North American Ecotourists: Market Profile and Trip Characteristics

By Pamela A. White*
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This article is the first in a two-part series that presents the results of comprehensive, practical, primary research on ecotourism markets. The assessment provides information on markets, trip characteristics, motivation, product preferences, and overall demand. This part focuses on market and trip characteristics, including party size, spending, preferred season, and trip length.

Until recently, there has been little or no information on ecotourism market demand. The available information has related to travelers (often from one country of origin) visiting specific destinations (Boo 1990; Fennell 1990; Fennel and Smale 1992; Eagles 1992; Ballantine and Eagles 1994; Eagles and Cascagnette 1995) or has come from surveys of the travel trade (Yee 1992; Ingram and Durst 1989; HLA Consultants 1994). Cook, Stewart, and Repass (1992) presented the first survey of past and present ecotourism travelers, in place of origin.

Recently, Alberta Economic Development and Tourism, together with the government of British Columbia and two Canadian federal departments, commissioned a major comprehensive ecotourism market demand assessment (HLA Consultants and ARA Consulting Group 1994). The challenge to the consultants was to assess demand for ecotourism, with particular focus on current and potential markets, in Alberta and British Columbia. Figure 1 encapsulates the challenge presented to the consultants. This global leadership study of markets was based on a range of valuable primary research. This article is the first of two attempting to relate some of the findings in the literature to the more recent and comprehensive findings of the study (hereafter referred to as HLA/ARA, or the Market Demand Study). It will present findings that relate to North American ecotourists, rather than on information specific only to Alberta and British Columbia.

DEFINITION

One commonly asked question is "Who are ecotourists?" A problem in answering this question is that the motivations of ecotourists overlap with those of other types of tourists, nor can ecotourists be solely defined by the products in which they express interest (Wight 1993). In large part, the tour operator or product deliverer determines whether an experience is one of ecotourism, with its associated values and ethics, or one of more general recreation or adventure. This central role of the operator and related resource tour has been illustrated by Fennell and Eagles (1990). However, omitted in this model is the recognition that many ecotourists do not participate in an ecotourism vacation provided by a tour operator; they are independent travelers seeking ecotourism experiences.

The definition of ecotourism has been much debated. However, the actual definition used is less important than the application of the principles supporting ecotourism (Wight 1994). Boyd and Butler (1993a, p. 12) also advance the helpful notion that ecotourism should be viewed as dynamic, flexible, and prone to change within the variety of destination settings. In the Market Demand Study, the clients and consultants defined ecotourism as developed by the Canadian Environmental Advisory Council: "Ecotourism is an enlightening nature travel experience that contributes to conservation of the ecosystem, while respecting the integrity of host communities" (Scace, Grifone, and Usher 1992). This definition was developed in a consensus-oriented setting, rather than one where a particular perspective was being promoted. A number of key characteristics were understood to underlie the definition. These principles are illustrated in Figure 2 and represent the elements of sustainability a balance of benefits to the environment, society, and economy.

For the purposes of the study, a definition of ecotourism was not provided to survey respondents. Individuals tend to have their own varied perceptions/definitions of ecotourism and such a definition might predispose them to orient their responses accordingly. In addition, no one can truly be called an ecotourist until they are "on the ground" at the destination, behaving in accordance with the principles enumerated in Figure 2. Rather, respondents were asked questions related to their activities. They were asked if they had taken or were interested in taking a vacation that involved activities related to nature, outdoor adventure, or cultural experiences in the countryside or wilderness. These elements are well recognized as having a relationship with ecotourism (Lindberg 1991; Ryel and Grasse 1991; Phelan and Calloway 1993; Wight 1993; Stewart 1994). This question pointed respondents toward a common perspective without requiring a lengthy preamble to ensure that they understood and agreed with an "ideal" definition of ecotourism. By their responses, the respondents demonstrated that they understood the orientation of the question, since they made very few "nonecotourism" responses (e.g., golf). In the end, whether a visitor actually participates in ecotourism at their destination will be determined not only by their activities, but by their own behavior and the behavior and practices of operators and others in the industry.

