

THE US ECOTOURISM MARKET

This Fact Sheet provides a brief overview of travel behaviour and motivations of the United States Ecotourism Market. The information provided here is based on a market research study commissioned by the Destination Australia Market Alliance (DAMA). The study investigated travel behaviour and motivations of long-haul travellers in key international marketsⁱ. The total sample size for the United States was 1017 persons who were interviewed in their home country. Further secondary data analysis of the DAMA research was commissioned by Tourism Queensland to identify and profile tourists specifically interested in Ecotourism experiences.

Ecotourist Definition

For the purpose of this research, an Ecotourist is defined as someone who did at least one of the following activities on their last long haul holidayⁱⁱ:

- Saw wildlife in its natural surroundings
- Stayed in the wilderness
- Visited a rainforest/ jungle
- Visited national parks

And agreed that they look for at least one of the following activities:

- Environmental/ ecological sites to visit
- See wildlife in natural surroundings
- Walk in untouched countryside and natural environments

And sometimes plan holidays around at least one of the following activities:

- Bird or animal watching
- Camping
- Nature/ ecological/ environmental/ wilderness activities
- Walking/ hiking/ bush walking/ rainforest walking/ rambling
- See wildlife in natural surrounds

Interest in Ecotourism among American Tourists

Using the above definition, 20% of all American tourists who participated in the original study qualify as Ecotourists.

Overall, a relatively large percentage of American tourists stated that they were looking for activities such as “seeing wildlife in natural surroundings” (43%), “walking in untouched countryside or natural environments” (38%) or “visiting environmental/ecological sites” (36%) in a long haul holiday. Around one third (29%) of American tourists sometimes plan their holiday around nature-related activities. The following tables provide further detail.

Activities participated in on last holiday	
Saw Wildlife in its natural surroundings	27%
Visited National Parks	26%
Visited a rainforest/jungle	10%
Stayed in the wilderness	5%

Activities looked for in a long haul holiday	
See Wildlife in natural surroundings	43%
Walk in untouched countryside and natural environments	38%
Environmental/ecological sites to visit	36%

Activities that holidays are sometimes planned around	
Nature/ecological/environmental activities/wilderness	29%
Walking/hiking/bushwalking/rainforest walk/rambling	20%
Camping	14%
Bird or animal watching	12%

Demographic Profile

Demographic	
Age	Many American Ecotourists are aged between 45 and 54 (23%) with a further 22% aged between 55 and 64 years.
Gender	Amongst American Ecotourists, there seem to be slightly more females than males (57% females and 43% male).
Household Income	Over half of all American Ecotourists have a monthly household income of 60,000 – 99,999 USD (27%) or 100,000 USD and higher (25%).
Education Level	The majority of American Ecotourists have graduated from high school, with significant numbers having also graduated from college (26%) or post graduate college (24%).
Travel Party	Most of the US respondents travelled with either one other person (35%), or five or more persons (16%) on their last long haul holiday.

Travel Planning

Types of accommodation

During their previous long-haul holiday, the vast majority of American Ecotourists stayed in moderate (2-3 star) hotels (37%) or luxurious (4-5 star) hotels (27%). Relatively small numbers stayed at budget (one or no star) hotels (16%); B&B's/Guesthouses/lodges/ farmstays (13%); on cruise ships (13%); in all-inclusive resorts (7%); backpackers (4%); tents (2%) or camper vans/caravans (2%).

Booking timeframes

American Ecotourists typically started planning their long-haul holiday six to nine months prior to departure (35%). A further 22% started planning around one year prior to departure.

Organising Previous Holiday

American Ecotourists tend to book many components of a long-haul trip prior to leaving their home country. Many American Ecotourists (59%) had organised all flights/transport and all the accommodation. Of these, 49% had also booked meals and tours/activities prior to leaving their home country.

Inspiration and Travel Ideas for Long-Haul Holidays

For American Ecotourists, the top five sources of inspiration for travel and ideas are:

1. Friends who have been there (57%)
2. Magazine articles/ travel sections (57%)
3. Newspaper articles/ travel sections (48%)
4. Travel books or guides (47%)
5. Other travellers/ holidaymakers (46%)

Sources of information to research travel destinations

In the United States, the top three sources of information used by Ecotourists are Internet travel sites (55%), travel books or guides (49%), and magazine articles/ travel sections (44%).

