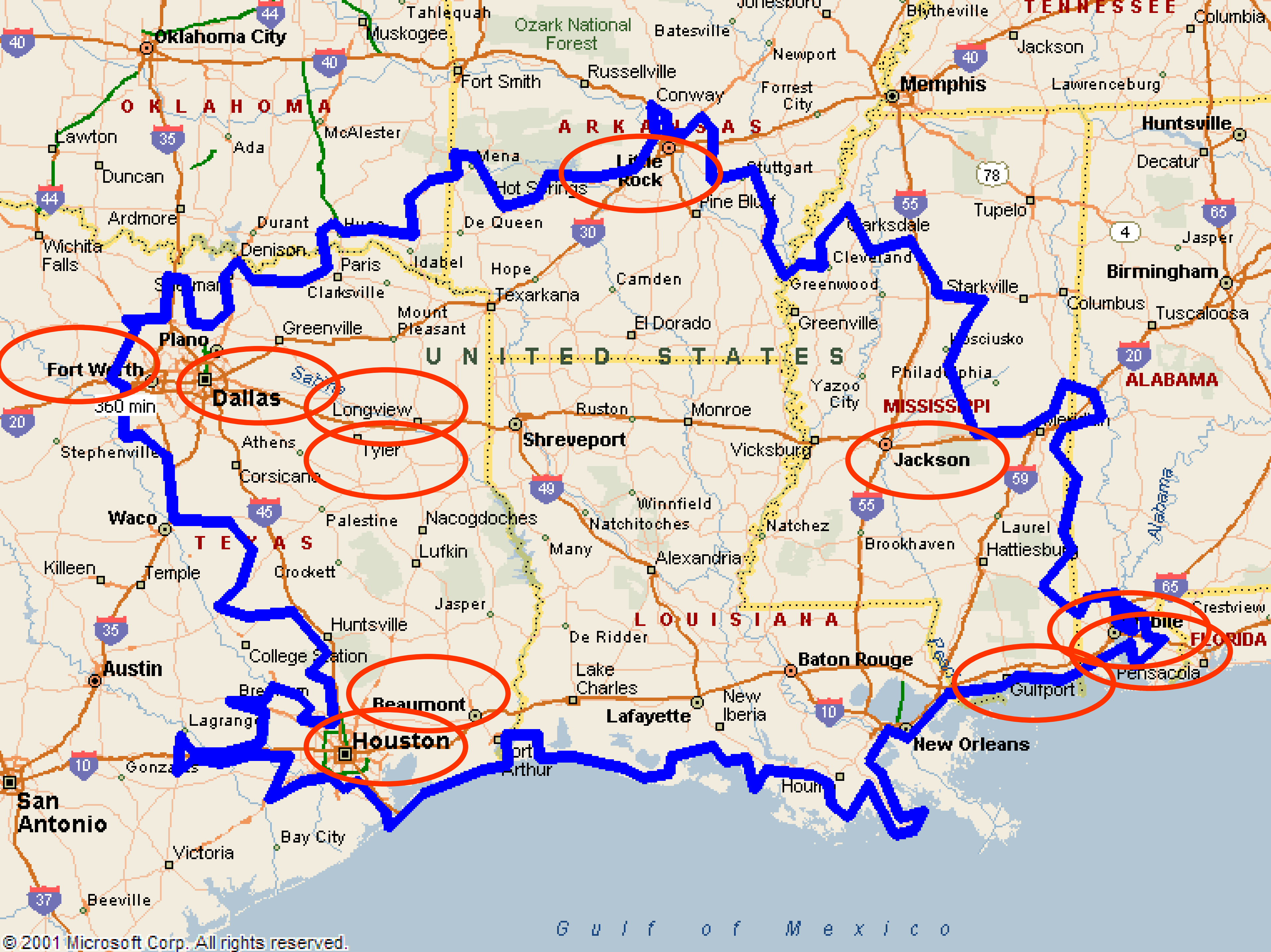
- Top Louisiana non-resident markets: Houston (12%), Dallas – Fort Worth (11%), San Antonio (2%) and Austin (2%)

- 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.


