

Can Marketing Save The National Parks?

Take a Number
To Take a Hike

8/20/90

The Battle for YOSEMITE

*The National Park Service has traditionally
viewed the park as a national playground more
than a natural refuge, says the author*

Grand Canyon
Considering
Crowd Control

Civil War battlefields
focus of preservation

ITEMS OF INTEREST

Park begins two-year visitor use study

The Crowded Outdoors

Anxious Armies
Of Vacationers
Are Demanding
More From Nature

Tourism
Turns Soft
For District

*Travel Slows Across U.S.,
But Has D.C. Lost Allure?*

Visitors soaking up
view from their cars

National park becomes parking lot

August 20, 1990

Memorandum

To: Park Superintendents
From: Assistant to the Director for Science and Technology
Subject: ITEMS OF INTEREST

This edition of the Superintendents' Memo Series addresses a number of items of interest relating to ongoing social science activities.

Money Generation Model. My memo #17, THE ECONOMICS OF PARKS, made reference to an economic model that very quickly, and at zero cost, could be used to estimate the economic impacts of parks on local economies. This model, called the Money Generation Model, was developed a few years ago by Dr. Ken Hornback of the Denver Statistical Office. We currently are updating this model and simplifying it for easy use. Copies will be distributed to all Superintendents shortly.

Economic Studies. Working through the MAR's Cooperative Parks Study Unit at Virginia Polytechnic Institute, I have initiated two new economic research projects. The first, requested by the Director, is designed to assess the economic consequences of preserving ten currently unprotected major Civil War battlefield sites located in the Shenandoah Valley. The second project will evaluate the total economic benefits that accrue to the Commonwealth of Virginia as a result of all existing NPS units located within the State. This study also will develop a standardized methodology that can be used in similar fashion to determine the economic benefits of NPS units in other States. These Statewide economic data are being developed to support NPS budget requests.

Park Visitation, Director's Summary. Starting with visitation statistics for June, I now am providing the Director and the Regional Directors with a one-page summary of key visitor recreational use data on a monthly basis. Emphasis is on visitor use for the current month and for the YTD, showing percent changes from the previous year. A copy of the June summary sheet (issued 7/15/90) is attached FYI. The data on Civil War parks is included specifically because of the Secretary's continuing interest in this subject. From time to time we will include other statistics that reflect important changes in visitation patterns or visitor-use characteristics.

Visitation Statistics. The Denver Statistical Office has pulled

together available visitation data for the period 1916-1989, and displayed this information in bar graph form (see attached three charts). Note that these charts show recreational visits as a 5-year moving average for example, the 40,000,000 recreational visits shown for 1953 is the average visitation level over the preceding 5-year period 1949-1953. This averaging technique is particularly useful for smoothing out year-to-year anomalies and for showing long-term trends in visitor use patterns.

General User Survey. In Superintendents' Memo #15, I forwarded to each of you a copy of the General User Survey visitor questionnaire. This standardized questionnaire, which will be used to gather comprehensive data about NPS visitors Systemwide, is being field-tested this summer in various types of parks Prince William Forest, Assateague, Gettysburg, Great Smoky Mountains, Mesa Verde, Badlands, Grand Tetons, and Bryce Canyon. After revisions and after receiving final OMB approval, the General User Survey questionnaire will be used to collect in-depth baseline visitor data at some 20-40 NPS units that will serve as indicator parks for the System as a whole; the survey will be readministered periodically at these same indicator parks to detect changes and to identify trends in visitor profiles, visitation patterns, recreation preferences, economic impacts, etc. It currently is planned that the General User Survey will be carried out at WASO expense, with no charge to the parks that are selected as indicator parks. ANY SUPERINTENDENT WHO WISHES TO HAVE HIS/HER PARK CONSIDERED FOR INCLUSION AS AN INDICATOR PARK, AND WHO HAS NOT ALREADY DONE SO, SHOULD CONTACT JEAN HANDSBERRY AT FTS 343-8123 OR (202) 343-8123.

Mount Rainier Visitor Survey Brochure. In 1985, Mount Rainier NP conducted a visitor survey and displayed their findings in a glossy 9"x16", 8-page fold-out brochure. Those of you who haven't seen this Mount Rainier brochure may find it quite interesting; it provides considerable information in compact, readily usable, and well-organized form. A copy (reduced to standard page size) is attached FYI. The copy doesn't do justice to the original, but you can get the general idea. This is a very professional and effective way of displaying visitor survey data!