STUDY METHODOLOGIES

Besides an extensive secondary data analysis, a series of surveys were administered to members of the ecotourism travel trade, general consumers, and experienced ecotourists. One of the advantages of the study is that although different surveys were administered to various target groups, the structure of the surveys was similar, so that comparisons could be made between group responses.

The North American General Consumer

The general consumer survey focused on the residents of seven major metropolitan areas in North America: Winnipeg, Toronto, Los Angeles, San Francisco, Seattle, Chicago, and Dallas/Fort Worth. The target completion was 200 telephone interviews in each center, providing a total of nearly 1,400 usable interviews. Based on literature indications that nature, adventure, and culture markets tend to come from middle- to upper-income groups, neighborhoods were selected where the average household income was in excess of Can$45,000 and U.S.$35,000. Respondents were those who had taken a vacation out of state or province in the last three years and who had taken or were interested in taking a nature/ adventure/culture vacation in the countryside or wilderness. Although 23% of the sample had not taken such a vacation previously, it is significant to future demand that only one of these respondents did not intend to take one in the future. Although this group is referred to as "consumers" in the text, they are clearly current or potential ecotourism travelers.

The Travel Trade

The ecotourism travel trade survey comprised those global companies that offered nature, adventure, or cultural experiences in a nonurban setting in North America. The survey sample was specifically selected to include companies that had North American ecotourism product offerings for both North Americans and overseas visitors. Of 176 surveys sent by fax, 120 were completed by fax or telephone, for a response rate of 68%. However, the response rate varied by country. The highest response rate (84%) was from Canadian firms, followed by European (77%) and U.S. firms (68%). The lowest response rate (36%) was from Pacific Rim companies (although firms from Australia and New Zealand had a 100% completion rate). In addition to the survey, several focus group interviews were held with buyers at Rendezvous Canada, an international travel trade marketplace.

Experienced North American Ecotourists

The travel trade survey was used to generate lists of clients. Mail surveys were sent to 1,200 experienced ecotourists living in the United States and Canada. Approximately 200 were returned with incorrect addresses, and 424 surveys were completed, representing 42% of those who received surveys. Because client lists were volunteered, it is not known to what degree those firms volunteering names are representative of the ecotourism travel trade. Consequently, it is also not known how representative the respondents are of all ecotourists. However, the sample does represent a large number of experienced North American ecotourism travelers.

MARKET PROFILE

Age

In the past, different studies have given conflicting information about the age of ecotourists. For example, nature tourists have been said to be older than the average tourist (Boo 1990; Backman and Potts 1993; Eagles and Cascagnette 1995); younger than the average tourist (Yuan and Moisey 1992; Chudintra 1993); 54 years on average (Fennel and Smale 1992); mid-30s to mid-50s in the Yukon, but mid-20s to mid-40s in the Northwest Territories (Tourism Research Group 1988).

In this Market Demand Study, when consumers were asked if they had previously experienced a vacation involving nature/adventure/culture in the countryside or wilderness, virtually all age groups were represented by those who said "yes." There was some tendency for the "yes" sample to be slightly older than those who said "no." However, all those who had not taken an ecotourism vacation expressed an intention to take one in the future. This response indicated that virtually all the general consumers (representing all ages of adults) were interested in ecotourism. In support of this conclusion, the experienced ecotourist survey also represented all age groups, roughly in proportion to that of the consumer survey (Figure 3). However, the experienced ecotourists were generally older (56% were 35 to 54 years old) than the general consumers (49% were 25 to 44 years old). These age comparisons between North American general consumers and experienced ecotourists resemble findings about Canadian ecotourists (Eagles and Cascagnette 1995). The travel trade survey also found that a wide age range of clients was represented, although there was a tendency for the European operators to capture a slightly older clientele. A similar result occurred in a study of Yukon adventure travel trade markets (ARA Consulting Group 1991).

It is probable that age varies with activity and other factors such as cost. For example, in a recent Tourism Canada (1995) survey of adventure and nature operations where most participants (80%) were North American, age varied by activity preference. Older clients (aged 45 and over) were interested in polar bear watching (83%, with 61% over 55), sailing (69%, with 42% over 55), sealpup watching (49%), and such winter activities as heli-skiing (78%). Younger clients (under 34 years) were interested in ice and rock climbing (67%), trail riding (57%), scuba diving (56%), canoeing (54%), cross-country skiing (53%), and rafting (50%). One-third of all hikers were 19 years and under. Overall, however, a full spectrum of ages was represented.

