

THE FUTURE OF

PARKS

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**“THOUSANDS OF TIRED,
NERVE-SHAKEN,
OVER-CIVILIZED PEOPLE
ARE BEGINNING TO
FIND OUT THAT
GOING TO THE MOUNTAINS
IS GOING HOME; THAT
WILDNESS IS A NECESSITY.”**

- John Muir

INTRODUCTION

As the great John Muir suggested, nature has always been the antidote for our civilized world.

Charles I moved his court to Richmond Palace in 1625 to escape the plague and created what is still London's largest park. Frederick Law Olmsted's vision for Central Park in 1857 resulted in what remains a natural escape from the hustle and bustle of New York City. And, of course, the establishment of the Yosemite Grant in 1864 set the stage for our treasured national parks.

Nature is timeless, but we change. The way in which our grandmothers and grandfathers interacted with nature – and our national parks – is very different than how we do it today. We expect this interaction to continue evolving, perhaps at a quicker pace, thanks to technology disruptors, changing demographics and new concepts of leisure time.

Our goal in undertaking this report is not to answer all the questions about what the future holds, but to start a dialogue and ask, “What if?” This process can be uncomfortable. Change often makes us anxious, and no one wants to guess wrong, but inherently this process is energizing. Contemplating what comes next pushes us out of our comfort zone, but in a good way that opens up possibilities and new frontiers.

We hope this work sparks some interesting and useful discussion on what it could look like for the national parks and our future guests.

As Muir said, wilderness is a necessity – and that's something we can confidently predict will never change.



Scott Socha
President, Delaware North Parks and Resorts

THE FUTURE OF PARKS TEAM



CRAIG COMPAGNONE is Chief Operating Officer of MMGY Global and plays a lead role in shaping account and brand planning, company operations and business strategy for 10 international offices, seven operating brands and services that support more than 400 clients. Craig’s guidance on brand strategy and deployment has led to award-winning marketing solutions for brands across multiple travel industry disciplines. His insights have been featured in publications like The New York Times and Skift.



GREG OATES is Senior Vice President of Innovation at MMGY NextFactor. He focuses on trends in the global visitor economy that drive the future of tourism, community and economic development. He also oversees the ongoing evolution of Destination International's industry-leading DestinationNext framework, which provides a road map for innovative tourism development and sustainable destination management strategy. Prior to joining MMGY NextFactor, Greg led research at Skift, defining the shifts reshaping the travel and tourism industry.



CHRIS DAVIDSON oversees MMGY Global's travel insights and strategy division. He is responsible for the agency's portfolio of syndicated and custom research products, including its Portrait of American Travelers® series and its DK Shifflet suite of travel performance products. Chris has over 25 years of experience in market research, strategic planning, brand strategy and integrated marketing communications. He is a recognized speaker at numerous industry conferences and events each year.



CHERYL SCHUTZ has worked in market research for more than 20 years and is Vice President of Travel Insights at MMGY Travel Intelligence. Cheryl is responsible for the MMGY Travel Intelligence business, Portrait of American Travelers® and travelhorizonsTM, which has provided the highest quality research to the travel and tourism industry for more than 30 years. Cheryl is a regularly invited speaker, offering insights and opinions on U.S. resident travel behavior.



TODD MERRY is chief marketing officer and oversees Delaware North's sales, marketing, analytics, communications, sustainability and customer experience strategies at more than 200 locations across four continents. Todd and his teams are focused on delivering value to both guests and Delaware North's clients, with a portfolio that includes iconic destinations such as Grand Canyon National Park, Yellowstone National Park and Kennedy Space Center Visitor Complex. Todd earned a bachelor's degree in classics and physics at Middlebury College and an MBA in international marketing at Boston University.



ERIN CARLSON is a Business Strategist and Account Supervisor at MMGY Global whose hybrid role serves both the account service team and the planning and strategy team. Erin's role enables her to blend MMGY Travel Intelligence research with her understanding of clients’ business challenges, target audiences and cultural trends in order to craft strategies that help connect the dots to drive revenue and build brands.



ANDY GRINSFELDER is vice president of sales and marketing and coordinates all sales, marketing and revenue management efforts across Delaware North's dining, lodging, recreation and tour operations at parks, resorts and attractions in the United States. He has more than 20 years of leadership experience in Delaware North's parks and resorts division, including overseeing revenue management and leisure sales teams, along with departments such as marketing, technologies and analytics. His career also includes management roles at Lake Powell Resort (Arizona) and Zion Lodge (Zion National Park).



ALLISON LANER leads the translation services, quality control and narrative content department as Director of Editorial Services. She reviews all manner of content from every client in the MMGY Global portfolio - from videos and print ads to social media posts and web articles. She closely follows individual client style guides to ensure all i's are dotted, all t's are crossed and every last comma is in its place.

THE FUTURE OF PARKS TEAM



LEANNE HILL is a Research Account Manager who manages MMGY Global's annual Portrait of American Travelers(R) syndicated study. She has worked with travel and tourism brands conducting both quantitative and qualitative research to uncover insights that lead brand and marketing strategy. Leanne and her team establish the analytical groundwork that drives strategic branding campaigns and other creative by directing focus groups among past travelers, creating consumer surveys and conducting industry research to inform a brand campaign.



SARIKA CHAWLA is a Narrative Content Manager at MMGY Global. She has over 15 years of experience writing in the travel and tourism industry and is an award-winning journalist and travel writing judge for the American Society of Journalists and Authors. Sarika is a frequent industry panelist on topics such as content marketing, travel media and culinary travel and has researched and edited several non-fiction travel publications, including The New York Times best-seller “Don’t Go There!”



KELLY CASSIDY is a writer at MMGY Global. She was an assistant editor at Elevation Outdoors Magazine based in Colorado and has written for a variety of travel and tourism brands. Whether she’s crafting a headline or composing a well-researched article, Kelly leverages words to communicate a particular story through compelling copy across a variety of channels. As an avid traveler herself, Kelly feels fortunate to be able to inspire adventure and human connection through writing.



EMALEE CROSSER is an Account Coordinator at MMGY Global. She is the liaison between clients and various departments throughout the agency and coordinates all necessary resources in order to best fulfill client requests. Emalee studied creative writing and strategic communication and uses her English background to provide insightful feedback to the creative teams. She believes that through her work, she is making a positive difference in the world by inspiring people to go places.

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AMERICA'S BEST IDEA



Organic Act of 1916

"To conserve the scenery and the natural and historic objects and the wildlife therein, to provide for the enjoyment of the same in such manner and by such means as will leave them unimpaired for the enjoyment of future generations."

America's national and state parks stand sentinel over the country's most cherished natural and cultural treasures. Writer and historian Wallace Stegner, speaking specifically about national parks, said: "They are the best idea we ever had. Absolutely American, absolutely democratic, they reflect us at our best." From Yosemite National Park in California to Niagara Falls State Park in New York, protected public lands provide spaces for domestic and international visitors to connect with the fundamental values of the nation.

The U.S. Congress created the National Park Service (NPS) in the Organic Act of 1916. The stated goal was "to conserve the scenery and the natural and historic objects and the wildlife therein, and to provide for the enjoyment of the same in such manner and by such means as will leave them unimpaired for the enjoyment of future generations." State parks, meanwhile, under individual state jurisdiction, were developed for similar purposes as their federal brethren to preserve, conserve and protect America's most important natural resources.

Today, national and state parks have also proven to be significant economic and community development engines for populated areas within their proximity, and national and state tax coffers. Visitor spend in national parks alone contributed \$40 billion to the U.S. economy and supported 329,000 jobs. In terms of their overall benefits, the parks have five primary roles as platforms for: 1) tourism, employment and economic growth; 2) social cohesion and community building; 3) health, wellness and well-being; 4) environmental education, stewardship and conservation; and 5) youth and family development.

In recent decades, annual visitation has surged. The 419 areas within America's National Park System recorded more than 318 million visits in 2018, the third highest figure since 1904, and 28 parks set new records for visitor volumes that year. Overall, from 1984 to 2017, attendance increased in national parks by 33% and the nation's 50 state park systems by 25.6%.

Numerous factors have contributed to the increase in park visitation, especially during the last decade. Ken Burns and Dayton Duncan's popular PBS documentary miniseries, "The National Parks: America's Best Idea," in 2009 drove global awareness. Promotions around the centennial anniversary of the National Park Service in 2016 led to some parks seeing their highest traffic ever, and social media has played a huge role in encouraging a new generation of travelers to explore the parks.

International visitation is also growing exponentially. According to the U.S. Travel Association, the share of overseas arrivals visiting U.S. national parks and monuments jumped from 33.6% in 2013 to 36.7% in 2018.

This all should be welcome news. However, there are significant challenges facing the future of America's national and state parks, forest lands and monuments, making it more difficult to ensure they remain "unimpaired for the enjoyment of future generations."

For example, during various times of year, high-compression traffic is significantly diminishing the overall visitor experience and creating increasing environmental impacts. Exacerbating that, the U.S. Department of the Interior has \$16 billion worth of deferred maintenance, with the NPS shouldering \$11.6 billion of that for upgrades to roads, trails, buildings and other infrastructure assets.

There are also considerable challenges relating to changing consumer motivations and expectations, moving beyond pure escape into the wilderness. A growing portion of today's visitors are seeking more immersive, educated and transformational travel experiences, while at the same time, others are driven to enhance their social equity and share images across multiple social media networks.

America's public parks are also lagging in terms of technology, digital media and new forms of mobility, creating a vacuum of innovation for visitors of all ages. America's Best Idea needs an upgrade and reboot to align with our modern era heading into the 2020s.


At this critical juncture, the nation's parks have reached a point of searching for creative solutions to improve overall visitor experiences, ease the strain on park resources, spur sustainable development for peripheral communities, and inspire a new generation of stewards to help preserve America's public parks for lifetimes to come.

318M 

National Park visits in 2018

28 

Park records for visitor volumes

33% 

Increase in National Park attendance (from 1984 to 2017)

UNEVEN

GROWTH

The purpose of this report is to define the future of the visitor experience in and around public parks by analyzing current leisure travel trends and capturing data from prospective park visitors. The goal is to provide insight about how public parks, tourism organizations, private companies, nonprofits and all levels of government can develop stronger partnerships to attract more high-quality, higher-spending visitors to America's great outdoors more extended periods of time-year-round.

