The North Quabbin

Community Forestry Initiative

Ecotourism Marketing Report

Winter 2001/2002

cynthia barstow environmental marketing

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The North Quabbin Community Forestry Initiative: Ecotourism Project

Executive Summary

The nine towns of the North Quabbin area, located at the northern end of the protected Quabbin Reservoir in Central Massachusetts, boast a unique natural setting with lakes, streams, wildlife and a vibrant ecosystem living and breathing throughout an extensive forest. Its panoramic landscapes spreading so close to urban settings provide a significant opportunity as a destination for travelers interested in a nature experience.

With this in mind, the New England Forestry Foundation (NEFF), has identified Ecotourism as one project component of their North Quabbin Community Forestry Initiative. The initiative is one of the Ford Foundation's National Community Forestry Demonstration Programs and is designed, over a five-year period, to enhance the economic, social, and ecological health of the region through improved utilization of forest resources.

Investigation of the market potential for Ecotourism in the North Quabbin began in early Spring 2001 with research conducted and presented by Cynthia Barstow, an environmental marketing consultant. Following an initial presentation titled "Ecotourism and Market Trends: Opportunities in the North Quabbin,"" a task force was formed to develop a marketing plan. Six meetings were held over a six-month period to analyze further market research, determine target markets, set goals and objectives and plan strategies. The results of these sessions are outlined in the market analysis section of this document. Overall, the organization of this document follows the marketing plan model outlined below.

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Marketing plans are often written in isolation by a single consultant who reviews the data and makes educated decisions based solely on the information at hand. The plan is usually delivered to the client for their review, to be executed by a staff that is not engaged and is likely already overloaded with their own duties. These reports are usually nicely published and are "filed" on a shelf with other such reports. Content is either forgotten while the consultant is still pulling out of the parking lot or is tried to be put into action, usually with little support or enthusiasm by staff.

A number of years ago, this continuous waste became clear. Simultaneously, hierarchical management structures dropped by the wayside to allow more progressive "work teams" to exist. Teams needed attention to perform efficiently. Their tendency to follow a traditional pattern of "forming, storming, norming and performing" shed light on new possibilities for the study of organizational behavior and effectiveness. Peter Senge and system thinkers throughout management circles began to advise the country on methods to motivate teams and create solutions where all members are engaged and each dream is partially realized.

This study, as well as extensive facilitation training on the part of this consultant, began the creation of a new system of creating marketing plans in which self-selected team members shared in the development of plans under the careful guidance of the marketing expert. Different strategies have met with varying levels of success. The process has been honed to create the most successful results.

One component of the process, which varies depending on the client, is the market research. In some cases, particularly nonprofit organizations, individuals will be asked to collect data for review by the consultant and later by the team. The upside of this is that participants often appreciate the quantity and necessity for research; the downside is the time it takes to collect it. The most efficient method, it seems, is when the consultant collects the majority of data using partners within or associated with the client. The research is then synthesized down and shared in an easy Powerpoint format. After each data review, team members are asked to contribute through a variety of exercises to tease out the necessary elements of the marketing plan. Advantages of this method include a more efficient use of the time of volunteer team members and their better understanding of the project. This was the method used for the North Quabbin ecotourism project.

With an understanding of the process as described, it may not be a surprise that the objectives of the ecotourism projects were to a.) insure buy-in through multi-stakeholder approach to strategy development; b.) focus on both environmental stewardship (minimal impact) and economic development in planning; and c.) develop realistic research-based and market-driven strategies. Team members (including members of the community) were asked to commit to six meetings to review data and then participate in brainstorming sessions. It was decided outside-of-meetings contributions would be minimized due to the voluntary nature of the group.

The market research followed a traditional format to best inform the planning process. First, participants examined the current macroenvironment including demographic, political, economic, societal, technological, and environmental trends. Next, the group looked at tourism trends, nationally as well as on a state level. These data helped frame the destination potential in terms of competitors in the state as well as the region. They also provided insights on where current visitors are from, lending to their potential as target markets. Ecotourism and nature-based travel trends were then examined.

Target market research continued with an examination of ecotourists, their demographic descriptions, their perception and their behaviors. Geographic markets were identified through census data based on the profiles on the most likely ecotourist as well as data on visitor origins. A competitive analysis followed with a focus on the positioning strategies used in various regions.

The next step was benchmarking other ecotourism projects. These ranged from small-scale forest-based programs to larger multi-faceted initiatives in other parts of the world. A great deal of ecotourism attention is currently being paid to small tropical islands where severe environmental damage and economic inequities are the result of unmanaged tourism. The North Quabbin region can benefit from taking steps early on in the movement by developing measures to prevent ecological damage .

Finally, the group reviewed promotional materials and resources currently available in the area, conducted a SWOT analysis (strengths, weaknesses, opportunities, threats), and devised current belief and desired positioning statements, goal, objectives and strategies.

The details of the entire process are available in the market analysis section of this report. The sections that follow substantiate the outline above. The report is heavy on macroenvironmental and industry trends as these are the starting point of any successful plan. With thorough research in these areas, planners can identify opportunities based on actual facts rather than grasp at anecdotal evidence on which to base their suggestions. The research shared with team members was, as mentioned earlier, a synthesis on the data you are about to read. Handout copies of the Powerpoint presentations are available in the appendix.

Target markets, competitive analysis, benchmarks and the current marketing mix were captured to facilitate the process, not to be shared at length in a final report. Most of the information came through websites and university databases, copied and presented in the powerpoints. To review those materials, please see the appendix for presentations and the market analysis for the results of those sessions.

Ultimately, the goal of any marketing plan is to develop a brand identity, goal/objectives and strategies. In six short meetings, this voluntary team accomplished that goal.

Ecotourism Marketing Team

- Earle Baldwin, Athol Conservation Commission
- Ron Cloutier, Mt. Grace Conservation Land Trust
- Sue Cloutier, Millers River Environmental Center
- Robert Day, Winterwood at Petersham Bed and Breakfast
- Annette Ermini, Ermini Marketing
- John Foster, New England Natural Training Center
- Jim Heyes, New England Forestry Foundation
- Bonnie House, Phillipston Conservation Commission
- Carol Joyce, White Buffalo Herbs
- Tom Kussy, North Quabbin Chamber of Commerce
- Marion Larson, MassWildlife
- Scott Maslansky, New England Forestry Foundation
- Alice Rojko, Millers River Watershed Team Leader
- Dave Small, Athol Bird and Nature Club
- Don Stone, Small Business Consultant
- Bruce Scherer, Orange Planning Board

Market Research

Macroenvironmental Trends

Analyzing macrotrends is a critical first step. It brings all members of the team to the same starting point. By looking at the influences our target markets collectively cope with every day and at the opportunities emerging in the world, which may be to the advantage of the project, participants begin the journey together.

Demographic Trends

Diversity

The United States' population is growing at approximately one percent each year with 39% of the growth coming from net international migration. In 2000, 28.4 million foreign born resided in the United States, representing 10.4 percent of the total U.S. population. Among the foreign born, 51.0 percent were born in Latin America, 25.5 percent were born in Asia, and the remainder were born in Europe or other regions of the world.[1] – Diversity in this country continues to increase. Today, approximately one-third of today's kids are minorities vs. one-fourth the same age group 40 years ago. "Approximately one in eight people in the United States are of Hispanic origin."[2] It is projected that by 2050, non-Hispanic whites will account for 54 % of the population, down from 74% now. It is expected that Hispanics & Asians will constitute 61% of U.S. population growth from 1995 to 2025.

With minority influence projected at these rates, marketers jumped quickly to understand this significant trend, only to find out it is not as widespread as it would appear, but centered on several specific multiethnic counties. American Demographics led the way in breaking the diversity myth. "The fact is the largest blocks of Hispanics and Asians are clustered in only a few markets. Most markets beyond these 'multiple melting pots' are largely white, or white and black."[3] The top ten Hispanic markets house 58% of the nation's Hispanic residents and 43% of all U.S. Asians live in three metropolitan areas. Of 3,142 counties in 1996, only 745 show white populations below the national white percentage (73%), and well over half (1,711) are at least 90% white.[4]

Aging

The U.S. population is aging. Currently one out of every ten persons is sixty years or older with estimates of one out of every five by 2050.[5] The basis of this growth can be found in the Baby Boom generation – the population born between 1946 and 1964. The largest single generation group, Baby Boomers have lead many trends throughout their lifespan. "In 1996, the eldest boomers began celebrating their milestone birthday and since that historic day, a Boomer turns 50 years old every seven seconds. However, only 23% of all Boomers are 50 plus."[6] Several consequences of this demographic shift are anticipated. For example, over the next 30 years, the workforce of 55 to 64 year-olds is expected to expand by at least 8 million.[7] With recent medical improvements, the number of centurions has increased significantly. The average lifespan today is 75 years compared to 47 at the turn of the century.[8] If this continues, it is suggested that by 2050, boomers 83 and older will be 37 million.[9] By 2030, the age distribution for the U.S. is projected to look like Florida is today.[10]

Family Structure

In 1998, there were 70.9 million family and 31.6 million non-family households — 69.1 and 30.9 per cent of U.S. households. Fewer than half (49.0 per cent) of the family households had their own children under 18 living at home and of that 27.3 percent were headed by a single parent. There were 2.1 million father-child and 9.8 million mother-child family groups. In the mother -child family groups, 42.2 per cent of the mothers had never married.[11] With this restructuring of family units come new parenting units including same gender couples and grandparents.[12]

Geographic Trends

Geographic trends show all ethnic groups traversing across the country . American Blacks, currently concentrated in northern urban centers and the rural South are moving to the metro areas of the "New South" (Atlanta, Raleigh-Durham, Houston.) White growth is mostly occurring in the Southeast, Texas, and the Rocky Mountain states near California. These gains are largely due to domestic migration, as whites follow job growth in high-tech, information-based industries. And the Hispanic/Asian communities are found primarily in the three largest metro gateways and smaller metros in California and Texas.[13] A recent Census Bureau report concurs; "the nation's fastest-growing counties were in or near metropolitan areas of the South and West." [14]

Generations

People are often clustered into "generations" to identify trends that correspond. . Depending on the demographer, different labels are attributed, but there is general agreement about the classification of the groups and their:

Generation Y (b. 1980 to present) represents the children of the largest population group, the Baby Boomers. Techno-savvy, these individuals are growing up with computers in their homes and classrooms; cell phones, and cable. One-third of 6-7 year olds have TVs in their bedrooms.[15] One in four lives in a single-parent household. Three in four have working mothers. Raised in these dual-income and single-parent families, they've already been given considerable financial responsibility. Surveys show they are deeply involved in family purchases, be they groceries or a new car. One in nine high school students has a credit card co-signed by a parent, and many will take on extensive debt to finance college.[16] A recent survey of the age group found more than 80% believe that it's "IN" to be smart.[17]

Also called the "Baby Boomlet," this generation is considered, "by most calculations, already bigger than the baby boom: 77.6 million born since 1979 vs. 76.8 million from 1946 through 1964, according to the research firm Yankelovich Partners."[18] But don't let that fool you. This group of youngsters is not evenly distributed across the nation; it is primarily located in counties of large minority populations. And the "pig in the python" movement of the boomers is more like two piglets for the boomlets. Two significant blips occurred from 1979 to 1994 resulting in large numbers yet without the enormous influence their parents brought with them. [19]

Generation X (b. 1965 to 1979) was once referred to as the generation of slackers, a mere 52. 4 million compared to the previous gang of 25 million more. No longer considered as such, their behavior is still cautious and somewhat disengaged. These young adults were raised within more divorced and latch-key homes than in any previous generations. "As young adults, maneuvering through a sexual battlescape of AIDS and blighted courtship rituals—they date and marry cautiously."[20] This moderately small group of approximately 50 million is slowly setting up homes and starting families. Politically, they lean toward pragmatism and nonaffiliation, and would rather volunteer than vote. "A wide sampling of surveys indicates that Xers are less politically or civically engaged, exhibit less social trust or confidence in government, have a weaker allegiance to their country or to either political party, and are more materialistic than their predecessors."[21] Simultaneously, Generation Xers have led a renewed interest in spirituality and alternative health practices.

Baby Boomers (b. 1946 to 1964) have had the greatest influence of any single generation due to its enormous size of 77 million. For years, marketers have focused their attention on the lifestages of these individuals. Stay-at-home mothers armed with the advice of Dr. Spock raised this generation to be independent and in control of their futures. "During the 1960s, this manifested itself in the anti-authoritarian counterculture movement. In the 1980s, it translated into see-how-fast-I-can-get-rich materialism. In the 1990s, Boomer individualism was apparent in increased entrepreneurialism, the self-help movement, and the rise of New Age spiritualism."[22] Today, "entering midlife (and national power), they are trumpeting values, touting a "politics of meaning," and waging scorched-earth Culture Wars"[23] Now, marketers are interested in the maturing of these individuals. Healthcare institutions, leisure travel groups, and retirement communities have been waiting for the Baby Boomers to age.[24] In response, boomers are creating a new life stage referred to as "mid-youth" with an emphasis on adventure travel, new careers, and self-health.

Swing Generation (b. 1933 to 1945) *and War Generation* (b. pre-1933) The Swing generation is not deemed as such because of its affiliation with an era of swing dancing, but as a small group before the War generation and after the Boomers. Their behavior tends to "swing" towards one group or another versus defining its own. They have been receiving attention due to their unique ability to live longer, healthier lives. Americans aged 65 or older number more than 33 million, and their ranks are growing. Approximately 1,050 more people over age 65 are added to the population each day. [25]

Economic Trends

The economy has been a major focus of the past year. When the project first started, economists were beginning to forewarn investors that the heyday of the stock market would soon be over. After September 11, economists were sure the market would plummet. As it turned out, the dive was not as devastating as some had predicted. The Commerce Department announced recently that in the last quarter of 2001, the nation's economic output rose at an annual rate of 1.4 percent. That better-than-expected performance was driven by strong consumer spending and is a tribute to the resilience of the American economy in the aftermath of the Sept. 11 attacks. In all of last year, the economy grew by a meager tenth of 1 percent. There is some indication that U.S. Corporate layoffs have been significant over the past year. However these too may be slowing. The number of workers filing initial applications for jobless benefits fell for the fifth week in the last six, the Labor Department said today, a sign that layoffs are slowing. The six-week stretch of claims below 400,000 is the longest since before mid-April 2001, when the first recession in a decade was beginning.[26] More than a million jobs have been lost to the slowdown in the last year, and Alan Greenspan reflected the overwhelming consensus among economists when he said he expected the unemployment rate to continue rising, even during a recovery.[27] Business Council survey of big-company chief execs finds 75% believe economy remains in recession, and 77% say economy is not likely to grow much this year, despite economists' growing optimism about recovery.[28]

This month (March 2002), 28% of Americans rate the current economy as excellent or good, while 16% give it a "poor" rating. Another 55% say "only fair." These results are virtually identical to those obtained last month, and show little substantial change since November.[29]

Consumer Spending

Meanwhile, contrary to what is supposed to happen in a downturn, spending by consumers has remained strong, despite people's losses in the stock market, rises in unemployment and the sense of insecurity that followed Sept. 11. The housing market has also remained strong.[30]

Spending on housing, automobiles, furniture, toys, fast food, physicians and dentists—almost everything that is routine and unrevolutionary—has rescued the economy from the collapsed investment in telecom networks and dot-coms and from the depressing effects of fallen stock prices.[31]

While the economy was booming and incomes were finally beginning to climb for those on the middle and lower rungs of the ladder, a "national culture of upscale spending" emerged, economist Juliet Schor wrote in *The Overspent American*. People are running up record levels of debt, she argued, in order to acquire bigger cars, bigger TVs, and bigger houses.

