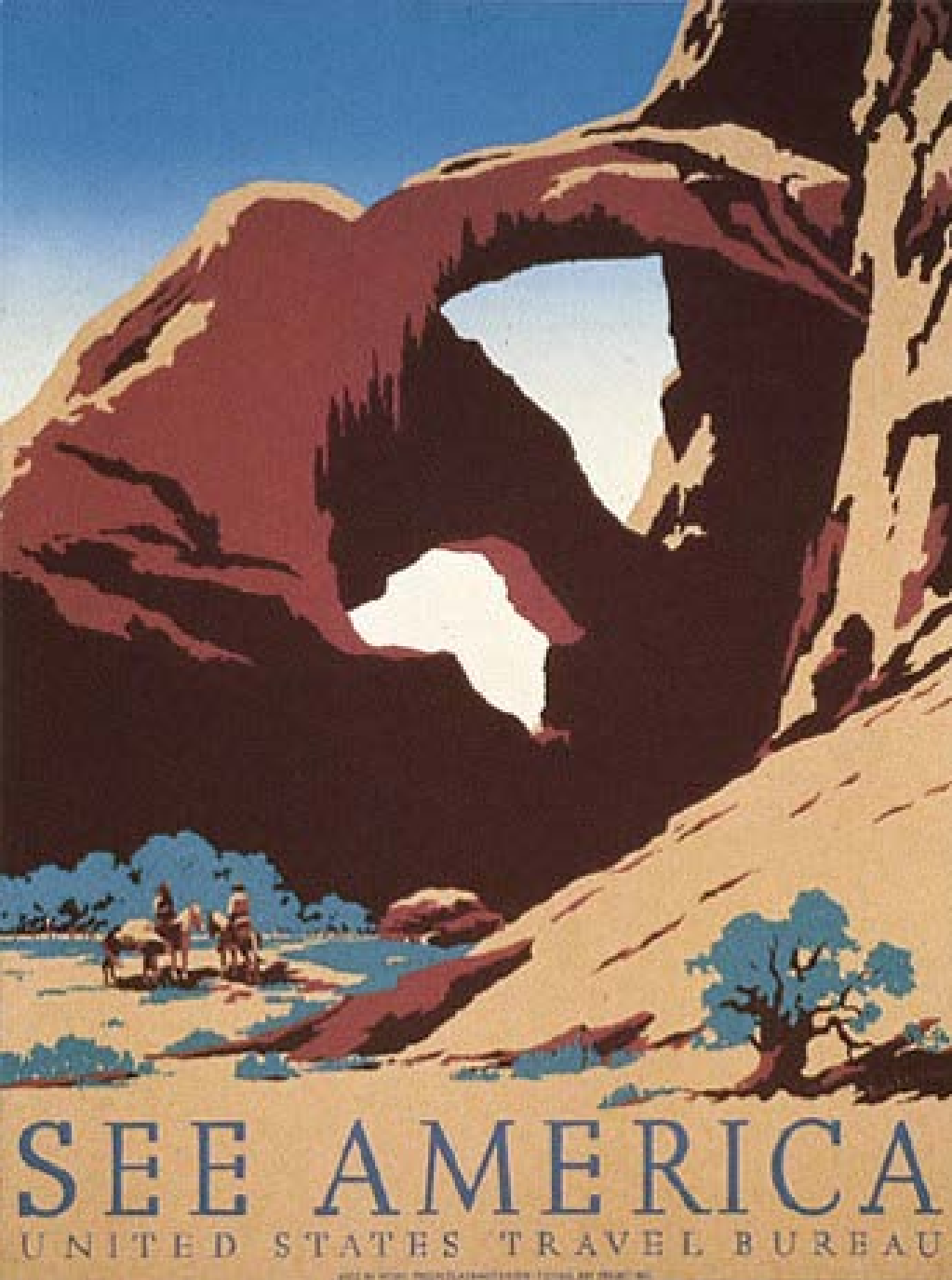


National Park Hospitality Association

New Visitors & Enhanced Services Survey

October 2014





Reasons for NPHA Survey



That's who we are...

