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**Northern
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Center**

Heritage and Nature-Based Tourism in the Northern Forest Region: A Situation Analysis

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Issues and Trends in Heritage and Nature-Based Tourism within the Northern Forest Region

Overview.

The Northern Forest Region (NFR) contains hundreds of thousands of acres of forestlands. Ensuring a successful, sustainable environment for future generations will necessitate utilizing natural and human resources in ways that will enhance, not undermine the region’s characteristics. One of the tools for achieving sustainability is the region’s tourism industry. The success of the NFR’s tourism industry is greatly dependent upon four factors—the weather, the changeable demands of the traveling public, the Northeast’s economic health, and gasoline prices. The first two are difficult to predict long term, the third is recovering from a lengthy downturn, and forecasts for the fourth are not encouraging at present.

Given its quaint villages, beautiful woodlands, scenic byways, recreation facilities, and rural workscapes, the NFR possesses a product mix that appeals to travel preferences of millions of Americans as evidenced by the following³⁵:

- 48 percent of U.S. travelers are interested in visiting remote or untouched paces
- 57 percent are attracted by culture
- 76 percent want to visit a place they have never visited before

With domestic travel increasing by 3.5 percent in 2005, and with another 1.8 percent increase projected during 2006,¹⁶ there is potential for gradually increasing the flow of dollars and revenue into the NFR. A breakout of 2002 traveler spending and tax revenues generated in the four states housing the NFR follows. Note that in Maine, New Hampshire and Vermont, visitor spending engenders important levels of revenue for those states, ranging between 11-20%.

	<u>Visitor Spending</u>	<u>Tax Revenues Generated</u>	<u>% of State Tax Revenues Generated</u>
Maine ^a	\$ 1.9 billion	\$ 255 million	11%
New Hampshire ^b	2.6 billion	246 million	13%
Vermont ^c	1.3 billion	180 million	20%
Northern New York ^d	1.6 billion	115 million	NA

Sources: 15, 20, 26, 27, 34, 48

^a northern and western parts of the state, contains popular Bar Harbor/Acadia destination

^b northern portion of the state, contains no significant urban destinations

^c northern portion of the state, contains largest city Burlington and capital Montpelier

^d northern and western portions of the state, contains popular Saratoga Springs destination

To be objective, increasing nature and heritage recreation and tourism in the NFR will produce both positive and negative impacts upon host areas. On the positive side, such activity has helped to diversify local and regional economies, generate economic growth, and expand public services. Tourism performs as an export activity, bringing money from outside the area to be spent on local goods, services and activities. At the same time, it stimulates the development of new infrastructure (roads, electrical lines, etc.) and superstructure (recreation

spaces, lodgings, etc.). These actions influence other non-tourism activities to locate in the area, thereby creating new jobs, wages, other forms of spending, and tax revenues.

However, there are potential drawbacks. There is no guarantee that new businesses will be locally owned, or staffed by area residents. Wage and other forms of money leakage have occurred in other, largely rural locales when a large proportion of ownership, employees, as well as goods and services is imported from outside the geographic area.⁷ This is a very real threat within the NFR, wherein communities that are already fiscally overextended must finance infrastructure needed to support new tourism activities, with no guarantee about the length of their tenure. It is further exacerbated by the fact that different skill sets are required by the hospitality and tourism industry than the traditional primary and secondary sector jobs being displaced. While New Hampshire has provided a training mechanism for tourism employees, and Vermont’s is in the beginning stages, these are model programs not yet available elsewhere in the U.S. To date, anecdotal support for the New Hampshire program is very strong, but there is no corroborating research.

Employment.

There are 5.4 million direct and 2.5 million indirect U.S. tourism employees.¹⁸ Employment growth offers residents more job opportunities, enabling other local residents to benefit from the trickling-down of jobs formerly performed by new tourism employees. One needs to be careful to take into account whether new jobs are filled by locals or others who are lured into the community by new employment opportunities.³³

The following table depicts the availability of full and part-time tourism jobs within the states comprising the NFR, during 2002-03. During this period, New Hampshire experienced the greatest percentage of tourism employment growth, with Maine and Vermont each experiencing substantially lower rates of job growth; New England as a whole received a 2.3 percent increase in tourism job growth, while the U.S. rate was 2.2 percent.