National Travel Statistics. The U.S. Travel Industry Association recently published its summary of domestic travel data for 1989:

- Vacation travel (person-trips over 100 miles from home) increased six percent in 1989.
- Winter vacation travel (person-trips over 100 miles from home) increased nine percent in 1989.
- Weekend vacation travel (person-trips over 100 miles from home) increased four percent in 1989. (Note. Weekend vacation trips comprised nearly 50 percent of all vacation trips for the year and continue to be one of the fastest growing segments of vacation travel).

Over time, NPS visitation patterns often tend to follow national vacation travel trends and respond to the same basic forces economic conditions, personal income, consumer confidence, disposable income, discretionary monies, travel costs, fuel availability, etc.

Population Data Around Parks. The Denver Statistical Office has used published U.S. census data to determine the number of people living within prescribed distances from parks i.e. within 50 miles, 100 miles, 150 miles etc. to 500 miles. The Statistical Office also has calculated the population density (i.e. persons per square mile) for each park at 50 mile increments, up to 500 miles from the park. These two population parameters, numbers of people and population density, serve as measures of the potential market of visitors who live within 50, 100, etc. miles of the park. This population information, when coupled with local or regional demographics data (age, education, income, etc.) and recreational preferences data, can be extremely useful to park managers and planners who are interested in tailoring recreational opportunities, programs and facilities to serve the needs and the interests of local and regional visitor markets.

Forest Service Visitor Surveys. Superintendents' Memo #20 dealt with Forest Service plans regarding future management of recreation and wilderness areas. As a follow-up, the Forest Service announced this month a major new visitor survey initiative designed to gather in-depth information about people who visit Forest Service lands. The Forest Service has developed a standardized visitor survey questionnaire that is similar to concept to the Catalog of Questions and the General User Survey adopted last year by the NPS. They call this questionnaire the CUSTOMER survey to focus attention on the new emphasis being given by the Forest Service to visitors as customers, and the importance of visitor services and visitor satisfaction. Six to ten week CUSTOMER surveys will be conducted this summer and fall at nine Forest Service areas: East Mojave National Scenic Area; Cherokee National Forest; Oregon Dunes National Recreation Area; King Range National Conservation Area; Sawtooth National Forest; George Washington National Forest; Chequamegon National Forest; Flaming Gorge National Recreation Area; and Gunterville Reservoir. SUPERINTENDENTS NEAR THESE FOREST SERVICE AREAS MAY WANT TO REVIEW THE FINDINGS AND THE RECOMMENDATIONS RESULTING FROM THESE "CUSTOMER" SURVEYS.

Social Carrying Capacity/Crowding. The social carrying capacity research project being carried out for WASO by Dr. Robert Manning, University of Vermont, is continuing on schedule. Dr. Manning, a Schedule "A" NPS employee, is working with superintendents and staff at some 24 parks and Regional Offices this summer and fall. His carrying capacity report will be issued next year.

Plaudits. The 1989 annual poll by the Roper Organization once again has concluded that the National Park Service warrants the highest public approval rating of any federal government agency

..... for the seventh straight year.

Hispanic Visitors. The body of information concerning Hispanic visitors' use of parks and other outdoor recreation areas continues to grow. Dr. Frank Noe, Regional Sociologist for the Southeast Region, recently published results of a Key Biscayne NP Survey which examines differences between Hispanic versus non-Hispanic attitudes toward environmental concerns, as relates to the preservation and use of recreation resources. A recent study of visitors to Angeles National Forest, by California State University sociologists, similarly has reported on how country of birth and cultural heritage affect Hispanic visitors' use of recreation opportunities i.e. this study has looked at differences in perceptions, interests, motivations, and recreational preferences amongst U.S. born Hispanics versus Mexican born Hispanics versus Central/South America born Hispanics. Some fairly significant differences exist --- suggesting simply that Hispanic persons who participate in outdoor recreation activities in an NPS or Forest Service type environment should not be expected to behave as a homogeneous group, but rather distinct subgroups of Hispanic visitors can be expected to exhibit quite different recreational attitudes and recreational use patterns.

