

Where Does the
FREE TIME GO?

'Random samples
are becoming
impossible to
obtain.'

Enthusiasm for 4-Day Week Wanes

More Surveys, Fewer Answers

**Americans Are Less Interested in Work
Because More of Them Are Working**

ITEMS OF INTEREST

**Civil War battlefields
focus of preservation**

Park begins two-year visitor use study

The Crowded Outdoors

**Anxious Armies
Of Vacationers
Are Demanding
More From Nature**

**Tourism
Turns Soft
For District**

**Visitors soaking up
view from their cars**

**Dealing with a
national park**

**Biologists
strive for
balance
in park**



United States Department of the Interior



NATIONAL PARK SERVICE
P.O. BOX 37127
WASHINGTON, D.C. 20013-7127

IN REPLY REFER TO:

December 7, 1990

Memorandum

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

ECONOMIC IMPACTS OF PARKS. The Money Generation Model (MGM) mentioned in my Superintendents' Memo #17 (6/3/90) has been completed and will be mailed to you early in December. The MGM shows you how to calculate various economic benefits that can be attributed to individual parks . . . i. e., SALES BENEFITS as measured by increased local sales of goods and services; INCREASED-LOCAL TAX REVENUES; and NUMBERS OF JOBS CREATED LOCALLY. As we move into the 75th Anniversary Year of the National Park Service, you may find this an appropriate time to use the Money Generation Model to demonstrate the substantial economic contributions of your parks to local area economies.

THE PUBLIC WE DON'T SERVE. Internationally recognized social scientist and management consultant Peter Drucker recently made some observations that we should take to heart:

"No one has better customer data than the big department stores, or studies them more assiduously. But these data are all about people who already shop at the store. They ignore the people who should be customers but aren't"

Similarly, when we in the NPS collect socio-economic information about park visitors, we are doing market research on our current customers, but we aren't really learning very much about our potential customers, namely the tens of millions of Americans who never have visited a park.

There is a message here for those park units that would like to attract additional visitors. It may be to your advantage to focus at least some part of your socio-economic efforts on reaching out to potential visitors, on learning more about the demographics, interests, and recreational preferences of the visitor market that today is not being served, on publicizing the attributes and the features of your park that make it a nationally significant area, and on targeting educational and other information specifically to those publics and those geographic areas that you wish to attract. The Canadians do this very effectively with their parks, albeit for reasons of increasing foreign tourism expenditures. In a similar vein, but with different objectives, I would like to see the WASO

social science office work with one or two interested parks on a pilot program basis to see if collectively we could develop and test some techniques either for increasing visitor use in selected areas or for modifying visitation patterns. If any of you have had successes, or failures, in this regard, please let me know. This clearly is a topic that we want to talk about as part of the social science training program planned for FY-91.

MONTHLY VISITATION STATISTICS. For those who don't have an opportunity to review the Monthly Visitation Report published by the Denver Statistical Office, let me remind you that the first pages of that report contain general information you may find interesting. For example, the Preliminary Statistical Summary Sheet includes, among other things, monthly and YTD data about numbers of recreational visits in five different categories of parks, and monthly and YTD data about numbers of overnight stays for different types of accommodations. Also, each month we put in a page or two of summary charts that call attention to some aspect of visitor use that is of general interest . . . for example, Attachment #1 is a bar chart identifying the 25 units where 50 percent of total NPS recreation visits occurred during September, 1990. Attachment #2 similarly identifies the 27 parks where 50 percent of total visitation occurred for the first 10 months of CY 1990. Attachment #3 shows the relationship between the cumulative number of recreational visits in CY 89 and the number of parks where those visits occurred.

OLDER ADULT travel continues to grow. A recent issue of the "Travel Trends" newsletter reports that older adults (average age 59-60) now comprise the second largest group of family travelers in terms of annual person-trips. Also, older adults on average take the longest trips in distance and duration, with preference for package tours and with high usage of motels/hotels. And from recent market surveys: A high percentage of older Americans consider themselves 'outdoor persons', with some 75% remaining active in spectator outings, and one-third remaining active in camping, fishing and similar semi-rigorous outdoor recreation activities. Also, lest there be no doubts about the important economic impacts of older adults, the Bureau of Labor Statistics reports that the vacation travel expenditures of those aged 55 or older contributed some \$28 billion to the travel and tourism economy in CY '87. This represents an average spending of \$855 per year for each of the 33 million households headed by an older adult. It also means that older adults spend a considerably higher percentage of total annual expenditures on vacation/pleasure trips than does any other age group.