Leisure and Hospitality Employment^{27, 34, 39, 43}

	<u>2002-03</u>	<u>2005</u>	<u>% Chg.</u>
New Hampshire	61,500	66,700	8.5%
Maine	58,500	60,400	3.2
No. New York	38,700	40,800*	5.5
Vermont	<u>32,800</u>	<u>33,500</u>	<u>2.1</u>
Total	191,500	202,000*	5.5

* est. based upon a regional ave. increase of 7.0% applied to no. NY state

Of concern to NFR economic planners should be the tourism industry’s reputation for providing substandard, seasonal jobs, and straining the local infrastructure. Despite this commonly shared belief, rural recreation counties as a whole experienced 24 percent employment growth during the 1990s, which was approximately double the rate of other non-metropolitan counties.³³ Nationally, the average earning per job in “recreation counties” was \$22,234 in 2000, or about \$450 less than in other rural counties. While this is consistent with the prevailing attitude about low paying tourism jobs, the USDA found that earnings per job increased faster in recreation counties than in non-recreation ones, possibly in response to spin-off economic opportunities in areas where tourism is thriving. As a result, according to a

USDA study of 311 rural recreation counties, recreation and tourism “resulted in lower local poverty rates” as well as improvements in educational attainment and health measures.³³ Further, tourism helped to increase job diversity⁶ by creating or supporting 51 different types of private sector jobs and an additional 51 indirect private sector jobs.³ Tourism had a slightly positive impact upon earnings for multiple job workers, as earnings were approximately \$29.6 thousand per capita or about two thousand higher than in other, non-recreation rural counties.³³ Traditionally, tourism has been more important to the economic well-being of states with substantial rural regions than predominantly urban states. During 2005, the three northern New England states provided 25 percent of New England’s direct and indirect leisure and hospitality employment, despite having only 22 percent of New England’s 2000 population and 23 percent of its total employment.

One of the benefits derived from tourism actually may prove to be a significant threat to the NFR, as new jobs mean more employees, and their families may move into the area. This resulting population growth provides what geographers term an increase in market *threshold*. As more service market thresholds—*def.* the minimum population required to support specific services—are met, there will be even greater growth.¹⁷ Not all development that may occur in the NFR will be deemed desirable by residents. This is where tourism, like any other form of economic activity, can threaten the natural and cultural character of the NFR, making sustainability a problematical goal to achieve. Avoiding these pitfalls is dependent upon a proactive policy consisting of master planning, zoning, capital improvements programs, and other tools.

Tourism Markets.

Travel and tourism is an enormous economic engine. During 2004, there were an estimated 1.2 billion person trips in the U.S., or 6.5 billion visitor person-days.³⁶ 43% of these trips were taken for various marketable occasions, 41% were to visit friends and relatives, and 16% were for business-related purposes. Within the NFR, an estimated 22.5 million visitors spent approximately \$7.4 billion and generated more than 200,000 jobs.^{27, 34, 39, 43} While there are no data for total overnight versus one-day trips in the region, based upon Maine’s experience, it is estimated that the ratio of day-to-overnight visitation⁴² is approximately 4-to-1. Tourism DMOs would like to increase the relative proportion of overnight visitors.

Tourism futurists believe the travel markets that are most likely to increase in coming years are those seeking enrichment, health, revitalization, enhancement, ecotourism, and soft adventure.⁹ This reflects growing interest in environmental and cultural/heritage forms of travel. During the last six months of 2005, one-third of Americans visited an art museum, historic museum, zoo, botanical garden, science center, or similar facility.²³ Opportunities such as these abound within the NFR, but the traveling public must be made aware of them first. Visitors to the NFR are significantly more likely to engage in outdoor recreation, winter sports and activities, and camping than the national average—all important reasons that people have visited the area traditionally.