Sources of information to Research Destinations	Percentage
Internet travel sites	55%
Travel books or guides	49%
Magazine articles/ travel sections	44%
Friends who have been there	43%
Government tourist office	36%
Newspaper article/ travel sections	35%
Specialist travel magazines	33%
Family who have been there	31%
Other travellers/ holiday makers	29%
Tourist office brochures	26%

Media habits

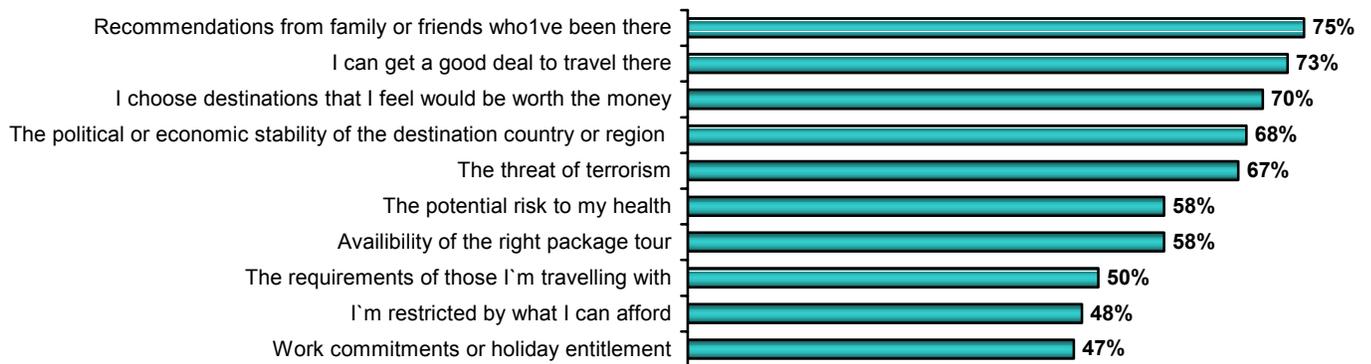
Among the TV programmes viewed by American Ecotourists, "Vacation and Travel" rates sixth (44%). The number one magazine read by American Ecotourists is the "National Geographic" (23%).

Travel behaviour

Destinations considered and factors influencing choice of destination

For American Ecotourists, the top holiday destinations seriously considered are Australia (54%), followed by the USA (52%), Italy (50%) and Hawaii (48%). For American Ecotourists, the choice of destination largely depends on "recommendations from family or friends who have been there" (75%); "whether they can get a good deal to travel there" (73%) and "whether they feel the destination would be worth the money" (70%).

Key Factors Influencing Choice of Destination:



Number and length of last long haul holiday

The majority of American Ecotourists have taken one (28%) or two to three (32%) long haul holidays in the last five years. Of those who have taken at least one long-haul holiday in the past five years, the majority of trips were eight days to two weeks in length (38%), followed by 15 to 20 days (20%).

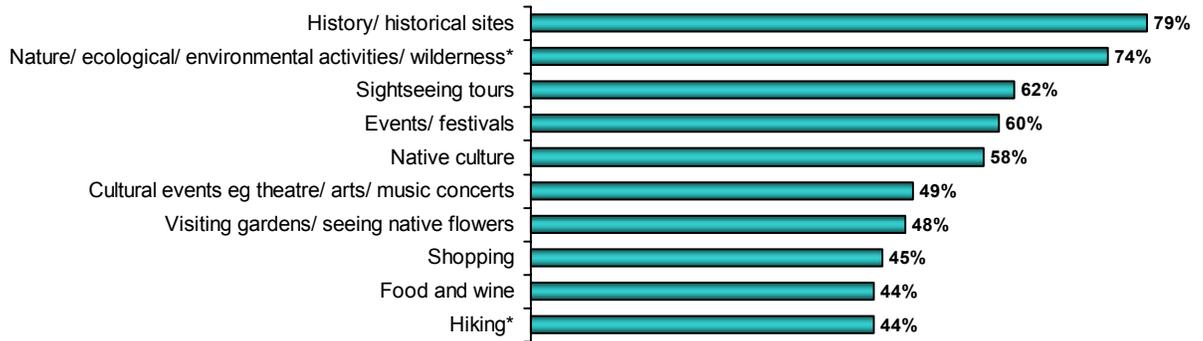
Motivations of going on long-haul holidays

For American Ecotourists the top three motivations of going on a long-haul holiday are "to see new things" (99%), "to see some more of the world" (97%) and "to have fun" (96%).