Some Recent Social Science Publications of Interest:

- BIG BEND. "Big Bend Preliminary Community Analysis", 5/89
..... an assessment of local perceptions as to how NPS management decisions, attitudes and actions affect the local way of life; local reactions to controversial designation and subsequent planning for the Rio Grande Wild and Scenic River; and public perceptions about the net benefits of the park on local populations and communities. This report deals specifically with tensions and points of controversy between local residents versus park personnel and park management actions. THE RECOMMENDATIONS ARE ONES WE HAVE HEARD BEFORE: make a greater effort to have all staff and family members be aware of community dynamics; and managers need to be personally involved in outreach activities involving nearby communities, particularly in facilitating give-and-take discussions on issues of concern, on local turf.
- GREAT BASIN. "Great Basin N.P., a Tourism Laboratory", 3/90
..... this article reviews ongoing socio-economic research at Great Basin NP, an initiative designed to provide in-depth data to support development of a GMP for our newest National Park. In a sense, this is a unique project because the social science scope of work and schedule of output were developed from the beginning as an integral part of the GMP planning process. Careful documentation of before-and-after conditions, recorded over a four-year period starting with the 1986 designation of the park, is providing valuable information about changes in visitor use patterns, recreational preferences, effects on local and regional

economies, and the impacts of creating new tourist resources. THOSE WHO ARE PLANNING TO WRITE NEW GMP'S MAY WANT TO EXAMINE THE PROCESS FOLLOWED AT GREAT BASIN.

- BLUE RIDGE PARKWAY. "Identifying and Mapping Critical Views of Blue Ridge Parkway Vistas", 7/90. This study reports on techniques that can be used to systematically and quantitatively determine the relative values of different viewsheds or vistas along the Parkway, as measured by the scenic preferences of visitors. A most interesting aspect of the study is that it deals with the question of HOW LAND USE PRACTICES ALONG THE PARKWAY AFFECT THE PERCEIVED QUALITY OF SCENIC VISTAS. The results have particular value in that they can help planners and superintendents predict the potential impacts of proposed management actions that would change landscape features and alter visual resources.

- YELLOWSTONE-GRAND TETONS - ROCKEFELLER PARKWAY. "Winter Use Survey", 1/90. This project was carried out to gather data needed for development of a Winter Use Plan for the area. The study reports on the results of a 1989 winter visitor survey conducted in the three parks by the DSC Central Planning Team. The report provides valuable information about visitor use characteristics, recreational preferences, spending patterns, etc. during "off-season" periods. It also includes data about the growth and interest in sometimes controversial recreation activities such as snowmobiling, and insight into visitor reactions to this popular sport. For example:
 - Summer use of the area is distributed nationally, while winter use is much more regional, with an average five repeat visits per each winter visitor;
 - Winter users spend nearly twice as much as summer visitors;
 - Snowmobiles, although utilized successfully by 48% of the Grand Teton visitors and 72% of the Yellowstone visitors, were listed most often as the least liked part of the visit;
 - Ranger - led walks and talks were rated by winter visitors as not very important.

- THIS WINTER USE STUDY REPRESENTS ANOTHER EXAMPLE OF THE APPLICATION OF VISITOR SURVEYS TO GATHER DATA NEEDED FOR PLANNING AND PARK MANAGEMENT.

- FOREST SERVICE. "An Analyses of the Outdoor Recreation and Wilderness Situation in the United States: 1989-2040", 4/90. This report deals with national outdoor recreation demands, preferences, opportunities and problems. The final chapter is concerned with program implications associated

with satisfying outdoor recreation needs, primarily from the perspective of the Forest Service manager. THOSE SUPERINTENDENTS WHOSE PARKS ARE ADJACENT TO NATIONAL FOREST SERVICE LANDS SHOULD READ THIS SIX PAGE SUMMARY. Ref USDA Forest Service General Technical Report RM-189.

- N.Y. TIMES. "The Crowded Outdoors", 7/8/90. Some excerpts from this article by Michael Hinds:

Dramatic changes in the way Americans take vacations, combined with a rising concern for the environment, are bringing a new sort of visitor to the nation's parks, refuges, forests and seashores. The new visitor is one who wants to commune with nature more often but for shorter periods of time and with more creature comforts.

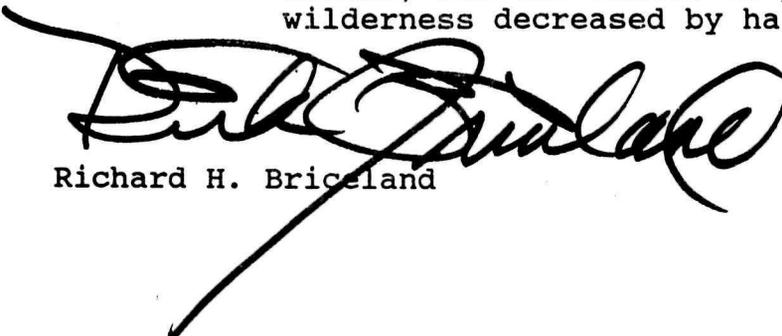
But as life has become more complicated and stressful for people, so it has for parks.