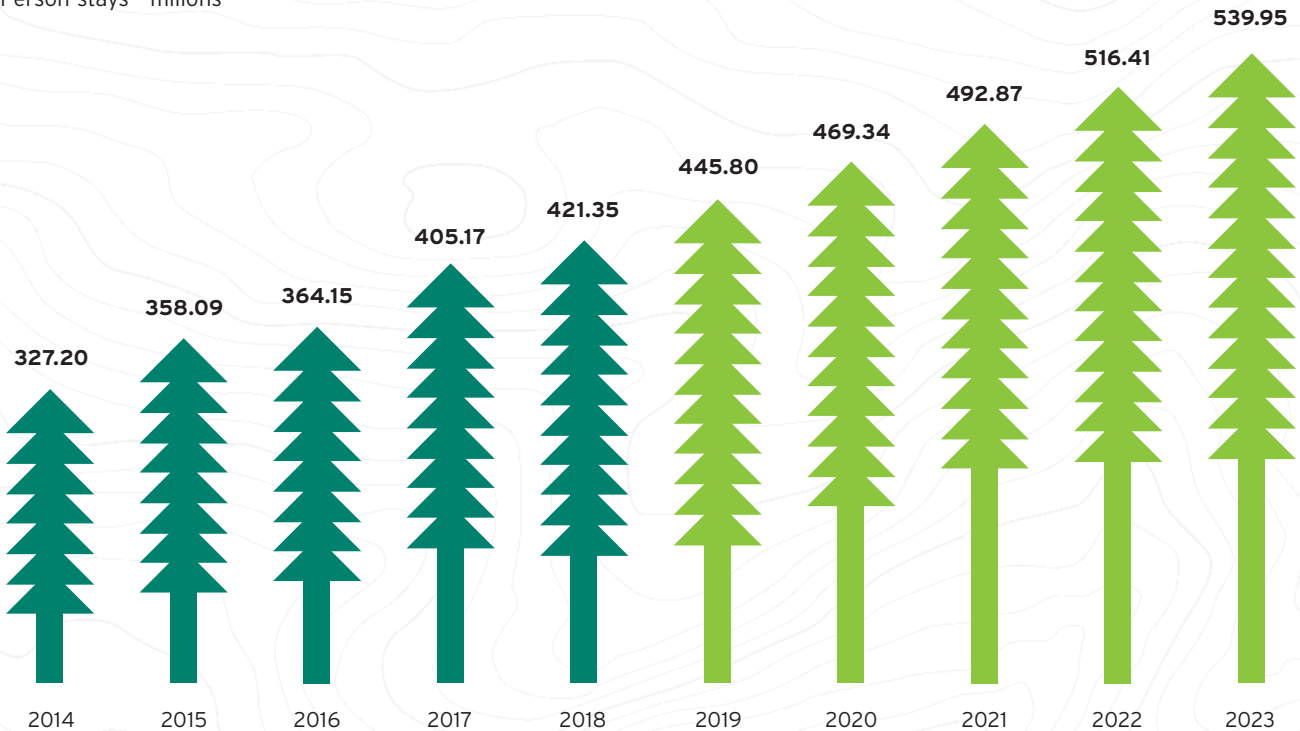
As things stand now, the day-to-day operations in national parks is unsustainable because of growing, uneven demand. While overall domestic and international visitation has grown year-over-year for decades, the volume of overall overnight stays inside has been declining. NPS data shows an increase in recreational visits during 2000-2018 from 285.5 to 318 million, while total overnight stays decreased from 15.7 to 13.9 million during that time frame.

Traditionally, national parks have welcomed more overnight visitors – in accommodation/campsite options such as concessioner lodging, RV campers and tent campers – than state parks, which cater more to day-trippers on a percentage basis. In 2018, state parks welcomed 66.7 million visitors compared to 318 million in national parks. More than 90% of all state park visitors are day-trippers, according to the National Association of State Park Directors.



5-YEAR PROJECTIONS

VISITORS TO NATIONAL AND STATE PARKS (TOTAL)
Person-stays - millions



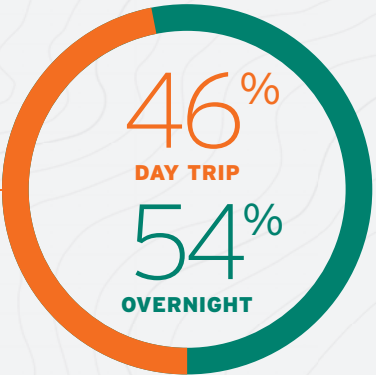
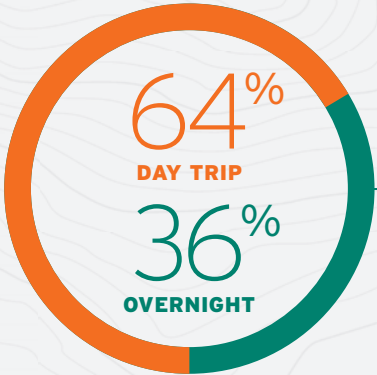
In terms of declining overnight visitation inside national parks, the one category showing robust growth is concessioner campers. NPS defines a concessioner campground as “an element of a concessioner operation involving services for overnight camping such as RV parks, tent campgrounds and trailer courts where trailers are not provided by concessioner.”

At the same time, the 2019 MMGY Travel Intelligence Consumer Survey shows that prospective park visitors state they are more likely to visit overnight than for the day, by a 54-46% margin. That said, 64% of visitors reported that their most recent visit to a national/state park was a day trip and 36% were overnight.

The conflicting data suggests there is clearly demand for overnight visits, but the lodging and/or overall experience inside parks is not necessarily meeting today’s visitor expectations. Rather, visitors are opting more and more, year-over-year, for concessioner camping experiences inside the park or lodging on private lands around the park’s periphery.

SURVEY

If you were to visit a national or state park, would it most likely be for a day trip or would you stay overnight?



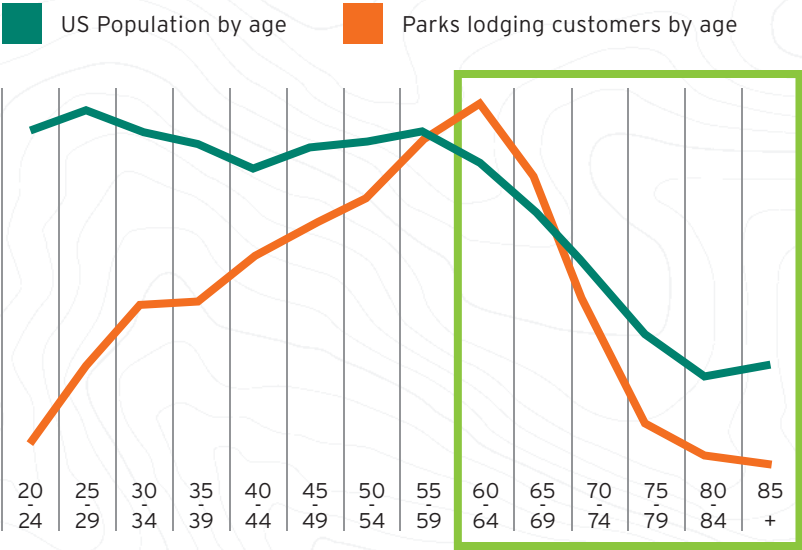
SURVEY

Was your most recent visit to a national or state park a day trip or did you stay overnight in the park?

The increase in day-trippers poses serious macro challenges for all kinds of parks. Primarily, visitors and rangers are reporting longer wait times to enter parks, and aggravated interactions are increasing over limited parking spots. Day-trippers also spend less per person per day, but they require the same level of infrastructure and services during their visit as overnight guests. And, their numbers contribute to continually increasing levels of environmental impacts, requiring parks to invest more in maintenance and operations.

Altogether, the growing crowds of people visiting for only a few hours are hampering the parks’ overarching mission to preserve, conserve and protect the environment and area wildlife.

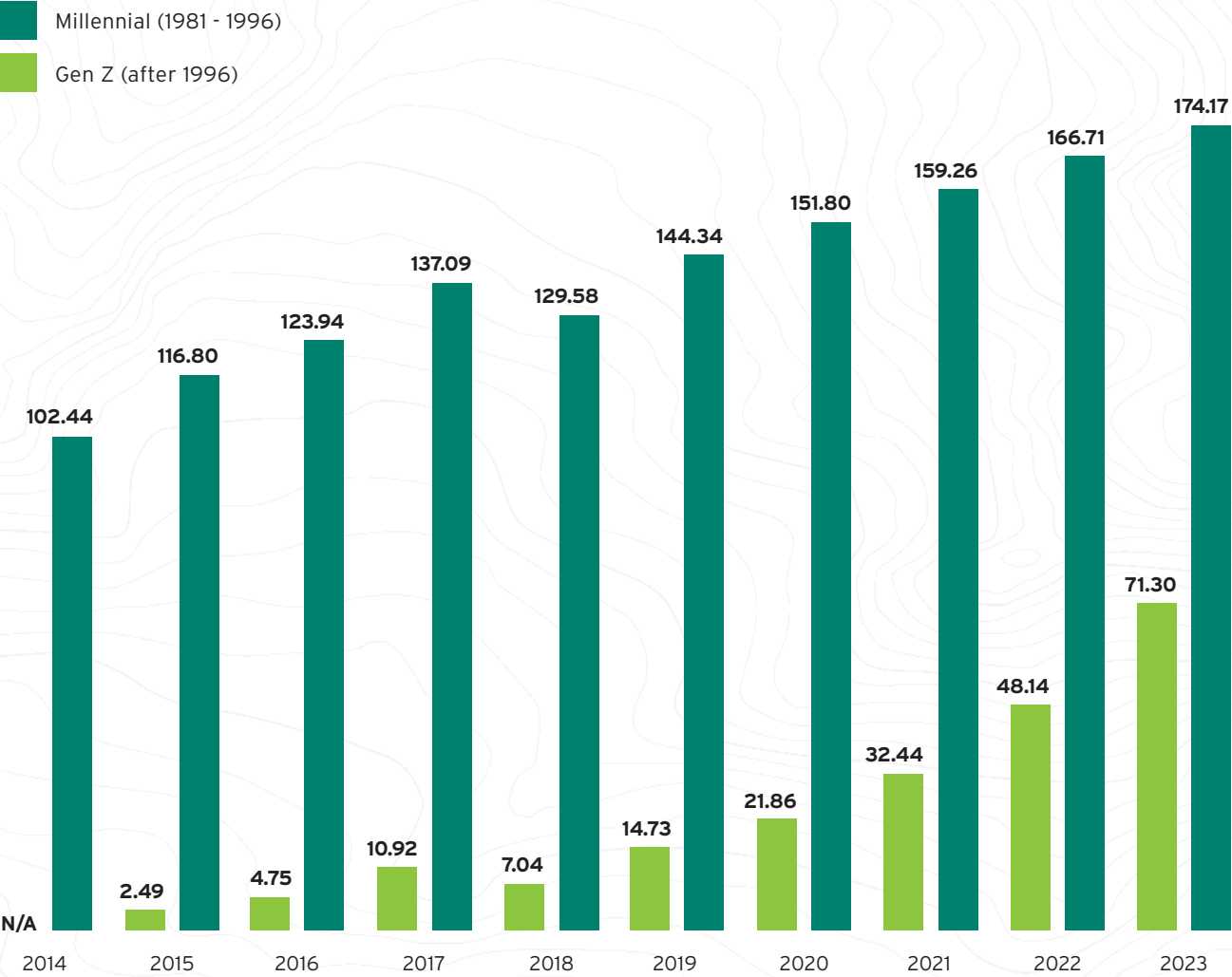
PARK LODGING GUEST AGE VS U.S. POPULATION



With advances in public health, the rise in longevity is one mankind’s crowning achievements. However, the rate of park visitation in the age categories above 60 years old is quickly declining - and it far exceeds the rate of decline of the general U.S. population among the same age. Several factors present unique challenges to aging guests, including remote park locations with low-oxygen mountains; long, uncomfortable, winding roads; and climate extremes. As the upper age groups are projected to be some of the largest growth in U.S. population soon, it presents unique challenges for park operators and partners as to how to make these parks accessible for all ages.