“Geotourism” and “enrichment tourism” are target audiences for NFR tourism businesses. These travelers have relatively large disposable incomes. NFR destinations must market to such travelers by convincing them that new and different enrichment opportunities are available. Educational programs with a cultural (e.g., language immersion), heritage, or environmental theme appeal to such people. Between 2000 and 2004, there was a 30 percent nationwide increase in people who said they observe or photograph wildlife (to 125 million),

and a 17 percent increase in people who observe scenery (to 151 million). According to the Travel Industry Association, 49 percent of travelers have indicated that they prefer to experience local culture, and 41 percent prefer to see and do things that are “authentic” while on vacation.³⁷ All of this bodes well for the NFR. Within the New England States, Maine ranks first for the rate at which its visitors participate in outdoor activities (NH 2nd, VT 3rd), beaches (NH 4th, VT 6th), national or state park/forest attendance (NH 2nd, VT 3rd), and water sports/boating (NH 2nd, VT 3rd). Vermont ranks first for rural sightseeing (ME 2nd, NH 3rd), winter sports (NH 2nd, ME 3rd), and cultural events/festivals (VT 3rd, NH 6th). It must be noted that shopping ranks as a very important activity in all three states. Unfortunately, comparable data were not available for northern New York state.⁴⁵

Culture and heritage tourism remains one of the fastest growing segments of the travel industry. There is a strong indication that visits to a cultural or heritage attraction enhance visitors’ enjoyment of a place and cause them to return. In 2004, 146.4 million U.S. adults took a trip of 50 or more miles to engage in this type of travel. As the following table shows, the impact of greater lengths of stay and spending will have a positive impact upon the travel businesses within the NFR.

Comparing Culture/Heritage Travelers with Total Travelers—2004³⁷

	<u>Cult/Heritage</u>	<u>General Travel</u>
Travel party spending	\$623	\$457
Stay in comm. lodging	62%	55%
Spend ≥\$1000	19%	12%
Length of trip	5.2 nights	3.4 nights

No form of tourism within the NFR has been more controversial than motorized, recreation activities, which have had an impact upon the economy and ecology of the area. In Maine and elsewhere within the region, ATV owners have faced accusations about damage to the environment. In 2004, there were more than 59 thousand registrations of ATVs in Maine; the majority of these were state residents. ATV activities generated \$200 million in net spending. The problem is that the most popular ATV areas—the Maine Highlands as well as the Lakes and Mountains—are also popular settings for other, lower-impact forms of outdoor recreation.²² Conservationists oppose the proliferation of ATV usage. Others disagree, arguing that the economic benefits outweigh the environmental costs. In New Hampshire, during 2002-03, ATV and trail bike travel parties contributed \$162 million in direct and indirect spending, and the total impact on the state's economy (direct, indirect and induced impacts) was about \$264 million.³⁰ Snowmobiling is a form of winter recreation whose overall impact on the economy is frequently overlooked because it comes into conflict with cross country skiers and snowshoeing. The total impact of snowmobiling in New Hampshire was \$350 million;³¹ in Vermont it was \$165,252,700.²¹

During the last ten years, recreation vehicles have been displacing traditional forms of camping. In 2005, 7.2 million US households owned at least one recreation vehicle. Sales of RVs have gone flat, however, it is projected that 8 million household will own an RV in 2010. There has been a 22 percent growth in RV rentals during 2005 relative to 2004. RV travelers spend an average of \$91 per day at local businesses, for meals, groceries, and/or gifts.⁴¹

Trends.

a. Recent Travel Increases. During 2005, domestic travel increased by 6 percent compared to 2004, and leisure travel was up 9 percent.⁴¹ This growth reflects a steady rise in the Consumer Confidence Index, rising employment, falling unemployment, and growing disposable incomes since November 2005. Overall, a 1.8 percent growth in domestic travel is projected for 2006. With a projected larger number of travelers, visitation to the NFR should increase, provided the area is prepared to take steps necessary to maintain or increase its market share.