For people, the stress list includes the two-job family, longer working hours, longer commutes and decreasing leisure time, all of which make them eager to escape the work-a-day world as often as possible. People are taking shorter and more frequent holidays and traveling shorter distances than previously. For most families, the once-traditional two-week vacation has been replaced by a series of long weekends.

While the number of visits to all Federal recreation areas increased by about 30 percent from 1977 to 1987, the total amount of time people spent in these areas increased by only 4 percent, according to Government statistics.

Over 40 percent of the year's visits take place in summer months, mostly on weekends. The result is that more people are crowding into the most accessible portions of public lands and overwhelming those resources during peak times. Officials responsible for state parks report similar problems.

As the population slowly ages and accumulates more wealth, Americans are seeking fewer strenuous recreational activities and more leisure pursuits that are suitable for families with young children. Overnight park stays increased slightly during the decade, but the number of people backpacking into the wilderness decreased by half.



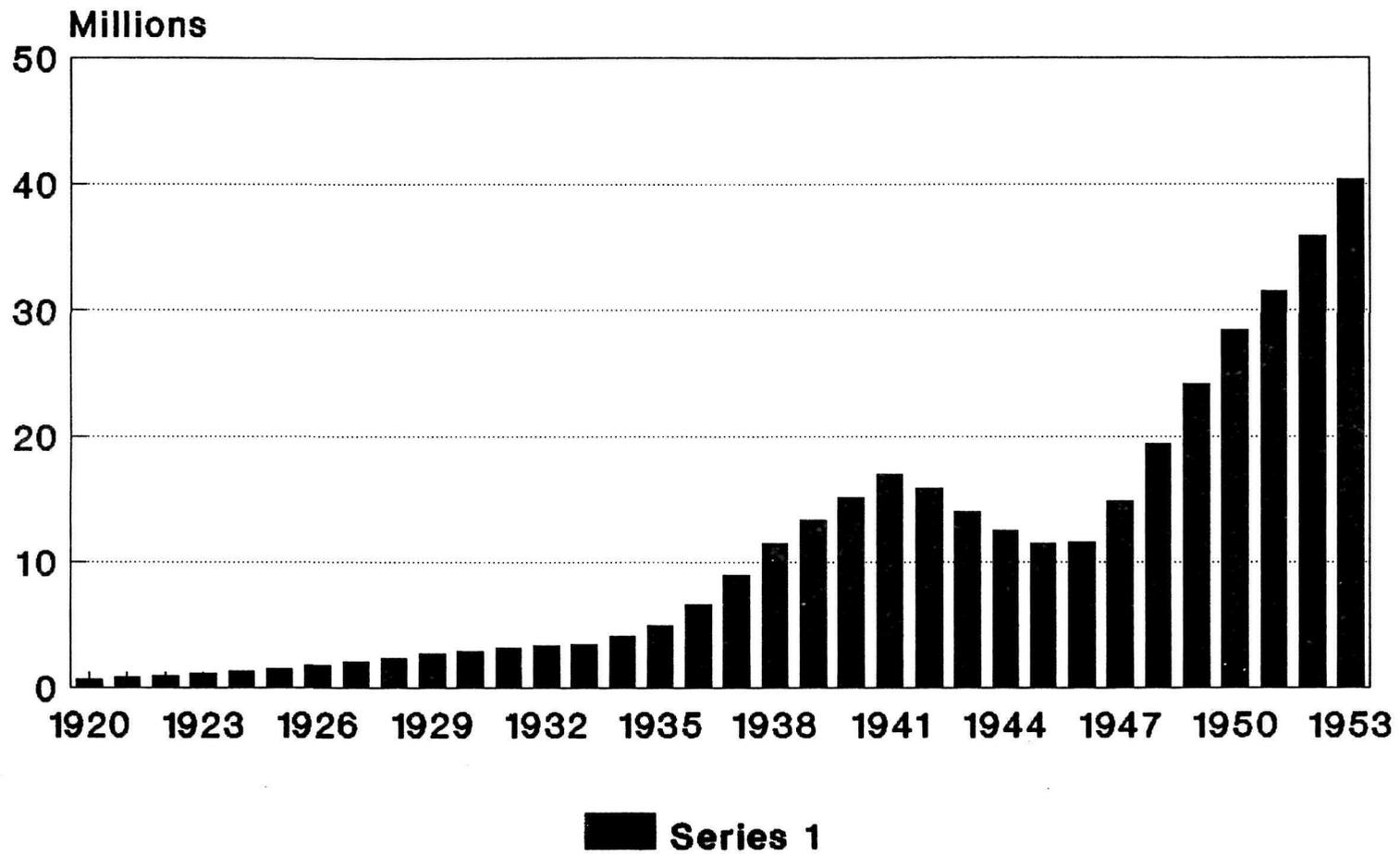
Richard H. Briceland

**NATIONAL PARK SERVICE
MONTHLY PUBLIC USE REPORT
JUNE 1990**

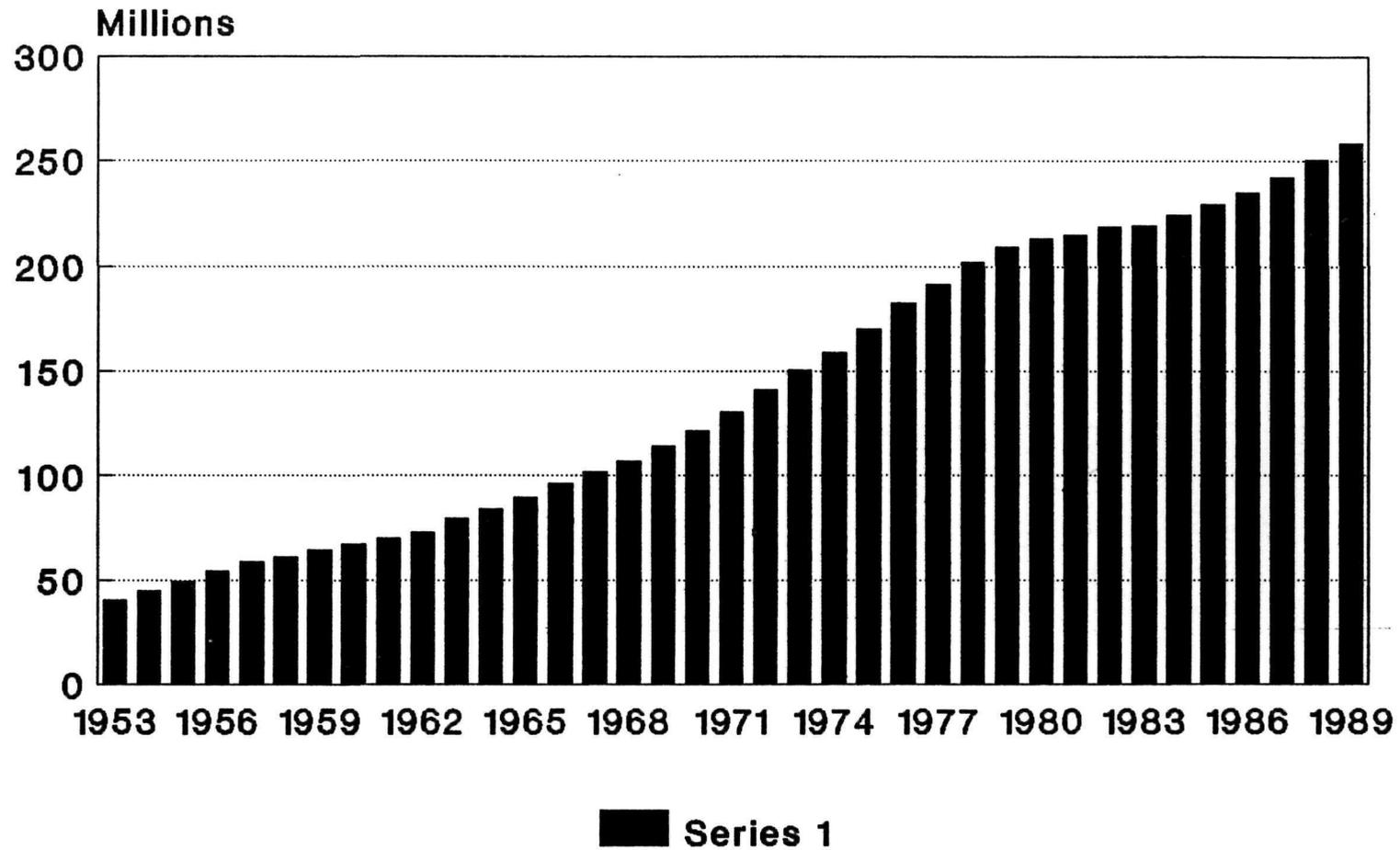
RECREATION VISITS

	<u>June '90</u>	<u>Change %</u>	<u>Total (YTD)</u>	<u>Change %</u>
NPS	31,137,831	0%	107,746,806	+1.0
REGIONS				
ALASKA	183,240	+2.0	223,707	+1.0
MID-ATLANTIC	2,150,692	+3.0	7,826,592	-1.0
MIDWEST	1,672,573	0	4,761,031	-2.0
NATIONAL CAPITAL	3,923,367	-2.0	14,725,462	0
NORTH ATLANTIC	3,738,697	-3.0	11,476,471	0
PACIFIC NORTHWEST	949,514	+1.0	2,707,918	+4.0
ROCKY MOUNTAIN	4,631,056	+6.0	9,491,135	+5.0
SOUTHEAST	6,346,577	-1.0	25,971,139	+2.0
SOUTHWEST	1,658,230	-4.0	6,747,295	-3.0
WESTERN	5,883,885	-1.0	26,425,794	0
URBAN PARKS (56)	8,664,195	-8.0	36,322,434	-2.0
Statue of Liberty	325,927	-4.0	1,079,505	-2.0
Vietnam Veterans	178,825	-33.0	1,003,949	-30.0
USS Arizona	132,079	+14.5	675,641	+5.7
Hot Springs	142,212	-14.0	526,587	-9.0
White House	119,971	+0.3	518,996	+8.0
Martin L King	149,476	+90.9	718,422	+54.1
RURAL PARKS (158)	12,052,369	+5.0	35,256,421	+3.0
Cape Cod	646,714	+13.5	1,890,872	+11.6
Grand Canyon	472,277	-13.0	1,703,214	-2.0
