

North American Ecotourism Markets: Motivations, Preferences, and Destinations

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This article is the second of a two-part series. The first part, "North American Ecotourists: Market Profile and Trip Characteristics," appeared in the spring 1996 issue. This study shows that all North American ecotourism markets, both the more generally interested (consumers) and experienced ecotourists, enjoy multiple activities, including walking and hiking. Consumers prefer more passive activities and cultural experiences, while ecotourists are more active, and prefer modest, intimate-type accommodation. Principle motivations relate to setting. Motivations that discriminate ecotourists from other tourists are discussed in terms of benefits sought.

This article describes a study of North American ecotourism markets (HLA Consultants and ARA Consulting 1994) jointly commissioned by Alberta Economic Development and Tourism, the government of British Columbia, and two Canadian federal departments. This second of a two-part study (hereafter referenced as HLA/ARA or the Market Demand Study) is based on a range of valuable primary research directed toward general consumers, experienced ecotourists, and members of the travel trade. The study methodology is described in detail in part one of the series (Journal of Travel Research, Spring 1996). Respondents were asked questions related to their activities, preferences, and motivations. But whether visitors actually participate in ecotourism in the destination location is ultimately determined by their activities and behavior, and the behavior and practices of operators and others in the industry.

TRIP PREFERENCES

Activity Preferences

Ecotourists are interested in a tremendous range of activities. However, walking, hiking, and trekking may not have been given as much emphasis as they deserve. There is some indication in the literature that for many destinations, these are popular activities for nature-based tourists (Nababan and Aliadi 1993; Backman and Potts 1993; Yuan and Christensen 1994; Lew 1995). In the Market Demand Study, members of the ecotourism travel trade indicated the activities they offered most on ecotourism trips (Table 1). Hiking topped the list in total package offerings and in the most popular packages.

Similarly, both consumers and ecotourists rate hiking as their most preferred activity (Table 2). When walking, hiking, and backpacking responses are grouped together, clearly they are the most popular activities. Of particular interest for both groups is the preference listed for the next trip, which by definition was to be primarily an ecotourism vacation. The intention to hike increases substantially with both groups.

Water-based activities are also important, particularly to the experienced ecotourist. The travel trade activity lists also include a considerable number of water-based activities.

The activity preference results show that a range of activities are desired by ecotourists. This is supported by a Tourism Canada (1995) survey of the adventure travel product in Canada, where product specialties were trail riding, canoeing, nature observation, and wildlife viewing. Nature tourism and ecotourism activities are thus seen to be very important components in the mix of so-called adventure product experiences.

The ecotourists' desire for multiactivity vacations echoes other findings that international tourists (particularly longhaul) favor multiple-stop vacations (Ayala 1995). They are interested in more than one type of activity for their next vacation and, although they are interested in ecotourism, they expect to incorporate other experiences into their total trip.

The inclusion of questions about both last trip and next trip preferences lends a dynamic element to ecotourism market research for the first time. Respondents indicate that not only would they prefer multiple activities, but they would choose to increase the number of activities between the last and the next trip. There are also preference changes for both the consumers and the ecotourists. The consumers' preferences tend to move in the direction of the ecotourists' preferred activities. This supports similar suggestions made in the literature (Reingold 1993; Lew 1995).

These findings are important both from a destination-wide perspective and from an individual operator perspective, when product package options are put together. Operators need either to offer a wide range of experiences or options, or to develop product linkages with others who can provide complementary experiences.

Accommodation Preferences

The Market Demand Study found that a range of accommodation were desired. The survey of general consumers tends to support the need for conventional accommodation, since 56% of respondents (42% of responses) preferred hotels/motels; however, they also selected a range of other camping and fixed-roof options (Table 3). It is possible that the degree to which hotels/motels are mentioned by general consumers is influenced by their previous experience and by the accommodation supply, rather than representing actual demand. In addition, the consumer survey was administered by telephone (a disincentive to multiple responses), unlike the ecotourist survey, which was conducted by mail.