Oklahoma City
Tahlequah
Muskogee
Ozark National Forest
Batesville
Blytheville
TENNESSEE
Columbia
Jackson
Newport
Memphis
Fort Smith
Russellville
Conway
Forrest City
Lawrenceburg
OKLAHOMA
McAlester
ARKANSAS
Huntsville
Lawton
Ada
Mena
Little Rock
Stuttgart
Decatur
Duncan
Hot Springs
Pine Bluff
Tupelo
Ardmore
Durant
De Queen
Clarksdale
Jasper
Wichita Falls
Denison
Paris
Idabel
Hope
Camden
Cleveland
Birmingham
Clarksville
Texarkana
Greenwood
Starkville
Columbus
Tuscaloosa
Mount Pleasant
El Dorado
Greenville
Plano
Fort Worth
Dallas
UNITED STATES
Philadelphia
Yazoo City
ALABAMA
MISSISSIPPI
360 min
Longview
Ruston
Monroe
Athens
Tyler
Shreveport
Vicksburg
Jackson
Stephenville
Corsicana
Winnfield
Waco
Palestine
Nacogdoches
Natchitoches
Natchez
Laurel
TEXAS
Many
Brookhaven
Killeen
Temple
Crockett
Lufkin
Alexandria
Jasper
LOUISIANA
Crestview
Huntsville
De Ridder
FLORIDA
Austin
College Station
Baton Rouge
Pensacola
Lake Charles
Gulfport
Beaumont
New Iberia
Lagrange
Lafayette
Houston
New Orleans
San Antonio
Bay City
Victoria
Beeville
Gulf of Mexico
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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

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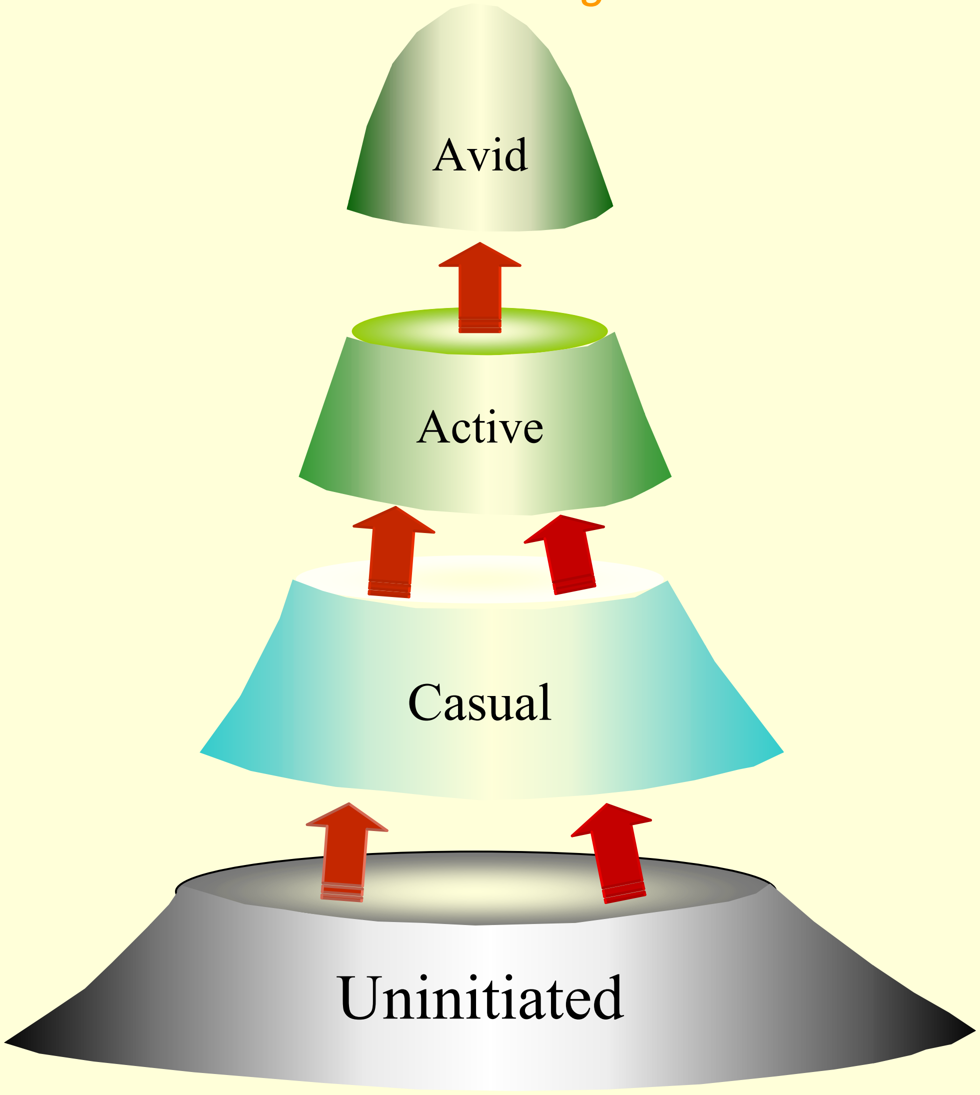