VISITORS TO NATIONAL AND STATE PARKS (GENERATIONS)

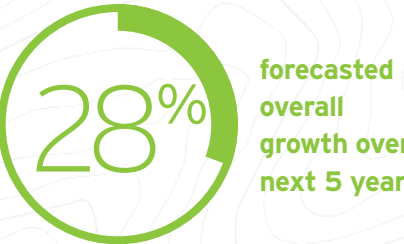
Person-stays - millions



According to DK Shifflet “TRAVEL PERFORMANCE/ Monitor National & State Park 5-year Forecast,” the number of visitors to national/state parks is expected to increase to almost 540 million visitors over the next five years, representing a growth of almost 30%. Day-trips will represent the largest growth at 35%. Those taking overnight trips that include a visit to a national/state park will increase by 24%.

The youngest visitors, Millennials, will continue to make up a small share to national/state park visitation. Although Gen Z shows the largest forecasted growth, due primarily to the continued growth of this generation in general, they will only represent about 12% of all visitors to national/state parks by 2023. Millennials and Boomers will still make up the largest number of visitors, each representing about 29% of total national/state park visitors. Gen X (1961 - 1981) will represent a similar share at about 27% but shows signs of slowed growth.

Hispanic visitation will be on the rise over the next five years, however, by 2023, they will still only represent about 17% of total visitors. The majority of visitors to national/state parks will continue to be white representing about 75% of all visitors. The largest growth, however, will be among Hispanic visitors with a forecasted increase of 35% by 2023 as opposed to only 25% for white Americans and 12% for black Americans.





OVERTOURISM

Increasing congestion during peak periods is a major challenge for many parks and park visitors. Not surprisingly, 75% of travelers say they would be more likely to visit a park if they didn't have to wait in long lines. This is a fundamental problem for America's most popular national and state parks. Moreover, many of them lack the necessary funds to invest in large capital expenditures, such as intercept parking lots, public transportation, and new automated technology systems to navigate traffic flow more effectively.

GLEN CANYON NATIONAL RECREATION AREA

The iconic Horseshoe Bend in the Colorado River has long been a main attraction for those visiting the Glen Canyon National Recreation Area in northern Arizona. In fact, now that Horseshoe Bend is being counted in Glen Canyon's visitation totals, we are realizing the full extent of its popularity. Annual visitation has jumped from 1.9 million people in 2008 to 4.2 million in 2018 – or a 121% increase in a decade. Translation: There's an overcrowding issue.

To help alleviate the crush, tour buses are no longer permitted to park for extended periods of time. Now, they're only allowed to sit idle for dropping off and picking up visitors. Also, when the park's parking lots are filled, visitors are no longer able to park on the shoulders of U.S. 89.

Instead, visitors are told simply to come back another day – preferably early in the morning and during the week. A new intercept parking lot is being built, and visitors are asked not to take their lunch or linger too long on the canyon's rim.

YOSEMITE NATIONAL PARK

At Yosemite National Park, roads that were first developed in the 1930s are now bearing the weight of more than 8,000 cars on a holiday weekend. With more than 4 million visitors in 2018, peak summer season means waiting at least an hour at the entrance and two to three hours for Yosemite Valley.

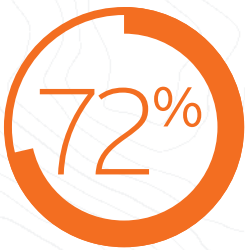
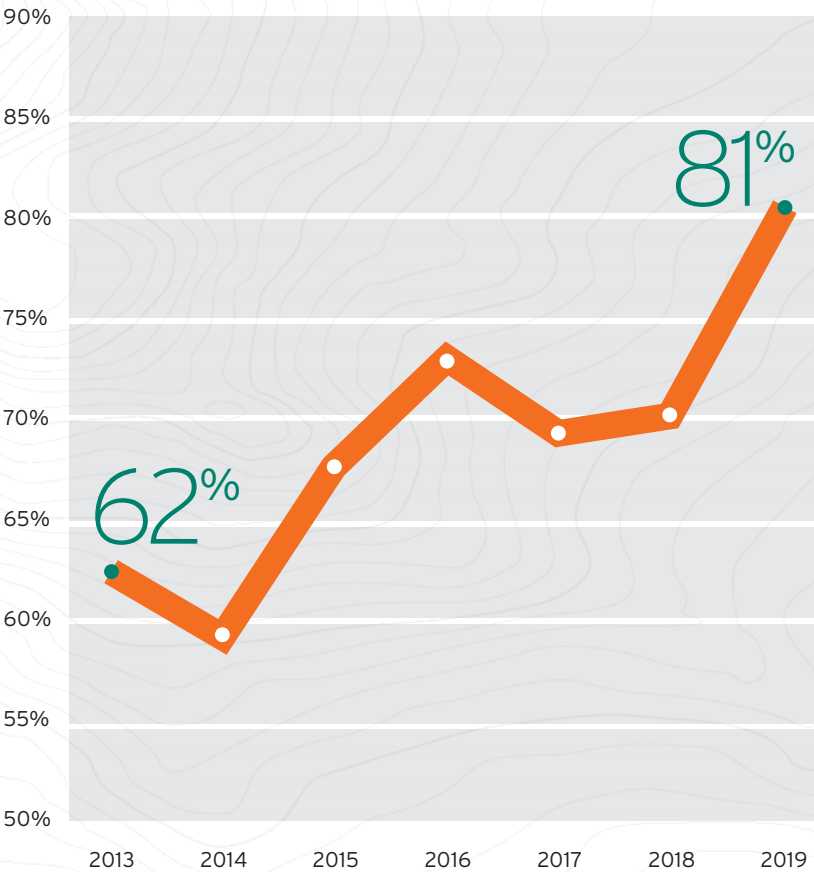
YELLOWSTONE NATIONAL PARK

In 2018, Yellowstone National Park recorded more than 4.1 million visits, its third-busiest year on record. Since 2008, annual visitation in Yellowstone has increased by more than 40%. In its Visitor Use Study, more than half of Yellowstone's visitors surveyed responded that there are too many people in the park. Its 2017 Transportation and Vehicle Mobility Study identified high-trafficked corridors with overflowing parking lots, traffic jams, clogged pedestrian zones and safety concerns. This landmark survey illustrated the urgency with which parks need to adapt and get ahead of the problem, as numbers are only expected to rise.

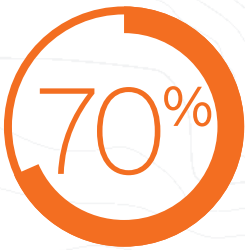
The study concluded that Yellowstone National Park was overcapacity in the congested areas by 29% at peak times in the peak season.

The exceedingly high growth rate in national and state parks is of significant concern across the board. Survey data shows that 54% of respondents are concerned about long lines at the entrance, 60% worry about the park being too crowded, and 47% expect there to be traffic congestion inside the park's boundaries.

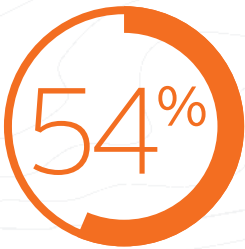
INTEREST IN NATIONAL PARKS IS SURGING



Agree tourism overcrowding will have a significant impact on the state of our national parks

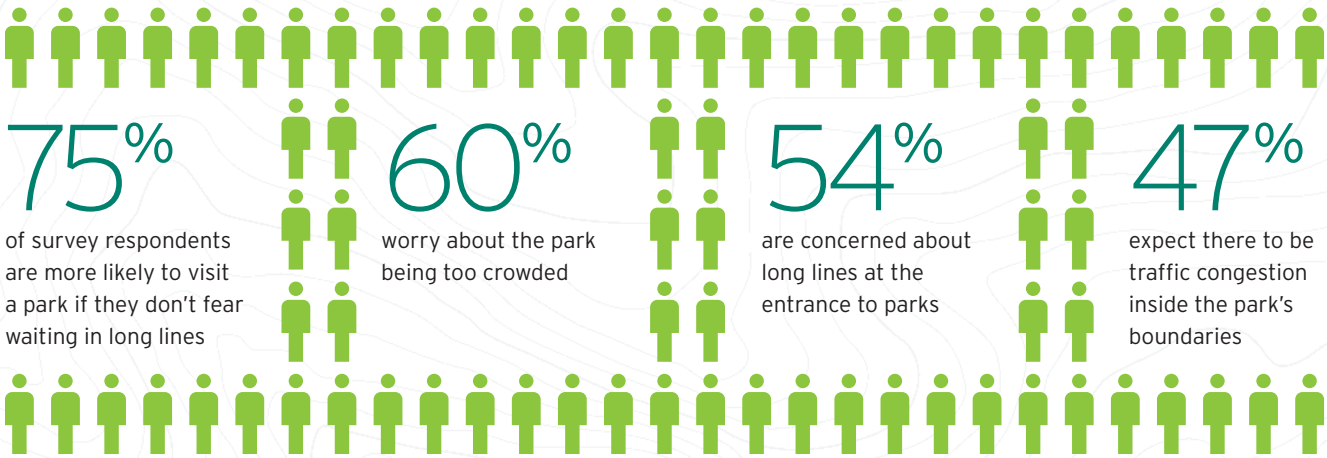


Agree tourism overcrowding will have a significant influence on the destinations I want to visit within the next 5-10 years



Agree sustainability efforts are important to me when choosing a destination to visit

THE CHALLENGE OF OVERCROWDING



POTENTIAL SOLUTIONS

Providing better experiences at different times of year can be a major boon for capitalizing on this increased demand, while alleviating pressures on the park.

Left unchecked, the consequences of over-tourism in parks at will likely lead to untenable resources and experience degradation. The swell of visitors crammed into the same pre-packaged front-country routes leads to more people wandering off the trail in search of solitude. Those who remain in line - packed into suggested trails - become frustrated that the natural experience doesn't match their expectations. Social media complaints have already begun to increase, and media outlets are picking up stories about crowds in parks. No one can argue that this is the best way to handle the rise in consumer interest, but it certainly does have a constraining effect on that demand as more people opt to avoid just the perception of over-crowded parks.

Better ways to address the situation include:

DIFFERENT PARKS

In 2018, of the 318 million visitors to 388 NPS units, over half of the visitation came from just 21 parks. That's 51% of the visitation at just 7% of the locations.

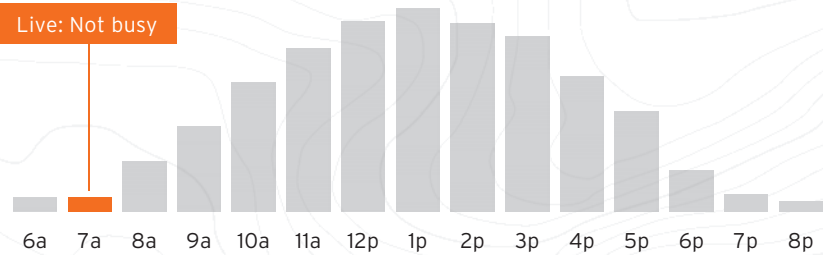
The problem is there are limited facilities in many of the lesser-used parks. If the NPS is relying on concessionaires almost exclusively to market and drive traffic to these locations, the lack of facilities at these locations removes the incentive for concessionaires to push traffic to these locations.