b. Marketing on the Internet. This is a very good time for non-mainstream tourism destinations to market to potential travelers. For the first time in history, the marketing “playing field” has been leveled substantially by the Internet. During 2004, nearly 64 million people, 30 percent of the U.S. adult population, used the Internet to obtain travel information; by 2005, 79 million Americans were utilizing it. In 2004, 44.6 million booked services online.⁴ Recognizing this, the region’s travel industry has dramatically increased its use of the Internet to promote sustainable forms of tourism; this includes everything from promoting ecotourism to increasing mindfulness of cultural and heritage attributes. Therefore, it will be essential that Internet connectivity be made available throughout the NFR. State and national parks and forests as well as other systems serving outdoor recreationists should be prepared to provide highly functional electronic reservations systems and email services.⁵

c. Gasoline Prices and Tourism. Tourism in the NFR is very vulnerable to rising transportation costs, given that 1) an overwhelming proportion [75-80%] of NFR visitors arrive by automobile, and 2) much of the NFR is situated a full day’s drive from its principal marketplaces. The price of gasoline will be a key factor in the region’s success a destination. Regular-unleaded gasoline rose from a regional average of \$1.60 during 2003, to \$1.87 during 2004, to \$2.25 during 2005. The national average was \$2.92 per gallon in late April of 2006.¹ This represents a nearly 85 percent increase during a period of less than 36 months. If this trend continues, Regular-unleaded gasoline may sell for more than \$4.00 per gallon by 2010, an event that would be extremely detrimental to the NFR’s tourism industry and overall economic well-being. Should the price of gasoline continue to rise, there will be increasing demand for outdoor recreation opportunities that are geographically convenient to markets, i.e., within or adjacent to urban areas, offered at comparatively low cost.

d. Travel Party Composition. The average U.S. travel party contains 3.8 members; however the region’s travel parties tend to be smaller than the U.S. mean: Maine’s average part size is 3.4, while New Hampshire’s is 2.7, and Vermont’s is 2.3 persons. Northern New England’s visitors also tend to be older than the U.S. average:

Percentage of Visitors Who are Less Than 35 Years of Age^{24, 27, 42}

US	36%
ME	26%
NH	9%

This is an indication that the NFR is becoming increasingly dependent upon couples without any children living at home, particularly those households in the 45-and-older age cohorts. The leading generator of visits to Maine and New Hampshire is Massachusetts, with New York serving as Vermont’s principal market. The Middle Atlantic states are northern New York state’s leading sources of visitors. Other important markets are in-state residents and visits from the remaining New England and Middle Atlantic states. California and Florida

contribute a small but measurable number of visitors. Following a period of several years when their levels of visitation had been spiraling downward, the number of visitors from eastern and central Canada has been increasing since 2002, largely in response to a more favorable currency exchange rate for Canadians.

Much emphasis has been placed upon marketing to the Baby Boomer generation. This segment will continue to travel farther a field, stay away longer, and demand more services than earlier generations such as the Matures. As Baby Boomers retire, they will be looking for upscale conveyances and conveniences—including larger campsites, better access roads, improved recreation and fitness facilities, food services, and WiF—to take them to out-of-the-way areas and serve them while away from home.^{5,37}

Other generations that warrant the attention of marketers are the “Gen-Xers” (born between 1965-76) and “Millennials” (born between 1977-94). The former is a generation of knowledgeable travelers with much more experience with the Internet than their parents. Millennials are a large market segment (28%) that is confident, knowledgeable, independent and demanding of travel options that may never have been considered by prior generations.³⁷

The Future.