That's what we do...

And we want to do it
even better...

Why tackle this issue now?

- Help support the National Park Service
- Centennial creates new opportunities
- Reach new audiences
- End visitation decline
- Meet fiscal challenges
- Follow up on Congressional Testimony
- Stay relevant



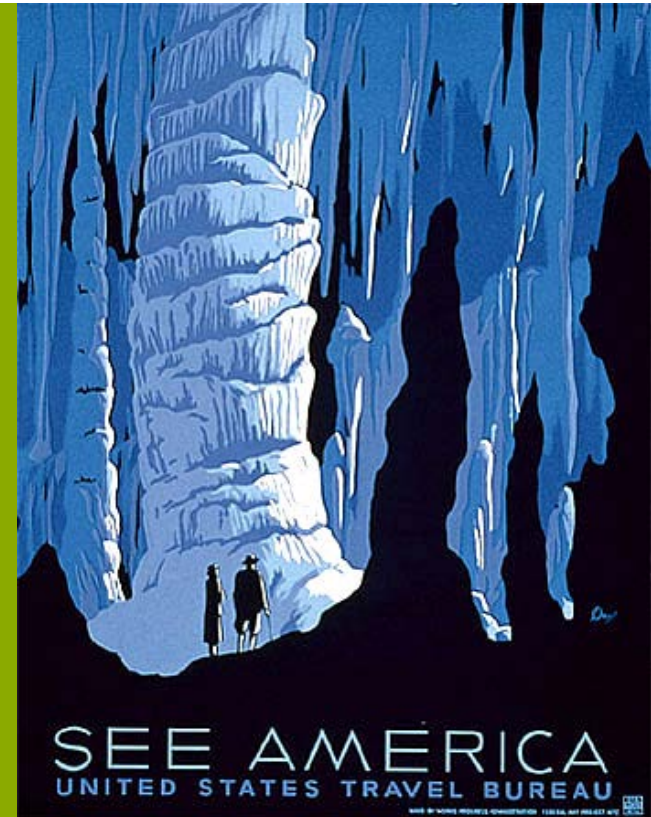
FIND YOUR **PARK**



2016
National Park Service
CENTENNIAL

Survey Summary Part I: Visitor Services Opportunities

“Friday was dominated by sessions on marketing and urban parks. Marketing experts urged park managers to use everything from television ads to additional highway signs to encourage park visitation. Superintendents were told they must forge a marketing strategy to meet the needs of the changing population.” Report from 1988 Superintendents Conference



Current Visitor Services...

• Retail	82%
• Developed-site camping	55%
• Food service	53%
• Lodging	53%
• Vending machines	50%
• Special camping	39%
• Transportation	37%
• Boating and rafting	32%
• Guided tours	26%
• Auto/gas/service stations	26%
• Scenic/sightseeing tours	24%

Increased Visitation Strategies...

• Dynamic Pricing	87%
• Expanded Tours & Interpretive Opportunities	63%
• Local Promotion	61%
• Friends Groups Support	53%

NPS/CMAB Visitor Service Working Group Draft Summary

- *Adventure Activities*
 - Camping and improved RV sites, water features, alpine slides, backcountry motorized tours, balloon rides
- *Aerial Tourism*
 - Zip lines, canopy tours, gondola rides
- *Creative and Adaptive Re-use*
 - Overnights in historic homes, cooking classes in historic kitchens
- *Fitness Activities and Wellness*
 - Cycling, running and adventure races, triathlons, yoga, skiing, workout and fitness stations, ice climbing, bouldering, disc golf
- *Local and Regional Experiences*
 - Cultural programming (music and theatrical events), culinary classes and events, farmer's markets, craft beer tastings and events, festival and art events, package-based travel
- *Pampering Services*
 - Spa services
- *Technology*
 - Enhanced connectivity, app development and enhancement; wearable technology, WIFI connections in vehicles, camera rental and photography classes, televisions