DIFFERENT TIME OF DAY

Helping the consumer understand when places are busy can help improve traffic flows at popular destinations by guiding consumers to visit during off-peak hours. Google is just now providing tools that allow users to see when places are busy.

Below is an example of the live traffic for the search query "Rocky Mountain National Park" taken at 7:21 a.m. on November 4.

We can envision a near-future where these tools are much more detailed, providing guidance for different locations within the parks and hosted in apps or on concession websites.



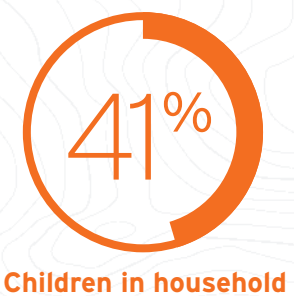
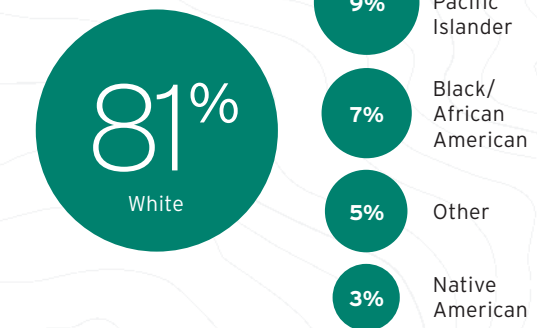
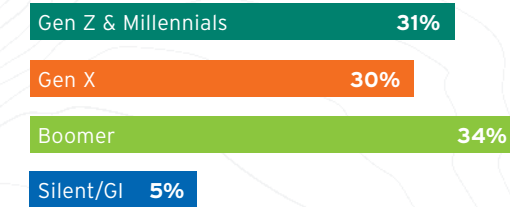
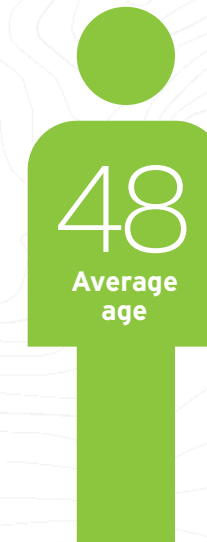
DIFFERENT SEASONS

Concessionaires could invest more in shoulder and off-season events and activities to drive traffic beyond summer. Commitments from NPS in keeping roads open, and allowing for expanded activities and events in the non-peak seasons, would go a long way toward shifting traffic from peak seasons.

Percent of visitation occurring in Summer by NPS Park Type	
% Summer	Type
68%	National Lakeshore
57%	National Wild & Scenic River
46%	National Reserve
43%	National Park
43%	National River
42%	National Seashore
40%	National Monument
39%	Total NPS Average
37%	Park (Other)
37%	National Historic Park
36%	National Historic Site
36%	National Battlefield
36%	National Recreation Area
34%	National Parkway
34%	National Memorial
33%	National Battlefield Park
31%	National Military Park
29%	National Preserve

DEFINING THE PARK VISITOR

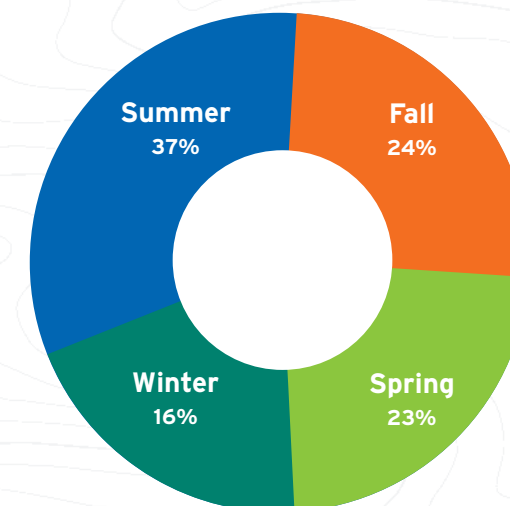
WHO ARE THEY?



WHERE ARE THEY FROM?



WHEN DO THEY VISIT?



WHAT DO THEY DO?



INTERNATIONAL TRAVELERS LOVE U.S. PARKS

International travelers are choosing national park sites in droves. According to Brand USA, the U.K., China, Germany, France and Australia were the top five source markets, comprising 42% of overseas visitation to national parks and monuments.

Brand USA-supported promotions around the NPS centennial increased visibility of the national parks to international audiences, while the strong U.S. dollar may have driven inbound travelers to seek more affordable experiences. While the injection of \$32 billion in economic output is a boon, there is a lot of work to be done in terms of international readiness and encouraging dispersion.

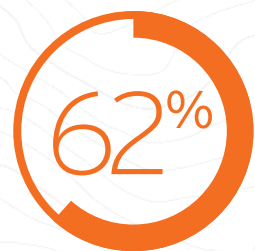
Although numbers have recently dropped for the first time since 2003, the Chinese market is especially significant to U.S. tourism – spending \$36.4 billion last year, according to the National Travel and Tourism Office. Chinese tourists spend about \$7,000 per trip, which is 50% more than the average international traveler to the U.S. The growth of Chinese outbound travel is a global phenomenon: According to the UNWTO, in 2018 Chinese overseas tourists spent \$277.3 billion globally, up from \$10 billion in 2000.

MILLENNIALS & MILLENNIAL FAMILIES

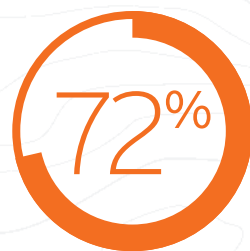
With Millennials set to overtake Boomers as the nation's largest adult generation, this is an incredibly high-value audience to understand and target. According to MMGY Global's 2019-2020 Portrait of American Travelers®, Millennials expect to spend

5% more on vacations than they did the previous year, and Millennial families in particular expect to increase their spend on travel by 9%. By comparison, Boomers expect to spend 2% less than they spent last year, and Gen X spend is anticipated to be flat or

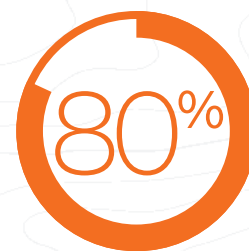
down. According to the same study, 83% of Millennial families are interested in visiting a national park during the next two years. They are also road-trippers: 57% of Millennial families took road trips that began in another city, compared to 41% of singles and 28% of couples.



Would be more likely to visit if they could enjoy family-friendly activities



Say engaging with family and friends is one of their top reasons to visit a park



Feel that getting exposure to new cultures is a great learning experience for their children

According to Kampgrounds of America, Millennial families have already embraced the camping lifestyle. Diverse, active and engaged, this group reflects the population of the future and represents a desirable audience for national parks to tap into. The 2019 North American Camping Report illustrates:

“Fifty percent of Millennials say life events (such as having children and increased income) enable them to camp more often. Among younger campers, the significant life shift of becoming a parent can be attributed to shifts in camping behavior, including increased frequency of camping and camping accommodation preferences. Camping families (campers with children under the age of 18 in the household) are the most devoted group of campers and, with children in the household, see increased desire to own their camping gear, whether a tent or RV. Camping families are most likely to say that their camping trips increased in 2018, and two-thirds say that their camping will increase in 2019.”





VISITOR MOTIVATIONS

Predicting the park visitor of the future begins with understanding what motivates today's travelers to visit national and state parks. Where are there opportunities beyond the most expected traveler desires relating to simply escaping to the great outdoors? To help define those psychographic triggers, the following data is culled from both the 2019 MGY Travel Intelligence Consumer Survey and MGY Global's 2019-2020 Portrait of American Travelers® (POAT) survey.

According to POAT, 81% of American travelers surveyed are interested in visiting a national park during the next two years, while 60% are interested in visiting a state park. Of those national park prospects, relaxation is by far the primary motivator to travel (93%), followed by exploration (87%) and experiencing different cultures (79%).

In terms of what motivates travelers across all generations to explore national and state parks, beautiful scenery and the opportunity to experience nature rank highest, although those factors motivate Boomers and Gen X more than Millennials.

The top responses, revolving around nature and escape, are to be expected, and they will always be the primary drivers for park visitors. However, the

lower-ranking motivators provide the biggest opportunities for parks, private industry, nonprofits and local communities to elevate the overall visitor experience more intentionally. National and state parks, tourism and nonprofit organizations, and private industry should pay more attention to the following themes, which align with the macro trends influencing the future of the overall global visitor economy:

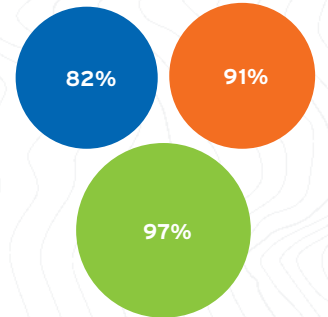
- Self-discovery, self-determination and self-actualization
- Expanded worldview and global perspective
- Physical health and wellness
- Mental and emotional health
- Sense of community
- Overall well-being

These themes are growing in importance for both next-generation travelers and older generations, so parks and their industry partners should develop programming and messaging that align with those consumer psychographics. They are the foundation for the growing interest in transformational travel worldwide.

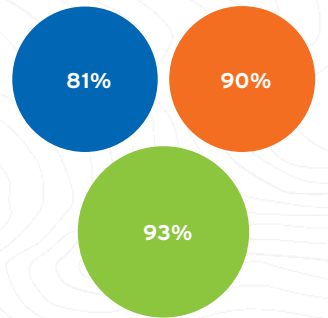
- Gen Z/Millennials
- Gen X
- Boomers

VISITOR MOTIVATIONS BY GENERATION

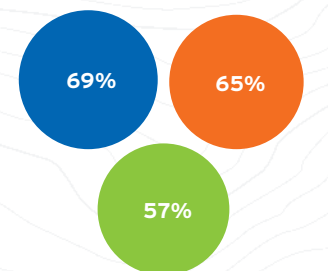
Beautiful scenery



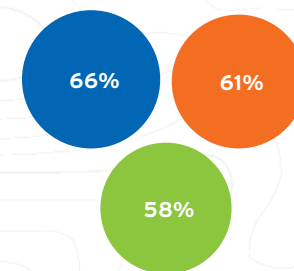
Being in nature



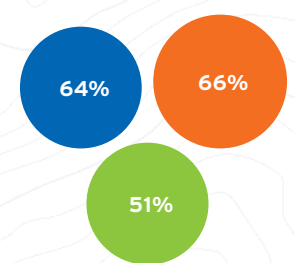
Self-reflection/self-discovery



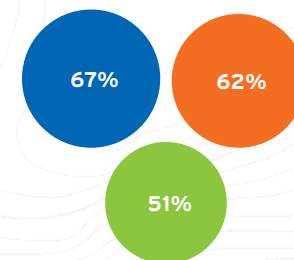
Focus on physical health



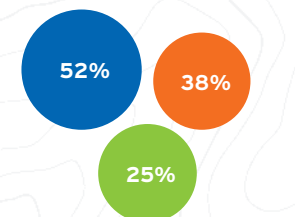
Disconnect from technology



Focus on mental/emotional health



Be part of a community



TRANSFORMATIONAL TRAVEL



For the last 20 years, the global visitor industry has been fixated on the experience economy, whereby travel companies can drive competitive advantage by delivering authentic and local travel experiences. The intent has always been to provide more active and immersive engagement between travelers and local residents to connect visitors with the unique cultural DNA of a destination.