On the other hand, many affluent Americans, they say, are beginning to recognize that, "there's a very short half-life to the pleasure that comes from spending." Between 1990 and 1996, according to a survey by EDK Associates, nearly a fifth of the population made a voluntary effort to achieve a simpler lifestyle. About 85% of these "downshifters" reported that they were happier as a result.[32]

Work

And even with many working on the "more balanced" approach, Americans are working more than ever. Average hours of working per day is on the rise, number of dual-income earners is moving up and the increased participation of women in the labor force—especially mothers with young children—has changed lifestyles and consumer behavior.

The market is working more than ever. Only one in five of us works a traditional 7 hour day and 60% of men's and 40% of women's workdays already exceed 9 hours or more.

Those working more than one job nearly doubled from 1982 to 1996. The number of "involuntary part-time workers" has tripled since 1969. More than half of U.S. households are headed by a woman working full or part time.

Although we have learned through the 90s to work more than ever, actual material success is giving way to values. "83% of women and 74% of men consider a work schedule which allows more time for family the most important job component."[33] Mid-career retirements may provide solutions. Increasingly over the next decade, consumers will take career breaks to home-school, volunteer, go back to school.[34]

Widening Gap

Until recently household income was increasing at all income levels. Median income was the highest since 1969 at $40,800 and poverty lowest since 1979 at 11.8%. Unfortunately, this has not changed the widening gap between the rich and the poor, referred to as a "canyon" by USA Today. One percent of the population owns nearly 42% of the nation's wealth (more than the bottom 90%); since 1980, income has grown 21% for the wealthiest one-fifth while meanwhile, wages for the bottom 60% have stagnated or dropped; and 10% of the population owns 90% of the value of stocks and mutual funds.

Recently, numerous reports have shown that the gap between the top and the bottom of the income scale is greater than at any time since the gap was tracked, back in the 1940s.

A new report by the Economic Policy Institute and the Center on Budget and Policy Priorities found that while the gap grew more slowly in the 1990s, the best economy in 30 years did not stop inequality's inexorable climb. In the 1990s, the inflation-adjusted incomes of the poor were flat, middle-class incomes grew only 2 percent (adjusting for inflation), while the average income of the top 5 percent grew by 27 percent.[35] A recent Roper poll calibrated the voters' ambivalence: When asked if government should try to close the income gap by imposing heavy taxes on the rich, 45 percent of respondents favored redistribution and 51 percent were against it.[36]

Technology Trends

Technological innovations are becoming mainstream. By 2003, 30% of industrialized nations will use portable information appliances, fuel cell-powered cars will be introduced by 2004 and alternative energy sources re expected to meet 30% of energy needs.[37]

Technology is also changing the way we work. In 1994, 13.6% of downsizing was attributed to new technology. By 2005, 20% of all workers will be working from home as a result of technology.[38]

According to American demographics, computers are in most homes–64 million households have home PCs, up from 52 million just two years ago, and 56% of the U.S. population accessed the Internet in November 2000[39] One report on Internet access and penetration—The Fourth Quarter 2001 Global Internet Trends –found that 498 million people now have Internet access from home. According to the Pew study, Americans are making more online purchases and other financial transactions, as well as writing e-mails with more significant and intimate content.[40]

Security technologies, artificial intelligence, third-generation networking products and services, voice-over Internet protocol, and all things wireless are the hot technology areas.[41]

Security technologies are booming, including biometrics like iris and fingerprint scanning, but also more intrusive and, therefore troubling, identity methods such as body scanning. Over and over again, executives noted that this area is going to be a big one in coming years, spurred by concerns after the September 11 attacks on the United States.

Artifical Intelligence (AI) is moving more into the IT mainstream and is key to the concept of pervasive computing, with "intelligent" machines that respond to human needs and patterns. Future applications will involve sending robots into dangerous situations for police and military use, an application that has been employed in Afghanistan and will continue to evolve, said Helen Greiner, co-founder and president of iRobot, in Somerville, Massachusetts.

Societal Trends

Balance
A desire for balance seems to be the overarching societal trend today. One of the earliest millenium stories a few years ago in Brandweek, a mainstream marketers' magazines, indicated, "A lot of optimism is welling up in the face of the millenium, about changing self and changing the world with new age spirituality, the 12-Step movement and a world of sustainable resources." This on the heels of more than a decade of faster living, longer work hours, more pressure at home with dual-income earners, seemed to be the cry for a more balanced existence. How this has manifested in a few short years is not the huge increase in voluntary simplicity as predicted by Gerard Celente (although some have

taken that route), but instead a search for best-of-both-worlds solutions. At Roper Starch, they're called "cool fusion solutions." In this new consumer alchemy, opposites—Western versus Eastern, work versus personal life, nostalgia versus the future—not only attract, but they produce interesting new solutions. The results are often greater than the sum of their parts.

Rather than choosing between work or home, people are trying to integrate their careers and personal lives. They're investing in technologies that break down the walls between home and office. They're also infusing new ideas into the workplace, like flex-time/flex-place work schedules, casual dress codes, and bringing the dog to work. Americans are increasingly confident about their fast-paced future. They're more likely to say the pace of change has never been faster (81% agree, up 5 points since 1993), and to think that, in the long run, these changes "will be for the best" (69% agree, up 9 since 1993). At the same time, they're awash in nostalgia: 55% agree the "good old days" were better than the present, a complete turnaround from 1974, when the majority said the present was better.

Hence, we have the growth of "materialistic simplification" products and services like takeout dinners, lawn-care services, and new technologies that let you buy back time, and a host of books, seminars, and consulting services on "simplifying your life." There's a market: Fully 51% of Americans strongly agree that they would be "willing to pay" for products and services that "will make life easier for me and my family."[42]

Health

Just like the contradictory trends associated with our lifestyle of balance, two different studies concur, Americans may want a healthy lifestyle, but more are losing the battle to obesity. "According to a study by the Addictive Behaviors Research Center at the University of Washington, "More than one-third are classified as obese, up from one-quarter in 1980."[43] Subsequently, overweight consumers have spawned a diet industry with sales of $35 billion in 1996, according to MarketData in Tampa, Florida.[44]
Along with our ever increasing awareness and concern for health comes a thirst for knowledge. "Americans follow health news more closely than sports, business and finance, or entertainment news, according to the Pew Research Center for the People & The Press."[45] As the computer-savvy baby-boom generation ages and encounters more health problems, boomers will turn increasingly to the Internet to investigate health problems and seek advice.

Environmental Trends

The widespread concern for the environment has become more obvious these past few years. In part, people tend to be more concerned about "Mother Earth" when most other aspects of their lives are under control. "The height of concern occurred, not coincidentally, during the last economic boom in the late 1980s. The recession of 1991-92 dampened our Earth-first zeal, and only in the last two years have Roper and ERA seen an upsurge-to-late-'80s levels of concern for all things environmental."[46] This is not to say citizens want the environment to be top-of-mind only at times of luxury problems.

"Nearly six in 10 Americans desire a balance between economic growth and protecting the environment, but generally feel that protecting the environment should win out when both can't be achieved together."[47]

According to a CNN/USA Today/Gallup Poll conducted this March, "Americans are most likely to mention air pollution, water pollution, destroying rain forests, and global warming as the most serious environmental problems facing the U.S....85% said they personally worry about the pollution of rivers, lakes, and reservoirs, while 84% are concerned about the contamination of soil and water by toxic waste."

Interestingly, the activities citizens chose to support environmental causes have changed in the past ten years. In 1990, over 90% of Americans said they were willing to do the following activities to help the environment: Separate household hazardous wastes, take automotive oil to a center; recycle trash, limit use of fertilizer and pesticides, and support dog waste ordinances. In the 1998 NEETF/Roper reported 85% were willing to do the following: save electricity, buy 'green products,' conserve water; and recycle trash. Simple household behaviors, such as recycling (90%), reducing energy usage (83%), and trying to use less water (83%) are most common, closely followed by shopping behaviors. Many Americans say they have avoided environmentally harmful products (83%) or bought environmentally beneficial products (73%), an indication of the appeal of "green consumerism."[48]As more consumer buying opportunities present themselves as options to participate in the cause, Americans seize the day and thereby contribute to the phenomenal success of the natural products industry; organics in particular have been extremely successful.

When asked if they consider themselves an active participant in the environmental movement, sympathetic but not active, neutral or unsympathetic toward it, nearly 1 in 6 Americans (16%) say they are active in the movement. Another 55% are sympathetic toward the environmental movement, and only 5% are unsympathetic toward it.[49]

Political Trends

President George W. Bush began the month of March, 2002, enjoying an 81% job approval rating, according to the latest CNN/USA Today/Gallup poll, conducted March 1-3. Each job approval rating for Bush since Sept. 11 ranks among the highest Gallup has recorded for any U.S. president, dating back to 1938, and no president has remained above 80% approval longer than Bush has.[50] Last year the country was split between the directions Congress wanted to take the country and those Bush wanted to take. Currently, Bush receives tremendous public support.

According to a February 2002 Harris Poll, the three most important issues people would like to see the government address are terrorism, the economy and education, in that order. In a January CBS News poll, economy and jobs beat out terrorism for the single most important problem for the government to address in the coming year.

Confidence in the military and the White House has changed significantly over the past year, according to a recent Harris Poll. The U.S. Supreme Court has remained[51] virtually the same where major educational institutions have declined.

The World Trade Organization has received minimal attention since the Seattle riots. 62% consider U.S. participation in the WTO good, 22% consider it bad. [52]

Industry Trends

Travel and Tourism Trends

National Overview

The following synopsis of the travel market shares notable trends from the Spring 2001 when the initial research took place and for trends after September of that year when the travel industry was severely affected by the terrorist attacks.

In 2000, direct traveler spending in the United States by domestic and international travelers reached $563.6 billion, 5.7 percent of the nation's gross domestic product. This activity generated $100.2 billion in tax revenue for federal, state and local governments.[53] Of the 997.6 million person trips, 75% were for leisure travel and 77% used an auto, truck or RV for the mode of transportation. The top activities for domestic travelers were identified as shopping (33%), outdoor activities (17%) and visiting museums and/or historic sites (14%). The number of trips by U.S. residents mirrored the 6% increase in population from 1994 to 2000.[54] Spending by domestic travelers reached $481.6 billion in 2000, registering an increase of 6.6 percent over domestic travel expenditures in 1999.[55] The travel share by month is, as one might predict, slower from January through March (5-7%) grows in the Spring to its peak in the summer months of June–August (10-11%), and tapers off in the Fall (8% each month).[56]

According to TIA Domestic Travel Market Report 2001, Hotel/Motel/B&B's are used for over half (56%) of overnight trips in the U.S. This translates to 260 million overnight trips that include a hotel/motel or B&B stay. Hotel/motel/B&B trips are more likely than the average U.S. trip to be taken for business reasons (45% vs. 22%). These trips are also more likely than average to be taken by air (34% vs. 18%). The average duration of a hotel/motel/B&B trip is 4.0 nights. One in six (17%) hotel/motel/B&B trips include children.[57]

In early 2001, Business Week projected the travel industry would begin a slowdown concurrent with the predicted economic trends. "After years of buoyant demand and modest capacity growth, the travel industry can count on only one side of that equation this year. Airlines, hotels, and car rental companies are still expected to expand cautiously, but it's questionable whether demand will keep up in a slowing economy."[58]

The TIA traveler sentient index of the same period (first quarter 2001) showed modest increases in travel interest based in part on perceived availability to travel. It also indicated that across U.S. regions, the Northeast again shows the strongest gain mainly due to more positive consumer interest in taking a pleasure trip (up 17.6%) and perceptions of service quality (up 10.6%).[59]

Travel Markets/Demographics

Baby Boomers (35 to 54 year-olds) generated the highest travel volume in the U.S. in 2000, registering more than 245 million trips, more than any other age group. Boomers are more likely to stay in a hotel or motel (60%), to travel for business (34%) and to fly (25%). Boomers spend more on their trips than other age groups, averaging $479 per trip, excluding transportation to their destination.[60] More than half of trips that include children are taken with Baby Boomers (55%). One in five trips in the U.S. (22%) include children under 18, or 125 million trips in total. Most (87%) trips with children are for leisure, nearly half of which are taken to visit friends or relatives. About 42 percent of overnight trips with children include a hotel stay. Popular activities on trips with children include shopping (36%), outdoor activities (22%), historical places/museums (15%), and theme/amusement parks (14%).[61] Mature Americans, aged 55 or older, average the longest stays away from home (4.9 nights, excluding day trips), with 18 percent staying seven or more nights away. Conversely, this group also has a higher share of day trips (21%). Even when including day trips in the average, mature travelers continue to rank first over other age groups with 3.9 nights average trip duration. Half (52%) of mature travelers stay in a hotel or motel on their trip, and four in ten stay at the homes of friends and relatives (43%). Mature travelers are the most likely of all groups to travel alone or with someone from outside their household (49%). They are also the most likely of all age groups to have household travel party sizes of two members (41%).[62]

Exploring a destination on your own, at your own pace appeals to many Americans. Nearly one-quarter of U.S. travelers, or 34.8 million U.S. adults, have taken a vacation by themselves in the past three years. These travelers are less likely than total U.S. travelers to be married and to have children in their household. The solo vacationer is 42 years of age with an average annual household income of $54,000. More than one-quarter (26%) have a professional or managerial occupation, 53% are male, 47% female and 38% have completed college.

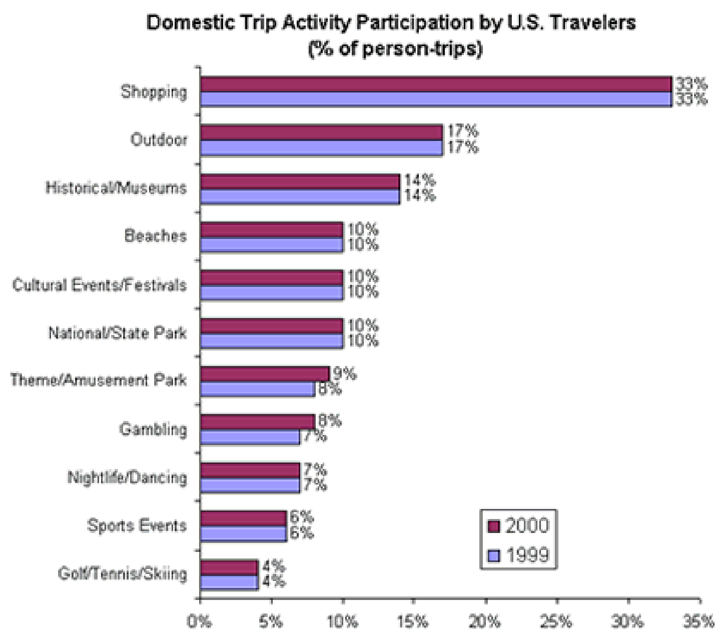
Despite currently living alone, nearly half (49%) of all single travelers have been previously married. More than half of all single travelers (59%) are college graduates. The median household income for single travelers is $27,200. Ninety percent hold credit cards. Fifty-nine percent of single travelers own their own homes. Forty-three percent of all single travelers own a personal computer. Twenty-four percent of single travelers own cell phones. Nineteen percent have health/fitness club memberships. Sixty-three percent of all person trips are for pleasure while twenty six percent are taken for business. The remaining travel by singles is for personal or other purposes. Sixty-four percent of person trips taken by single travelers is by car, twenty six percent is by plane and nine percent is bus, train and other forms of transportation. Only six percent of single travelers have taken a group tour in the past year. Forty percent of single travelers have stayed in a hotel, motel or bed and breakfast in the past year. Average number of nights that single travelers spend in a hotel is 3.6 nights.[63]

Travel Trends/Activity Participation

The top domestic trip activities continue to be shopping, outdoor activities and visiting museums and historical sights.