Accommodation preference may also be influenced by factors such as travel party, destination, or trip purpose. For example, consumers traveled with children more often than did ecotourists (a representative consumer comment was "with buddies, a backpack and tent; with wife, a trailer park; with kids, a motel"). Consumer comments about influence of destination included "in Yosemite, want a cabin; in Hong Kong, want hotel/motel" and "like something suited to country it is in." Comments about purpose included "if nature trip, want cabin; if sightseeing, want hotel."

By comparison, hotels/motels were only 12% of the total number of responses (41% of respondents) for experienced ecotourists. They were far more likely to select from a range of intimate, adventure-type accommodations, such as cabins, lodges/inns, camping, bed and breakfasts, or ranches. This range has been discussed as a spectrum of ecotourism accommodation (Wight 1993b).

Of possibly greater significance than the desire for adventure-type accommodation, is the number of responses made by each respondent (3.5). The travel trade focus group interviews and other evidence (HLA Consultants 1994) support the conclusion that the overall vacation experience seems to be the determinant for the accommodation; the accommodation is not the critical determinant. For example, European travel trade customers generally want comfortable accommodation that has character. However, they are prepared to "rough it" if this is part of the experience (ARA Consulting Group 1991). The notion of accommodation as part of

the experience is also supported by the fact that camping was given as an activity by one-fifth of both consumers and ecotourists.

Other research has alluded to the desire for accommodation that is intimate and varied. Silverberg, Backman, and Backman (1994), in their study of nature-based tourists, found that preferences range from "condos to campgrounds." Ingram and Durst (1989) found that there was relatively high use of rural and village-level accommodation in their study of nature-oriented tour operations: 40% rural/village; 27% camping; 21% luxury hotels; and 33% other hotels. In a Tourism Canada (1995) survey of adventure operators, the most popular form of accommodation was cabins/cottages (41%), followed by tents (40%).

Wight (1995a, 1995b) discusses considerations relevant to providing ecotourism accommodations, including the accommodation type (is it more rustic, intimate, and adventure-type, that is, representative of its setting?) and the environmental sensitivity (does it demonstrate credibility and sensitivity to the environment, regarding internal "green" or conservation practices?). Accommodation is part of the infrastructure necessary for the ecotourist to be able to stay overnight in the area. But the "add-ons" (type, programs, activities, interpretation, and environmental sensitivity) will determine whether the accommodation is regarded as an extension of the ecotourism experience, worthy of a recommendation or return visit. Such qualities and add-ons enable the operator to promote and encourage extended stays. For example, after introducing a comprehensive list of nature tours and activities, the Coconut Beach Rainforest Resort in Australia experienced a 30% increase in average length of stay (Kerr 1992).

Luxury Preferences

In a Tourism Canada (1995) adventure survey, 44% of operators, when asked about the services they provided, indicated basic utilities (e.g., running water, electricity, showers, or washrooms). Most market segments do not prefer luxury. This was confirmed by the HLA/ARA surveys and by the travel trade focus group interviews. All groups preferred middle-range levels of luxury (consumers 60%, ecotourists 56%), followed by basic/budget. Only 9% of consumers and 6% of ecotourists wanted luxury. Representative consumer comments included "something in middle, not too classy," or "want small affordable place, not looking for much comfort as would be out hiking and enjoying evening."

The literature provides support for these findings. One piece of market research divided Americans into five psychographic motivational groups. Nature-based travel, including ecotourism, was associated with a group called "get away active." Among other traits, the accommodations for this group tended more toward the rustic than the lavish (Reingold 1993). Nababan and Aliadi (1993) point out for Indonesia, "appropriate accommodations for the (nature tourism) sites should be motels, cottages, and other small lodging types, instead of five-star hotels." Pearce and Wilson (1995) also found that wildlife viewers tended to spend a greater proportion of their time in more modest forms of accommodation.