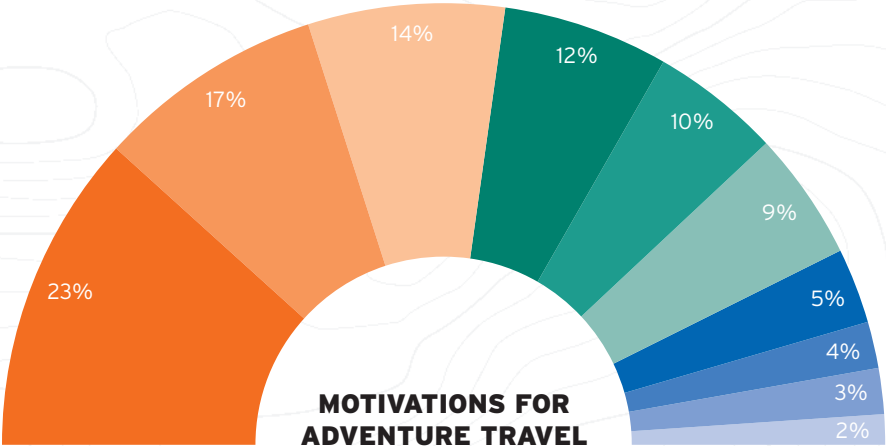
Today, however, more travelers are seeking something that aligns more closely with a vision of their best selves – mentally, emotionally, physically and/or socially. The actual travel experience is still key to visitor satisfaction, but there's a more conscious decision-making process behind why someone is choosing that specific experience.

In 2017, the Adventure Travel Trade Association (ATTA) polled its members about what motivates them to seek out adventurous travel experiences. The top three responses were transformation, expanded worldview and learning. Surprisingly, unique experiences fell last. The top rankings stand in stark contrast to the association's 2005 poll, when the answers related more to themes of physical danger, risk and exertion.

Providing context to support the survey results, ATTA explains, "Rather than accepting transformation as a happy byproduct of their quest for fun and thrills, adventure travelers are actively motivated by this desire for personal growth and change."

According to Joseph Pine II, co-author of the acclaimed best-seller "The Experience Economy," the global consumer industry is evolving beyond physical experiences toward what he calls "the transformation economy." Today, he states, brands can differentiate themselves by providing products and services that specifically support an individual's personal and/or professional development aspirations.

"We're now going beyond the experience economy to what people are calling the 'transformation economy,' where an experience changes us in some way during a particular moment in time," he says. "When you can easily design the experience to be so appropriate for a particular person, and exactly the experience that they need at a particular moment in time, then it becomes easier to deliver a life-transforming experience."



- Transformation
- Expanded Workflow
- Learning
- Nature & Discovery
- Mental Health
- Fun & Thrills
- Connection
- Meaningful Stories
- Physical Health
- Unique Experience

To design and deliver such an appropriate experience, travel companies need to understand the traveler's motivations and intentions as much as possible in order to customize the experience around a customer's specific travel and life goals. One example of this is the Transformational Travel Council (TTC), a group of tour operators in the western U.S. that work with travelers to define what the individual hopes to achieve before a trip. The TTC operators then customize the itinerary to help achieve those goals, and they help the traveler track their progress during a trip and evaluate the overall process at the end of the journey.

Tourism boards are starting to promote their destinations this way, ranging from Destination Canada to the Singapore Tourism Board (STB). Both developed their present promotional strategies completely around the theme of transformation.

Destination Canada pivoted the country's national tourism direction in summer 2019 to highlight Canada's legacy of openness, equality and sustainability, along with the general welcoming spirit of Canadians themselves. The new tagline, "For Glowing Hearts" (a line in the national anthem), replaced "Keep Exploring," representing the shift from experiential to transformational travel. In effect, the strategy is based on the idea that visitors who are interested in progressive themes can find like-minded communities in Canada.

And in Singapore, the STB's "Passion Made Possible" tourism development framework also positions the destination as a place to meet people who share the same passions and who can inspire visitors to reach new heights. To date, the STB has profiled dozens of citizens doing exceptional things in art, design, film, sports, food, technology and other fields of interest to connect with potential travelers on a more elevated level revolving around shared goals and passions.

"Tourism is no longer about what you can do," says Kershing Goh, senior vice president of strategic partnerships & alliances at the STB. "It's about who you can be."

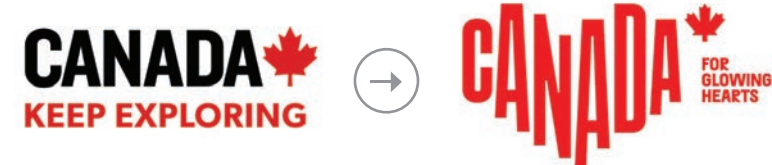
National and state park leaders can adopt a similar strategy to elevate their messaging directed at next-generation travelers. The demand is clearly there, as illustrated in the 2019 MGY Travel Intelligence Consumer Survey.

75% of people view travel as a source of transformative personal growth.

Additionally, survey data shows that Millennials are significantly more motivated by being part of a community when making travel decisions than older generations. Parks could develop a series of various live and/or online programs that cater to specific communities, which could then lead to organic engagement within those groups. If national and state parks can play a stronger role in that type of community building, it provides participants a greater opportunity to learn from one another about themes they care about to support their personal goals.

"TOURISM IS NO LONGER ABOUT WHAT YOU CAN DO. IT'S ABOUT WHO YOU CAN BE."

- Kershing Goh, Senior vice president of Strategic Partnerships & Alliances at Singapore Tourism Board



The question that park leaders need to consider is how and toward what end could we aid and mobilize a visitor who seeks some form of transformation.

Harness the "tribal" mentality that has been exponentially magnified by social media. Neo-Tribes are usually niche groups through which people self-identify and behaviorally transform

- Park partners could create exclusive opportunities through volunteerism and philanthropy as one way to foster individual transformation
- Create unique difficult to attain challenges within the parks the endear a sense of accomplishment to the participants

Conduct further research asking visitors if they are seeking transformative goals, what they want to get out of their connection to a park, who they want to become and develop programs that can help

- "I want to live a healthier lifestyle"
- "I want to help save the planet"
- "I want to be happier and less stressful"
- "I want to be more spiritual"

A large photograph of a coastal campsite. In the foreground, a yellow and orange tent is pitched on a dark sandy beach. To the right, a man and a woman stand on a large piece of driftwood, looking out at the ocean. The background features a line of tall, thin trees and a hazy coastline under a blue sky with light clouds.

KOA: CAMP THE FUTURE

What does the next generation of campgrounds and campsites look like? And how do these campgrounds of the future address the current issues the outdoor industry faces, such as sustainability and conservation?

Kampgrounds of America (KOA) sponsors an annual research initiative called the North American Camping Report, which looks at the preferences, behaviors and attitudes of all North American campers. The results provide key insights into how the evolving visitor experience is shaping the future of camping.

By using major takeaways from the North American Camping Report, KOA created the Campground of the Future, a vision for its campgrounds in the year 2030. Through five environment concepts - Desert, Coastal, Forest, Mountain and Urban - this ongoing project shows how future campgrounds can incorporate technology, nature and sustainability initiatives into different environments.

DESERT

The structures of the **desert** campground capitalize on the amount of sunshine it receives through smart design. Solar panel structures throughout the area not only provide shade to parked cars below, but also provide power to the park. Pools allow campers to cool off during hot days, and every building is constructed with the intention to bring the outdoors in through a glass-and-open-air design.

COASTAL

KOA envisioned the **coastal** environment to exist harmoniously with the ocean. Floating solar panels on the surface of the water provide power to the park but are nearly invisible to campers. Underwater cabins enable visitors to experience the ocean ecosystem up close, and above-water and below-water trails provide seamless access from land to sea.

FOREST

Centered around limiting vehicle distractions and creating secluded campsites, the **forest** environment separates parking lots and roads from the actual campground by using non-invasive walkways that take visitors from the parking lots to their sites through the treetops. Accommodations range from luxury cabins and treehouses to secluded tent sites.

MOUNTAIN

Cantilevered campsites with epic mountain views are the highlights of the **mountain** environment. Automated check-in enables a seamless experience, and deluxe cabins integrated with the mountain landscape allow for a unique alpine setting.

URBAN

The focus of **urban** parks is introducing outdoor activities and environmental education in a metropolitan area. Building rooftops are used for camping, and partnerships with local food trucks and RV dealers help boost local industries as they offer visitors their services. A large education space is a setting for nature talks and interactive demonstrations that contribute to the site's purpose of extending nature into urban areas.

MOBILITY AND ACCESS

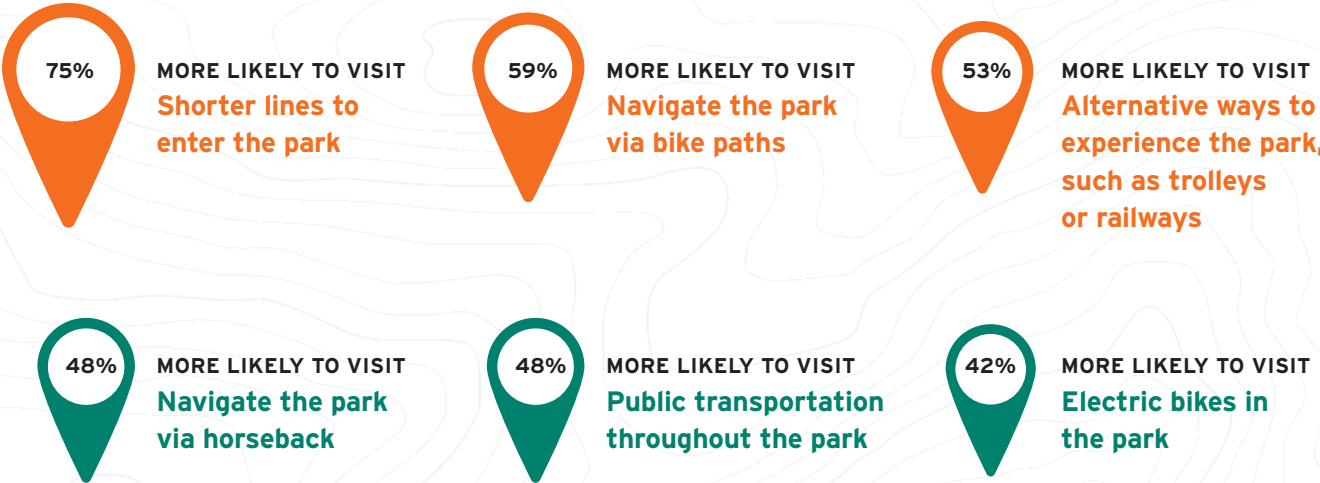
It's not uncommon today to see cars lined up for miles at the entrances of national and state parks. Reducing chokepoints at the entrance and increasing public transportation options would directly speak to visitor needs and lighten environmental stresses.