<u>Shopping</u>

In the year 2000, 91 million people—63 percent of adult travelers— included shopping as an activity on a trip. Because people can go shopping on more than one trip away from home, TIA estimates that 33 percent of all person-trips or over 333 million U.S. person-trips include shopping. Shoppers are almost as likely to stay at a hotel, motel, or bed and breakfast establishment (50% of person-trips) as they are with friends or relatives (47%). Overnight shopping trips average 4.3 nights and on them people spend, on average, $564, excluding the cost of transportation to their destination. A majority (59%) of shopping travelers obtained information about shopping areas from friends, family or co-workers. Hotels were another popular source (for 25%) to learn about shopping (in-room maps, brochures, a TV or the hotel concierge).[64]



Source: *Travel Industry Association of America; TravelScope*

<u>Outdoor recreation</u>

Outdoor recreation and/or visiting national or state parks is the second top activity for U.S. travelers taking leisure trips within the U.S. One in five (21%) leisure person-trips includes some form of outdoor recreation and/or a visit to a national or state park. Outdoor trips are also likely to be taken by car (74%) and one in six (17%) outdoor trips includes camping in an RV or tent.[65] Camping is the number one outdoor vacation activity in America. One third of U.S. adults say they have gone on a camping vacation in the past five years and only 6% of people who have gone camping said it was not for them. Camping vacationers tend to be married with children at home. The average age of travelers who go camping is 37 and their median household income is $43,000. People who go camping also tend to enjoy hiking, biking, canoeing. Fifty-nine percent of campers said they traveled with their spouses on their most recent outdoor vacation and nearly half traveled with their children.[66]

In addition to be second most popular outdoors activity, hiking is the second-fastest growing outdoors activity in the USA, second only to bird watching. According to the National Hiking Association, about 73 million Americans hike, a 196% increase since 1982.[67] According to one USDA Forest service report, hiking is the most popular outdoor adventure accounting for close to 50 million participants, 804.7 million days and about 557.7 million primary-purpose trips in 1995.[68]Biking vacations attracted more than 27 million travelers in the past five years and they rank as the third most popular outdoor vacation activity in America, (following camping and hiking). People who take biking trips tend to be young and affluent. About half are between the ages of 18 and 34 and one-fourth are from households with an annual income of $75,000 or more. More than 80% of biking travelers took a camping trip in the past five years and 72% took hiking trips in the past five years. National Parks are one of American's biggest attractions. Nearly 30 million U.S. adults (20% of travelers or 15% of all U.S. adults) took a trip of 100 miles or more, one-way, to visit a national park during the past year. Residents of the Rocky Mountain region of the U.S. are most likely to visit a national park with 37% saying they included a park visit while traveling. A large share of these travelers (70%) participated in outdoor activities while visiting the national parks. Among these outdoor activities, hiking (53%) was the most popular, followed by camping (33%) and fishing (19%).

Historical/Museums

Historical Places/Museums are popular attractions for U.S. travelers taking trips within the United States. Historical places and museums are included on 14% of all U.S. person-trips. Trips including historical activities are more likely than other trips to be taken by air (22%) and to include a hotel stay (61%).[69] The learning aspect of travel is important to U.S. travelers, with about one-fifth —30.2 million adults— having taken an educational trip to learn or improve a skill, sport or hobby in the past three years. Eighteen percent of travelers in the past year said that taking such a trip was the main purpose of their travel. Overall, educational travelers are more likely than total U.S. travelers to be male (56%), younger (39 years, average age), a college graduate (49%), have a professional or managerial occupation (38%), have children in the household (51%), and have a higher annual household income ($75,000 mean annual household income). They are less likely to be married.

Festivals are a popular way for travelers to experience new and interesting cultures. One-fifth of U.S. adults (21%) attended a festival while on a trip away from home in the past year. This translates to 31.0 million U.S. adults. One third of festival travelers (33%) attended an arts or music festival in the past year, making it the most popular type of festival to attend while traveling. Twenty-two percent of festival travelers attended an ethnic, folk or heritage festival. This was followed by county or state fairs (20%), parades (19%), food festivals (12%) and religious festivals (11%). Thirty percent of festival travelers attended a type of festival other than the six previously mentioned.[70]

Travel Trends/Duration

Most of the travel in the U.S. is made up short trips. More than half of all travel in the U.S. is for two nights or less.

Trip Durations in 2000	% of Domestic U.S. Person Trips in 2000
No nights	17%
1-2 nights	38%
3-6 nights	31%
7 nights or more	14%
Source: Travel Industry Association of America; Travelscope®	

Weekend travel is more popular than ever, with half of all U.S. adults—nearly 103 million—taking at least one weekend trip per year. Almost 30 percent of Americans have taken five or more weekend trips in the past year and 35 percent of all weekend travelers say they've taken their children with them on at least one weekend trip. Compared to five years ago, day trips and weekend trips appear to be more popular today than trips lasting about one week or longer. In fact, 40 percent of weekend travelers report they are taking more day trips and/or weekend trips (38%) today than five years ago. Interest in longer trips lasting more than one week seems to be declining—43 percent of weekend travelers claim they are taking fewer long trips than they did five years ago. Most weekend travelers (42%) make last-minute plans and select their destination within two weeks of their trip. Thirty percent of weekend travelers say they took advantage of discounts, coupons, or special offers while planning or while on their most recent weekend trip. Visiting cities (33%) and small towns (26%) are favored destinations for weekend travelers, followed by beaches (16%), mountain areas (10%), lake areas (4%), state or national parks (3%) and theme or amusement parks (3%).[71]

Travel Trends/Information Sources

Travel Information comes from a variety of sources, but friends and relatives are the number one source for information about places to visit or about flights, hotels or rental cars (43%). Travel agents are the second most popular source of travel information (39%) and travel companies such as airlines, hotels or rental car companies were third (32%). One in five past year travelers (21%) contacted a city, state or country's tourism office to get information about a destination that they planned to visit or about flights, hotels or other travel services in the past five years. This equates to 33 million U.S. adult travelers. Contacts with travel agents, tourism offices and travel companies include visits to the web sites of these organizations. In total, 19 percent of travelers visited a web site to obtain travel information in the past five years.

Half of all U.S. adults (101.9 million) say that they use the travel media—everything from newspaper travel sections and television travel shows to online newsletters—to plan their vacations. Twenty-eight percent say they used newspaper travel sections to plan their travel in the past year, 21% used an Internet web site for their travel planning and 21% used television travel shows such as CNN Travel Guide. However, when travelers who use more than one travel medium were asked which travel medium is *most useful* to them, 24% say that they find Internet web sites most useful, followed by newspaper travel sections and television travel shows. Half of travel media users (50%) say they read, watch or listen to travel media at least once a month or once a week. About one third (31%) of travelers have decided to visit a travel destination because of information that they saw or read in the travel media.

The Internet and online services are very popular with travelers. Travelers tend to be quite computer savvy, with two-thirds of the 90 million travelers who are online—over 59 million-using the Internet to make travel plans in 2000. Among online frequent travelers, 69 percent use the Internet for travel planning. Use of the Internet to actually book travel continues to increase, with 27 percent of all travelers now online having made travel reservations on the Internet during the past year. That translates to nearly 25 million people, up nearly 60 percent over 1999. Of these, 15 million are frequent travelers.[72]

Travel Trends/Current and Forecast

Following a golden decade of travel, the industry came to a screeching halt in 2001. A slowing economy in the first half of the year already had a number of segments in trouble, most notably the airlines. The events of September 11 made the downslide all the more inevitable. Although consumer confidence is rising slowly, many tour operators are still reeling from sales lost immediately after the terrorist attacks.[73]And while people will eventually feel comfortable about walking jet ways again, they are not yet willing to board an airplane at the drop of a hat, or stay away from their families for more than a brief period. It is no surprise that in November, the number of domestic passengers arriving to and departing from Logan International Airport dropped 32.1% compared to November 2000.[74]

While many Americans have avoided travel since September 11, the nation's two largest recreational vehicle rental companies have been swamped with reservations for Thanksgiving and Christmas. They say it's the biggest increase in business they've ever seen and that many of the renters are first-timers(42 to 67%).[75]

According to Peter Yesawich, keynote speaker at the Western Massachusetts Regional Tourism Conference held in September 2001, 68% of Americans polled on September 13 said they will drive rather then fly when possible for leisure trips and 77% said they would like to take their next vacation to someplace they have not been before.

An increase in auto travel will be accompanied to closer-to-home activities. According the Herman Group, "Expect a significant up-tick in sales at home improvement stores and other types of stores that sell items to enhance the hearth and home. People will cocoon for a while in their homes and will want to be as comfortable as possible. Family trips to major entertainment destinations like Orlando will not be as popular, but those families will look for other close-to-home, lesser-known attractions."[76]

While the travel industry as a whole is expected to suffer low numbers in 2001, a very modest increase is expected to begin in 2002. TIA's Travel Forecast Summary projects a 3.5% decrease in total domestic person-trips and a 12.6 percent drop in international visitors to the U.S. in 2001. They expect a 7.6% decrease in total travel expenditures. They also anticipate a modest recovery in the travel industry by 2002 with a 2.2% rise in travel expenditures and a minimal 0.3% increase in total domestic person-trips. Projections for 2003 parallel optimistic forecasting for the economy in general with an 8.2% increase from 2002 in expenditures and a 2.8 increase in trips.[77]

New England and Massachusetts Tourism Trends

Direct traveler spending in Massachusetts, including both domestic and international, totaled $13.3 billion during 2000, up 8.7 percent over 1999. Massachusetts ranked 14th in domestic travel expenditures and seventh in international travel expenditures among all 50 states and the District of Columbia in 2000.

50.7% of all person trips to Massachusetts come from the New England area. 24 % come from the mid-Atlantic region. The top five states of origin for visitors to Massachusetts are Massachusetts, Connecticut, New York, New Hampshire, and New Jersey. Of all visitors, 20.2% are from Massachusetts, 15.2% from Connecticut, 15.1% from New York and dropping way down to 5.8% from New Hampshire and almost the same from New Jersey. In a MOTT study of Western Massachusetts visitors, Massachusetts resident visitors increased to 27.5% and New York increased to 23.8%, presumable due to the attraction of the Berkshires.

The share of visitors originating from these states varies by season. For instance, Massachusetts' residents represent a greater share of seasonal visitors in the summer (24.2%) than in other seasons, whereas New Hampshire and New Jersey residents represent a greater share of visitors in the spring (9.5%; 8.3%) than in other seasons. Thirty-eight percent of Massachusetts' 24.8 million domestic visitors, or 9.5 million, come in the summer months: June, July, or August. The autumn season hosts the second greatest number of visitors (6.6 million), followed by spring 2 (4.8 million), and lastly winter (3.9 million).

Of the metropolitan areas, the Boston market ranked first (20.3%), the New York market second (17.9%), the Hartford/New Haven market third 12.8%) and again, with a big drop is Providence/New Bedford (4.8%).

Nearly half (42.5%) of the visitors to Massachusetts came to see friends and relatives, the same to Western Mass. The next most-cited reason for visits dropped down to 14% with entertainment, 13.6% for business, 11.8% for personal, and 8.1% for outdoor recreation.

The mode of transportation most frequently used for travel to Massachusetts was own auto or truck (67.3%). For travel to Western Mass, this number increased to 82.2%. Airplane dropped from a statewide number of 21.8% to a mere 8.6%.

The average trip duration for the state in 2000 was 3.9 nights, but the actual stay in the state was only 2.3 nights. A majority of visitors (35%) did not stay overnight and the hotel/motel/B&B stays were 32% in the statewide survey and 29.9% in the Western Mass survey. After a similar percentage of overnight lodgings in private homes (27%), RV or tent stays dropped to 2.4% statewide and 3.3% in Western Mass. Summer visitors report a significantly longer average length of stay than visitors of other seasons (4.5 nights, excluding day-trips). Additionally, a significantly smaller share of summer trips are day-trip visits (33.9%) than occur in other seasons. Compared to the annual average length of stay (3.7 nights, excluding day-trips), visitors in the spring stay significantly fewer nights (2.8 nights, excluding day-trips). Forty-five percent of all winter visitors report a day-trip to Massachusetts.

The average spending per trip statewide was $431 and in Western Mass, $315. Some other statewide figures, for which there were no Western Mass comparisons, were travel party size—one at 47.6% and two at 30.6%; children in the household—none at 66.8% and both two and three at 13%. Nearly 80% of travelers had no one under 18 in their travel party. 95.5% of visitors were white.

Activities which visitors enjoy in Massachusetts vary from national figures. For example, outdoor recreation drops from the second most-identified activity nationally to fourth in Western Mass and statewide. Other regional/state variations are noted in the chart below.