Gender

The gender of ecotourists reported in the literature has also varied. Some studies have reported a majority of males (Fennell and Smale 1992; Backman and Potts 1993; Tourism Research Group 1988; Nababan and Aliadi 1993; Tourism Canada 1995); a majority of females (Cook, Stewart, and Repass 1992; Reingold 1993); or an even split of males and females (Boo 1990; Ingram and Durst 1987). The HLA/ARA study of experienced ecotourists was evenly divided between males and females, a result based on actual participant lists, not on sample structure. Similarly, a special run of Alaska visitor data done for the Market Demand Study also showed a relatively equal gender distribution of visitors. Such an even split corresponds with the results of a survey of past and future U.S. ecotourists, which found that in the past 65% of ecotourists were male, while future ecotourism markets would be 50/50 male and female (Cook, Stewart, and Repass 1992).

It has been suggested that there may be a tendency for greater male interest in specialist activities, while females are more likely to participate in general interest experiences (Duda n.d.). Also, it has been suggested that males would be more interested in outdoor adventure travel products (Campbell Goodell Consultants 1991). The HLA/ARA study found that for experienced ecotourists such gender differentiation was not a general rule, but varied by activity. (This conclusion has been confirmed by other comprehensive surveys [e.g., Tourism Canada 1995].) For example, females were underrepresented in camping and cycling, overrepresented in hiking, but equal to males in rafting. Some of these gender preferences may vary over time, however. For example, while females were overrepresented in wanting to hike on their next trip (52% versus 47% males), they were underrepresented on their last trip (44% versus 52% males).

For the general consumer there were clearer differences by gender and by activity. Respondents were asked to rate various activities on a scale of 1 to 5, with 1 representing the most important. Males rated wilderness settings (2.32 versus 2.62 females), participation in physically challenging activities (2.87 versus 3.23), mountain climbing (3.67 versus 3.97), and rafting/canoeing/kayaking (2.91 versus 3.23) as more important than did females. Females rated casual walking (1.68 versus 2.06 males), learning about other cultures (1.97 versus 2.45), and interpretive education programs (2.69 versus 2.96) as more important than did males. Other activities, however, were of equal importance to males and females, such as visiting national parks or protected areas, wildlife viewing, cycling, ocean sailing/kayaking, and crosscountry skiing.

It is evident that the genders are equally interested in the overall range of ecotourism experiences. However, for specific activities, there may be slight gender differences in the degree of interest and these may vary over time.

Education

The literature has consistently suggested that ecotourists tend to be much better educated than general tourists (Tourism Research Group 1988; Fennell and Smale 1992; Cook, Stewart, and Repass 1992; Backman and Potts 1993). Eagles and Cascagnette (1995) found that while 20.7% of Canadian travelers had university degrees, 64.9% of Canadian ecotourists were degree holders. The literature on wilderness adventure markets (ARA Consulting Group 1991) and wildlife-viewing markets (HLA 1990; Bartlett 1991; Duda n.d.; Reingold 1993) makes similar observations.

These findings are reinforced by this Market Demand Study. The education levels of the experienced ecotourists, however, were considerably higher than the levels found in previous studies. A 1993 survey of visitors to Alaska showed education levels that closely parallel those of the general consumer. Figure 4 shows that most of the experienced ecotourists surveyed were college graduates (82%), while 14% had some college education. Very few had no college education at all. Furthermore, for those consumers who indicated that they had a previous ecotourism experience, there was a tendency toward a somewhat higher education level.

Overall, the most significant finding would seem to be a shift in interest in ecotourism from those who have high levels of education to those with less education -- an expantion of interest into mainstream markets. Such a change is supported by a survey of past and future U.S. ecotourists (Cook, Stewart, and Repass 1992).

Household Composition

Major differences in household composition were not found between the consumer and ecotourist (Table 1), nor among the seven cities surveyed. The majority of respondents were living together as a couple (44% of consumers and 47% of ecotourists). However, the consumer sample contained more couples with children (35% versus 24%), while the ecotourists were more likely to live alone (25% versus 18%). This latter finding does not necessarily imply, however, that ecotourists travel alone, as will be demonstrated in the section on trip characteristics.