ENTRY POINTS

Part of the challenge, aside from the surge in visitor demand, is based on the tradition of having live personnel working at the gates. In the past, that was considered a positive and welcoming experience where visitors could ask gate attendants any number of questions about how to navigate and enjoy the park - almost serving as a de facto visitor center. Today, that's creating a bottleneck at the worst imaginable time, disrupting the quality of the live visitor experience at the very beginning of the journey.

There are incremental steps toward broader solutions that are now coming into play. Rocky Mountain National Park is working toward upgrading its outdated Fall River Entrance and creating a fourth "fast pass" lane to align with its Beaver Meadows and Grand Lake entrances. Last year, Yellowstone made digital park passes available for visitors to display on their smartphones at the entrance. However, until the NPS pass programs are entirely digitized - meaning guests can scan them electronically without stopping - installing automated gates to ease traffic flow upon entry remains a vision of the future. Furthermore, at some locations, automation and easing the bottlenecks at gates could create upstream congestion points that need to be evaluated.

HOW CAN IMPROVED MOBILITY AND ACCESS INCREASE VISITATION?



IN-PARK MOBILITY

At Acadia National Park in Maine, annual visitation topped 3.5 million people in 2017, up 59% from 2007. And things are going from bad to worse: The park welcomed 35,000 visitors in one day on July 5, 2019. To help disperse visitors and get them out of their cars, Acadia's free Island Explorer Shuttles connect area hotels and campgrounds with various areas of the park and neighboring area villages. More than 600,000 visitors used the shuttles last year, but they're still a tough sell for Baby Boomers, who, according to Acadia Superintendent Kevin Schneider, prefer to use their personal cars more than younger generations. This suggests that mass adoption of public mobility is still a ways off, as evidenced by only 51% of respondents in the 2019 MMGY Travel Intelligence Consumer Survey stating that public transportation in a park would positively impact their experience. However, in March 2019, the Acadia National Park Final Transportation Plan & Environmental Impact Statement laid out some proposed initiatives, including paid parking reservation service and new timed parking fees - designed to provide additional funds for park maintenance and upgrades.

While parks with high visitation have seen success by using shuttles to reduce vehicle traffic, ever-increasing volume inevitably leads to congestion. Zion National Park in Utah was a pioneer in public transportation: Twenty years ago, it was the first national park outside of Alaska to ban nearly all vehicles from its popular sections when the park received an estimated 2.5 million visitors annually. The impact was immediate, with lightened congestion, longer stays in the park, and even an increased sense of socialization and community. Today, however, Zion attracts 4 million visitors annually, and visitors report long wait times and standing room only on shuttles during peak times.

Current solutions are to disperse visitors seasonally, promote bike transportation in the park, and suggesting alternative destinations outside of the park toward Bryce Canyon, the Great Basin and Cedar Breaks.

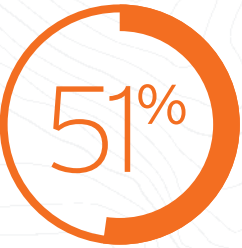
It's a similar situation in Banff National Park in Alberta, Canada. Visitors in August 2019 were waiting from one to two hours to catch a ride on public shuttles traveling between Lake Louise and Moraine Lake. Shuttles were sold out at various times without notice, and unlucky visitors missed their chance that day to see the bucket-list destinations. Banff & Lake Louise Tourism have attempted to address these challenges with their "Explore the Park" website, offering detailed information about how to plan ahead and navigate the area via various modes of free and paid public transportation.

Due to its geography, one of the more successful models is Denali National Park, which sees over 600,000 visitors a year. There's only one road - the 92-mile Denali Park Road - and there are multiple options to travel it. Private vehicles are only allowed on the first 15 miles during peak season. Other than that, the options include fee-based narrated tour buses of various lengths, non-narrated transit buses and three types of free buses.

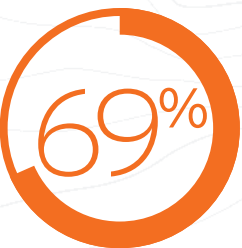
APPS TO EASE CONGESTION

Technology presents a great opportunity for information sharing, which is an efficient way to alleviate some of the pain points caused by overcrowding. Many recreational areas have implemented this kind of information sharing to great success. The Epic Mix app from Vail Resorts informs users of wait times at lifts and whether lifts are on hold or closed. The My Disney Experience mobile app tracks wait times, manages FastPass+ experiences and finds Character Greeting locations and times.

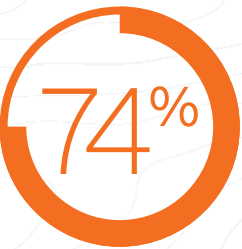
According to the 2019 MMGY Travel Intelligence Survey:



Agree that having an app tell them the most or least crowded areas of the park would make them likely to visit



Indicate that this sort of app would have a positive effect on their park experience



Indicate apps that notify them of park closures and traffic would have a positive effect on their park experience

THE RISE OF E-MOBILITY

Pedal-assist electric bikes (e-bikes) have significant potential to get more visitors out of their cars, improve overall traffic flow, and make larger swaths of land more accessible to a wider audience. The prices of e-bikes are decreasing, and more consumers are buying them for personal use, especially in Europe. Demand is also growing for e-bike use in and around national and state parks. According to the data:

42% of prospective park visitors agree that having e-bikes in the park would make them more likely to visit

45% say that having access to e-bikes would positively impact their park experience

59% say that the ability to navigate bike paths [in general] would make them more likely to visit

Currently, however, there is a lot of debate about the role of e-bikes on public land. Some state parks equate e-bikes to regular non-electric bicycles, or they have designated areas for e-bikes. National parks recently reclassified e-bikes as non-motorized vehicles, overturning the long-standing limits that still pertain to dirt bikes and motorcycles. While there is significant pushback coming from conservation groups, it's anticipated that e-bikes will soon be openly accessing cycling trails on national park land.

Unfortunately, many parks do not have dedicated bike lanes or paths. Any park planning regarding traffic congestion should include considerations for increased mobility and flow through the use of expanded or new bike paths. At the U.S. Forest Service, the Forest Service Travel Management Rule also considers e-bikes motorized vehicles, but things are changing.

For example, Mammoth Mountain in California leases 3,500 acres of forest lands, and in May 2018, it opened its popular mountain bike park to e-bikes. As one of the largest bike parks in the country, Class 1 e-bikes on Mammoth Mountain now have access to 80 miles of singletrack.

Meanwhile, numerous national parks in western Canada revised their regulations for e-bikes in summer 2019. Jasper National Park in Alberta, Kootenay National Park in British Columbia and a host of others launched a pilot program this year to allow e-bikes everywhere that bicycles are allowed, including scenic trails, as long as the bikes' maximum speed is no more than 20 miles per hour.





EDUCATION AND ENGAGEMENT

Like any town or city with an active visitor economy, the biggest opportunities for national and state parks today revolve around building active communities of locals and visitors with like-minded values. It is incumbent on national and state parks to provide integrated live and digital platforms for knowledge sharing between the public, private and nonprofit sectors relating to the stewardship of the environment, wildlife and all of the interconnected systems that contribute to these magnificent spaces.

The route to environmental conservation is education. That is achieved through both live visitation in the parks and through digital media aligned with the visitor’s interests. Both public and private entities have a responsibility to educate consumers about conservation – before, during and after their visit. By connecting visitors to the park system’s natural, cultural and historic treasures, we provide a richer experience that’s equally as educational as it is exciting.

“When people can taste, touch and feel things with all of their senses, they’re more motivated to want to protect and revisit those things,” said Tammy Blount-Canavan, CEO of the Monterey Convention & Visitors Bureau.

The overall direction for messaging and content is clear, more so than perhaps any other type of travel destination. Visitors are interested in learning what to do, where to go and who to meet to align with what’s best for the natural resources and wildlife within the parks.

Today, among prospective park-goers:

77% Think it's important for parks to implement sustainability initiatives

76% Agree they want to see the world as it is today before it changes

73% consider themselves to be environmentally conscious

55% say they're more environmentally aware than they were two years ago

50% think parks could be doing more to implement sustainability initiatives

57% think sustainability efforts are important when choosing a destination

The NPS has been called “America’s greatest university without walls,” and people are genuinely interested in what they can learn from the parks.

74% Say that learning about park plants, animals and the environment would make them more likely to visit.

56% Agree that participating in hands-on creative and learning activities would make them more likely to visit.

53% Would be more likely to visit if they could participate in experiences in the community surrounding the park.

THE DIGITAL CONTENT EXPERIENCE

The value of a modern, mobile-friendly, story-driven website for any travel destination can't be overestimated. The best online portals today connect readers with the most creative and innovative people in the region, because driving engagement requires more than just showcasing the local experience. It's about communicating a purpose and how people in the destination are supporting that purpose. Web content needs to explore and define a brand's identity from the varying perspectives of its audience, which in this case is park visitors.

More destinations and travel companies are also embracing new online technologies such as virtual and augmented reality, which have enormous potential to engage audiences in real time. The NPS, for example, partnered with TimeLooper, a virtual-reality platform creator, around the National Mall. The company created VR storytelling for several landmarks at the mall, including the Lincoln Memorial, the Martin Luther King, Jr. Memorial and the Vietnam War Memorial, relying on the park service's vault of historical archives for content. There is especially rich potential for enhancing the experience on national historic battlefields through augmented reality, a technology that's already in place with the U.S. military.

Chat platforms are also beginning to influence how travelers engage with destinations. San Francisco Travel worked with Chatfuel to develop a new chat functionality based on Facebook's Messenger platform, which helps visitors navigate from the most iconic places around the Bay Area to highly specific experiences customized for the individual user. Chatfuel's artificial intelligence engine evolves as the machine-human relationship builds over time, helping deliver more personalized and valuable information based on user behavior.