While ecotourists are fairly flexible on the type of accommodation they accept, they often want a higher degree of comfort at the end of their trip. For example, after a week of hiking, hikers want amenities like a bed and a tub or shower (Sorensen 1993). Consumers made such comments as "like to camp, but come back to a nice hotel."

IMPORTANT ELEMENTS OF TRIP

Respondents were asked to rate the importance of various features on a five-point Likert scale. A wilderness setting was the most important feature for the experienced ecotourism traveler, followed by wildlife viewing, hiking/trekking, and visiting national park/other protected area (Table 4). The features most important to the general consumer were very similar: casual walking, wildlife viewing, learning about other cultures, visiting national park/other protected area, and wilderness setting.

Members of the travel trade were asked to rank the most important product characteristics. Again, the setting had very critical importance, with a wilderness setting ranked first, followed by guides, outdoor activities, all-inclusive package, park/protected area, interpretive/educational programs, cultural experiences, and ability to communicate in client's language. When the travel trade members were asked to select the top three product characteristics, the results duplicated the importance rating results: wilderness setting, guides, outdoor activities (see Exhibit). There were minor differences when examined by country of origin; for example, parks and protected areas were mentioned most frequently by overseas respondents. When the results were examined by the degree to which firms specialized in

ecotourism product, those that catered to fewer ecotourists rated parks and protected areas higher. Those elements sought in cultural experiences were viewing artifacts (e.g., petroglyphs), visiting ruins and museums, learning about the history of an area, visiting villages, and contacting local people.

Activities that ecotourism markets see as important range widely and include land- and water-based, active and passive, and general and specialized activities. Of those ranked highest for each group, three common important activities were casual walking, wildlife viewing, and hiking/trekking.

Walking/Hiking/Trekking. When the importance of a range of activities and services was rated, experienced ecotourists rated casual walking sixth in importance and hiking/trekking third; general consumers rated walking first and hiking/trekking fifth. This reinforces the earlier findings describing a high desire to walk and hike.

Wildlife Viewing. While not being mentioned very frequently regarding activity preferences, wildlife viewing was subsequently rated second highest in degree of importance to the trip for both groups. Wildlife viewing is featured in one-fourth of the most popular travel trade packages. Similarly, ARA Consulting Group (1991) found that almost all those in the adventure-oriented travel trade surveyed felt wildlife was one of the Yukon's products with the greatest future appeal and potential.

Guides and Interpretation. Quality guides are extremely important for ecotourism (Henning 1993), with skills in language, natural and cultural history, environmental interpretation, communications, service, and ethical principles rated as highly desirable. The general consumer ranked guides and interpretive programs as somewhat more important (seventh) than did experienced ecotourists (eighth). Members of the travel trade felt that important features of interpretive programs should include natural history, human history, environmental politics (discussions with clients), rangers/experts, learning skills, and reference materials.

An example of the importance of interpretation is found in a survey of Canadian ecotourists to Kenya. They were dissatisfied with only one element of their trip -- lack of information on conservation issues. "This suggests a weakness in the interpretation programs of both the safari operators and the parks visited"

(Ballantine and Eagles 1994). In Tasmania, operators underestimated the value clients placed on guides' interpretation of the environment and land management (Gardner and McArthur 1995). Loker (1993) found that one of the most common complaints by backpackers was that organized tours lacked adequate explanation and interpretation. Similarly, 10% of experienced ecotourism travelers mentioned that high quality guides were a major travel concern.

Parks and Protected Areas. Visiting a park or protected area had the fourth highest ranking, both with the general consumers and the experienced ecotourists. In addition, parks and protected areas were identified (unprompted) by both groups as one of the reasons for taking an ecotourism vacation. That is, visiting parks is viewed as both a reason for the trip and an activity on the trip.

