



What Is Known About the Outdoor Recreation Industry

*Adapted from "Oregon Agri-tourism Industry Market Analysis"
Jan Woodruff, Market Advantage, June 1997*



As you assess your property assets, take a look at these findings from recent surveys about outdoor recreation enthusiasts, and see if ideas begin to develop about matching resources to particular markets.

Foreign Travelers:

German travelers, on average, spend almost \$3,000 on a 20-day visit to the U.S. Most German visitors come to the U.S. for vacation or holiday travel. Getting 14-15% of German visitors to stay one week on a farm or ranch would add about \$4 million to the Agri-tourism industry. There are about 1,000 "Western" clubs in Germany with about 80,000 members. Authenticity is the focus of the clubs; members spend time and money researching the U.S. West and Indian history ride horses, learn to shoot with a bow and arrow, and cook over a campfire. German's seek outstanding scenery, good value, and learning opportunities. These are visitor needs that the Oregon Agri-tourism industry is uniquely qualified to satisfy.

Japanese tourists, in contrast, are seeking large theme parks, shopping experiences, exciting cities and lifestyle. Japanese travel primarily in large groups and rarely rent cars on vacation, making travel to rural areas difficult. Japanese tourists are not as adventurous as their German counterparts. They tend to travel to substantiate what others have seen, rarely to discover something new.

Age:

Baby boomers represent 30 percent of all Americans and half of all visitors to Oregon. Increasingly, baby boomers are looking for self-fulfillment and examining their self-potential. This makes baby boomers an ideal target market for tourism products that offer education and challenge. Baby boomers are doers, not sitters; many are burned out in their jobs and hectic pace of life.

Young seniors (55-65 years of age) are the richest age group in the U.S. Those aged 55 and older represent 20 percent of the population and 80 percent of the vacation dollars spent in the U.S. To successfully attract mature consumers, marketers must consider the important issues to this group: 1) independence and self-sufficiency, 2) social and spiritual connectedness, 3) selflessness, 4) personal growth, and 5) revitalization. Seniors tend to be better educated and hence, interested in museums, historical sites, cultural exhibits and activities. They value security, cleanliness, value, and comfort.

Participation in outdoor recreation, particularly physically demanding activities, decreases with age. Participation in passive activities (walking, visiting historical sites, wildlife viewing, observing nature, bird watching) does not decrease with age.

Intergenerational travel (grandparent traveling with grandchild) is a growing trend. A shared experience becomes a memory and legacy for both.

Families:

Children love animals and the outdoors. Activities and adventures that involve these attributes will bring attention from parents. Affordability is important, as well as safety, proximity, and accommodations. Some will want to "rough it," while others want a softer adventure for younger children. Families with children are characterized by bargain hunting, demand for quality service, and extra amenities. However, this can be a fun and exciting clientele group.

Childless Travelers:

Currently two-thirds of American households have no one under the age of 18 living with them. Childless travelers spend more on vacation than families with children because they have more disposable income and take longer trips. One-quarter of American households are occupied by just one person. One of the greatest opportunities for leisure travel marketing, according to a renowned speaker in the travel industry, will be a vacation for one.

Gender:

Women are more likely than men to influence decisions for short vacations. This is a key point about marketing to families. Single women are also an important target market. Izzy Oren, owner of Oregon's Ponderosa Ranch, finds that virtually 90% of the inquiries he receives from German visitors are young, single women. In developing marketing strategies and programs for most kinds of Agri-tourism enterprises, the interests and values of women travelers should play an important role. When planning vacation itineraries, women are motivated by: 1) geographic limitations, such as cold winter temperatures, 2) availability of time, money, and babysitters, 3) social belonging and peer approval, 4) getting away from home, children, and work, 5) excitement, 6) possibility of making new friends, and 7) discovering their roots.

Activities:

Off road bicycling grows at an annual rate of 20 percent a year. There are now about 10 million off-road bikers. Most are young, unmarried or childless men, aged 22-33. Many trails on public lands are being closed to bike riders. Demand for new trails is increasing.



Non-hunting wildlife recreation activities, such as bird and game observation, photography, and animal feeding are extremely popular. In Oregon, 18 percent of visitors participated in non-hunting wildlife recreation on their trips. Nationwide, non-hunting wildlife enthusiasts outnumber hunters five to one and sport anglers two to one. The most popular sites for viewing, photographing, or feeding wildlife are woodlands, lakes, and streams. The most popular wildlife for these enthusiasts are birds and land mammals (deer, bear, etc.). In Oregon, according to a 1995 industry inventory, only 25 agricultural landowners offer visitors the opportunity to view or photograph wildlife. The demand for this type of activity is predicted to grow rapidly in the future. Bird watching is the fastest growing outdoor recreation activity.