70.4 million NSRE birders
46 million USFWS bird observers
40.3 million residential bird observers
18.3 million nonresidential bird observers
1 million Nature Conservancy members
600-700 thousand NAS members
400 thousand purchased Sibley
30 thousand Cornell Lab supporters
22 thousand ABA members

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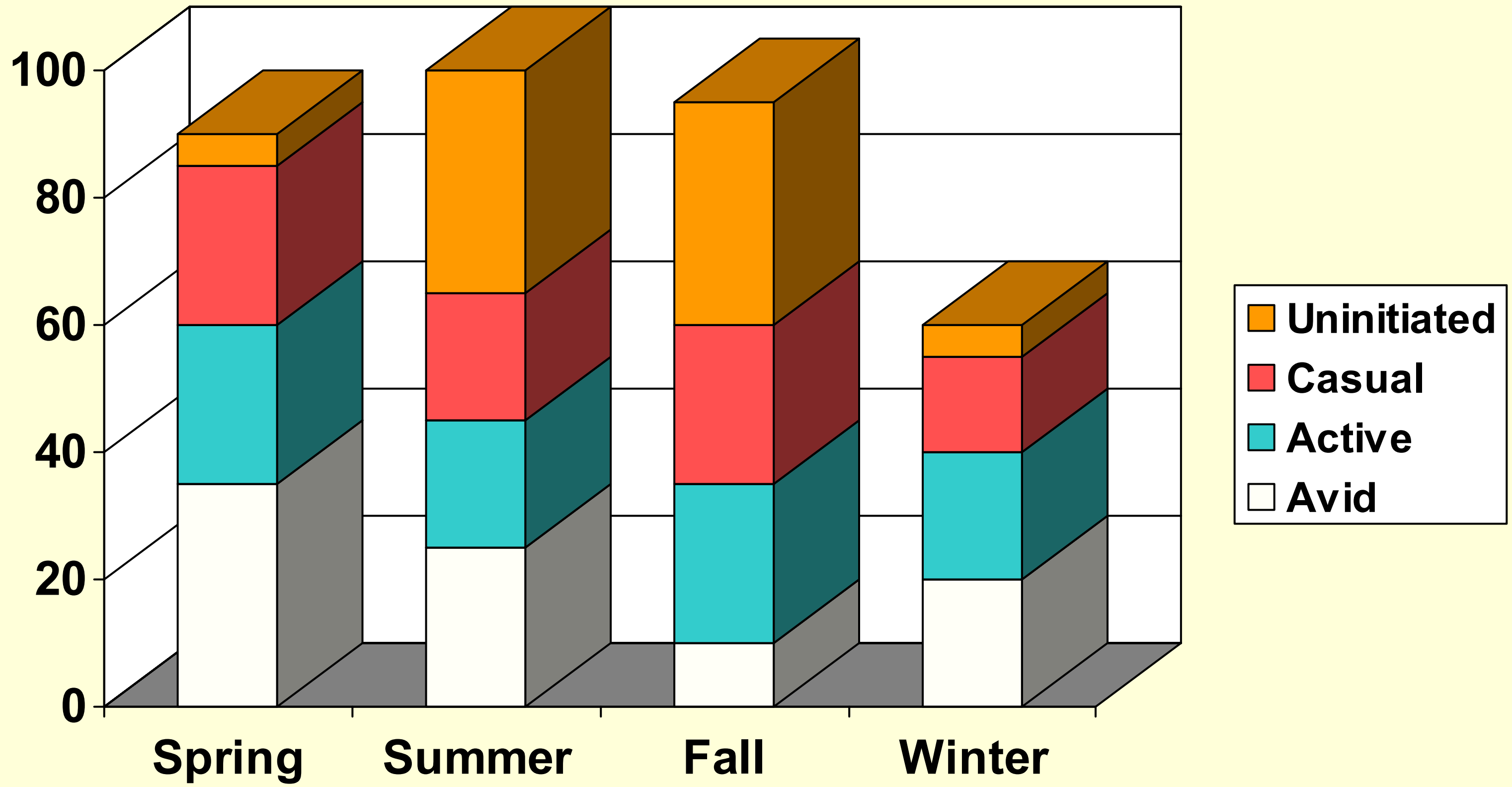
Market Segmentation in Nature Tourism

The Avitourism Example

Avid	Active	Casual	Uninitiated
Primary Recreationist	Secondary Recreationist	Peripheral Recreationist	Incidental Recreationist
Avitourist	Nature Tourist	Experiential Tourist	General Tourist
Committed Birder	Naturalist Wildlife Viewer General Nature Traveler	Adventure Traveler Cultural/Historical Traveler	Leisure Traveler Business Traveler

Market Segmentation in Nature Tourism
Travel patterns



What else do we know about experiential travelers?