FALL VISITATION PATTERNS. For the National Park System as a whole, typically 7-9 percent of total annual visitation occurs during the month of October. Not so, however, for some 20 parks situated in

areas where viewing of fall foliage is an important event. For example, Shenandoah NP received a whopping 22 per cent of its 12-month recreational visits in October; Effegy Mounds NM, also 22%; FDR Home NHS, 17%; Adams NHS 16%; Vanderbilt Mansion NHS 15%; Blue Ridge Parkway 15%; Carl Sandburg Home NHS, 15%; Cape Lookout NS, 15%; Saint-Gaudens NHS, 15%, and so on. We know that millions of our visitors enjoy the striking natural beauty of parks; seasonal visitation statistics tell us when and where they experience attractions of unusual interest.

DSC ASSESSMENT. Darryll Johnson, Regional Sociologist in the PNWRO, recently completed for the Denver Service Center a series of surveys designed to evaluate the attitudes and perceptions of Superintendents and other park employees as regards the DSC. Topics included:

- - Awareness of services and products available through DSC, and impressions (favorable/unfavorable) about those services and products;
- - Perceptions concerning demands for DSC services that currently are not being met.
- - Attitudes about the current distribution of planning, design and construction professional staff within the Service;
- - Attitudes toward DSC priorities, responsiveness, costs, quality of work, and overhead charges; and
- - Perceptions about the need for improved coordination between parks, Regions and DSC; better communications; reduced red tape; etc.

A draft report was issued by the University of Washington Cooperative Parks Study Unit in July, 1990. The DSC will publish and distribute a summary document shortly. This is a fine piece of work dealing with important matters.

MORE ON FOREST SERVICE SOCIAL SCIENCE STUDIES. Superintendents have asked for additional information about social science work being done for the Forest Service. Some recent studies conducted for the Forest Service Wildland Recreation and Urban Culture Research Unit in California that may be of interest are the following:

- "A Study on the Implementation of Outdoor Recreation Policy on Four National Forests in Southern California."

-- "Depreciative Behavior Impacts and Controls: An Assessment of Southern California Recreation Agencies."

-- "Evaluation of Knowledge, Attitudes, Beliefs, and Behaviors Related to Cultural Resource Protection and Management in National Forests."

-- "Development of Procedures for Gathering Statistics on Recreational Visitor Use of BLM Land in the California Desert."

-- "A National Survey of Public Attitudes Toward Prescribed Fire Policies."

-- "Off-Road Vehicle Rider Ethics and User Training Programs."

-- "Social Psychological Dimensions of Risk Sport Participation."

-- "The Socio-Cultural Meanings of Outdoor Recreation: The Role of Race and Ethnicity in Defining Relationships to Recreation Places."

Superintendents who are interested in these reports can contact Alan Ewert at the Forest Service Research Station, 4955 Canyon Crest Drive, Riverside, Ca., 92507; (714) 276-6285.

JANUARY-JULY 1990 VACATION TRAVEL IN THE U.S. The U. S. Travel Data Center reports a four percent increase in U. S. vacation person-trips for the first seven months of 1990 (one person traveling more than 100 miles away from home). Total NPS recreational visits for the same period were off 0.3 percent, caused primarily by a five percent decrease in visitation at urban parks. Visitation for the seven month January-July period was up three percent at rural area parks and up five percent at remote parks.

VISITATION AT CANADIAN PARKS. Parks Canada reports 14.1 million recreational visits for the January-August period, roughly a two percent increase over the same period in 1989. These 14.1 million visits included 8.2 million visits at Canadian National Parks, 5.3 million visits at Historical Sites, and 0.6 million visits at Historic Canal Sites.

FOREIGN TOURISM. The number of foreign visitors to the U.S. grew from 25 million in 1985 to 37 million in 1989, an increase of

nearly 50 percent over the 5-year period. A further 20 percent increase to 44 million foreign visitors by 1991 is predicted by the U. S. Travel and Tourism Administration. This represents a growth rate of about 10 percent per year. In contrast the growth rate for American tourists leaving the country has been about 3-4 percent per year over the 5-year period. In terms of expenditures, foreign tourists are expected to contribute \$50 billion to the U. S. economy this year, while Americans will spend about \$47 billion in foreign countries, resulting in a projected, and growing, travel and tourism budget surplus of some \$3 billion for 1990.