Hiking is one of America's fastest growing outdoor activities. Hiking is correlated with income and age. Hiking is significantly more popular for high-income households and younger aged Americans. Participation is not correlated to gender. Hikers are typically ardent conservationists. Hiking provides participants an opportunity to improve physical fitness while enjoying nature.

Camping is most popular with younger people. Those aged 25-34 are more likely than any other age group to go camping more than once a year. It is also an attractive activity for families, enabling parents an experience in the outdoors with children.

Hunters and anglers are motivated by a love of the outdoors. Those who fish and hunt tend to be men who live in rural areas, between the ages of 16 and 34. Access is one of the key issues facing sportsmen. In Oregon, landowners can charge a "trespass fee" to licensed sportsmen during a legal hunting or fishing season. According to the 1995 industry inventory, Oregon has 21 properties that offer fee hunting and 23 that offer fee fishing to guests. The number of anglers has consistently increased during the past 20 years and is expected to continue to do so.

Winter Enthusiasts:

Millions of Americans love winter snow activities. Sledding, ice skating, cross-country skiing, and related activities are seasonal attractions that can augment some farm or ranch recreational enterprises. People aged 25-35 dominate these sports. People in households earning over \$100,000 a year are three times as likely as lower income households to participate in cross-country skiing and other winter sports. Snowshoeing is one of the fastest growing winter sports.

Horseback Riding:

In 1994-95, seven percent of Americans aged 16 or older went horseback riding at least once. The largest share of horse enthusiasts are between the ages of 15 and 19 years. People in higher income households are more likely to participate in horseback riding. According to the 1995 industry survey, 30 farms and ranches in Oregon offer horseback riding to guests. Some offer paddock and trail riding. Others offer cattle drive experiences. Others offer riding lessons.

Adventure Enthusiasts and Extreme Sports:

Adventure travel is a booming segment of the tourism market. Nearly 10,000 tour operators offer adventure trips, tapping over \$110 billion annually. Adventure tourism is nature-based involving thrills, excitement, and challenge. Examples include mountain climbing, off-road mountain biking, whitewater rafting, and other sports that involve physical or mental challenge. Adventure seekers tend to be intensely social and tend to travel in larger groups. Since adventure travel often involves a high level of physical activity, adventure seekers tend to be young and healthy with higher than average income levels.

Learning Enthusiasts:

Gardeners—Gardening in the U.S. has grown from a hobby to an obsession. Next to walking for pleasure, gardening is America's most popular physical activity. Currently, 55 percent of American adults garden as a hobby. Public and private gardens or gardening education provides an opportunity to engage simultaneously in a variety of popular outdoor activities—sight-seeing, walking, studying nature, and nature photography, satisfying visitors' needs for relaxation, knowledge building, connectedness, and escape.

Heritage Travelers—Almost half of all U.S. adults planning a pleasure trip say they intend to visit an historical site. Three in ten Americans are "Western enthusiasts." These include "historians" who are enthralled by the Native American cultures, the Oregon Trail, Lewis and Clark and westward expansion; "new pioneers" who are interested in contemporary Western lifestyle; and "city slickers" who are interested in the look and the experience, less so in the history and lifestyle. Two-thirds of Western enthusiasts are women. More than half are aged 26 to 44. The median income is slightly higher than average.

Nature-Based Tourism—Nature-based tourism attracts people who want an active adventure vacation and an intimate encounter with nature. They seek hands-on experience. Rather than passively observing wildlife and plants, people will spend money and invest labor to help build and restore sites. They prefer wilderness settings, wildlife viewing, hiking or trekking. Typically, 35 to 54 years of age, only a handful of this group travel with children. The nature-based tourist prefers trips lasting 8 to 14 days.

Culinary Tourists—Cooking school vacations and gourmet tours are another important trend for Agri-tourism marketers. Shaw Guide the bible of cooking school guides offers 339 pages of choices. Cooking tours tend to attract childless travelers, most aged 50 or older, who love food, wine, hand crafted beers, and gourmet cooking. Education is the main thrust of all trips. They want to meet the locals, see how Parmesan cheese is made and try the local specialties. Many classes coincide with agricultural or cultural events, or are associated with museums or other local attractions. The Northwest is on the leading edge of culinary tourism with its reputation for organic farming, specialty crops, innovative chefs and tremendous diversity of ag products.