Glen Canyon	498,340	-3.0	1,339,936	+0.9
Yellowstone	521,291	+11.5	831,445	+5.7
Olympic	308,300	-0.7	963,508	-3.0
Zion	316,983	+5.5	888,884	+6.5
CIVIL WAR (21)	869,118	-9.0	2,904,436	-2.0
Gettysburg	143,797	-21.0	545,232	-10.0
Chick & Chatt	100,416	+18.0	424,586	-1.0
Kennesaw Mtn	58,272	-21.0	391,653	-6.0
Harpers Ferry	65,702	-11.0	232,758	-8.0
Vicksburg	64,029	-5.0	325,261	+7.9
Appomattox	52,654	+1.5	179,952	+11.9
Fredericksburg & Spot	46,610	+4.7	214,464	+0.7

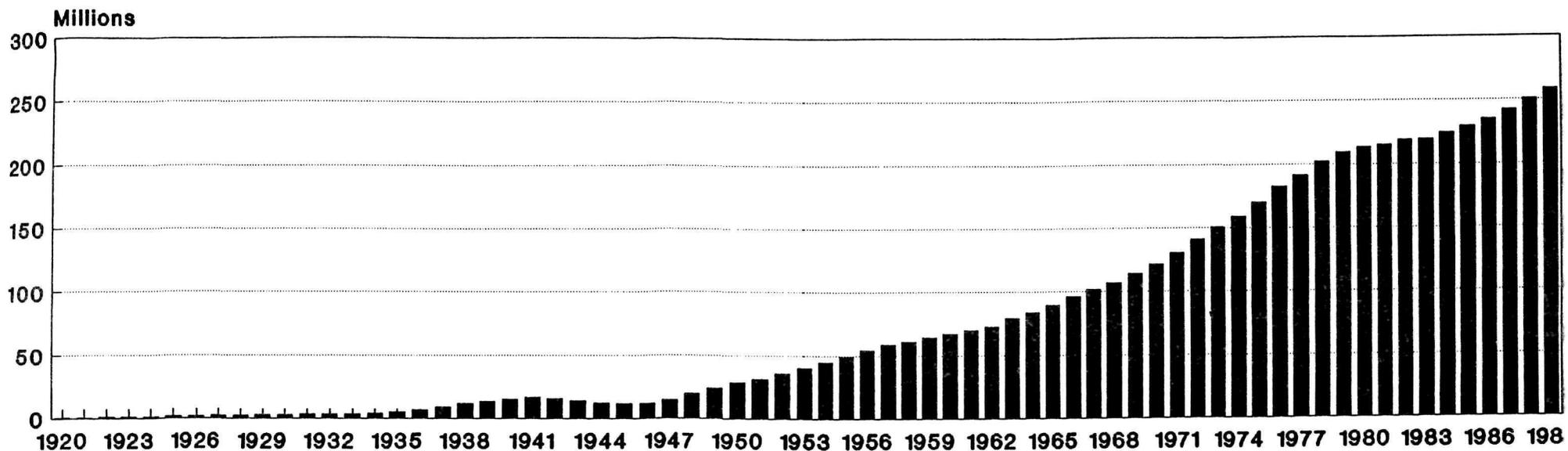
NATIONAL PARK SERVICE RECREATION VISITS (Five-Year Moving Averages)



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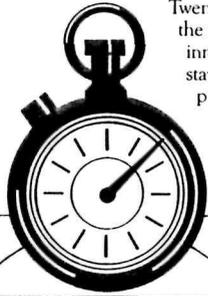


their visit, 24% decided between one week and one month before, and 20% decided between one month and six months prior to their trip. A variety of sources for Park information was used by visitors to learn about the recreational opportunities at Mt. Rainier. Sixty-two per cent of the respondents cited previous Park experience, and over one-half indicated friends or family. Other sources included NPS brochures or maps (36%), commercial guidebooks and maps (24%), Park visitor centers (20%), magazines (19%), and newspapers (8%).