Western Mass		**Statewide**	
Shopping	34.6%	Shopping	26.1%
Cultural Events/Festivals	20.3%	Historical Places/Museums	19.0%
Historical Places/Museums	15.6%	Beaches	11.2%
Outdoor	13.8%	Outdoor	10.1%
Theme/Amusement Park	5.6%	Cultural Events/Festivals	10.0%

Total domestic and international traveler spending in Massachusetts, including direct and indirect spending, reached almost $21.5 billion in 2000, up 8.8 percent over 1999. Total payroll income earned by travel-generated employees was $7.4 billion in 2000, an 8.5 percent increase over 1999. Total travel-generated employment in Massachusetts, including direct and indirect, was 269.1 thousand jobs in 2000, approximately 8.1 percent of the state's total non-agricultural employment. Twelve counties in Massachusetts received over $100 million in domestic travel expenditures in 2000. Six counties in Massachusetts indicated five thousand jobs or more directly supported by domestic travelers. Unfortunately, the two counties where the North Quabbin towns are located received very little impact at all as indicated by the chart below. [78]

2000 Domestic Travel Impact on Massachusetts
Table A: Alphabetical by County, 2000

County	Expenditures ($ Millions)	Payroll ($ Millions)	Employment (Thousands)	State Tax Receipts ($ Millions)	Local Tax Receipts ($ Millions)
Barnstable	$713.06	$201.97	9.39	$28.72	$38.11
Berkshire	253.62	69.16	3.33	12.17	6.29
Bristol	281.26	63.06	2.79	14.58	4.98
Dukes	105.01	29.04	1.31	3.83	5.47
Essex	583.17	150.29	6.70	30.14	13.79
Franklin	42.07	8.46	0.39	2.31	1.25
Hampden	336.33	80.02	3.30	17.98	6.02
Hampshire	75.41	17.86	0.79	3.94	1.86
Middlesex	1,589.72	473.90	20.04	83.95	38.15
Nantucket	152.97	43.84	1.65	4.22	4.71
Norfolk	627.01	215.83	8.76	32.55	12.46
Plymouth	326.45	70.10	3.24	15.46	13.58
Suffolk	5,565.09	1,603.27	55.52	139.32	91.78
Worcester	493.40	117.84	5.31	25.56	9.96
State Totals	$11,144.57	$3,144.65	122.52	$414.70	$248.40

Ecotourism and Nature-based Travel

Ecotourism is a nature-based form of specialty travel defined by The International Ecotourism Society (TIES) as "responsible travel to natural areas that conserves the environment and sustains the well-being of local people."[79] Although "ecotourism" attempts to recognize the incredibly complex interactions among the environment, culture, economy and travel, it often eludes a clear definition. Although TIES has been a leader in the area, other guidelines are offered by such diverse groups as the United Nations Environmental Programme, Conservation International, the American Society of Travel Agents, Sierra Club and Mountain Travel*Sobek. "Certified ecotourism" has recently been introduced in Australia, offering consumers a "Good Housekeeping"-type seal like those used for certified organic produce and sustainably-harvested wood.[80]

"The founders of the eco-tourism movement twenty years ago—they included Elizabeth Boo of the World Wildlife Fund, and Stanley Selengut of Maho Bay Camps in the U.S. Virgin Islands—had a clear vision of what they meant by 'eco-tourism'…they clearly intended it to apply to tourism that satisfies at least the following criteria:

1.Eco-tourism is outdoor travel, in natural settings, that causes no major harm to the natural environment in which that travel takes place. It is travel that 'treads lightly on the land.' It uses sustainable resources: solar power, wooden lodgings, recycled materials and waste water.
2. Eco-tourism makes use of the travel facilities created by inhabitants of the area in which it takes place. It does not patronize international hotel chains, nor dine on foods and wines flown in from other countries. It uses local lodgings, eats native meals, and employs sightseeing guides from indigenous populations. It thus directly benefits the people whose habitat is the object of your trip.
3. And finally, ecotourism respects not only the local natural environment, but the native culture of the area. It is travel conducted in the spirit of humility. It does not harangue the local population but listens to them; it does not ask them to create entertainments for the visitors, but subdues and minimizes any such economic differences through modest behavior and clothing."[81]

The United Nations has declared 2002 as the International Year of Ecotourism. The World Tourism Organization and the United Nations Environment Programme have taken the lead in organizing activities for this Year at the international level. The UN declaration is a testimony of the growing importance of ecotourism, not only as a sector with a great potential for economic development—especially in remote areas where few other possibilities exist—but also as a powerful tool for conservation of the natural environment if it is properly planned, developed and managed. The World Ecotourism Summit is scheduled for May 2002 in Quebec, Canada.

In this country ecotourism, although growing by 20 to 30 percent a year, still represents less than one-tenth of the total tourism industry.[82] WTO (1998) stated that ecotourism and all nature-related forms of tourism account for approximately 20 percent of total international travel.

"The whole idea of ecotourism has become more and more mainstream," says Linda Pearson, sales and operations manager at REI Adventures. "There are a lot of baby boomers involved now, and they don't want to just bake in the sun. They want a more active vacation, but they also want a comfortable lodge, maybe with outside showers and recycled dishware." Dan Crandall is a trip consultant with Natural Habitat Adventures, and he reports that business is growing 20 percent a year, fueled by a strong interest in southern Africa. Ecotourism could become too popular: Crandall's company takes visitors to Canada's Hudson Bay, and he says some uncaring tour operators roar their tundra buggies to within 50 feet of the polar bears. Pearson adds that sensitivity to local cultures should be a watchword for the emerging ecotourism industry. "When we're planning meals, we try not to buy all the chickens in a village," she says, "because that would mean no eggs for the local people."[83]

1. Outdoor recreation experiences are consumed on site, well away from home.
2. Travel costs to the site often far exceed the costs at the site.
3. It is a package of facilities and programs that attracts people to a site or area.

4. Recreation experiences are ephemeral and experiential; they cannot be possessed except as memories.
5. The production, delivery, and consumption of the recreation product occur simultaneously.
6. The consumer is actively involved in the production of the experience, both their own and those of others.
7. Poor recreational experiences cannot be returned for a refund.
8. Recreational sites and experiences are difficult to assess before purchase; therefore, word-of-mouth from friends and family is an important choice determinant.
9. Recreational products cannot be stockpiled during periods of low demand and sold during times of excessive demand.
10. Important aspects of the recreation experience occur before and after the on-site participation.

Although ecotourism certainly goes beyond nature-based or outdoor recreational tourism, understanding the trends in those areas is a base upon which to build. A survey of 17,000 Americans over the age of 15 was conducted in 1994-95 as part of the National Survey of Recreation and the Environment. From that survey, results showed 94.5 percent of Americans participated in at least one form of outdoor recreation in 1994, up from 89 percent in 1982 and translating to 189 million nationwide.[84] An update in March 2000 provides the percentage of Americans participating in a variety of outdoor recreational activities and their increases since 1982 .[85]

Wildlife watching has increased significantly over the years. According to The National Survey of Fishing, Hunting, and Wildlife-Associated Recreation conducted in1996, 62.9 million (31%) U.S. residents enjoyed a variety of wildlife-watching activities. 60.8 million watch around their homes and 23.7 million watch on trips away from their homes. Wildlife-watching participants spent $9.4 billion on trips.[86]

According to National Parks trends, nearly six in ten Americans participate in outdoor recreation at least monthly. Twenty-nine million U.S. adults (15% of all U.S. residents) took a trip of 100 miles or more, one-way, to visit a national park during 1997. One in three Americans (1998) visited a federal recreation site over the past twelve months. Visitors to federal recreation sites continue to believe that they receive good value for the fees they pay. Americans would have been willing to pay an average of $9.20 in additional fees for their most recent visit to a federal recreation site.

Recommendations from National Parks visitors for improvement of the system include: expand volunteer programs to help with maintenance, including trails (73.3% support), develop trails across public and private land for non-motorized use (56.5% support), designate some trails for specific uses such as snowmobiles or bikes (55.1% support), expand commercial recreation, including outfitters (28.8% support), and develop trails across public and private land for motorized vehicles (28.8% support).

With the increased interest in this form of tourism, new labels and overlapping definitions exist. Adventure travel is usually known to include higher-risk sports activities but not always.

"Half of all American adults took an 'adventure' travel vacation in the last five years, according to the Travel Industry Association of America, a trade group that defines adventure as anything from camping to river rafting. About 24 million Americans traveled simply to watch birds or animals, the group says."[87] 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.[88]

In the New England market, Rodney Warnick of the University of Massachusetts Hotel, Restaurant and Travel Administration Department has compared activity percentage of the national level to those on the regional level from Simmons data collected annually from 1980to 1996 and Standards Rate and Data's research from 1993 to 1999. According to Warnick, in 1999, participation in wildlife activities were 15.5% at a national level compared with 15.6% in New England, for camping and hiking, nationally 26.8% participate versus 20.6%. For fishing, 21.3% of New Englanders participate versus 18.8 nationally. For cultural activities, however, New England participation rate is 19.3% versus a national rate of 16.7% and for history and heritage activities, New England percentage was 15.7% versus a national 15.5%. [89]

Competitive Analysis

From the work of Rodney Warnick, it has been determined that after Massachusetts (36.4%), the closest share of visitors is Maine (19.5%), New Hampshire (14.9%) and Vermont (10.2%). These three states share considerable natural resources similar to those in the North Quabbin. Maine contains 542,629 acres of state and national parks, including the 92-mile Allagash Wilderness Waterway, Acadia National Park (one of the top ten most visited national parks in the United States), and Baxter State Park (location of Mt. Katahdin and the northern end of the Appalachian Trail). A nationally recognized outdoor outfitter reinforces the image of Maine as a gem of natural wonders. Maine is hosting a symposium on Nature-Based Tourism for the state in April 2002.

New Hampshire is sometimes referred to as the "Mother of Rivers." Five of the great streams of New England originate in its granite hills. New Hampshire has 1,300 lakes or ponds and about 40 rivers with a total mileage of about 41,800 miles. New Hampshire is also home to Mount Washington at 6,288 feet (1,918 m).

Vermont hails visitors to its maple syrup, flowering trees, beautiful mountains and traditional lifestyles. Dominating the state's natural resources are the Green Mountains, one of the oldest mountain ranges in the world. Some 223 mountains over 2,000 feet in elevation rise above fertile valleys that support and extensive dairy industry. The nation's sixth largest lake, Lake Champlain, runs along the state's western border.

From statewide data from the Massachusetts Office of Travel and Tourism, we have learned that considerable travel is made to Barnstable county (Cape Cod). The county posted $713.1 million in direct domestic expenditures (from tourism). These expenditures generated $202 million in payroll as well as 9.4 thousand jobs within the county.

Berkshire County has far less "tourism" impact than others in the state, but the number of second homes is quite high, alluding to a seasonal residence. The average cost of a Berkshire County home is $164,907. An average home in the summer community of Great Barrington is $224,839.

These five regions have been targeted as potential competitors for ecotourists and nature-based travelers: Cape Cod, Berkshire County, New Hampshire, Maine and Vermont.

Although neither the Pioneer Valley nor the North Shore of Boston were not identified as a potential competitors, both areas have undergone ecotourism studies and have recommended strategies. The Pioner Valley, for example, has developed the idea of creating a Connecticut River Adventure Center, a scenic farm trail and festival, and further partnership opportunities at the Great Falls Discovery Center.

Target Market

Demographics

Although figures vary, The International Ecotourism Society provides the most consistent and definitive description of an ecotourist in the following market profile:

Age:
35 - 54 years old, although age varied with activity and other factors such as cost.

Gender:
50% female and 50% male, although clear differences by activity were found.

Education:
82% were college graduates. Interest in ecotourism was found to shift from those who have high levels of education to those with less education, indicating an expansion into mainstream markets.

Household composition:
No major differences were found between general tourists and experienced ecotourists.

Party composition:
A majority (60%) of experienced ecotourism respondents stated they prefer to travel as a couple, with only 15% stating they preferred to travel with their families, and 13% preferring to travel alone.

Trip duration:
The largest group of experienced ecotourists (50%) preferred trips lasting 8-14 days.

Expenditures:
Experienced ecotourists were willing to spend more than general tourists, the largest group (26%) stating they were prepared to spend $1,001-$1,500 per trip.

Important elements of trip:
Experienced ecotourists' top three responses were: (1) wilderness setting, (2) wildlife viewing, (3) hiking/trekking.

Motivations for taking next trip:
Experienced ecotourists' top two responses were (1) enjoy scenery/nature, (2) new experiences/places.[90]

Paul Eagles, the foremost authority on ecotourism trends and traveler characteristics suggests, "Ecotourists are of all ages. However, people in the older age groups have higher levels of ecotourist participation than occurs in the general population. Both sexes participate equally. High levels of formal education, and the associated income levels, are influencing factors for those of mature ages."[91]

Some researchers who have gleaned information about specific segments are interested in ecotourism for different reasons and therefore study different demographic factors. "At the 1995 World Conference on Sustainable Tourism, three prototypes were identified as potential ecotourists. The first is composed of wealthy, healthy, older people (between 44 and 66 years of age) who have previously traveled extensively and have exhausted traditional destinations. The second prototype is the much smaller segment of younger (between 33 and 40 years of age), liberal, middle-class travelers who tend to participate in packaged, lower cost ecotours. The third segment, ecotourists, are travelers 20 years of age or younger who seek a travel experience sensitive to environmental issues but one that also reflects an alternative lifestyle. A lengthening period between retirement and death and a growing elderly population suggests that the first group profiled—older, wealthy, experienced travelers—will constitute the core of future green tourists."[92]

Many of these studies have been conducted about the ecotourist who travels overseas to pristine and unspoiled countries. Although the North Quabbin can continue to glean a great deal of information from these ecotourism pioneers, information about these nature-based tourists with destinations in the United States is certainly more applicable. One such study was conducted of North Carolina visitors. The study, "Ecotourists' Motivational and Demographic Characteristics: A Case of North Carolina Travelers," published in the Journal of Travel Research, gave this perspective on ecotourist traits:

"First, the results indicate the 80.4% of the sample traveled three times or more for overnight weekend vacations during the past two years. Second, 45.9% of the sample spent four to nine nights away from home on a typical annual vacation. The following preferences associated with an ideal nature-oriented vacation were chosen as the top seven: uncrowded (60.9%), experiencing nature (56.9%), inexpensive (51.9%), historic (42.4%), educational (42.0%), friendly (39.3%), and hospitable (30.9%). Finally, the top five sources for travel information are previous experience, travel books/guides, word of mouth, tourist bureaus, and 1-800 telephone numbers."[93]

Psychographics

Although the demographic characteristics are critical in informing the next step—matching criteria within geographic boundaries such as Boston to determine towns or communities where the greatest numbers of potential customers exist, the psychographic commonalities are most important for product development. The following information, about how ecotourists think, feel and behave has been gleaned from the work of Paul Eagle:

"Nature without the soiling influence of people is celebrated; low levels of human presence, except for conservation purposes, are desired. The human heavy hand is encouraged if it helps attain ecological conservation goals. This latter idea is an important departure from the wilderness perspective where any human intervention is discouraged. The observation of natural features is best done first hand, but films and books suffice when personal contact is not feasible. Ecotourists hold their environmental attitudes strongly, and they have no hesitation in forcing a set of desired behaviors on others. Activities such as bird watching, wild flower photography, and reef snorkeling are reflections of these attitudes.

"Ecotourists are personal and reflective. Other people are allowed to enter their personal space under specific circumstances. People who help the ecotourist to find, observe, and understand wild nature are actively sought. Other travelers who make the trip cost efficient are tolerated. Ecotourism is primarily concerned with an individual search for learning and for the associated personal development, and no specific level of social contact is required to make the experience worthwhile.

"Ecotourists have high levels of dedication to their activity, associated with a strongly held and coherent attitude set. They have an environmental philosophy that is well developed and that is reflected in many other cultural forms, such as literature and art. Their philosophy guides their travel actions. The resultant social rules are widely developed and widely transmitted to others. Travelers are sensitive to these rules as long as the rules fit within their attitude set. They work hard to force their rule set onto others, using all of their economic and social power to influence, often forcefully, the social and political structures to reflect the rules that they have developed."[94]

Niche Markets

There are several niche markets that present significant opportunities for the North Quabbin. For example, "Women's adventure trips are an increasingly popular segment of the USA's $100 billion-a-year adventure travel industry. The trips, which often include hiking, camping and mountain climbing excursions for women only, cater to those who may not have much exposure to outdoor adventure.[95] Along with women-only packages are coming spiritual/outdoor recreation retreat packages, many targeted to women.