Origins

Since the Market Demand Study targeted North American markets, the origin of respondents was a given. However, it is worth mentioning that other recent primary research has found that the origin of visitors for Canadian adventure and nature-based activities is varied and very much depends on the activity preferred (Tourism Canada 1995). Overall, Canadians are the primary market to Canada (57%), followed by U.S. residents (23%) and those from overseas (20%). More than half of the total visitors who preferred polar bear watching and winter activities such as heli-skiing were from the United States, and over one-third of those who enjoyed sea kayaking and interpreted nature observation were from the United States. Overseas visitors preferred dogsledding (74%), snowmobiling (52%), and canoeing (39%). Over 80% of the markets for river kayaking, rock and ice climbing, and bicycling were Canadian.

Clearly, origin varies by activity and it may also vary by other factors, such as local opportunity, intervening opportunity, distance, cost, and marketing efforts.

However, from the market demand study it could be generally concluded that ecotourism markets exist in virtually every major metropolitan area in North America.

SPECIALISTS AND GENERALISTS

Boyd and Butler (1993b, p. 26) relate ecotourist specialists and generalists to trip duration, with specialists engaging in a recreational activity for more than seven days and generalists less than 48 hours. A further differentiation between specialist and generalist travelers can be found in the literature (Laarman and Durst 1987; Wight 1993; Allcock et al. 1994), where the distinction is based on degree of specialized interest. As a general finding in the HLA/ARA study, consumers provided more generalized responses, whereas experienced ecotourists were more specific. Thus, for example, when asked what activities were of interest in their trip, consumers may have said "boating," which represented mainly canoeing, rafting, and boating. Experienced ecotourists, however, clearly specified the activity (cruise boats, rafting, canoeing, kayaking, or sailing) and mentioned these specific water-based activities with far greater frequency than "boating."

Similarly, when tour operators for Alberta ecotourism experiences were asked in a survey to describe their companies' activities/products, the National Tourism Association operators mentioned general products and the only specific activities were "nature viewing" and "visiting parks and mountains." The Specialty Tour operators, on the other hand, provided very specific activities, such as hiking, northern lights viewing, fishing, cycling, trail riding, and so on (HLA Consultants 1994).

Subsequent analysis of activity preferences shows that a larger proportion of ecotourists than general consumers respond with specialist activities, both for last trip and for next trip (e.g., almost no consumers mention backpacking, whereas 10% of ecotourists enjoy backpacking; on their last trip, 4% of consumers cycled versus 18% of ecotourists; on their next trip 8% of consumers will cycle versus 25% of ecotourists).

Jamrozy, Backman, and Backman (1994) ask whether highly involved specialist travelers are also responsible for the spreading wave of interest in nature-based tourism. It is not possible to determine precisely who or what is responsible for this growth of interest, although the Market Demand Study points to a number of relevant associated trends, such as growth of soft adventure, increased interest in environmental concerns, growth in popularity of specific outdoor activities, and increase in educational tourism. It is clear that interest in ecotourism is growing. Indeed, it also seems evident from the findings of the HLA/ARA study that some characteristics of the experienced ecotourist are being incorporated into mainstream markets.

TRIP CHARACTERISTICS AND PREFERENCES

Party Composition

The literature provides very diverse findings about party composition. Boo (1990, p. 43) found that fewer nature tourists traveled alone, and more traveled in groups than other types of tourists. These findings may have been influenced by the location (tropical destinations) or the type of experience. However, a survey of U.S. nature-based tour operators found that 68% of clients were individuals and 32% were groups (Ingram and Durst 1987). The literature indicates that party composition varies with the type of activity, but that families are not a large part of the adventure travel market. Yet Backman and Potts (1993) found that nature-based travelers in North Carolina, South Carolina, and Georgia almost exclusively travel with family and travel by automobile.

Figure 5 shows that, in fact, the majority of respondents prefer to travel as a couple (approximately 60% for both consumers and ecotourists). The couple may be from the same household or from a different household. This echoes Reingold's (1993, p. 38) report that U.S. specialty operators indicate that singles (both male and female) are frequently signing up as couples. The travel trade survey found that 50% of ecotourism clients travel as couples, 31% as singles, and 19% as families.