Length of Stay and Use of Facilities

While the average time spent in the Park was 19 hours, two thirds of the respondents stayed less than one day and one-half stayed less than 7 hours. Twenty-three percent of the sampled visitors stayed overnight in the Park, and of these, 52% stayed in a developed campground.

Twenty-one percent spent the night at one of the two inns in the Park, while 16% stayed in commercial or public lodging outside the Park.



How long did they stay?	
1-6 hrs	54%
7-12 hrs	17%
13-23 hrs	2%
1 day	12%
2 days	8%
3 days	4%

Visitors took advantage of the many facilities Mt. Rainier National Park provides. Those most often used were the Paradise Visitor Center (61%), the Paradise Inn (42%), and Sunrise Visitor Center (27%).

Participation in Park Activities

Mt. Rainier National Park offers visitors the opportunity to experience its richness through a wide range of activities. Driving to view the Park's



What did they do?	
Driving to View Scenery	81%
Taking Photographs	58%
Day Hiking	55%
Viewing Wildflowers	51%
Observing Wildlife	46%
Picnicking	42%
Attending NPS Talks	20%
Camping	14%

scenic beauty was the most popular (81%), followed by taking photographs (58%), day hiking (55%), viewing wildflowers (51%), observing wildlife (46%), and picnicking (42%). When asked to specify the most important activity they participated in, visitors listed sightseeing while driving first and day hiking

second. Visitors who were Washington residents preferred day hiking to sightseeing.

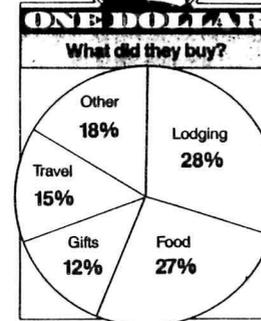
Reasons to Visit the Park

Survey respondents were also asked to identify their reasons for visiting the Park. The most important was developing a relationship with nature by being close to it and learning more about it. Being together with family was the next most important motivation for the visit, followed by the desire to learn by experiencing new and different things, being with others who enjoy similar interests, and escaping personal and social pressures. When asked to rate their experience in the Park, over 80% of the visitors regarded it as very good to excellent.

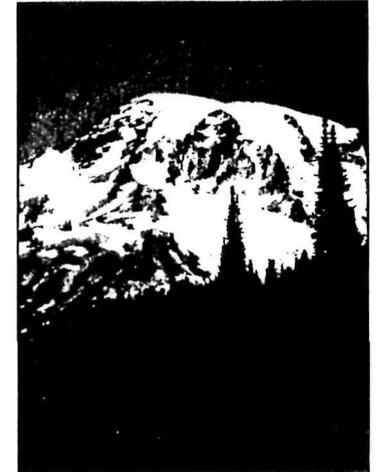
Economic Impact

In addition to providing a comprehensive visitor profile, the 1985 visitor survey produced data detailing the Park's economic impact in the vicinity of Mt. Rainier. The findings confirm that the Park is a significant source of income and seasonal employment for the local economy. In 1985, visitors spent over 13 million dollars in the Rainier vicinity during the course of their stay. This represents a substantial increase over that estimated in a similar 1968 study.

The results of this visitor survey demonstrate that Mt. Rainier National Park not only provides large numbers of visitors with a satisfying outdoor recreation experience but also makes a valuable contribution to the health of the state and local economy.



MT. RAINIER



National Park

*Park Use
and
Visitor Profile*

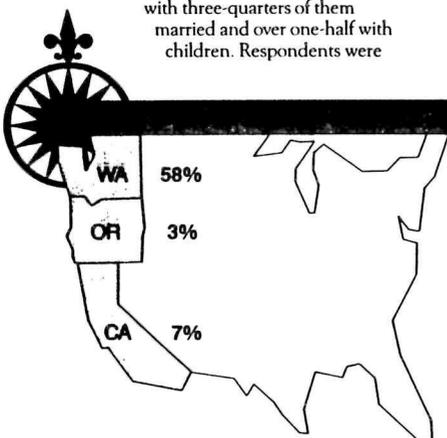
Introduction

Established in 1899, Mt. Rainier National Park is an area rich in geologic, natural, and human history. The Park serves more than 1.8 million visitors each year hailing from every state and many foreign countries. To gain a more comprehensive profile of the Park visitor and the nature of Park visits, a visitor survey was conducted by Mt. Rainier National Park and the Cooperative Park Studies Unit at the University of Washington during the summer of 1985. Of 5500 questionnaires distributed to Park users, over 4000 responded, providing a great deal of valuable information. Highlights of the results of this survey from a broad range of topics are presented below.