NEXT-GENERATION ENGAGEMENT

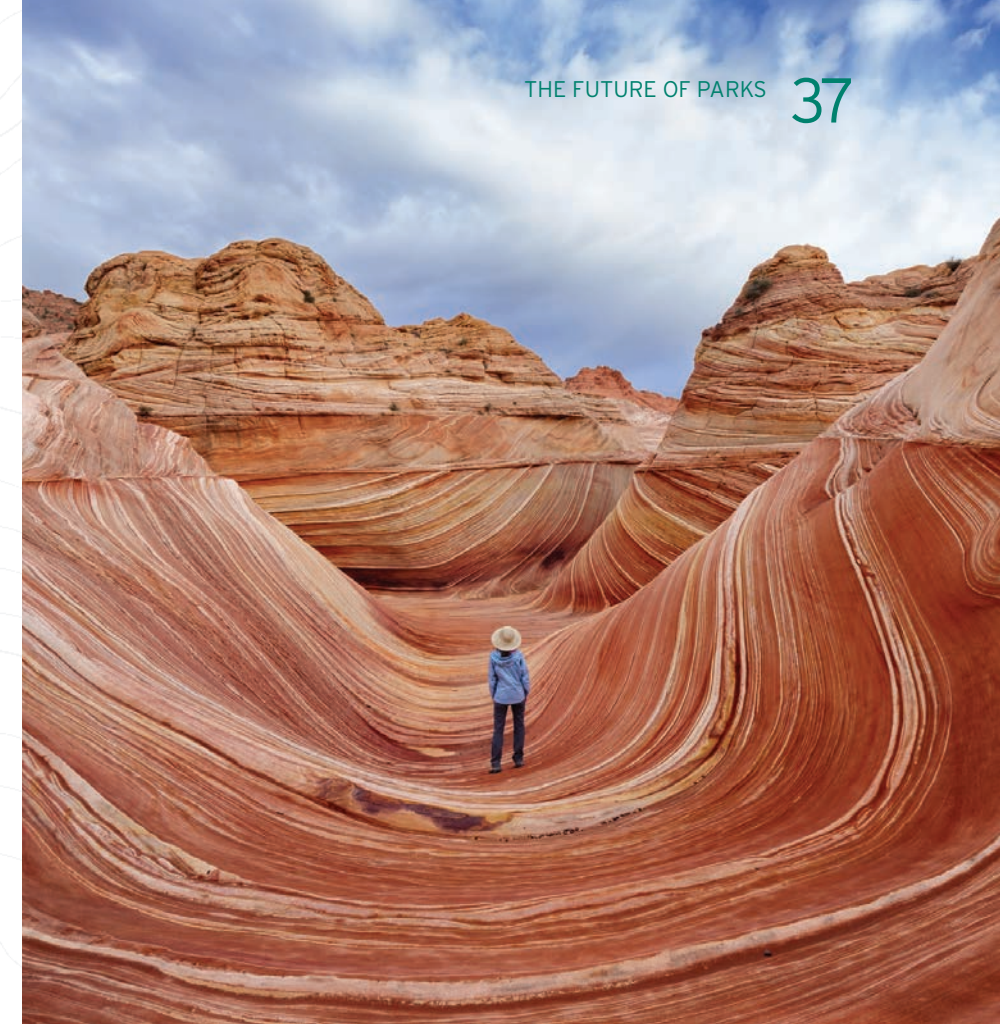
One of the major goals around the 2016 centennial was, and continues to be, to "connect with and create the next generation of park visitors, supporters and advocates."

Youth engagement has always been a pillar of the NPS, and today nearly every site offers education opportunities for young visitors. The legacy of the Civilian Conservation Corps continues through partnerships with conservation corps organizations. The Junior Ranger Program in the parks primarily teaches kids aged 5 to 13 about the particular environment through ranger-led interactions and activity books. Field trips, classroom resources and distance-learning electronic field trips open up new routes to learning.

Volunteering represents an impactful way to engage and educate visitors while fostering a deeper interest in environmentalism. There are a number of "Volunteers-in-Parks" programs for both individuals and groups, ranging from one-day to long-term posts. American Express recently funded seven grants to support volunteer programs, including outreach and training. The grassroots Parks Project, which supports conservation programs through retail, also spearheads several volunteer days in public lands.

By further leveraging technology and innovation, it's possible to reach out and educate even before people step foot in the parks. In honor of the centennial, NPS partnered with Google to launch "The Hidden Worlds of the National Parks." The Google Arts & Culture interactive documentary offers immersive 360-degree tours of several national parks.

NPS also offers live webcams in harder-to-access parks like Katmai National Park in Alaska that broadcast images of brown bears and attracted 60 million viewers in 2017. The Channel Islands Live distance-learning program lets participants virtually interact in real time with NPS scuba divers while they are underwater.



Travel Oregon was promoting specific local experiences across the state on all of its website and social media channels up until 2018. The strategy worked so well that many of Oregon's most pristine environments were becoming overwhelmed with too many visitors, while also disrupting life for many residents. In 2019, Travel Oregon pivoted its content strategy around the overall magic of Portland's natural environment, supplemented with a fantastical animated campaign with a magical realism element depicting a world run by giant animals. The campaign tagline, "Only Slightly Exaggerated," was designed to depict the overall vibe of the destination and the local values within, versus specific locations for a good selfie.



STORYTELLING

Our history is immersed in stories. Ursula K. Le Guin said it best: "The story is one of the basic tools invented by the human mind for the purpose of understanding. There have been great societies that did not use the wheel, but there have been no societies that did not tell stories."

Interpretive programming based on dates, names, species and other mundane facts is missing the forest for the trees with regard to educating and engaging visitors. Focus on the stories and storytelling skills have always been the true path to passing meaningful, retainable information. Gone are the days where people want to memorize facts; we have Google for that. We want to hear stories they can pass along.

Concessionaire and Park interpretive speakers, need to first come into their role as actors, entertainers and storytellers, passing cultural history much like it was passed from tribal leaders to their children. Geology needs to be taught as the story of what the world long ago looked like, before it was immortalized in the strata we see in modern fissures. Lee Stetson dressed as John Muir or Shelton Johnson as a Buffalo Soldier presented visitors with the most memorable education experiences.

Advancements in technology are bringing amazing changes to the art of storytelling. Digital sets and backdrops seen in modern theaters are becoming more affordable and could easily be deployed in park settings. Augmented reality can enhance the visualization of a guided hike. Hologram projectors are more pervasive and could easily replace current wildlife props.

BRAND PARTNERSHIPS

When managed correctly, connecting with like-minded corporate sponsors has great potential – in terms of both funding and cross-promoting campaigns. Naturally, posting company logos in and around the parks would detract from the natural experience, but there are plenty of ways for donors to align themselves with the nonprofit National Parks Foundation in visible yet rewarding ways. Meanwhile, co-branded campaigns can attract a new generation of visitors who are being properly educated about everything the parks have to offer.

Currently, Subaru and American Express are the premier multimillion-dollar donors to the National Park Foundation. Subaru, which has pledged to become America’s first zero-landfill auto maker, launched a fully interactive site to educate consumers on eco-initiatives and how to explore parks responsibly. Suburu also created an immersive digital experience at the New York International Auto Show, displaying Yosemite, Denali, Arches and Yellowstone national parks in a 360-degree floor-to-ceiling display built from recycled and sustainable materials.

Find Your Park/Encuentra Tu Parque is a public-private partnership supported by several brands, including Subaru, L.L. Bean, Union Pacific, Budweiser and Nature Valley, along with the National Park Service and the National Park Foundation. This interactive bilingual site is designed to connect potential travelers with the 419 sites in the park system through storytelling, experience guides and search tools.

Union Pacific is also the largest private sponsor of Open OutDoors for Kids, a partnership with the National Park Foundation. Field trips, camps and teacher training initiatives create new pathways for youth to connect with the parks, providing free access and education in these natural learning environments.

With so many additional opportunities to engage potential new audiences – through culinary experiences, wellness retreats, hands-on environmental education, diversity outreach and much more – the opening for corporate partnerships is robust and beneficial across the board.

VISITOR DIVERSITY

By 2045, the U.S. Census projects that the nation will become “minority white” because of the higher growth of multiracial populations, Asians and Hispanics. And yet, among the consumer survey respondents for this report, 78% of respondents were white/non-Hispanic; 8% black/non-Hispanic; 7% Hispanic; 6% Asian; and 2% other.

People of color have long been a vastly underserved population in outdoor recreation, and the national park audience does not reflect the makeup of our society. Our projects indicate that the majority of park visitors are and will continue to be white over the next five years, even though Hispanic growth will outpace it.

However, there is every indication that this is a growing and thriving potential audience that is particularly interested in the outdoors. For five years in a row, the North American Camping Report has found new campers are much more diverse than the overall U.S. population. And in 2018, the percentage of new campers from multicultural groups (51%) outpaced new campers who were white (49%). Hispanic visitors, especially, are most likely to engage in multigenerational camping and to camp in large groups.

The emergence of nonprofit advocacy groups has increased visibility in the parks. Latino Outdoors brings the tenets of “cultura y familia” to the outdoor narrative. Outdoor Afro has successfully built a community of Black travelers who are inspired by the outdoors and care deeply about the future of public land.

Meanwhile, in an effort to accommodate the growing international audience, the park service is offering various printed and digital materials, signage and guides in multiple languages. Many parks are also are recruiting employees who can speak foreign languages, including Spanish, Mandarin and French.

But to make an impact, change needs to start at the top. Hiring diverse employees, interpreters and rangers helps visitors to connect and make them feel like they have a place within the community. In addition to historic and memorial sites, the parks themselves are a part of Black history – like the Buffalo Soldiers who became some of America’s first park rangers in Yosemite and Sequoia. Indigenous voices are an essential part of the national park story when told through the lens of land acquisition and partnerships that still inform decision-making to this day.



BECOMING “CHINA-READY”

The explosive growth of Chinese inbound travelers to the U.S. has dipped for the first time since 2003, but that doesn’t mean they’ve stopped traveling. The Hamburg-based China Outbound Tourism Research Institute predicts that Chinese overseas travel will increase from 149.7 million in 2018 to more than 400 million by 2030. Therefore, it’s important to continue to appeal to this audience while keeping an eye on methods to improve the experience from every perspective.

As the benchmarks of increasing visitor numbers and hotel nights are evolving to also include visitor sentiment and community happiness, it’s essential to create an environment that is welcoming to overseas travelers. Basic elements within parks and resorts include Mandarin-language signage and brochures. And, as we saw recently in Utah parks, appropriate signage helped inform guests of the proper way to use toilets after a series of broken seats.

Currently, the big hitters like Niagara Falls, the Grand Canyon and Yellowstone top the list among international travelers, while day trips to Yosemite are part of circuits that include San Francisco and Napa. However, tertiary parks such as Sequoia, Joshua Tree and Zion are also moving up on the list as they’re included in longer-circuit tours, which suggests that there is an appetite for experiences beyond the traditional bucket list. Increasing dispersion even further begins with educating and adding inventory among wholesalers, tour operators, advisors and OTAs.

Brand USA, which has worked with its 900 partner organizations to generate 6.6 million incremental visitors to the U.S. over six years, will have an especially powerful hand in promoting alternative destinations. Destinations and travel brands also benefit when they reach out to Chinese travelers through their preferred digital platforms – such as Baidu and Dao Dao – and capturing this market requires a deep understanding of WeChat as a tool for direct marketing, native advertising and transactions through WeChat Pay.

TECHNOLOGY AND CONNECTIVITY

It's not a question of if or when. Improving technology on every level is critical to addressing the needs of future national park travelers while preserving the land around them. The volume of visitors is only going to increase, and the parks are naturally restricted in their ability to hire staff due to ever-present budget concerns and limited housing options in and around federal lands. Automating systems and improving connectivity will provide solutions for many of the compounding issues, including long lines, congestion, interpretive education, safety and personal enjoyment.