Setting is of paramount importance to the ecotourism experience. It is interesting to note that parks often provide the very qualities sought by ecotourists, when one considers the top-rated factors indicated by respondents -- wilderness, wildlife, walking and hiking, and visiting protected areas. The respondents interested in parks are also more willing than the total sample, on average, to pay more for their ecotourism experiences.

MARKET MOTIVATIONS AND BENEFITS SOUGHT

Motivations and Reasons for Trip

Reasons and motivations for ecotourism vacations are dynamic (Wight 1995d), may incorporate many categories of variables, and may relate to a variety of elements, such as destinations, specific market segments, preferred activities, education, qualities of place, or other reasons.

Multiple Reasons and Motivations May Exist. All of the major trip reasons provided in the study can be grouped into four general categories: nature-related, outdoor activity-related, cultural activity-related, and other, as determined by an open-ended question (Table 5). The opportunity to enjoy scenery and/or nature was the number one reason for the next ecotourism vacation for almost half the consumers and ecotourists. The general consumer tends to be more interested in culture-related activities, while the experienced ecotourism traveler tends to be more interested in outdoor-related activities. However, it is evident that there were multiple motivations.

Reasons for Travel Are Dynamic. For both the ecotourist and the general traveler, the opportunity to enjoy scenery/ nature is the primary reason for taking their next ecotourism vacation. The importance of this reason has doubled for the general consumer traveler, 22% of whom gave "enjoy scenery" as the reason for their last trip, but 45% gave this as the reason for their next trip, a figure identical to the responses of the experienced ecotourists. Other notable increases in interest (roughly doubling) relate to new experiences/ places, wildlife viewing, see mountains, experience cultural attractions, and study or learn about nature or cultures. Of note is the decline in conventional reasons for travel, such as rest/relax/get away (40% to 13%) and visit family/friends (31% to 11%). These responses all move strongly in the direction of the experienced ecotourists' responses.

Of particular note is the importance of wilderness. While this did not even rate as a reason for the consumers' last trip, it became a reason for 12% of respondents for their next trip -- a result almost identical to that of the experienced ecotourist. Also of note is the importance of cultural experiences or attractions for the general consumer, which has become more important than for the experienced ecotourist. Those in the industry should examine the experienced ecotourists' preferences, since there is a tendency for the mainstream markets to "follow" the ecotourists' lead.

Reasons and Motivations May Vary by Destination. Eagles and Cascagnette (1995), in presenting the motivations of Canadian ecotourists, found that tropical forests ranked fourth (since at least one-third of all their respondents were destined for Costa Rica and Africa, this finding is hardly surprising). Similarly, in the HLA/ARA study, "seeing the mountains" was the appeal for 15% of general consumers when considering their next destination, but this response rose considerably for those consumers who selected British Columbia (22%) and Alberta (31%) as their next destinations.

Reasons and Motivations May Vary by Target Market. The literature reports that ecotourists have different motivations than the traditional traveler (Eagles 1992; Fennel and Smale 1992). Reingold (1993) cites sources that refer to the "growing dissatisfaction with traditional sightseeing" and give "life enhancement" as the chief vacation goal for 40% of travelers interviewed. Hall and Weiler (1992) discuss the

special interest tourist's "common desire for authenticity, immersion in the cultural and/or physical environment, and the pursuit of environmental and experiential quality. These characteristics may be distinguished by educational and cultural motivations, and by a desire to experience novelty and uniqueness as part of the travel experience" (p. 8). Indeed, the latter element (new experiences/places) is a reason given by one-fourth of all ecotourists for going on their next ecotourism trip (Table 5).

Benefits Sought

Ecotourists seek a range of products, but it is clear that the setting (which includes wildlife viewing) is of paramount importance to an ecotourism experience -- 45% for both general consumers and ecotourists (Fennell and Smale 1992; Boo 1990; Eagles 1992; HLA Consultants 1994; Allcock et al. 1994; ARA Consulting Group 1994). It may be, however, that the setting is also critical to other, more traditional types of travelers (e.g., travelers to urban or resort destinations). It is important, therefore, to discover those features that distinguish between ecotourists and other types of travelers, to determine the benefits that ecotourists seek (Wight 1995c). These will be the elements to provide in a package and also to feature in promotional activities. Thus, it is important not only to differentiate products to respond to market segments (e.g., adventure versus natural history), but also to do so through a benefits-sought approach.