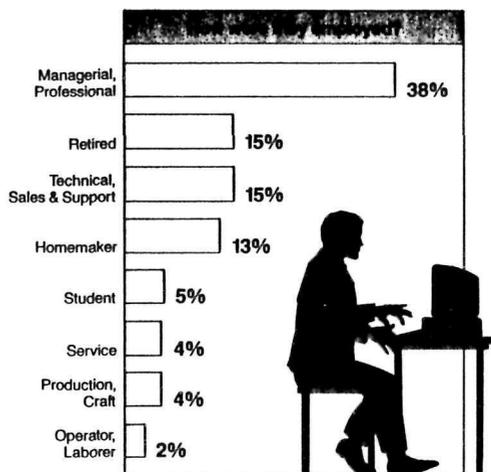
Visitor Origin

Although visitors traveled to Mt. Rainier National Park from all parts of the United States, over one-half (58%) of the survey respondents were from Washington state. Local residents from the four counties surrounding the Park (King, Lewis, Pierce, and Yakima) accounted for 39% of the total visitors.

The Park was used predominantly by well educated, professional men and women with families. Men and women visited the Park in equal numbers, with three-quarters of them married and over one-half with children. Respondents were



primarily employed in the managerial and professional occupations (38%) or were retired (15%). Their average education level was high, with one-half having completed college degrees. The average



age among the sample was 42 years, with over one-half between the ages of 25 and 44. Twenty per cent were 60 years or older.

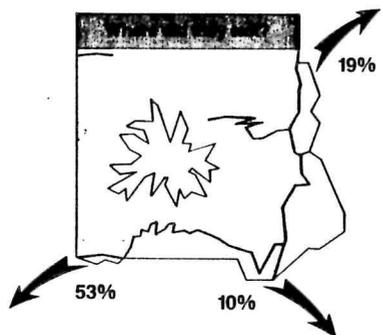
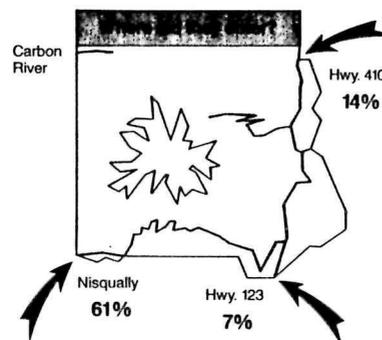
Organization Membership

Nearly one-quarter of the respondents belonged to a conservation or outdoor recreation organization. The organizations that were mentioned most often were: The National Wildlife Federation (6%), The Audubon Society (5%), The Sierra Club (5%), and The National Rifle Association (4%).

Points of Entry

Visitors may enter Mt. Rainier National Park from several directions. The majority (61%) entered

through the Nisqually entrance in the southwest corner of the Park. This was followed by entry through the Highway 410 northeast entrance (14%) and the southeast entrance of Highway 123 (7%). Exit from the Park followed a similar pattern, though visitors exited less frequently through the Nisqually entrance (53%) and more frequently through the northeast and southeast entrances (19% and 10%, respectively). As expected, many of the visitors traveled a loop through the Park, entering at one point and exiting at another.



Mode of Travel

Most of the respondents, 73%, traveled to the Park by automobile. Twenty-one percent were in pickups, vans, or jeeps, followed by 2% in motorhomes and 2% in buses. The number of visitors per vehicle was high, averaging four for the sample group.



Automobiles	73%
Pickups, Vans, Jeeps	21%
Motorhomes	2%
Buses	2%
Motorcycles	1%
Bicycles	1%
Walking	0%

Trip Make-up

Thirty-seven per cent of the survey respondents were first-time visitors to Mt. Rainier National Park. Of these newcomers, nearly three-quarters were from outside the Northwest states. While 67% of the visitors named Mt. Rainier as the primary destination of their trip, one-third of them visited at least one other Northwest outdoor recreation area (including British Columbia). Mt. St. Helens was the site most often visited, with 12% of all visitors stopping there.

Nearly one-half of all respondents decided to come to the Park less than a week before the day of