66% expect cell phone coverage in some areas of the park



58% expect apps to notify me about park closures, traffic etc.



59% expect park-specific maps designed for mobile devices



52% expect wi-fi in some areas of the park

While the impetus behind going out into nature may be to “disconnect,” modern travelers prefer that to be an option, not a requirement. Today, 66% of travelers expect cell phone coverage in some areas of national and state parks, and 68% state that cellular connectivity (or Wi-Fi) would make a positive impact on their experience. Millennials, more so than older generations, indicate they are more likely to visit if they have connectivity everywhere they go in the park. The percentage of people seeking consistent connectivity in parks will only continue to grow in coming years.

To be clear, the demand for digital connectivity relates to the front country where there is already basic infrastructure in place, such as roads, rest stops and hiking trails. At this point, no one is advocating to establish cell phone towers or broadband access in the backcountry.

The primary reasons behind the demand for greater connectivity are varied, ranging from life-saving necessities to personal lifestyle choices. They include:

1. **fear of being disconnected from family and loved ones in case of an emergency back home;**
2. **safety and security inside national and state parks where there are concerns about dangerous terrain, inclement weather, getting lost, wildlife, etc.;**
3. **accessing maps, general information and additional context about a visit+ immediate surroundings;**
4. **the ability to purchase tours and activities on-demand; and**
5. **the surge of sharing experiences on social networks.**

The NPS has taken steps toward providing greater connectivity in the parks with Wi-Fi access points in more than 100 sites, including visitor centers and partner facilities. Safety and security are a primary motivation for doing so, with 48% of people concerned about getting lost or hurt when visiting a national or state park.

AccessParks is a National Park Service concessioner with experience developing broadband hotspots in hundreds of remote military bases worldwide. In 2017, the NPS issued its first concessions contract for wireless internet service to AccessParks for high-speed connectivity in Lake Mead National Recreation Area, located just outside of Las Vegas. The company is also installing cell signal boosters near visitor centers in parks like Chaco Culture National Historical Park in New Mexico. According to Kurt Rausch, Acting Chief, Commercial Services Program at the NPS, “It works really well at Lake Mead because they were able to access the Bureau of Land Management tower and bounce the signal down directly into the park.”



AccessParks

TRIP PLANNING AND THE RISE OF MOBILE BOOKINGS

Personalizing the consumer experience drives higher sales, brand loyalty and customer lifetime value. Therefore, companies across every industry today are shifting from a product-centric approach to a customer-centric one by customizing the engagement journey from the initial brand contact through post-experience advocacy.

Consumers generate unfathomable amounts of data by using their mobile phones daily, including when they travel. In the 2019 MMGY Travel Intelligence Consumer Survey, 65% of respondents think it's important for trip-planning tools to be available on a mobile device, and that number will continue to increase in coming years.

A forward-thinking technology and digital media approach can change how travelers plan and book their national and state park experiences. It will also elevate the visitor experience by opening up a portfolio of activities that they may not even be aware is possible. The future of mobile in travel is an evolution from digital engagement to digital conversion based on the increasing sophistication of live inventory platforms and booking engines for small tour operators.

NPS.gov is one of the top-performing sites in the government, and 50% of its visitation comes from mobile devices. In time for the centennial, the site was upgraded with a more mobile-responsive design and trip-planning tools. Concurrently, the park service's reservation system, Recreation.gov, was optimized and upgraded - generating more than 4 million reservations across 300 facilities in 150 parks.

A deeper dive into the user experience, including collecting and responding to individual feedback from consumers, may reveal that a number of other tools and features could pay off in engaging audiences across every digital platform. Those potential upgrades include:

- **Chatbot to provide recommendations on the go**
- **Website personalization to present information to users based on their preferences**
- **Enhancing content to promote dispersion to less-visited areas**
- **Event API for a dynamic feed of activities around the parks**
- **Tour operators to reserve activities on one platform**
- **Retargeting ads to the NPS.gov and/or Recreation.gov sites**
- **Leveraging original media assets from influencers and user-generated content**

StarLink is a SpaceX venture aiming to launch up to 42,000 low earth orbit satellites blanketing the Earth with broadband access. The venture would especially benefit remote regions like National and State Parks. The expectation is that SpaceX will begin offering broadband service in North America in 2020, and with global coverage expected to be offered by 2021 after 24 launches of satellite clusters. The original plan was to offer initial service to the U.S. government which could benefit National Park connectivity initiatives, but after an outpouring of interest the company is now focused on it's consumer business. Initial tests produced data throughput of 610 megabits per second.

How important is it that you are able to do each of the following from your mobile device when visiting a national or state park?

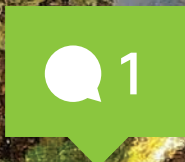
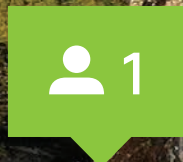


HARNESSING THE POWER OF DIGITAL MARKETING

Cutting through digital clutter is an art form, but delivering targeted messages is the key to attracting and retaining consumers at every stage of the purchasing funnel.

Instagram now provides a solution for driving purchase conversion, with in-app options to “Book,” “Reserve,” “Get Tickets or “Start Order” that connect with the platform's new native payment feature. Tourism boards such as Visit Dubai and London & Partners have already adopted this technology, creating Instagram content that links to online content with seamless click-to-buy options.

In the state park realm, Custer State Park in South Dakota is known for its annual Buffalo Roundup, which draws more than 14,000 spectators per year. As part of the event's integrated marketing promotions, a social media influencer was invited to attend the event and create original content assets as part of the agreement. Her 70 photo assets and 85 social media posts earned more than 1 million impressions - including South Dakota Tourism's top-performing post of its fiscal year, which generated more than 30,000 engagements at a 13.9% engagement rate.



SOCIAL MEDIA

Countless stories today rail against Instagram and other social media networks as a scourge behind the rise of overtourism in pristine natural environments and iconic cultural attractions worldwide. Instagram, Vero and the next big social media platform are clearly here to stay, and a lack of Wi-Fi won't stop travelers from seeking their next great shot. (They'll just post a #latergram.)

That said, social media can be a powerful tool that encourages visitors to explore less crowded areas while delivering messages to help protect environmentally fragile areas. “People across all ages are much more educated about the parks because of Instagram,” says Jonathan Farrington, executive director of the Yosemite Mariposa County Tourism Bureau. “Instagram causes both overtourism in heavily trafficked areas, and it disperses visitors to quiet places that can be easily overwhelmed by mass travel.”

While many social media enthusiasts are in search of their next backdrop, they're not necessarily looking for death-defying perspectives. Improved signage for photo ops and pullover points is a tried-and-true solution to encouraging “safe selfies.” There is also great value in creating original guides through web content and downloadable apps that redirect them from iconic shots to alternative spots - thereby satisfying the appetite for fresh, less-crowded points of view.

Promoting responsible geotagging leans into the situation rather than trying to stop it in its tracks. In 2018, the Jackson Hole Travel & Tourism Board launched a campaign, “Tag Responsibly, Keep Jackson Hole Wild.” The idea is if uploaded media is tagged with a more generic location, rather than the specific trail or scenic point of interest, followers are less likely to set out on their own to replicate the experience in unprotected areas.

THE FUTURE OF WEARABLES

Large travel and tourism companies have been testing various wearable devices to create seamless, personalized experiences for visitors while reducing chokepoints and increasing traffic flow. Looking ahead in the long term, national and state parks could look at adopting the same types of technologies to customize the experience for the individual.

For the past decade, Vail Resorts has implemented RFID technology, connecting a chipped ski pass with sensors in the ski lifts that track data behind the scenes. Skiers can collect information on how much they skied, vertical feet and more details to map out their day, but it's only designed to “gamify” their experience if they choose to engage. The RFID tracking is also part of safety protocol, and naturally provides the resort a way of gathering massive amounts of data regarding ski patterns and preferences.

In a park setting, wearable devices offer myriad functions to help ease congestion, personalize the experience and ensure safety without being burdened by electronics in an outdoor setting.

On an efficiency level, this technology can be used to streamline check-in services, act as a digital key to accommodations, and provide seamless payments to concessioners and park partners. Information-led solutions that show available parking spots and which trails are open can ease congestion.

Non-invasive technology that tracks data in the background like current altitude, the distance of a hike or calories burned can personalize the guest's experience should they choose to engage with it. There is also potential for guests to act as “citizen scientists” by tracking wildlife or other informative data, providing new and creative ways to learn about their surroundings.

Last, but certainly not least, safety is one of the most obvious benefits of wearable technology. Being able to track guests' locations via GPS, triggering an emergency beacon, and providing a communication method for out-of-range electronics (similar to the goTenna Mesh device) are all paramount to guest safety.

SMART PARKS

In Northern England, Lancaster University and the Lake District National Park Authority co-produced a report, “Smart Parks: Bringing New Technologies to National Parks and Urban Greenspaces.” The document explores how parks should start using emerging platforms to deliver new efficiencies, because budgets for public parks are declining in the UK.

Real-time information from environmental monitors and sensors could soon inform rangers of the conditions of footpaths and monitor the effects of climate change. Bins could send alerts when they are full to reduce unnecessary emissions due to bin collections. Your phone could sense when you tire during a walk, notifying you of the nearest pub for a rest stop. It could even send you the menu, or make a reservation on your behalf.

Visitors are already making use of intelligent connected devices through apps like Google, Ordinance Survey and Booking.com for things like navigation and accommodation bookings. Some areas of the world are already drastically cutting traffic pollution by introducing ‘smart’ car parking systems, for example, directing individual motorists to available car parking spaces.



THE FINAL WORD

Starting with the premise that we continue to need nature as a counterbalance to our “civilized” lives, we see some of the risks and concerns from the future. Will we have simply shifted the buzz of civilization into the tranquility of nature? John Muir’s picture-perfect nature scene certainly didn’t include long lines, traffic and crowds.

But there is a light at the end of the tunnel, and it comes by way of technology and analytics. We can leverage these forces of the future to increase the speed of transactions - entry, purchases, parking - and better understand the flow of visitation, so we can optimize behavior through variable pricing and enhanced content.

Infrastructure investment is also critical to the future of parks. No one believes that we should “pave paradise and put up a parking lot.” But we should make strategic investments to support future visitation while identifying opportunities to improve the experience.

And let’s not forget marketing. We have seen the success of awareness programs for several national parks and their ability to drive visitation in significant numbers. A concerted effort to modernize our conversations with visitors is not only possible but critical. The classic image of Horseshoe Bend has become less newsworthy than the images of crowded lookouts on social media. We know there’s a smart-park future on the horizon - and it’s not hard to imagine personalized, AI-driven communications with guests. We can leverage technology and develop a strategy that both reduces the visitor impact on the park AND improves the overall experience.

Because at the end of the day, we all want what John Muir, Theodore Roosevelt and Stephen Mather wanted: to preserve and protect nature for the enjoyment of the people. Using that as our North Star will guide us through the change of the uncertainty of the future - leading us to a better, brighter place.

A place with WIFI, of course.



Andy Grinsfelder
Vice President, Delaware North Parks and Resorts

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