Alternative health options, yoga and meditation are being sought to fulfill the motive to take leisure travel…"a chance to relax and get rest."[96]

Mature Travelers are another niche market. "Mature travelers, age 55 and older, spend more money on outdoor vacations than any other age group in the U.S. The average spending by mature travelers on their last adventure travel vacation was $1,300 compared to $950 for travelers between the ages of 35-54 and $660 for travelers between the ages 18-34." Along with this mature market comes a couple of different opportunities. One is a multi-generational package. "The number of people who are taking their grandchildren on vacation has almost doubled; and one in five family travelers spanned three generations."[97] Mature travelers are also choosing lifelong learning as a motivator in their site selection. Elderhostel is a successful organization that packages educational opportunities for seniors at different locations around the world. On the other end of the lifelong learning spectrum, homeschooling field trips are often sought for environmental and historical education.

Benchmarks

Much of the focus of initial ecotourism has been on small tropical areas where destruction to environmentally sensitive is highly problematic. Ecotourism in the developing world has negatively impacted these environments, traditional resource access and local cultures.

After a thorough analysis of ecotourism and nature-based travel projects throughout the world, a handful were identified as having elements which might be considered "best practices." This is not to say the entire project falls under this description. Certain pieces can serve as helpful hints to the North Quabbin planning process. Some may be noticeably absent such as the Adirondacks. The projects mentioned in this study were primarily developed for ecotourism.

West Kentucky: On a website specifically designed to attract ecotourists, West Kentucky promotes their offering through a central site with a map to click for sights and links to recreation and wildlife area. Their copy reads: "In an era when wildlife is being constantly threatened by increasing development, people are becoming more interested in discovering diverse ways to cherish the natural beauty of our ever-decreasing wilderness areas. Ecotourism offers a passive approach to the appreciation of our natural resources.

This site is a guide to ecotourism in West Kentucky, which is becoming more and more unique in its efforts to preserve its indigenous species of flora and fauna. From bird watching to exploring cypress swamps, West Kentucky has unique plant and animal species that offer exciting outdoor opportunities."

Jasper, Arkansas: "Ozark Tours is in one of the poorest, though highly forested, counties of Arkansas. Considered the model of domestic eco-tourism by the Ecotourism Society, it has, for the past seven years, offered a range of outdoor activities, with an emphasis on local heritage. Run as a non-profit organization, the program was initiated to promote theCommunity and improve the economy."-*Houston Chronicle 1/21/2001*

Clearly the model for the North Quabbin project, Jasper, Arkansas provides resources for potential ecotourists outlining day hikes referred to as ecotours, adventures for youth, and information on its Woodland Learning Center, under the guise of Ozark Ecotours. "Ozark Ecotours is a job creation program of the Newton County Resource Council (NCRC), a nonprofit membership based community development corporation. Since 1987, NCRC has worked to improve the quality of life in Newton County while preserving and enhancing the county's traditions, values and natural resources. Ozark Ecotours is NCRC's nature tour company which assists Newton County residents to develop a quality tour based on the knowledge residents have of the county's natural resources and cultural heritage."

Forest County, Pennsylvania: Similar to both Jasper and the North Quabbin region, the Forest County area was a re-industrialized, resource-dependent area seeking to develop ecotourism to diversify its economy. The county has one of the lowest median household income and highest unemployment rates in the state. The forest area through forest-based industries and recreation make up 51% of the county's total payroll and proprietor income. Forest County currently promotes its nature-based area as "the Natural Escape." "The County offers limitless opportunity to escape the hustle and bustle of the work-a-day world. You can literally feel the stress and pressure melt away as you enter the County and become enamored with its pristine beauty. " With links to recreational opportunities and other relevant businesses, the community has narrowed its focus to the leisure provided by their natural surroundings.

Florida Ecotourism: Florida seems to be one of the most progressive in terms of communicating its ecotourism opportunities. In addition to an accessible, attractive and professional looking website, a magazine of the same name, Florida Ecotourism, is also produced. They also publish both an Ecotourism Guide and an EcoFlorida Ecotour Directory. Ecotourism guidelines are presented on their website to reinforce the need to preserve the natural environment.

According to their website, "Ecotourism in Florida is a large sector of the Sunshine State's travel industry. Many people visit Florida just to see the state's natural resources: Florida's lakes, rivers and oceans; its wildlife and birds; its forests, parks, preserves and wildlife refuges; and, of course, the Everglades. The Florida Fish and Wildlife Conservation Commission estimates that outdoors-oriented activities have a $7.8 billion impact on the state's economy."

Hawaii Ecotourism: A well-organized group, the Hawaii Ecotourism Association provides potential visitors with the following definition and goals of the association:

Ecotourism is nature- and culture- based tourism that is ecologically sustainable and supports the well-being of local communities and appeals to visitors who want contact with nature, local communities and indigenous cultures; targets travelers with special interests who are looking for unique and authentic experiences; takes into account the impacts of the visitor industry upon the environmental, social, cultural and economic fabrics of the local community; and strives to conduct its activities in harmony with nature.

The goals of the association are to: promote communication and education about ecotourism issues; provide an information and resource network for visitors residents, tour operators, resource managers, planners, educators, government agencies and other professionals; promote a visitor industry that is environmentally and culturally sensitive; promote community-based, sustainable economic development that benefits local residents; enhance visitors' experiences through effective interpretation; promote resource conservation; encourage repeat visitations, longer stays and multi-island itineraries; and provide continuing education and professional development opportunities.

Rancho Lobos, Mexico is a more unusual, but interesting project. Set on a single site in Mexico, Rancho Lobos in cooperation with the Scretariat of Environment, Natural Resources, through their Program on Forestry Development worked on a Complimentary Study to use and protect its Natural Resources through an ecotourism development project. Working in conjunction with the Secretariat of Tourism in the State of Sonora, Rancho Lobos opened its doors offering memberships and individual guided tours to visit and participate in the Ranch's development.

Their website provides details on their membership strategy, allowing Ranch visitors to experience the multiplicity of ecotourism resources available on site. A database of attractions as well as an annual calendar of activities is available

Costa Rica: Often looked to as the first and most successful ecotourism project, Costa Rica has not been without its own growing pains. Successful promotion has attracted significant crowds to its uniquely beautiful natural surroundings.

Its website heralds the attendance. "The fact that more than one million tourists visit Costa Rica each year does not happen by chance. Our country, located in Central America, is an isthmus where life seems to have created its roots. Covering only 0.03% of the surface of our planet, Costa Rica has approximately 6% of the world's biodiversity."

Current Marketing Mix

Unless otherwise indicated, the information in this section has been extracted directly from the North Quabbin Community Economic Profile prepared February 21, 2000.

The North Quabbin region is located in North Central Massachusetts, extending north from the Quabbin Reservoir to the New Hampshire border and east from the Connecticut River to Mt Wachusett. The 1,800 square mile region presents a landscape of rolling hills, small towns and larger old mill towns, wetlands, winding streams and river valleys. The forest, which covers about 85% of the region, consists principally of white pine types and "transition hardwoods", characterized by greater numbers of northern species than the central hardwoods of southern New England. The Quabbin Reservoir, created in 1938 by the damming of the Swift River, is a major and defining landscape feature and is surrounded by 60,000 acres of protected watershed forestlands. The North Quabbin region provides an important ecological corridor between this large protected area to the south and the Mt. Manadnock region to the north.

At the center of the North Quabbin region are two old mill towns, Athol and Orange, surrounded by six smaller hill towns, New Salem, Petersham, Phillipston, Royalston, Warwick and Wendell. These eight towns, bound together by common threads of history and economic conditions as well as proximity and shared environmental and ecological features, form the North Quabbin Community.

Product

The North Quabbin Community, at present, does not have a well-developed sector of its economy devoted to outdoor recreation, education and hospitality support for tourists and visitors to the region. We do see the area as rich in natural resources and scenic attractions that create a potential for significantly increased activity of this type. Our search of the Millers River CDC Business Directory revealed only two small businesses in the area devoted exclusively to providing outdoor educational / adventure experiences. Two much larger and successful outdoor recreation companies lie to the east and west of the region, hinting at the potential.

Outdoor activities including hunting, fishing, hiking, biking, canoeing and kayaking, rock climbing, mountain biking, and similar pursuits are all popular in the North Quabbin and attract a significant number of enthusiasts both locally and from a distance. However, there is minimal hospitality and retail infrastructure to support significanl levels of tourism. We have been able to identify only 4 B&B's and 3 motels within the 8 towns of the North Quabbin Community. There are also two small private campgrounds and two state parks providing seasonal acomadations for visitors to the area. Upwards of 50 restaurants and eating/drinking establishments are operating in the North Quabbin. However, most are small and cater mostly to locals; only a very fiew could be considered "destination" restaurants. There are no movie theatres.

Retail business supporting outdoor recreation is also limited. We identified 3 businesses selling canoes, boats and motors, 3 selling camping equipment, 2 bicycle shops, 2 locations selling guns, amunition, bows and arrows and related hunting gear, 1 selling fishing tackle, 4 selling ski-mobiles or off-road motor bikes. None of these retail establishments is large, and most are quite small. Most seem to cater to the local market.

Most of the area's 20 plus convenience and general stores carry items that appeal to campers, hunters, fishermen, and other users of the outdoors.

We feel the area's outdoor recreational potential is under-appreciated and under-utilized. More retail and hospitality infrastructure is needed to support an increased level of tourism. More promotion and an improved image for the North Quabbin area are needed to attract a larger flow of tourists that could support these new and expanded tourism support businesses. This "chicken-egg" situation needs a jump start. Even modest increases in the level of tourism in the area would have a noticable impact on the local economy.

Note: What the Economic Profile does not share is a handful of very positive nature-based programs and/or sites in the Community. The Millers River Environmental Center has recently opened its renovated building and provides numerous bird and nature field trips. The Athol Bird & Nature Club has a good reputation in the birding community. Paul Rezendez in a photographer and well-known tracker. He holds a very good reputation within the outdoor and wilderness enthusiasts' circles.

The Orange area has a number of antique shops and the presence of old mills may be an attribute if positioned correctly. A number of bed & breakfast establishments are beautiful historic buildings and there are numerous small and quaint town commons throughout the region.

Price

Note: The ecotourism offerings currently available in the region price their products according to market comparisons. What is critical to this project is to understand the North Quabbin economic picture to see how the community at large will be perceived. The Economic Profile continues:

As was previously introduced, a steady loss of the industrial employment base in Orange and Athol that started in the 1950's has contributed to economic hardship and decline from which those communities have not recovered even through the "economic boom" of the late 1990's. This picture of prolonged economic decline and hardship is clearly reflected in the per capita and median household income statistics for the towns. Table 2, North Quabbin Community Income Statistics, illustrates clearly how Athol, Orange and the surrounding small towns are among the poorest communities within the state of Massachusetts. Athol and Orange show, perhaps, the most severe effects of a prolonged decline in the communities' economic base. Orange, with a median household income that ranks in the bottom 10 out of the 351 towns and cities in Massachusetts, and a poverty index of 13.1%, is the most economically stressed of the towns. Athol closely follows Orange, with a median household income that also falls in the lowest decile of Massachusetts' towns and cities, and a poverty index of 11.7%.

The hill towns surrounding Orange and Athol, excluding Petersham and New Salem, have historically been towns of modest means and economic achievement. Wendell, Warwick, Royalston and Phillipston all fall well below the Massachusetts median household income levels. Only Petersham and New Salem are at or above the state median. These findings are all based on the 1990 census figures. More recent estimates confirm that the general picture of relative economic disadvantage remains true throughout the decade and still prevails today.

Overall, the North Quabbin Community towns record a per capita income that falls 28% below the state median and a median household income that is 23% below the state median. These figures would rank the region, were it counted as a town, among the lowest 10 per cent of Massachusetts' towns and cities in terms of income. At 11.1%, the percentage of households with income levels below the poverty line is also well above the state average.

Place

The main east-west route through the North Quabbin area is Route 2, which traverses Phillipston, Athol, Orange, and Wendell. A limited access, 4 lane highway from Athol eastward, Route 2 provides good access to the greater Boston area and the major coastal north-south highways (95, 495, 195). Other larger metrpolitan areas to the east along Route 2 include Gardner, Fitchburg, Leominster and Concord. At Athol's eastern border, Route 2 is reduced to a 2 lane higway, still with limited access. This stretch of highway has been the scene of many fatal accidents and a perennial subject for studies and proposals to upgrade.

As Route 2 passes west out of Orange and Wendell, it degrades still further to an ordinary 2 lane road passing through downtown Erving, and on through the rest of Erving, Millers Falls, Turners Falls and Gill before resuming its 4-lane limited access briefly in Greenfield. In Greenfield it intersects with Route 91, the other major north-south highway serving northern New England. Beyond Greenfield, Route 2 continues as a 2-lane road to the New York border. The segment of Route 2 between Orange and Greenfield has long been seen as an impediment to commercial transportation and economic development. Innumerable studies and proposals have yet to produce a viable solution or alternative, and Route 2 remains the best, and really the only alternative for travel west form the North Quabbin area and connecting with north and south destinations served by Route 91.

The principal north-south route through the North Quabbin is Route 202, which passes through Phillipston, Athol, Orange, and New Salem. It is mostly an ordinary 2-lane highway except fot the section that it shares with Route 2 through Athol. Route 202 connects with Winchendon and Peterborough (NH) to the north, and Belchertown, Holyoke and Springfield to the south. It is also the connecting route between the North Quabbin and the Amherst-Northampton area in Hampshire County. Route 202 is not ideal for commercial travel, and many haulers will use Route 2 to connect with the major north-south routes to the east and west.

Other state highways in the North Quabbin include Routes 32 and 122, which provides a connection from Orange and Athol through Petersham to Barre and Worcester to the south. Traveling north on Routes 32 and 68 connects Athol and the North Quabbin with the Keene area of New Hampshire. Route 2A, which parallels Route 2, is the principal road joining Athol and Orange. Route 78 runs north from Orange and Warwick linking the area with south-western New Hampshire and the Brattleboro (VT) area.

Most of the roads connecting the smaller towns of Warwick, Wendell, New Salem, Petersham, Phillipston and Royalston with Orange and Athol and each other are typical small "back country roads." These roads that pass through the forests and countryside may be less than ideal for commercial travel but are integral to the natural beauty and ambience of the North Quabbin region.

Until very recently there was virtually no public transportation within the North Quabbin or to destinations outside the community. Special services such as vans and buses are available to designated segments of the population (elderly, disabled, etc.) and for busing students to the local school systems. Taxi service is also available, but is very limited and used very little. There is no passenger rail service, although the tracks and right-of-way still carry freight trains on east-west destinations. Private automobile has been the primary and essential means of travel in to, out of and within the North Quabbin.

In October, 1999 a fixed route bus service began serving the area along the Route 2/2A corridor connecting Orange and Athol with Gardner to the east and Greenfield to the west. At the same time a more flexible van service has begun to provide transportation linkage between outlying communities and the fixed bus route. Much of the impetus for these recent developments has been to provide public transportation access to jobs both within Orange and Athol and the larger employment areas to the east and west. It is too early to gain a clear idea of the ridership and effectiveness of the new systems.