The experienced ecotourists had a larger percentage who preferred to travel alone (13% versus 7% for the general consumer). Families with children only comprised 15% of the experienced ecotourist market and 26% of the general consumers. However, there may be increasing interest in family vacations of this type. For example, the premier Canadian children's magazine, Owl, recently produced a vacation special on 23 top family vacations (Devins 1995). These focused strongly on adventure, nature, and education, and include, for example, ecoventures, palaeontological camps with microsite work, wildlife watching, and wilderness trips. At least one of the operators mentioned operates with minimum impact techniques and is constantly refining its environmental policy (Wight 1995c).

Trip Duration

There is little information in the literature on trip duration. It has varied tremendously and is usually destinationspecific rather than market-specific. For example, the average length of stay for all tourists in Nepal is 9.3 nights per visit; but while trekkers to Nepal stay an average of 25.8 nights in the country, pleasure tourists average only 5.9 nights (Parker 1993). In Indonesia, the majority (70%) of international tourists stay at natural sites for 2 to 4 days, and 18% visit natural attractions for over 4 days (Nababan and Aliadi 1993). In the United States, Backman and Potts (1993) found that nature-based travelers stayed an average of 5 nights at their destination, yet in Alaska conservation group trips averaged 12 days (ARA Consulting Group 1991).

Trip length may also vary by activity. In Canada, the average duration of packaged nature observation trips was 5.3 days, with wildlife-viewing trips ranging from 2.9 to 7 days and seal watching taking less than a day (Tourism Canada 1995). Yuan and Moisey (1992) found that Montana visitors interested in wildland-based activities spent more time in the state than nonwildland-based visitors (backpacking 8.22 days, angling 10.82 days, and nature study 5.99 days versus nonwildland-based visitors, who spent only 3.66 days).

The Market Demand Study examined total trip duration quite specifically, including the ecotourism portion of the total trip. Most respondents, whether the experienced ecotourists or general consumers, preferred total trips of more than a week in length. The results are shown in Figure 6. The largest group of consumers (40%) preferred trips of more than 2 weeks, while the largest group of ecotourists (50%) preferred trips lasting 8 to 14 days. This corresponds with the duration of most popular travel trade packages.

General consumers were asked about the length of the ecotourism portion of their trip. They clearly wished for other experiences on their trip in addition to those related to nature, culture, or adventure. The most popular length for the ecotourism portion was between 4 and 7 days, followed by 8 to 14 days, although 50% preferred more than 8 days (8 to 14 days, 27%; more than 24 days, 23%).

The travel trade estimated the percentage of its clients who preferred trips of a specified duration. Overall, the preference was for 4 to 7 days (35% of all packages and 37% of specialty ecotourism packages) followed by 8 to 14 days (25% in both categories). Approximately 40% in both categories preferred trips of more than 8 days. Table 2 shows the breakdown for the most popular packages overall, as well as the responses of those firms that specialize in the ecotourism product and those firms where the ecotourism product is secondary. In fact, there is not only some variation by specialization, but also by location of firm. For example, for overseas respondents, the most popular length of trip was more than 14 days (44%), followed by 8 to 14 days (38%). However, since overseas firms comprised only 18% of the total respondents, the overall findings are strongly influenced by the preferences of the clients of North American firms. For both Canadian and U.S. firms, at least 60% of clients prefer total package duration to be 7 days or fewer.

Clearly, since total trip length was longer than the ecotourism portion of the trip, general consumers were interested in a varied travel experience. This conclusion was supported by information related to the consumer's desire for multiple activities (Wight 1995a). They were interested in more than one type of activity for their next vacation, and although they were interested in ecotourism, they expected to incorporate nonecotourism experiences into their total trip. This information is important both from a destination-wide perspective and from an operator perspective, and has strong implications related to product linkages and packaging.

Expenditure

Ecotourists have been more frequently described as higher-spending markets and have been identified as having a higher-than-average income (over $50,000) (Backman and Potts 1993; Liu 1994; Eagles and Cascagnette 1995; Unaaq 1995). Reingold (1993) quotes research showing that about 7 million U.S. travelers were willing to pay $2,000 to $3,000 for a nature-based tour. Another survey of U.S. travelers found that "green" travelers were willing to spend, on average, 8.5% more for services and products provided by environmentally responsible companies (Cook, Stewart, and Repass 1992).