Visitor Service Opportunity & Demand

• Technology, WiFi, Apps and Camera Classes	87%
• Educational & Interpretive Content, including voluntourism, seminars and programs	63%
• Local Experiences	61%
• Adventure Activities	55%
• Creative & adaptive reuse of facilities	53%
• Boat, Bike or Equipment Rentals and Tours	53%

Current Limits to Increased Visitation

• Lack of Awareness by Potential Visitors	58%
• Inability to integrate with gateways, tour operators and others on passes, services	50%
• Park Policy	42%
• Operating Hours/Season	39%
• Park Resources	32%

Other factors limiting enhanced visitor services...

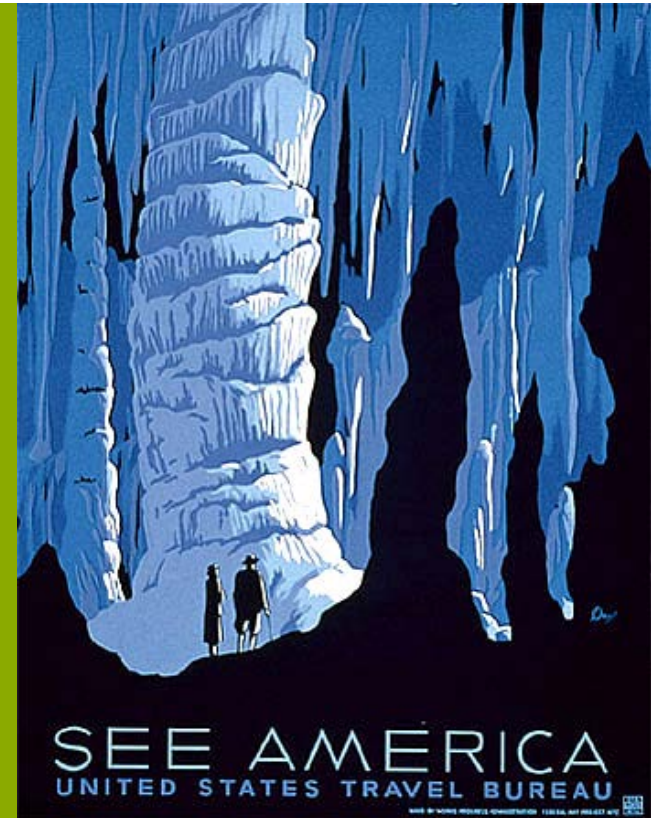
- Not allowed by current concession contract(s)
- Not relevant to the Centennial
- Not supported locally
- Not supported by region or WASO
- Not supported by Friends groups
- Other

Is There Market Demand For...

• Increased visitation at peak periods	88%
• Enhanced Visitor Services	83%
• Increased visitation at shoulder & off peak periods	83%
• Dynamic Pricing for Service	67%

Part Two: What about the Parks view?

"A visit inspires love of country; begets contentment; engenders pride of possession; contains the antidote for national restlessness.... He is a better citizen with a keener appreciation of the privilege of living here who has toured the national parks."-Stephen T. Mather



Benefiting the Parks

- Are park units interested?
- What could the parks take on – right now?
- Would concessioners be interested?
- How quickly could changes in visitor services be implemented?
- Why are new and enhanced visitor services important?
- And what would these new and enhanced visitor services mean to the parks – in terms of economic impact?

Would Your Park Benefit From...

• Increased visitation at shoulder & off peak periods	100%
• Increased Use of Contemporary Business Practices	96%
• Improved connectivity, including cellphone and WiFi	93%
• Marketing and outreach directed to expand visitation	92%
• Update of Directors Order 21	83%

Can your park currently support...

• Increased visitation at shoulder & off peak periods	92%
• Expanded visitor services	79%
• Increased visitation at peak periods	71%
• Increased visitor orientation and management	67%

How quickly could changes in visitor services be implemented?

- No more than 120 days
100%**

**of concessioners who provided an answer

Will New & Enhanced Visitor Services...