While the topic of this report is Tourism, its fundamental concerns are rural jobs and protection of the region's environment. As one examines the potential for growth of the travel industry in the Northern Forest Region, the following tourism-related axioms must be considered:

a. Opportunities

- tourism has a generally positive impact upon local and regional economies (spending, revenues, tourism multipliers, purchases of services, creation of new services and commercial enterprises) that will be difficult for regional leaders to ignore.
- sustainability (of the environment, economy and socio-cultural character) is the desired end of well-designed tourism enterprises, necessitating that a proactive stance be adopted by government and commercial interests, one that permits tourism development while addressing the long-term ramifications of introducing new populations and landscape change and into the NFR.
- More than ever before, visitors are seeking quality, authentic experiences and products, and are willing to pay for these, as long as value is provided; the presence of numerous, comparatively unspoiled natural areas and not-yet-gentrified communities bodes well for the future of tourism in the NFR.
- Partnerships/strategic alliances among former rival areas and businesses are essential in order to provide a competitive tourism product mix—a combination of accommodations, attractions and services. This is particularly true for rural areas and communities that lack a single, significant travel-generator.
- Geotourism and enrichment tourism strategies are sustainable, market-driven approaches that maintain or enhance the geographical character of a place—its environment, heritage, aesthetics, culture, and the well-being of its residents. Geotourism can be employed to leverage NFR's competitive advantages in the Northeast's tourism market place.
- Efforts to build interest in visitation to the Northern Forest Region should occur in cooperation with initiatives to build brand loyalties for souvenirs consisting of local products (e.g., maple syrup, wood chips, local foods, arts and crafts). This is a win-win situation.
- There are natural links between leisure travel and business travel, using the popularity of a place as a visitor destination to lure business, conferences and other meetings into the NFR.
- The Internet will be a key component in getting out the word about all that the NFR has to offer potential visitors. Efforts to link the various components (states, sub-state travel regions, communities) together have the greatest likelihood for success.

b. Challenges.

- Tourism represents a potential threat to the natural environment and cultural character of the region because it engenders change.
- With the exception of New Hampshire (and recently in Vermont), the lack of centralized training in the operation of tourism businesses is a problem. Because of the competition for tourism dollars, and the growing sophistication of service providers and consumers in neighboring areas, proper education and training of hospitality and tourism personnel must be coordinated.
- Long term rural residents are known for their avoidance of change; this attitude can prove detrimental to critical vocational retraining as well as planning and zoning efforts
- Few rural communities will be able to attract visitors alone; therefore, it is essential that people and agencies work within and among communities to develop, promote, and provide sustainable forms of tourism in the NFR. Towns within the region need to work together to

- implement legislative coalitions in order to expand awareness, on the part of lawmakers, of rural concerns and the prospects and threats presented by tourism growth within the NFR.
- It will be difficult to convince local people in some areas that visitation is really a viable option, as many have grown up with the awareness that their town was considered “undesirable.” Only by changing attitudes will a stronger sense of stakeholder participation in tourism planning and development initiatives be accomplished.
 - Second homes are a major component of the NRF’s development and its quality of life; yet data about this industry are nearly non-existent in this region.
 - There continues to be no uniform method for collecting, disseminating and applying regional tourism data. Prior to the federal government’s decision to disband the U.S. Travel and Tourism Administration in 1995, the individual states had already eschewed efforts to standardize tourism data collection. Now, with the absence of this central domestic tourism research entity, state and local tourism research has become increasingly self-regulating, making state-to-state comparison impractical. Within most states, data are collected then aggregated at state (and perhaps county and/or sub-state tourism region) level. Only in exceptional instances are local level data sets available. As a result, existing sample sizes are too small to have validity at the local scale. This situation makes the process of conducting issue-specific research (e.g., studying the impact of logging legislation upon snowmobile activity in the Northern Forest Region) very difficult.

c. Concerns that must be addressed.

In conclusion, there is considerable potential for tourism development in Northern Forest Region. However, the following overriding concerns remain:

- What will be the nature of the tourism product-mix; and what will be the quality of jobs that result?
- What impact will the increased prices and diminished supplies of gasoline have upon travel to and within the NFR?
- Can the natural environment and the quality of life within the NFR be sustained?
- Will regional people take the necessary steps to make tourism viable within the region?

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