- 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.

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- 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).

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	Historic/cultural travelers	Other U.S. travel
Average age	48	46
Average length of stay	4.7 nights	3.4 nights
Graduate degree	23%	20%
Use hotels, motels, B&Bs	62%	56%
Trip includes shopping	44%	33%
Spend more than $1,000	18%	12%
Take group tour	6%	3%
Air travel as primary mode	22%	18%

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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."

V. Lederman (2001) in the *International Ecotourism Society Newsletter*

Consumer preferences and demands - AUTHENTIC EXPERIENCES

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."

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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…

The trail is the mechanism by which we orchestrate the nature experience.

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**.

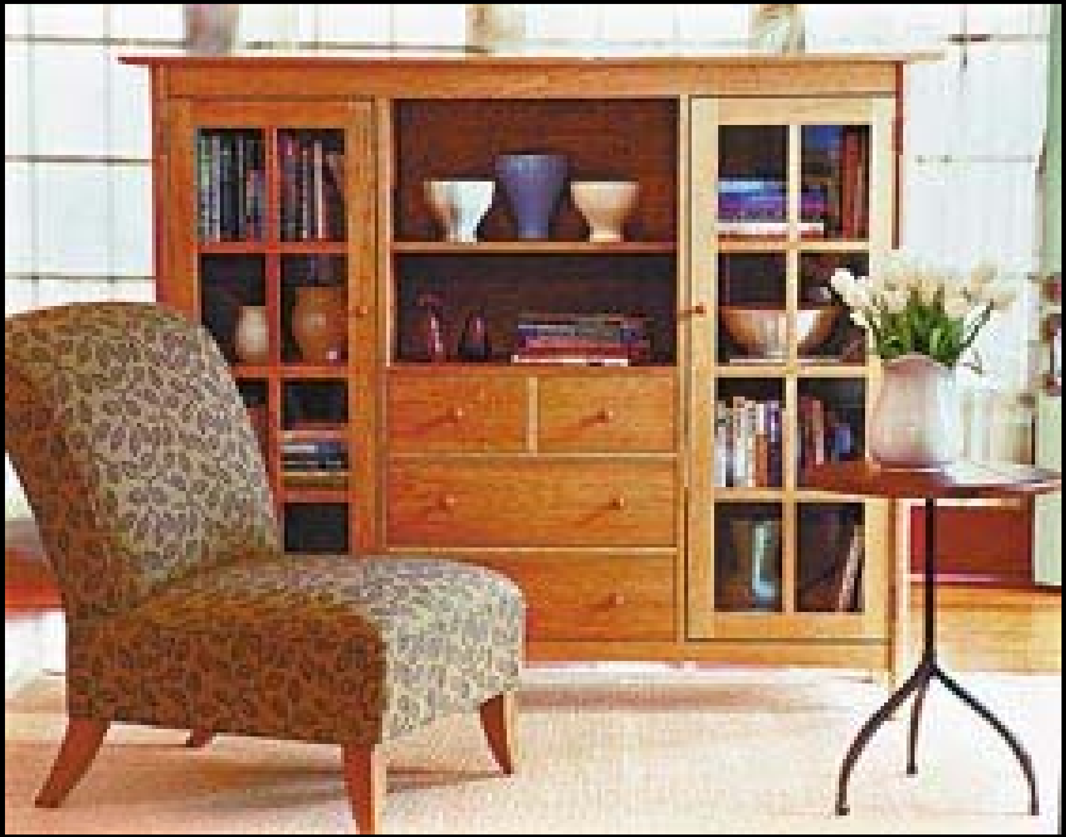
They should be offered in a **balanced mix** of expensive museum-quality genuine artifacts, affordable utilitarian products that are authentic and traditional, and fun inexpensive impulse buys.

V. Lederman (2001) in the *International Ecotourism Society Newsletter*

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.



Benefits to local communities from experience-based tourism

- Economic Development
- Recreation
- Education
- Communication
- Conservation

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