Promotion

The Economic Profile from which the above narrative was taken does not discuss the current promotion of the region. The North Quabbin area is not consistently promoted as such. The North Quabbin Chamber of Commerce has one of the most accessible websites and calls the nine towns the Millers River Region. The Trustees of the Reservations and the Department of Environmental Management for the State of Massachusetts are two that promote specific outdoor sites of the North Quabbin, but not the region. Even the Massachusetts Office of Travel and Tourism does this.

Part of the promotion problem for the North Quabbin is that is split between two counties, Worcester and Franklin. This creates several barriers for the area. First, tourism budgets in the state are divided by county. Neither county takes full responsibility for, nor significantly promotes, the activities in the North Quabbin. In some cases, it is considered part of Central Massachusetts. In others, it falls into Western Massachusetts.

Although many opportunities have been seized to promote the region, financial backing has created severe constraints. Some individual promotional materials highlight the area much to its advantage, such as the Bike Map. One map was created to promote the region, but its circulation has been minimal. An out-of-print book by a local resident has been the most inclusive source of information on the community.

Negative press in the Boston area has not helped the region out of an economically depressed image.

Market Analysis

Problems Definition/Opportunities Analysis

This section outlines a process of extrapolation of the most important market data as it applies to ecotourism opportunities and potential barriers in the North Quabbin region. In order to accomplish this analysis with the overarching goal of community participation and buy-in in mind, the marketing consultant takes a first step of synthesizing the data and providing it in a manageable form – through Powerpoint presentations limited to acceptable duration. After each presentation, a variety of brainstorming sessions are facilitated to tease out potential contributions to the overall plan.

There are two components to this section. The first section is the "SWOT" (strengths, weaknesses, opportunities and threats) analysis. This has been gathered from both the marketing team and a larger group that attended the first meeting of the project where the initial Powerpoint presentation was shared. The second component combines analysis with strategizing. "Positioning" or developing a "Brand" identity, explained in greater detail further in the document, includes a close look at current competitors, target markets and "benchmarks" – similar ecotourism projects in other parts of the world, which seem successful. This information combined with the SWOT analysis begin to form a base for developing the critical current belief statement and desired positioning statement with ultimately lead to the development of strategies.

These two statements are the most critical of any marketing planning effort. In the first, a brief statement of the current situation and how the area is perceived, with all its strengths and weaknesses, is agreed to by participating community members. This allows a baseline for change. The desired positioning statement is the culmination of all the market research identified as: opportunities, the competitive differential (what is clearly different about the North Quabbin area), and the unique selling proposition (attributes of unique benefit to the target markets). The positioning statement clearly describes how the planners would like the target markets to perceive of ecotourism in the North Quabbin region once the plan has been fully executed. Strategies are planned simply to get from the first statement to the second. In neither case are the statements to be used in public situations. They simply provide the tools for development of the brand through strategies (product, price, place and promotion including a logo, slogan and other promotional materials.)

SWOT Analysis

The initial contribution to the SWOT analysis came from the participants of a public meeting, "Ecotourism Market Trends and Opportunities in the North Quabbin" held April 26 at the Miller River Environmental Center. A synopsis of the macroenvironmental trends and industry trends sections of market research was shared in an hour-long Powerpoint presentation. Attendees were invited to ask questions and later share responses in a questionnaire. A majority of participants expressed their desire to take advantage of potential business opportunities while preserving the community's natural resources. The biggest concerns participants expressed about increasing tourism in the region centered around the effects of crowds and their impact on the land and pristine areas. The biggest obstacles were the lack of awareness about the region, cohesiveness of activities in the area, and infrastructure as well as the depressed businesses. Desired characteristics of North Quabbin visitors were older folks, youth groups, education/learning based, family based, and tourists who care about the environment and outdoor activities ("people that want to experience the peace that the forest paths provide"). Tourists with the following traits were mentioned as those they would not like to see visit the region: motorized vehicle users; "Disney tourists;" loud, trash-throwing, boom-box listening tourists; ("Those who wouldn't care about tossing a cigarette butt out the car window") and those who simply would not respect the area.

At the first meeting of the self-selected ecotourism marketing team, members were asked to share passions and frustrations to once again tease out a SWOT analysis. The natural beauty of the region, green space and diversity of the waters, connections with people and outdoor activities were most often-mentioned passions. Lack of resources, restaurants and local pride, as well as the bad reputation of the community and consequent poor potential for development, were identified as some of the biggest barriers to success. At the next meeting, team members were asked to take another look at the macroenvironmental and industry trends. The purpose of researching these trends is to bring to light the most important aspects of the marketplace as they pertain to the project at hand. Without the data, businesses or organization often invest a great deal of time and money in opportunities that were merely anecdotal and ultimately are not realized. Armed with facts and statistics, well-developed plans and their investments are based on sound evidence. The following charts indicate the result of the team's SWOT analysis:

North Quabbin Strengths
Current health/wellness practitioners
Current religious organizations and retreat centers
Education travel
Riverfront park
Antique shops in Orange
Artisans/musicians
1794 Meetinghouse – music series
People who do community environmental awareness outreach
MREC
Dark night zone – Milky Way
Jack Borden – For Spacious Skies
Holding onto buildings

Threats	Opportunities
In our economy, lows are lower… this downturn could affect us for longer	Current parachuting reputation… could build
Expectations might get too high	Engage religious leaders in environmental outreach
No places to listen to music, be at night	Wellness-spirituality
Negative image of North Quabbin	Historical context—remember what it used to be like
Complacency	Engage resident areas
Time crunch (we need some menus of opportunities now)	Outdoor adventure center
Sprawl	Brownfields
People talk about the environment, but the talk is shallow	Existing local religious communities – bank on… coordinate w/ bringing people to area
Keeping community here… everyone wants to travel	Keeping community here instead of traveling
Leafpeeping	Leafpeeping
Developed transportation routes	Cultural draw beyond current… e.g. get something like Tanglewood here
202 No/So route	Outdoor activities—exercise—canoeing
Social isolation-rushing society	Health-wellness
Crime	Educational travel
Car use vs. public transport and pedestrian friendly travel	Ethnic restaurants
Economic	Developing places
Complacent— pessimism	To educate not be complacent
Telecommunication	Telecommunication
Zoning issues	Dark night zone
Restaurants	Cohesive neighborhood values
Too much growth	Pride in community
Congregate vs. disperse	Hostel bylaws
	Turning schools into overnight accommodations
	Trip durations… plenty of activities – interests
	Low use
	Impose behavior standards
	EPIC

For readers looking at this data for the first time, the "notes" nature of the SWOT may be discomforting. What may look like a strength in a threat section may simply have been worded in such a way by the team member that "lack of" or "decaying nature of" or other qualifiers may be missing. This data is not as important now. It was critical in feeding the process for developing the positioning and strategies by the team members.

Positioning Discussion

A strong brand identity is critical to the success of any organization or product. What the identity means to the target market (or customer) is even more important. For example, mention the word "Volvo" and you get more than car, you will usually hear the word "safe" as a descriptor. Say "Smoky the Bear" and you will hear "prevent forest fires." Positioning the North Quabbin as a potentially positive ecotourism site is the intention of this project. The method to develop a workable identity is what "positioning" is all about.

Unfortunately, the human mind does not readily accept new information in contradiction to what they already think. This cognitive-dissonance theory has informed the "positioning" process for years. When people form opinions about something and associate those opinions with the thing's name or its visual icon, an identity has been created. When a product or service fails in the marketplace, businesses often "reposition" or give a new identity to a product that has been improved. If they don't reposition the product, the new and improved product often fails once again because it is still associated with the first product. Changing people's minds once an identity has been established is very difficult and sometimes impossible. Can you imagine a product called "Alka-Seltzer" that didn't go "plop, plop, fizz, fizz?" The North Quabbin has fought an identity problem for years in Boston area press and throughout the state and region. However, no strong campaign has been launched to date about the "North Quabbin" specifically. This is actually advantageous to the community since the identity is not already cemented in potential customer's minds.

To begin the positioning process, the third meeting of the ecotourism marketing team was dedicated to analyzing data for its development. By looking at several websites for a variety of regional areas identified as top competitors from the industry data, particularly that of Rodney Warnick and the Massachusetts Office of Travel and Tourism, participants were asked to identify their associations with each area. Once the following chart was captured, a sense of the successful brands currently attracting potential visitors emerged.

Maine	**Vermont**	**Massachusetts –Cape Cod**	**Massachusetts-Berkshires**	**Connecticut**	**New Hampshire**
Wilderness	Tranquility	History	Mines	Commercialism	Presidential range
Maine woods/Rangeley Lake Area	Green	Lobster	Hikes	Casinos	Appalachian Trail and huts
Small Cabins	Maple Syrup	Traffic	Mountains	Money	Old Man in Mtn.
Mosquitoes	Farms	Crowded	Mourning Warblers	Ocean Shore	Mountains
Fly fishing	Morgan Horse Farm	Gray Seals	Inns	Interstate Highways travel through	Commercial
Lakes	Hiking	Striped Bass	Glass Blowing	Canoeing	Snow
Moose	Green Mountains	Gay friendly	Summer theatre	Quaint	X-country Skiing
Rocky coastline	Covered bridge	Seashore	Tanglewood	Suburbs	Skiing
Portland-Fun city	Downhill Skiing	Beach	Concerts	Outside of NY	Wave Soaring
Lobsters	Micro-brews/ Country Inns	Dunes	Second homes	White Flower Farm	Hiking
Long Roads	Cows &	Sailing	Camps		White Pine

	farms				
Sailing		Seabirds	MA MOCA		Loons-Squam Lake
Sea Kayak			Rehab of riverways		No Tax

To further contribute to the analysis, the team identified the top three competitive areas: the Berkshires, Vermont and New Hampshire. This information also contributes to the target market strategy. With Western Massachusetts statistics identifying New Yorkers as a large market for the Berkshires, trying to attract that market would be less realistic. To further understand these competitors, participants identified the factors making these areas most competitive as follows:

Factors That Make Areas Competitive in the Eco-Tourism Market		
Camps	Highways	Vistas
Fishing/Streams	Organization	Tranquility
Positive self image	Upper class residence	Culture
History/tradition	Marketing $	Visitor amenities
Image & identity	Hospitality Infrastructure	Bigger mountains
Lakes	Promoting image (may be inaccurate)	Diversity of things
Hiking	Destination Spots	
Greenspace	More developed and successful entities	

This process begins to tease out the competitive differential – the qualities about the North Quabbin region which are different than from its competitors. For example, if big mountains are particularly associated with Vermont and New Hampshire or fishing and streams is attributed to Maine (even if it has to do with a national retailer more than the actual area), focusing on those attributes is not productive.

Any experienced marketer can sit down and analyze the data and make recommendations. However, there are advantages to combining the expertise of the marketer with individuals who viscerally understand the community, its strengths and weaknesses, and who are passionate about its future. Working with the community team, the marketing consultant can guide individuals through the series of decisions that professionals must make to form a well-researched and thoroughly analyzed plan to achieve their collective dream for the community.

The next step in the positioning process focuses on the target markets. Positioning strategies must speak to the customer from their own vantage point. For example, an identity targeted only to Boston residents such as "Your first stop West…" might be very successful. However, if there are significant potential markets south or east of the area, that message could not work. To better understand the market and identify their needs/wants and current perceptions, the next step was to analyse the market data. After reviewing the ecotourist profile and other nature-based tourist characteristics, the team members were reminded of the importance of education levels of potential visitors (82%

of the typical ecotourist are college graduates) as well as psychographic characteristics of the target market. The marketing consultant then shared several charts of demographic data broken into the geographic areas identified in the market research as having the greatest potential. These included Massachusetts towns within the five counties of the Boston area: Essex, Middlesex, Plymouth, Norfolk and Suffolk, as well as towns in the Springfield and Pioneer Valley area. It also included towns in Hartford and New Haven, Connecticut as well as Albany, New York. Although Worcester and New Hampshire were identified as potential target areas, these markets do not appear in travel research as potentially significant areas from which to attract visitors. Those planning individual strategies may reconsider this at some later date.

The data shared in charts about the areas were population percentages, income levels, bachelor and graduate degrees and psychographic characteristics of the counties including travel for pleasure, donate to causes and interest in wildlife/environment. Although these psychographic factors were slightly variable from the Boston towns to those in Western Massachusetts, the differences were not significant.

The next set of data looked at the counties by the interest in outdoor recreation activities taken from the same SRDA Lifestyle indicators research used for the above psychographic traits. The chart looked at interest levels in camping/hiking, bike frequently, walking for health, fishing frequently and horseback riding. Springfield, Hartford/New Haven and Plymouth counties had slightly higher interests in camping/hiking and fishing. All counties had high interest in walking. The most unusual trend indicated fairly high interest in biking at about the same level in all counties, in some cases higher even than camping/hiking.

Early in the process, Albany was eliminated due to its physical proximity to out-of-state alternatives, particularly the Lake George and Adirondack regions. After digesting data on the Western Massachusetts and Connecticut markets, a list was drawn up of the top towns with market potential, as shown in this first chart,

Preliminary list of Target Markets for North Quabbin Ecotourism			
Pioneer Valley	**Hartford**	West Hartford	**New Haven**
Amherst Center	West Simsbury	Tariffville	Cheshire
Northampton	Glastenberry	Suffield Depot	Orange
South Amherst	Weatogue	Newington	Madison
North Amherst	N. Granby	Collinsville	Guilford Center
Longmeadow	Simsbury Center		Heritage Village
Wilburham	Canton Valley		Madison Center
Agawam	Hartford		Woodmont

Team members expressed their desire to have the marketing consultant continue with the prioritization for the Boston markets using the same demographic criteria. Given the charge, I have reviewed the data and recommend the following. First, the Plymouth county market is primarily made up of very small towns with high incomes and education levels surrounding Brockton, the population center of the county with lower criteria levels. In addition, the proximity to the competitor Cape Cod suggest Plymouth residents may be less willing than those from counties North and West of the city to travel to North Quabbin. Similarly, the target towns located in the very North and Eastern county, Essex, are close to the water and to easy access to a major competitor for ecotourism benefits – Maine. For this reason, I recommend focusing on target populations within Middlesex and Norfolk, and potentially Suffolk. The following chart indicates the towns that fit the demographic profiles most closely. The starred towns appear to have the greatest potential due to higher levels of education combined with income and population.

Boston Area List of Target Markets for North Quabbin Ecotourism			
Middlesex	**Lexington**	**Norfolk**	**Wellesley***
Arlington	Newton**	Brookline**	
Belmont*	Reading	Dover	
Burlington	Watertown	Franklin	
Cambridge*	W. Concord	Medford	
Coohituate		Milton*	
Framingham		Needham*	
Grotin		Sharon	
Hopkinton		Walpole	

Identifying these target markets is important beyond the positioning discussion. Later, in the strategies section, I recommend individual target markets be identified for individual projects. For example, the "solitude in the woods" program should target younger men in the primary markets. With this in mind, the planners for that strategy may start with the recommended towns and identify which of those towns may have younger demographics. Cambridge may surpass Newton or Brookline for that particular project. A family-oriented project where female trip planners are targeted may find the later two towns more populated with their potential markets than is Cambridge.