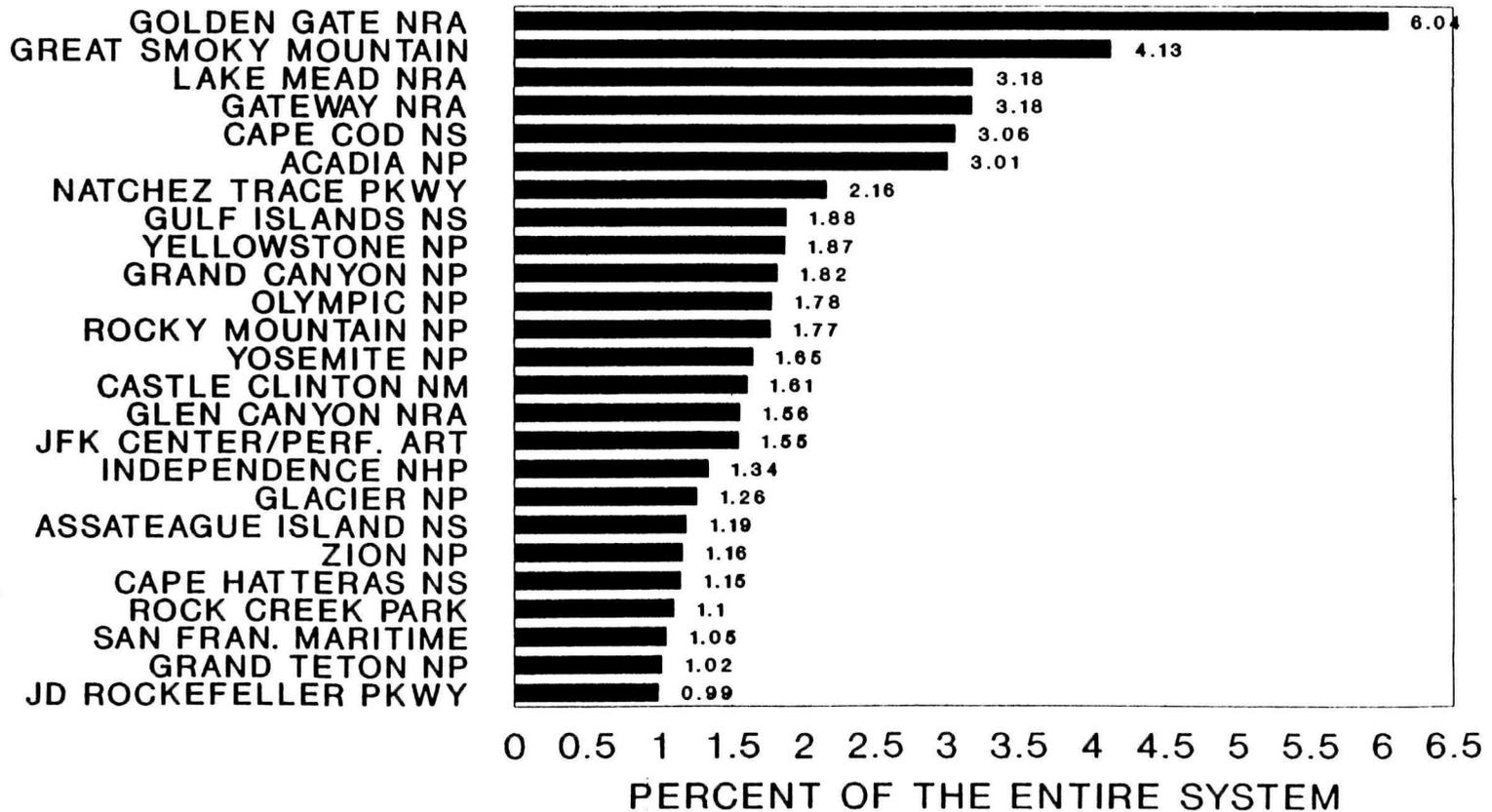
We do not have extensive information about foreign visitor use of our national parks; however, the survey data that are available indicate that about 40 - 45% of all foreign tourists visit one or more NPS sites. . . . i.e., an estimated 16 - 18 million park visitors from foreign countries in 1990. These foreign visitors are expected to spend about \$4.5 billion in the U. S. in 1990 on travel and tourism activities related specifically to the park-visit portion of their stay in this country. This means direct out-of-pocket park-related expenditures from foreign sources of roughly \$5.00 for every dollar spent by U. S. taxpayers for operation of the entire National Park System. And if one additionally considers the indirect and induced expenditures that occur as these dollars spent by foreign tourists are recirculated within the U. S. economy, the results are even more significant i.e., the monies spent by foreign tourists on park-related travel and tourism activities result in a contribution to the U. S. economy of roughly \$10 - \$12 for each taxpayer dollar spent to support the NPS system. These park-related foreign visitor expenditures also can be translated into employment opportunities at local and at national levels. If we assume that 25% of the park-related foreign visitor expenditures occur in and around parks, and that the remaining 75% of these expenditures are associated with travel to and from the parks, this would mean that about 250,000 jobs are supported within the U. S. by foreign visits to parks, and that about 60,000 -70,000 of these jobs occur in local areas immediately around the parks. Granted that the economic impacts I have calculated are estimates, there can be no question but that the contribution to our economy as a direct result of park-related expenditures by foreign visitors is very important. And further, there can be no doubt that taxpayers' dollars spent to support the NPS are recovered many-fold by monies spent by foreign tourists who visit park units throughout the country.