A Montana survey of tourists found that those interested in wildland-based activities spent 25% to 50% more per day than nonwildland tourists while visiting Montana (Yuan and Moisey 1992). The amount spent varied by activity of interest. Backpackers, anglers, and nature study travelers spent U.S.$92.61, $101.44, and $83.03 per day, respectively; nonwildland visitors only averaged $64.44 per day. In 1993, the average price of nature observation trips in Canada was Can$172 per day, whereas wildlife-viewing trips varied in cost by activity, ranging from $12.50 per hour to $337.50 per day (Tourism Canada 1995).

Ironically, ecotourism and nature-based tourism have been criticized for being potentially elitist (Wheeller 1991; Wieler and Richins 1995) and for having low earning capacity (Goudberg, Cassells, and Valentine n.d.; Laarman and Durst 1993; Sayer 1981). Expenditure clearly varies according to many factors, including length of trip, origin of ecotourist, economic ability to pay, destination for ecotourism, type of accommodation, vacation activities, and opportunities for expenditure. For example, in Thailand, nature tourist expenditures are estimated to be only one-third to one-half of the general tourist expenditures (Chudintra 1993, p. 38). However, typical Thai jungle trekkers tend to be younger (20 to 25 years old) and visitors to national parks tend to be Thai students, 15 to 25 years old, on one-day excursions. The age and nature of these markets and the short trip length would contribute to smaller expenditures. Similarly, in Alaska trip costs ranged from $10 for a day trip to $12,000 overall (ARA Consulting Group 1991). Table 3 shows a range of costs per day for travel trade packages, which clearly vary by activity, as well as by trip length. There seems to be no typical pattern of expenditure.

Eagles and Cascagnette (1995) reported that, on average, Canadian ecotourists spent considerably more per day than general Canadian travelers. Although this is also the case in the HLA/ARA study (1994), the Eagles and Cascagnette expenditure figures were a great deal higher than the findings of the HLA/ARA study (Table 4). However, it should be clear that Eagles and Cascagnette were reporting on the amount spent on pleasure travel during the year prior to the survey, whereas HLA/ARA were reporting on preparedness to spend per person on a trip. Eagles and Cascagnette found that almost three-fourths of Canadian ecotourists spent $2,000 or more during the year, with the mean being approximately $5,000. HLA/ARA found that one-fourth of North American ecotourists (24%) would be willing to spend this much per person per trip. While the Eagles and Cascagnette methodology may be somewhat predisposed to obtaining higher expenditure figures due to the fact that two of the study's four survey groups traveled to distant destinations (Costa Rica and Kenya), the essence of the two studies are similar: experienced ecotourists spend more than the general consumers.

In the Market Demand Study, all respondents were asked how much they would be prepared to pay per person for their previously described nature/culture/adventure vacation in the countryside or wilderness. The cost per person was to include transportation, food, accommodation, and all other vacation costs. Table 4 shows that the experienced ecotourists were willing to spend more for their ecotourism experience than the general consumers. For example, 22% of consumers would pay more than $2,000 per person, while 24% of ecotourists would; more than one-third (38%) of consumers would pay more than $1,500 per person, while almost half (45%) of experienced ecotourists would spend this amount per person. There was, as expected, a strong relationship between expenditure and length of trip. Of those who indicated a willingness to spend more than $2,000 per person on a trip, 5% would prefer a 4 to 7 day trip, 14% an 8 to 14 day trip, and 36% a trip of more than 14 days in length. It should be understood that willingness to spend cannot be interpreted as indicating the amount an operator can charge per person.

For the consumer there were some marked variations in willingness to spend by origin, age, household composition, or destination. For example, respondents from San Francisco, Los Angeles, and Toronto were more often in the higher expenditure categories, while Winnipeg was most often in the lowest. Older respondents indicated a greater willingness to spend more. Those living with children were more frequently in the less-than-$500 category, while singles were less frequently in this category. Similarly, there were variations by destination; when those who expressed interest in visiting Alberta and British Columbia were examined for willingness to pay, there were lower-than-average responses in the higher expenditure categories.