Crossley and Lee (1994) found that ecotourists could be differentiated from mass tourists in terms of characteristics and trip preferences, and benefits sought. They developed a continuum from "primitive nature to entertainment." Many of the findings of the HLA/ARA study support those of Crossley and Lee. According to Crossley and Lee (1994), benefits found to have the most discriminating power between ecotourists and mass tourists were found to be on the primitive nature end of the continuum. In addition, benefits with little discriminating power are "saw beautiful landscape and scenery" (enjoy scenery/nature; see mountains/scenery, HLA/ARA) and "increased knowledge about the destination's history or culture" (experience cultural attractions/events/ activities, HLA/ARA).

Crossley and Lee suggest that these findings indicate that environmental and cultural concerns are not limited to ecotourists. Setting and cultures may be very important features of a trip (and, indeed, are demonstrated as such in the Market Demand

Study), yet they do not necessarily assist in product differentiation. Thus, while operators may wish to highlight the setting attributes of their product, they should take care to emphasize relevant attributes on the benefit-sought continuum to differentiate their product.

Figure 1 represents a benefit-sought continuum, where similar benefits from both studies are placed side by side using the language unique to each study. Only those benefits with discriminating power are presented.

PREFERRED ECOTOURISM VACATION DESTINATIONS

Previous Ecotourism Destinations

Popular belief, as well as much of the research to date, has held that tropical and developing countries are the prime destinations for ecotourism markets. Yee (1992), in a study of North America-based nature-oriented tour operators, found that North America accounted for only 13% of 48 package destinations. Since these findings are based on a very small sample ($n = 24$), they should not be extrapolated to all ecotourists; the findings may be indicative rather than representative of North American operators. Yet both Yee's and Ingram and Durst's (1989) findings indicate that up to four years ago the nature-oriented U.S. travel trade did not view North America as a top destination for its clients.

By contrast, in the HLA/ARA study, members of the travel trade ($n = 118$) were asked to provide the destinations of their top three nature/adventure/culture packages. It was found that demand for First World destinations was high, with 48% of total packages in the United States and 37% in Canada.

The Market Demand Study asked consumers about the location of their last ecotourism vacation. Again, North American destinations were prominent (Table 6). Only a small percentage of general consumers had gone to the more exotic destinations, such as South and Central America, Africa, or Asia. In addition, the study found a varying propensity to travel to certain destinations. For example, Toronto residents traveled outside Canada more than Winnipeg residents (68% versus 34%) for their ecotourism vacation; residents of Chicago and Dallas mostly selected U.S. destinations (74% and 71%, respectively); San Franciscans visited Europe more than any others (16%); while residents of San Francisco and Los Angeles traveled more outside the United States.

The idea that the United States and Canada are attractive destinations for North American ecotourists is supported by a recent Tourism Canada (1995) survey, where nature-based operations had North Americans as their primary markets (Canada 57%, United States 23%, overseas 20%). This study also found that the specific origin was strongly linked with the activity preferred.

Future Ecotourism Destinations

When North American consumers were asked their preferred future ecotourism destinations, roughly one-third of those surveyed indicated Canada, one-third indicated the United States, and one-third indicated all other destinations (Table 6). Consumers were also given the opportunity to provide a second choice of destination and responses were similar: 38% chose Canada, 25% selected the United States, and 36% picked other destinations. Experienced ecotourists were more likely to select Canadian than U.S. destinations. Merschen (1992) makes the interesting point that only 8% of U.S. citizens hold valid passports; thus, most U.S. citizens would be less likely to have overseas ecotourism destinations in mind. Since Canadian and U.S. citizens do not need a passport to travel to each other's countries, Canadian and U.S. residents are prime markets for North American ecotourism opportunities. Overall, the study found that North American destinations were popular, not only for previous vacations, but for future travel.