Richard H. Briceland

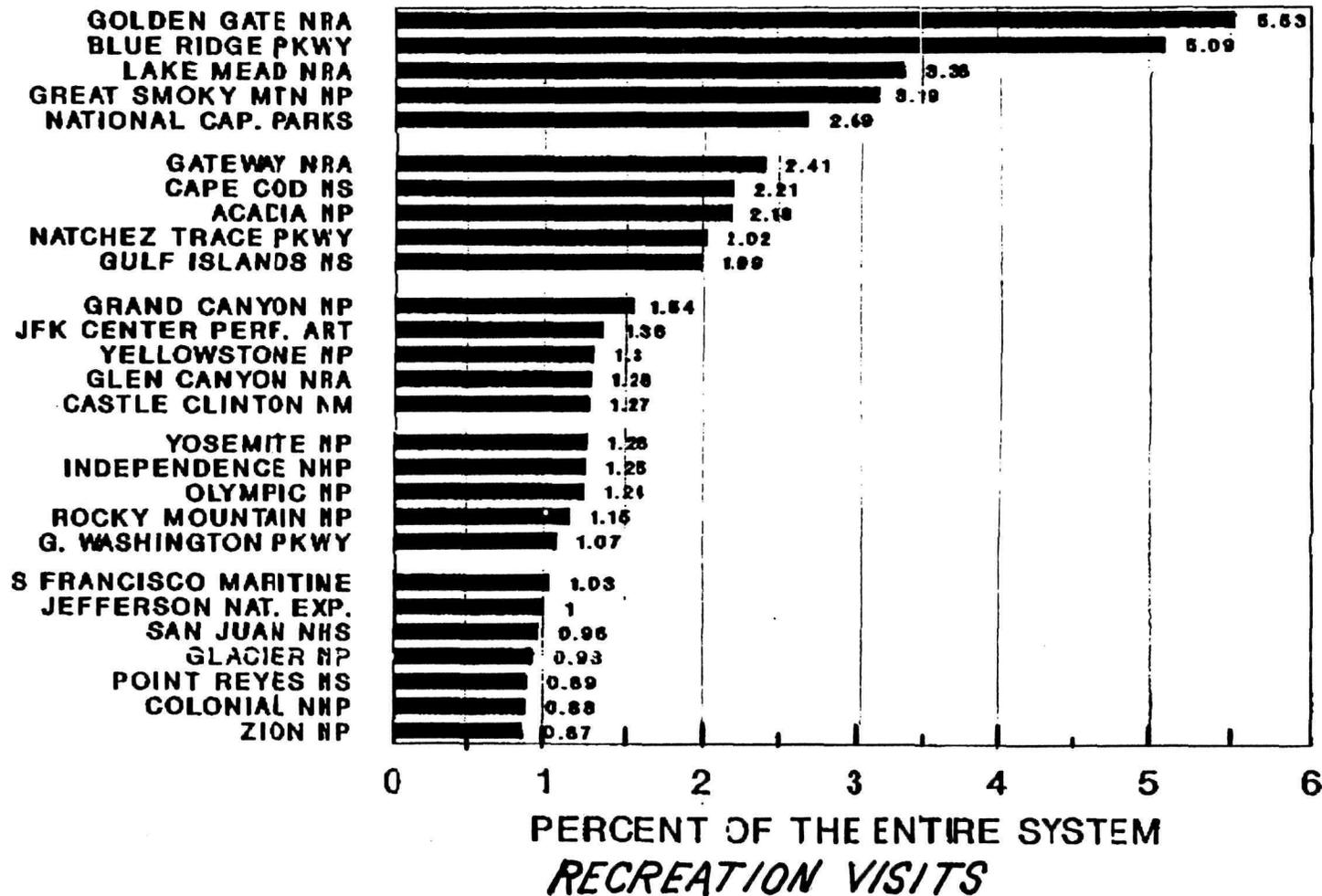
Attachments

THE TOP 25 MOST VISITED AREAS COMPRISE 50% OF THE ENTIRE SYSTEM SEPTEMBER 1990 RECREATION VISITS



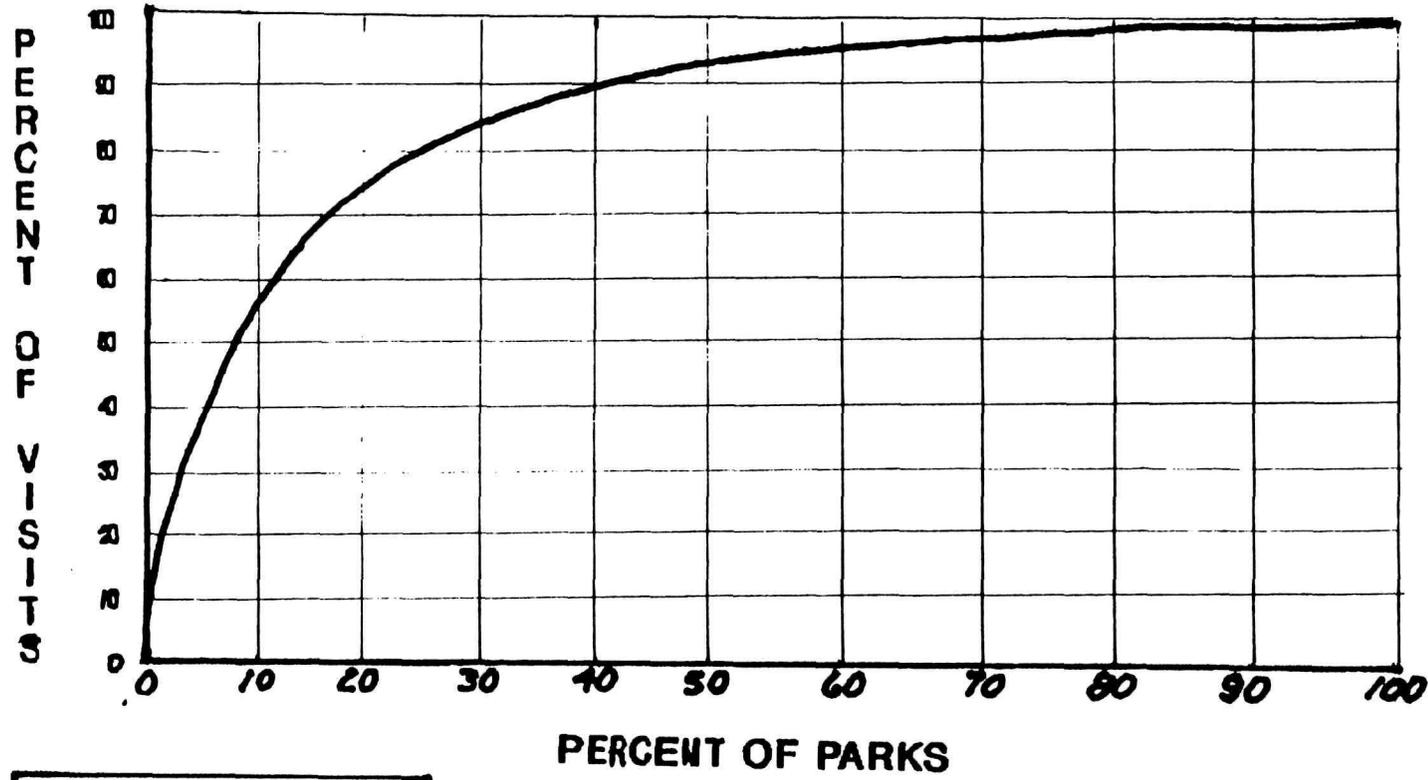
Attachment # 1

THE TOP 27 MOST VISITED AREAS COMPRISE 50% OF THE TOTAL SYSTEM JAN. - OCT. 1990 RECREATION VISITS



Attachment #2

1989 RECREATION VISITS



% OF VISITS	NO. OF PARKS
25%	8
50%	28
75%	71
90%	142

Attachment #3