Clearly, another important method of targeting is to identify special interest groups which may or may not be captured by straight geographic/demographic segmentation. Again, these groups may be targeted for some of the strategies and not for others. Some of the clustering simply helps inform the promotional process for each activites. For example, elderhostel would probably not be interested in the "solitude in the woods" program. However, another project which combines B&Bs, guide services and potentially a collaboration with a local university could be directed specifically to elderhostel groups. In this case, promotional information would be designed for the target market and sent to specific interest groups versus a community within the geographical locations mentioned above.

Readers will note that the first special interest groups is "locals." This group has not been identified as a target market with the greatest potentially for making a trip to the North

Quabbin region specifically to enjoy ecotourism. This group is no less important and is actually, often critical to consider in the development of certain products/strategies.

To inform this process, the team developed the following list as a starting point for special interest groups to target.

Special Interest Groups to Target		
Locals	DINKS (double income no kids)	Chambers of Commerce
Low-mid income	Colleges (clubs, orientation programs, leisure learning, continuing ed.)	On-line retailers (L.L. Bean, Lands End)
Educated women	Travel writers	Mass tourism
Elderhostel	B&B visitors	
Retired/AARP	Retail outdoor stores	
Environmental Centers	AMC	
MERC	Media	
Search engines	NPR listeners	
AAA	Guide books	

The next block of market research analyzed by the ecotourism marketing team was "benchmarks." The consultant shared about a number of projects from around the world – from ecotourism in West Kentucky; Jasper, Arkansas; and statewide in Florida to locations for ecotourists in Mexico, Hawaii, Costa Rica and Africa. Team members were then asked to identify aspects of the offerings that they found appealing to potential customers. This provides an opportunity to "borrow" successful ideas as well as focus on attributes the projects highlighted on their websites which might be currently available in the North Quabbin, but may have been overlooked. The following outlines some the top-of-mind highlights of the benchmarks.

Internet tour of Products/services/activities available
Tours/lectures/walks—Day themes
Simple front page—not glitzy
Diversity of local people with specialties • Clearinghouse for different guides • Contacts for visitors
Values/views expressed collaboratively
Endangered species listed
Maps—especially those in which you can focus on details
Clearinghouse—support from town (products, food, accommodations)
Highlights of local species
Identify and market what we have

Guidelines and visions—goals are up front (i.e. NO jet skiis) • sets standards for community
Example of Ecoflorida magazine supporting Johnny Appleseed
Create your own eco-tours
Internet/web page links to include community

The next step for the group was to begin identifying the current marketing mix. What does the North Quabbin currently offer? Outdoor and nature guides were identified as well as ecotourism destination locations such as Bear's Den and Tully Trail. The group then began to list the infrastructure to support ecotourism such as restaurants and accommodations. This section continues to need attention, but is most closely supported by data compiled by Don Stone's database and the North Quabbin Community Economic Profile. Since this project was developed by active community participants, much of the current marketing mix in the process was necessarily and acceptably anecdotal.

At the next meeting, the consultant began to extrapolate more contributions for the development of the current belief statements. Team members were asked to consider themselves as a potential customer we had identified in the process in forming their suggestions. To get beyond word identification which often locks a person's mindset in brainstorming, the consultant asked participants to reconsider the question and express their projected attitudes in the form of an animal and to explain their selection. The charts were then reviewed for key words for the desired statement and added others including "proud/strong, pure, beautiful/scenic, adaptable/survivor/resourceful, rugged/more raw/unpolished/natural."

Current Belief Statements	**Desired Belief Statements**
Six pack in a pick-up	Lakes, rivers and forests
Nice place to live	Nice place to live
Lots of shade/green/water	Lots of shade/green/water
Empty storefronts	Pristine towns/villages/NE commons
x-mas trees/apples	Unspoiled
Town greens	Town greens
Low-income/no jobs	Industrial history
Cheap properties	Cheap properties?
NE Mill town	"lost towns"
Small towns	Small towns
Empty store fronts	Community cultural activities (Garlic Festival)
Conservation areas	Conservation areas
Fishing & hunting	Fairs/special events (old home days)
Scenic vista	Scenic vista
Bird watching	Bird watching
	Woods next door
	Solid forest

Current Belief Statements -Animals	Desired Belief Statements- Animals
Possum (playing dead, slimy but nice	Bobcat (graceful, wild, noble)
Robin (everpresent but people don't think much of it, up-close is beautiful)	Wood thrush (people become aware when it sings)
Wolf (alone, outside of things, bad reputation, people's thinking)	Panther (wild and beautiful)
Toad (behind every toad is a prince, long-lived, perception=negative)	Moose (scenic, stoic, represents wilderness)
Beaver (doesn't like company, slaps tail-makes a statement, working)	Otter (friendly, playful, inviting)
Stray dog (looks bad-but not bad, survivor, can clean up)	Coyote (mysterious, elusive, not many seen, adaptable)
Moose (dull and uninteresting, can live in squalor and dirty places)	Deer (non-threatening, appealing, living in the woods)
	Otter (wild, makes you feel good to see one)

With these lists and the desired attributes in mind, the consultants came up with a first draft set of statements which were later reviewed and revised. The finally positioning statement and its highlights are shown below. The team then focused on the overall goal and objectives for ecotourim in the North Quabbin region which were also later reviewed and agreed as follows:

Positioning statement: The North Quabbin area is a mosaic of small New England villages with beautiful town commons and a couple of historically rich mill towns of friendly but reserved people conserving and working in their richly forested environment and offering unusual opportunities for intimacy with nature.

a.) Villages with commons
b.) Historically-rich mill towns
c.) Friendly, but reserved people
d.) Conserving and working
e.) Richly forested environment
f.) Opportunities for intimacy with nature

Goal: To have a successful sustainable ecotourism program which builds local pride and ownership, and attracts visitors from outside the area.

Objectives:

1. To bring dollars to the region through increased visitation by the target market;
2. To increase community pride, involvement, awareness, and support of ecotourism
3. To enhance current facilities which support the NQ ecotourism identity position
4. To conserve current natural resources, beauty, and historical/community character

Strategies

Instead of following a traditional marketing mix outline for the ecotourism project, I am recommending the following packages to meet the needs of a variety of target markets. Individual planning teams, depending on the interests of the community groups, can flush out the bundle of attributes and the marketing components of each strategy.

Solitude in the Woods

Strategy Description:

The "Solitude in the Woods" program provides individuals with the opportunity to enjoy intimacy with nature through a personalized non-guided experience. The purpose of the program is to encourage those who prefer solitary treks and individual interactions with wildlife to use and yet tread lightly on the North Quabbin woods.

Target Market:

Age: 25-54

Gender: 75% male

Education: college or graduate school

Primary Origins: Amherst, Hartford, Boston area

Promotion: outdoors stores, associations

Products:

1.) **GIS Map Website**: The core of this strategy is to set up and maintain a website devoted to GIS maps of the North Quabbin woods. These maps will allow individuals interested in designing their own experience consistent with their level of ability to investigate the natural surroundings of the area. In addition, the website should link to equipment rental opportunities, accommodations and local businesses, and the ecotourism principles, part of the "I" system described on page 12.

2.) **Facilities**: As a basis for any woods experience, various baseline facilities, such as bathrooms at trailheads, must be available. To this end, a component of the "Solitude in the Woods" program and cross referenced throughout the strategies is a focus on working with local government, associations, and businesses to improve North Quabbin facilities.

3.) **Outdoors Equipment**: The demand for accessible rental equipment as well as other products for outdoor experiences is high for this target market, particularly in a location geographically removed from a sizeable community with significant outdoors stores. Solving the problem of forgetting stove propane or freeze dried foodstuffs is at one end of the spectrum. At the other end is having access to canoes and fishing tackle once quiet lakes and streams are discovered.

This strategy may take the form of negotiating a satellite store of a leading chain such as Eastern Mountain Sports or it may be through an entrepreneurial support program for those local businesses currently providing similar products.

4.) **Ecotourism Promotion**: The "Solitude in the Woods" program should be promoted as part of a multi-faceted mosaic of offerings in the North Quabbin woods. Maps and other literature should be made available through traditional community welcome sites and those devised as part of the Ecotourism promotion strategies.

"I" System: This simple communication system of minimal quality signage including ecotourism principles, expectations of visitors and "support" suggestions should reinforce the importance of environmental conservation. The system, also cross-referenced throughout the strategies, is necessary to reinforce values and to provide access to the North Quabbin woods.

Guides in the Woods

Strategy Description:

The "Guides in the Woods" program is a training and support program for local community members interested in developing their skills as guides for visitors (in and out of the North Quabbin) in the Woods. This program is targeted to residents, but will ultimately benefit a wide range of ecotourists, from families with small children to the elderly.

Target Market:

Age: 25-65

Gender: 50% men

Education: high school equivalence

Primary Origins: North Quabbin's nine towns

Promotion: local papers, word-of-mouth, Athol Bird & Nature, invitations

Products:

1.) **Guides Training Program**: The New England Forestry Foundation (NEFF) will initiate the core of this strategy. In partnership with Greenfield Community College, NEFF will initiate a local training program for certifying ecotourism guides. These guides will be trained in natural history, group dynamics and other necessary skills to serve visitors. Guides may become specialists in a variety of areas including trekking, fishing, bird watching and other soft adventure activities.

2.) **Entrepreneur/Niche Marketing Assistant:** These guides will be provided training in small business development and marketing skills. They will have the opportunity to work cooperatively to best attract visitors from inside and outside the region.

3.) **Outdoor Equipment**: Accessible rental equipment as well as other products for outdoor experiences would be considered necessary tools for this target market. Having access to canoes and fishing tackle, hiking or backpacking gear, etc. is critical to the success of these guides. This strategy may take the form of negotiating reduced rates for certified guides with current businesses or those satellite stores that may be attracted into the vicinity.

4.) **Ecotourism Promotion**: The "Guides in the Woods" program should be promoted as part of a multi-faceted mosaic of offerings in the North Quabbin woods. Brochures and other literature should be made available through traditional community welcome sites and those devised as part of the Ecotourism promotion strategies.

5.) **"I" System**: This simple communication system of minimal quality signage including ecotourism principles, expectations of visitors and "support" suggestions should reinforce the importance of environmental conservation. The system, also cross-referenced throughout the strategies and further described on page 12, is necessary to reinforce values and to provide access to the North Quabbin woods. Guides should be fully familiar with the system and promote its importance to conservation of the area.

Working in the Woods

Strategy Description:

The "Working In the Woods" program is designed to showcase the thriving community-managed forestry aspects. This strategy will focus, although not exclusively, on communicating about the other components of The North Quabbin Community Forestry Initiative including the landowner program, the woodworkers' collaborative and the green certification of forest products. It will also educate visitors about the activities within the forest area beyond nature experiences.

Target Market:

Age: 25-65

Gender: 75% women (trip planners)

Education: college

Primary Origins: North Quabbin area and specific target markets prioritized by potential from income and education data

Products:

1.) **Sawmill Tours**: The emphasis of this strategy is to highlight the business activities within the forest area. To that end, various tours from the beginning of the process of a product to its finish can provide visitors with an entertaining educational experience. Sawmill owners will need to work cooperatively with others within the manufacturing process to insure successful tours.

2.) **Woodworker Kiosks:** This particular project has been initiated by NEFF and designs have begun. Kiosks highlighting local woodworker businesses will be strategically placed within the community to showcase the working forest aspect of the North Quabbin woods.

3.) **Partnerships:** A variety of partnerships with local organizations, such as Harvard Forest, should be initiated to package different "working in the woods" activities. The working forest history dioramas at Fisher Museum reinforce the image in an exemplary fashion.

4.) **Landowner Program:** NEFF plans to undertake an aggressive outreach campaign to landowners, including an extended series of forums and workshops, the results of which should be highlighted as part of the "working in the woods" strategy.

5.) **Green Certification:** Green Certification of forest products is a market-based program to communicate the highest level of sustainability management has been put into place on a particular forested area. Various third-party certifiers, such as the Forest Stewardship Program work with landowners and "chain-of-custody" (middle men through the manufacturing process) to insure certain standards have been met. The Quabbin was the first green certified public land in the country.

NEFF is currently working with local individuals to investigate the application of such certification for the North Quabbin woods. Once the lands have been certified, communication about the process and success for the future of our forested areas should be initiated as part of the "Working in the Woods" strategy. The form of communication might range from brochures to tours.

6.) **Facilities**: As a basis for any woods experience, various baseline facilities, such as bathrooms at trailheads, must be available. To this end, working with local government, associations, and businesses is a necessary first step to improve North Quabbin facilities.

7.) **Ecotourism Promotion**: Since this promotion campaign will focus on a multi-faceted mosaic of offerings in the North Quabbin woods, the "working" components must be highlighted. Brochures and other literature should be made available through traditional community welcome sites and those devised as part of the Ecotourism promotion strategies.

Environmental Education in the Woods

Strategy Description:

"Environmental Education in the Woods" is a set of products and communications about the North Quabbin woods dedication to conservation of the forested areas.

Target Market:

Age: 25-65

Gender: 75% women (trip planners)

Education: college

Primary Origins: North Quabbin area, Boston plus, Amherst/Worcester

Promotion: see Ecotourism Promotion

Products:

1.) **Partnerships:** In order to fully service the target markets with environmental education, it is important for all organizations providing these programs to collaborate and schedule activities to the benefit of the consumers. Activities should be developed with a close look at the needs of the visitors such as serving various family members simultaneously with age appropriate options. The Millers River Environmental Center should be a lead group and destination for these activities.

2.) **Environmental Biodiversity Days/Events:** The partnerships above should look to provide events within the community to reinforce the importance of environmental conservation and awareness.

3.) **Boy Scout Clean-Up Program:** Some youth organization (Boy Scouts or other), located within the area, may provide this critical environmental service to the community prior to enhanced ecotourism activities. Care should be given to promoting the organizations' contribution in promotional materials.

4.) **Alternative Energy Projects:** As the community accepts and encourages its environmental image, projects should be encouraged which exemplify a true environmental consciousness, such as composting toilets, electric people movers within the woods, etc. Grants may be provided to local area businesses to create these progressive solutions.

5.) **"I" System**: This simple communication system of minimal quality signage including ecotourism principles, expectations of visitors and "support" suggestions should reinforce the importance of environmental conservation. The system, also cross-referenced throughout the strategies and further described on page 12, is necessary to reinforce values and to provide access to the North Quabbin woods.

The Community in the Woods

Strategy Description: The "Community in the Woods" program is an important strategy for the overall effectiveness of the initiative. A sense of place beyond the forest needs to be presented in order to fully comprehend the mosaic that is the North Quabbin woods. The ability for the community to enhance economic vitality depends on community participation and enthusiasm.

Target Market:

Age: 25-65

Gender: 75% women (trip planners)

Education: college

Primary Origins: North Quabbin area, Boston plus, Amherst/Worcester

Promotion: various

Products:

1.) **Mill Tours:** Beyond the activities associated with the forest activities- solitude, guides or working in the woods – the North Quabbin region should reinforce its unique community personality. To this end, the couple of historically rich mill towns should spin their image away from empty storefronts to working mills and history-laden locations.