Given the diversity of the industry, prices naturally vary, sometimes wildly (Tourism Canada 1995). Indications are that expenditures differ a great deal, both from a willingness to pay and a product pricing perspective. It seems there are too many variables at play to make expenditure predictions. It is clear, however, that ecotourists are willing to pay more than general travelers.

Season of Travel

Little information exists in the literature on what times of year ecotourism travelers prefer to travel. A 1987 survey of U.S.-based specialty tour operators traveling to developing countries found that most clientele traveled in August (Ingram and Durst 1987). Canadian ecotourism travelers in Costa Rica were usually traveling in February through April (Fennell and Smale 1992). Clearly, destination has some bearing on season of travel. For example, when those consumers interested in visiting Alberta or British Columbia are examined, they show higher-than-average interest in the months of May through August.

Ecotourists are more frequent travelers, with 41% having traveled out of their state/province six or more times in the last three years versus 24% of consumers. It is, then, perhaps not surprising to find that ecotourists expressed greater preference for every month of travel than general consumers (Figure 7).

The majority of both consumers and ecotourists preferred to travel in the summer months, with 40% of general consumers preferring July and August, but approximately half of experienced ecotourists preferring June, July, August, or September. However, there appeared to be enough interest in winter travel to justify four-season products (Wight 1995b). This was particularly true for the experienced ecotourist. Ecotourists were more prepared than general consumers to travel in winter and particularly in the shoulder seasons <A7> over 25% of ecotourists indicated April through October to be their preferred months of travel. This finding presents useful opportunities for operators to extend their season well into shoulder seasons and perhaps beyond.

CONCLUSIONS

Ecotourism has been the subject of intense debate in recent years, with much of the focus related to sustainability, management, and supply-side issues. An important part of the equation has been missing to date <A7> comprehensive market-based information. The information obtained from the market demand assessment should be of value to resource managers, operators, and destination areas in their efforts to plan and manage a sustainable industry and appropriately match markets with product.

Much has been discovered about ecotourism markets in this Market Demand Study, where 77% of consumers had been on a trip that involved nature, outdoor adventure, or learning about another culture and that was experienced in the countryside or wilderness. Virtually all ages of adults are interested in ecotourism, with experienced ecotourists being somewhat older than the general consumer who is interested in ecotourism. Both males and females are equally interested in ecotourism experiences overall, although there may be slight gender differences for specific activities. Education levels are higher than those of the general population, and considerably higher in the case of experienced ecotourists, most of whom are college graduates. However, interest in ecotourism is spreading to less-educated groups. Market profile characteristics are summarized in Figure 8.

Some ecotourists are interested in general experiences, whereas others (mainly the experienced ecotourists) are interested in fairly specialized activities. Both groups are quite well traveled, particularly ecotourists. Most North American ecotourists prefer to travel in the summer months; however, the experienced ecotourist is more prepared to travel in other seasons (particularly in the shoulder seasons) than the general consumer interested in ecotourism. This versatility provides the nature/adventure/culture operator with opportunities for expanding the season of operations well into shoulder seasons and also for considering winter operations or linkages.

Expenditures by ecotourists differ with a variety of factors, especially trip characteristics and particularly trip duration and destination. There seems to be no typical pattern of expenditure. However, it can be said that one-fourth of North American ecotourists would spend more than $2,000 per person on a trip that includes ecotourism experiences. Trip length varies tremendously. Most prefer total trips of more than a week in length, with significant numbers of ecotourists and almost half of general consumers preferring a trip of more than two weeks. One-fourth of the consumers prefer the ecotourism portion of their trip to be more than two weeks long -- a significant length of time. This indicates that consumers are seeking an experience that combines ecotourism with other types of travel, which is important from product packaging, linkages, and marketing perspectives. Trip characteristics are summarized in Figure 8.

Overall, the characteristics of current and potential ecotourists suggest that interest in ecotourism is spreading to many population segments and that the characteristics of the experienced ecotourist are being incorporated into mainstream markets.

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* Pamela A. Wight is a Tourism Development Consultant with Alberta Economic Development and Tourism in Edmonton.

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