• Contribute to the overall visitor experiences and not detract from the quality of the experience	96%
• Encourage first-time visitation due to interest in diverse activities	92%
• Encourage repeat visits to NPS sites because the activities meet or exceed visitor expectations	92%
• Reflect current and forecasted trends in recreation, travel, tourism, and the use of leisure time	88%

Economic impact of new and enhanced visitor services is huge

- Millions of new visitors to Parks
- Millions of dollars in new concessioner revenue
- Substantial increase in franchise fees
- Substantial job creation
- Benefit to Gateway communities
- Additional advocacy for NPS philanthropy and budget support

Parks Canada Visitor Experience

It Is About the Visitor

Visitor Experience
Parks Canada



Greg Danchuk
Parks Canada, Visitor Experience Branch
Travel Manitoba Conference – April 15, 2008

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It Is About the Visitor

Understand them

Respect their needs, expectations, motivations

Provide them opportunities

- Products, programs, services

They will create their experiences

They will connect

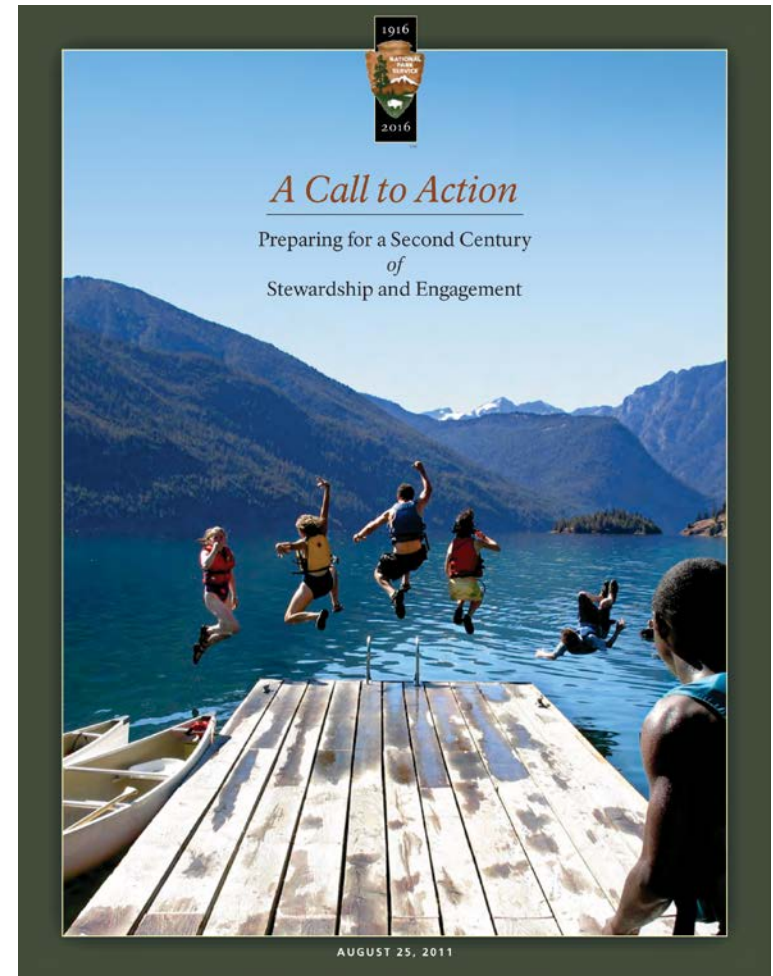


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Call to Action Includes Visitor Services

A SECOND-CENTURY NATIONAL PARK SERVICE

- Enhances Professional and Organizational Excellence by adapting to the changing needs of visitors...



In Summary...

- Current and future visitors require and expect enhanced services
- There are specific, immediate opportunities to increase visitation and services, some with no capital or budget impact
- Benefits abound to Visitors, NPS, Stakeholders & Taxpayers
- NPHA members are ready, willing and able to partner with the NPS to provide enhanced visitor services and activities

Thank You