Motivations of going on long-haul holidays	Percentage
To see new things	99%
To see some more of the world	97%
To have fun	96%
To have an adventure	91%
Scenery and landscapes to explore	88%
To learn something new	88%
To experience a different culture	86%
To relax and take it easy	85%
To get away from it all	82%
Understand the history of it all	82%

Activities which holidays are often planned around

For American Ecotourists the top three activities that holidays are often planned around are “history/ historical sites” (79%), “nature/ecological/environmental activities/ wilderness” (74%), and “sightseeing tours” (62%).



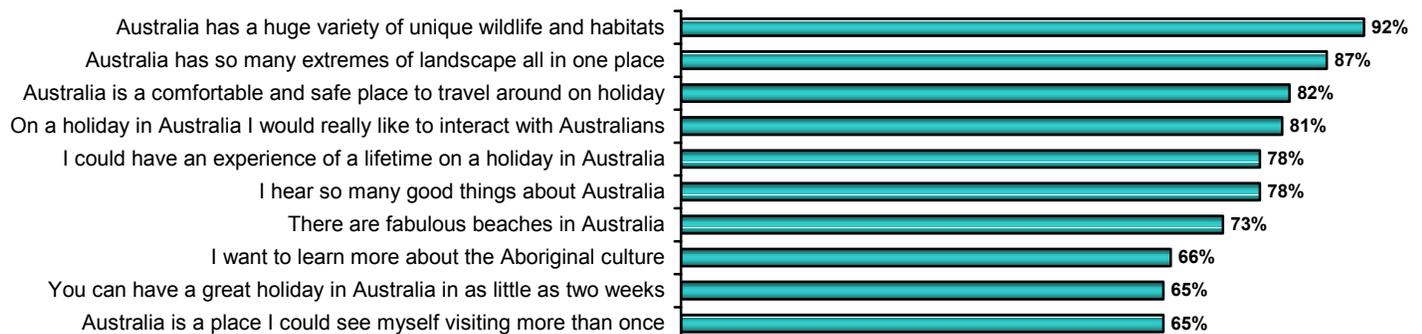
* Ecotourism defining variable.

Travel to Australia

Attitudes of American Ecotourists towards Australia

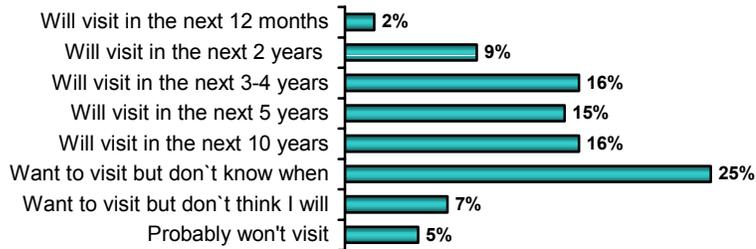
For American Ecotourists the top three attitudes towards Australia as a travel destination are: “Australia has a huge variety of unique wildlife and habitats”(92%); “Australia has so many extremes of landscape all in one place (87%)”, and “Australia is a comfortable and safe place to travel around on holiday” (82%).

Top 10 Attitudes of US Ecotourists towards Australia



Visiting Australia

The majority of American Ecotourists have never travelled to Australia (76%). One quarter (25%) “want to visit Australia but don't know when”; 9% are expecting to visit Australia within the next two years. Many of these prospective visitors intend on staying for two weeks or less (41%).



Amongst those likely to travel to Australia in the next two years, the majority would “visit a couple of regions to get a feel for Australia's diversity” (41%) or “several different regions to see as much as they can” (50%).

A full report is available on request.

Further Information

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ⁱ For the United States, long-haul holiday destinations as specified in the DAMA questionnaire, are all destinations other than the USA, Canada, Mexico, Alaska, Caribbean, or Hawaii.

ⁱⁱ Tourism Queensland acknowledges that a universal definition of an Ecotourist does not exist. A limitation of the definition used for the purpose of this analysis is that it is based on the selection of the most appropriate variables from the existing DAMA research.