OVERALL DEMAND FOR ECOTOURISM EXPERIENCES

One of the few points of agreement in the literature seems to be the fact that ecotourism markets are among the fastest-growing in tourism (Development Consulting Limited 1991; Cook, Stewart, and Repass 1992; Laarman and Durst 1993; Parker 1993). The environmentally committed, the travel trade markets, and general consumers are interested in products that are environmentally sensitive or beneficial (Wright 1991; Cook, Stewart, and Repass 1992; Wight 1993a). When overlaid on the changing travel preferences of general consumers, this widespread interest confirms that the potential ecotourism market is significant.

Lindberg (1991) found that tourism overall has been growing at 4% annually, but nature travel is growing at 10% to 30% each year. In Nepal, for example, there has been an explosion of trekking tourism over the last two decades. From 1980 to

1991, the number of trekkers increased 255% (27,478 to 70,000), over half of whom visited the Annapurna region (Gurung and De Coursey 1994).

The World Tourism Organization predicts that by 2000 most of the 86% increase in worldwide tourism receipts will come from active, adventurous, nature- and culture-related travel (Reingold 1993, p. 36). Other reports indicate that nature-based tourism is predicted to grow at 25% to 30% each year, followed by adventure and culture-based tourism at 10% to 15% (Oelrichs and Prossner 1992). Such rates have yet to be substantiated. However, there is no doubt that demand is increasing rapidly.

In the HLA/ARA study, 77% of consumers had already taken a vacation involving activities related to nature, outdoor adventure, or learning about another culture in the countryside or wilderness. Of the remaining 23% who had not, all but one stated that they were interested in doing so. There is no question that the potential market for ecotourism experiences is significant and growing, whether or not this is viewed as positive. The challenge is to respond to this demand with products that meet environmental, cultural, and economically sustainable principles.

CONCLUSIONS

The Market Demand Study found that travelers in ecotourism markets seek wide-ranging activities that are land and water-based, are active and passive, are general and specialized, and are all becoming more active. Market preferences and motivations are summarized in Figure 2. Of the top-ranked activities for each market, three common important activities are casual walking, wildlife viewing, and hiking/trekking. There is a continued need for modest hotel/ motel accommodation. But the experience determines the accommodation, and ecotourists are more likely to select from a range of intimate, adventure-type accommodation, such as cabins, lodges/inns, camping, bed-and-breakfasts, or ranches. Traveler preferences are dynamic. Certain activities are increasing or decreasing in importance for the general consumer, with interests tending to follow those of the experienced ecotourists. However, travelers in these markets are increasingly seeking products that respect the environment. Operators and destinations need to offer a wide range of products and experiences or link with others who can provide complementary experiences. Operators should also be aware that although these individuals are

interested in ecotourism, they expect to incorporate other experiences into their total trip

Ratings show wilderness, wildlife viewing, visiting parks and protected areas, walking/hiking, and learning experiences are highly important elements of the trip. Overall, the study found that North America was a popular destination for the last vacation that included nature, adventure, or cultural experiences in the countryside or wilderness. Canada and the United States continue to have appeal for the next ecotourism vacation.

There are multiple motivations and reasons for ecotourism travel, and they vary by market. Motivations are dynamic and may vary by destination. The natural setting is the most important feature for all surveyed, with ecotourists tending to be more interested in active outdoor experiences, and consumers more interested in cultural experiences. Setting, however, may not be the feature that distinguishes ecotourism from other types of travel. A benefits-sought approach is advocated. Distinguishing attributes include uncrowded, remote/wilderness, learning about wildlife/nature, learning about natives/culture, community benefits, viewing plants and animals, and physical challenge. These are features to consider in the development and promotion of ecotourism product.

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