2.) **Local Community Fairs:** Community fairs and events in the North Quabbin region reinforce the feeling of small New England villages and towns. The Garlic Festival and other fairs like it should receive the necessary promotion to reinforce the position. Tactics should be developed to encourage local fair organizers to use consistent community promotion materials and follow specific guidelines to insure maximum communications.

3.) **History Trails:** Working in partnership with the various historical societies in the region, history trails should be mapped and provided to visitors at traditional welcome sites.

4.) **Antiques & Architecture:** The town of Orange has become known for its many antique stores throughout the downtown area. These places can be seen as disparate entities struggling to make a profit or as a natural outgrowth of a focus on the history of the community. Working with the Orange Revitalization Project and others, antique tours, maps and brochures can reinforce the position of the communities.

5.) **Community After Dark:** Daylight activities in the North Quabbin abound, yet after dark, the community rests without many accessible opportunities for entertainment. To insure successful experiences for visitors, attention should be paid to enhancing evening hour possibilities. These activities should reinforce the small New England towns image.

6.) **Community Pride Campaign:** This campaign is a critical first step for the success of many of the strategies listed throughout this document. Currently, local residents lack the power of a positive bond with their community. This can create a negative reinforcing spiral where visitors feel a sense of depression and the experience is less than successful, causing further frustration within the community at large.

In essence, the campaign would promote to local community members a sense of pride in the North Quabbin Woods region. Similar to the "Be A Local Hero" campaign in the Pioneer Valley, promotion within the region would focus on the positive nature of the community. A task force or small group representing a range of community members should work together to construct appropriate messaging.

Infrastructure and Promotion

"I" System: This simple communication system of minimal quality signage is to be modeled after the European information system of signage. Suggested components include ecotourism principles, a list of the conservation principles developed in accordance with the International Ecotourism Society principles; expectations of visitors, such as "leave no trace" and "support" suggestions, such as how to make specific donations to improve trails or how important it is to support the local economy. All of this information should be couched in a "suggested rules to insure conservation" tone. They should be shared to reinforce values and to provide respectful access to the North Quabbin woods. In addition, the system must be simple to use and informative to visitors.

Ecotourism Promotion: A full communications campaign, including public relations and pro bono and grant funded advertising, should promote ecotourism and the products within this plan to the target markets as described. Consistent use of the logo and slogans, as developed, should be insured by those directly involved and encouraged by those who will peripherally benefit. Press release language should be agreed upon and distributed throughout the community. A lead organization should be identified to insure continuity.

Marketing Mix Recommendations

In this section I will provide a number of marketing recommendations for next steps. A majority of these will be focused on promotion. I will present them under each the traditional marketing mix components: product, price, place and promotion.

Product

Critical Threads
With a close examination of the strategies as outlined, the reader will find a handful of repeat components will seem to weave through the entire section. A few of these include infrastructure, the "I" system and facilities. These are critical threads that need priority attention.

The most critical part of any marketing program is the development of a product, which fits the needs of the potential customers. Most of these needs have been identified by studying the macroenvironmental trends and the available data on the target markets found in that earlier section under market research. No amount of promotion can persuade a potential customer to purchase a product unless it has benefits that person wants. No amount of promotion can persuade a customer that a repeat visit would be better the second time around. If the product, in this case the appropriate nature-based and/or historical package, is not completely ready for the customer – with all its appropriate infrastructure and communications systems in place, the customer may be disappointed with his/her experience. Negative word-of-mouth spreads quickly and repeat visits after a less than desirable experience are virtually nonexistent. Think of the last bad experience you had or product purchase you made. Were you willing to repeat it?

Successful promotion can also create an unsuccessful future. Two years ago, UMass Extension offered to give a very little promotion assistance to the Sheep & Wool Fair in Cummington, MA. After analyzing the most effective means of communication to reach the most desirable market, it was agreed simple flyers would be distributed to school systems throughout the Pioneer Valley. A simple promotion turned out disastrous because the Fair organizers were not prepared for the crowds. Warned on several occasions that they should increase services such as bathrooms and transportation as well as signage for events and workshops, the organizers did not take the product component seriously and were overwhelmed by the attendees. The group did not want the growth to occur as quickly as the promotion produced.

This is not an unusual turn of events. Degradation of communities and their natural environments can be accelerated by premature promotion and weak product development. Appropriate growth should be planned and all programs evaluated closely during the early stages to insure customers are satisfied with their experiences.

In the strategies outlined above, there are two important components that emerged in the product brainstorming – infrastructure and the "I" system (a communications plan for use within the outdoor recreation area.) These are critical packages. Bathrooms, parking at trailheads, restaurants and overnight accommodations should be thoroughly reviewed to determine how many visitors could be accommodated currently and what services would need upgrading before specific promotion plans are executed.

Most of the strategies referred to earlier are packaged specifically to attract different segments of ecotourists based on similar demographic and psychographic characteristics as well as interests in outdoor and/or historical activities. It is expected that each strategy will be fully developed by individuals who will directly benefit from the package. None of these strategies will be very successful without managed infrastructure and communications. Instead of each group trying to cobble together adequate services, a cross-cutting group of community officials, those who will directly benefit, such as B&B and restaurant owners, and others interested in the outcome such as the Orange Revitalization project, etc. needs to focus directly on the infrastructure of the area. Either this group or another also should focus on the "I" system before a broad invitation to visitors begins.

Product: a bundle of tangible and intangible benefits to the customer.

As each group begins its journey into the creation of their specific product, it is important to refer back to the trends and characteristics of the target market for that product. That way, the product (the bundle) can be built with all the tangible and intangible benefits a customer may seek. For example, for the "Solitude in the Woods" program, it may be thought to be enough to focus primarily on the GIS map website and when team members feel it is "good to go" to begin promoting it. However, if the outdoors equipment component of the strategy is not in place, visitors may arrive on site to experience only the frustration of needing to drive another 80 minutes roundtrip to Hadley to purchase necessary items from an outdoor outfitter for their experience. This person will presumably be lost as a potential repeat visitor or promoter of the area. Other components for this product might include a "check-in" location (such as MREC) to register as a solo trekker where various displays and local literature may be available; emergency services and radio rentals; or evening "talks" by local experienced trekkers such as Paul Rezendez or others. These augmented products can be as critical as any core product.

It is also important that these programs/products/strategies are developed by those most likely to benefit from the visits. Team members should be able and willing to volunteer to lead certain threads as it might be a benefit to their business, ie. MREC as a check-in center, town officials developing emergency services, etc. If the team is primarily made up of volunteers without the resources to build the product, its success will be less guaranteed.

Price

Nowhere in the strategies outline were prices mentioned. This is because each team will need to determine an appropriate pricing structure for each product package. When making pricing decisions, a six-point plan is often used as a model.

1. Select target markets
2. Study their buying behavior
3. Identify competitive pricing
4. Integrate positioning strategy
5. Relate costs
6. Determine price

Using the "Solitude in the Woods" program again as an example, the target market of 75% college educated male from Amherst, Hartford and the Boston areas has been suggested. The next step is to examine their buying behavior. For example, during this recent rise out of recession, has this target market started spending again? If so, on what? Our macroenvironmental trends suggest people are reinvesting in their homes and in shorter trips. This is good news. What else can be learned about this markets spending behavior at this moment? Next, what are these individuals spending on other similar packages? With a quick collection of competitor brochures or a stop at various websites, a range of prices can be determined. This information will further feed the decision-making process.

Next, integrate positioning strategy. The positioning agreed upon by the ecotourism team does not differentiate the area as particularly expensive, unlike the Berkshires where a "Smith & Hawkens" quality pervades. A visitor might expect high prices in Lenox where they would expect moderate to low prices in Orange. The final fact-finding is very important. Too often, prices are set without a thorough examination of costs. Later, businesses realize they have undermined themselves and do not make enough per unit to make the company profitable. This has been happening in a number of sectors in our economy of late. The prices earned fall below production and ultimately, there is a net loss. The program must include costs. The last step is to consider all of these factors to arrive at an equitable price.

Place

The term "place" is used to provide a "p" word, which describes the distribution function of marketing a product. This includes how a product is delivered, how quickly it gets there and what condition it is in. In the case of a site-specific product such as a retail location or as in this case, a tourism destination, distribution includes how the market gets to the product and all the variables surrounding that. As described in more detail in the Current Marketing Mix Section under Place, The North Quabbin region has both significant opportunities and threats in its physical location. For the Boston-based market, route 2 is a convenient, fairly well maintained (up to the area in question) thoroughfare for those in the Northern and Western counties, towns and Cambridge.

For those in New Haven/Hartford and the Pioneer Valley, the North/South route is not as easily accessible. In the summer months, the drive on route 202 reinforces the image of unspoiled and natural forest area. However, in poor weather and the dark, driving can be difficult. Route 91 and over route 2 from Greenfield is also less attractive. Signage is currently minimal. This provides a wonderful opportunity to construct directive communication that also reinforces the desired positioning of the North Quabbin Woods. Before significant promotion is executed, care must be given to travel assistance through signs and/or information booths, trailhead parking and regional transportation. The "I" system should be in place.

Again, stories abound which show the sad results of not considering this "P" as thoroughly as the other three. If the journey to the site is more exhausting than the actual adventure, that impression makes an impact on future visits. Like a pebble that hits a pond, the ripple effect of these frustrations may be minimal, but they spread out over time and impact the entire body of potential visitors.

Promotion

Marketers have not done a terribly good job of marketing the art and science of marketing. Unfortunately, promotion is often used synonymously with the term marketing when in actuality, is only one of the four major components and should not be done without the other three in place. People have different expectations of promotion. Some consider it the panacea. "It will bring hoards of crowds to the community insuring a vast improvement in the economy." Some consider it the problem. "It will bring hoards of crowds to the community insuring a devastation to our natural resources." Most however, think of it as "selling" the product and "hoards of crowds" will buy it. Unfortunately, sometimes this can be very disappointing if the promotion has minimal results and, for example, a single event is not well attended.

Logo/Slogan

What is not considered a part of promotion is the quiet and consistent inclusion of a simple message at every opportunity to reinforce a particular image. This may not bring an immediate onslaught of users. What it does, similar to the pebble, is create a ripple effect in the pond of potential visitors as the message spreads.

This is the essence of successful promotion. Developing a campaign to promote the area with extensive advertising and public relations is important in the long run. In the immediate future, however, the most critical promotion activities should be centered around the development of a logo and the inclusion of that logo on materials which are either in production or which are planned for immediate execution.

Examples of immediate logo/slogan uses include road signs, facilities and signage developed for the "I" system. Members of the ecotourism community at large should be encouraged to use the logo in any materials they produce or on websites created to promote the area. For example, MREC and the Chamber of Commerce should be encouraged to include the logo on printed materials. B&Bs and restaurants should be asked to include the logo on menus, brochures and websites. Graphic elements should be readied and distributed to community members with strict adherence guidelines. Logo/slogan uses instruction booklets might be produced to reinforce the importance of using the materials in the appropriate method to reinforce the message. Two sentences to be included on all North Quabbin press releases should be agreed upon and distributed to appropriate organizations. Who receives materials should be at the discretion of the organization managing the process.

New funding should be sought from traditional tourism sources to begin introduction of this new logo and ecotourism campaign. Grants and earmarked dollars set aside for signs, and information kiosks may be available to the project. Currently successful ecotourism businesses should be approached such as the Harvard Forest and Zoar Outdoor or Raven Adventures and urged to display the logo and/or slogan whenever possible.

The successful Costa Rica slogan "No artificial ingredients" is the centerpiece of all of their promotional materials. In the same way, this first step is a critical and inexpensive one to begin to reinforce the positioning of the North Quabbin Woods as a potential ecotourism location. Without these basics in place, the next promotional steps have no base upon which to build.

Logo/slogans are often not considered with the level of professionalism they deserve. This visual icon and few words will be all most potential visitors will receive in the way of communication about the area to make that critical first decision to investigate further. This component must express the image (brand or position) and quality they can expect from the destination. Its professional development should be the single most important investment in the promotion process.

The logo/slogan should not be developed until it is determined whether or not to broaden the positioning to satisfy the cross-sections of the community who have not been engaged to date. For more details on this, see the Campaign Promotion section below.

Strategies' Promotion

Each individual strategy should have a full marketing mix attached to it. One of the mix elements is promotion. These promotions should be developed specifically for the target end-user in mind, yet remain consistent in the use of the ecotourism logo/slogan materials. For example, the "Solitude in the Woods" program may be most effectively promoted through strategic alliances with outdoor stores in targeted areas of Boston, Hartford/New Haven and the Pioneer Valley. Feature articles highlighting the program may be very effective in specific outdoor publications. Specific organizations serving solo trekkers may be approached to develop a partnership program or mutually beneficial promotional ideas. Keeping promotion to extremely targeted vehicles in specific areas, which provide the greatest number of highly interested potential customers, is the most cost-effective and manageable method of growth.

Campaign Promotion

It was the initial intention of the North Quabbin Community Forestry Initiative to develop three marketing plans for each of the following: ecotourism, local woodworkers, and landowners/green certification. These plans would all fall under an umbrella Community Pride Campaign promotion. Each of the plans would be constructed by self-selected members of the community who would then share their plans with a larger group of volunteers representing the cross section of North Quabbin residents. This last team would oversee the development of a logo/slogan for the area as well as a promotion campaign which would be designed to improve community pride.

Considering the evolution of the project and the readiness of each of these three groups, the ecotourism plan is far ahead of any of the others in its marketing planning. It may benefit the overall project to capitalize on the current fervor attached to the ecotourism project and broaden the input on the positioning strategy to encompass the needs of the broader community. The positioning captures much of the positive personality of the region from natural resources to historical milltowns. The ecotourism image encompasses much more than the outdoor recreation features of the area. It imbues a feeling unique to the community in which many residents may feel great pride.

With this in mind, it is my recommendation to bypass a full process of regional identity development and to tease out the reactions to the proposed ecotourism image. With minimal effort, individuals from cross sections of the community not represented in the ecotourism group could be approached and encouraged to share their response to the proposed positioning. Comments can be integrated into the positioning strategy and the logo/slogan ca be developed to communicate the image preferred by the wider community. This may encourage buy-in from all who would be affected by the image being built.

To serve the other two groups, the "Working in the Woods" strategy would emphasis the activities of these two wood related business sectors – the woodworkers and the green certification land/mill owners. Specific marketing plans can be developed for these groups as they strengthen over the years. In the meantime the overall logo/slogan would be used on all these materials such as the woodworkers kiosks. At some point in the future, a seal may be devised combining the North Quabbin Woods logo with a "Made in" insignia.

In terms of developing advertising and promotional materials as part of an overall ecotourism campaign, I recommend focus be put on developing the community pride first with use of the logo/slogan and further communication to engender greater positive self esteem in the residents. This may help to create further product attributes in the North Quabbin region, from friendliness to potential new businesses, as individuals become more enthusiastic about their own "place." Taking the Costa Rica campaign as an example, there is no reason why a campaign could not be constructed from the ecotourism "No Artificial Ingredients" by adding "Who Would We Want to Be From Anywhere Else?" This kind of message reinforces the tourism message while focusing on the community and its members. Further ideas for promoting community pride can be found in the "Community in the Woods" strategy outline.

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