

**AN EXPLORATORY STUDY OF INTERNATIONAL TRAVEL  
TO U.S. NATIONAL PARKS**

**VOLUME III: IMPACT OF INTERNATIONAL TOUR VISITORS  
ON THE NATIONAL PARKS**

Prepared by the  
International Institute of Tourism Studies,  
School of Business and Public Management,  
The George Washington University  
pursuant to  
National Park Service cooperative agreement no. 1443CA000194018

August 2, 2000

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**EXECUTIVE SUMMARY**

1. This study reports on information collected from a sample of foreign tour operators to estimate the volumes of tour purchasers who visited individual National Parks in 1998 and how much was spent in or around these parks on their behalf.
2. Tour operators from 10 countries representing 881 thousand foreign tour visitors to U.S. National Parks (76 percent of all such visitors) participated in the study. These tour operators generated 2.7 million visits to National Parks in 1998, and 3.5 million visitor-days in them, according to this study.
3. Tour operator expenditures in or around the Parks visited totaled \$208 million, for an average of \$60 per visit per day.
4. Grand Canyon National Park dominated this activity with about 18 percent of the visits, visitor-days and expenditures in or around the National Parks. Yosemite National Park was second.
5. In all, the study identified measurable foreign tour visitor activity at 43 of the 50 National Parks.
6. The highest average spending per visitor per day was posted for Denali National Park at \$131.
7. The United Kingdom tour operators generated the largest number of Park visits at 700 thousand. France was a close second, followed by Germany. The United

Kingdom tour operators produced one-quarter of the expenditure in or around National Parks estimated in the study.

8. Foreign tour operators consider scenic beauty and other natural features the most important feature when deciding whether to include an individual National Park in a tour package, followed by visitor safety and security. Preferences differed somewhat among countries.
9. Participating foreign tour operators recommended that the NPS increase Park marketing in foreign languages, expand educational material available, and simplify price structures and stabilize costs.

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D. C. Frechtling, Ph.D., Principal Investigator



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**Introduction**

In June 1995, the NPS executed a contract with the International Institute of Tourism Studies (IITS) in the School of Business and Public Management of The George Washington University to conduct an exploratory study of international travel to U.S. national parks (National Park Service cooperative agreement no. 1443CA000194018, Amendment No. 1). Based upon initial findings of the first 12 months of study, the IITS proposed, and the NPS accepted, an extension of the contract to seek additional data on foreign visitors to NPS areas (Modification 00007). The results of these studies were delivered to the National Park Service in May 30, 1997 in a two-volume report entitled, *An Exploratory Study of International Travel to U.S. National Parks*.

This report analyzed the overall impact of international visitors to the U.S. on the NPS system, including national parks and other NPS areas. The data gathered and analyzed for this report did not allow any distribution of foreign visitor impact to individual NPS areas, however. Such information could be very useful in gauging international visitor use of individual parks and the expenditures accompanying their visits.

A year-long search subsequent to this report did not identify any existing database that could be used to develop such figures. Cost estimates were obtained of undertaking primary research through surveys of international visitors to derive such estimates, but these were considerably larger than budget resources that could reasonably be expected to support such an effort.

However, the Principal Investigator for the overall project, Dr. Douglas Frechtling, identified several sources of data that could be used to estimate the individual impact of a sector of international visitors on individual national parks: those visiting the U.S. on package tours. So a work plan was developed and submitted to the NPS contracting officer for this project, Dr. Richard Briceland, Special Assistant to the Associate Director NRSS. (see Appendix A) The work plan outlined compilation of an International Tour Inventory from a representative sample of foreign tour operators who bring visitors from their countries to U.S. National Parks. Dr. Briceland approved the plan in August, 1999, and work was then begun on the International Tour Inventory.

This document is the report on the results of this addition to the initial study. It is designed to provide information that will assist the NPS in planning for education, visitor services, marketing, visitor safety, planning, interpretive programs, resource preservation, and facilities management regarding foreign visitors<sup>1</sup>.

## Objectives

The National Park Service (NPS) administered 50 National Parks in 1998 and hosted more than 64 million recreational visits, of which a substantial but unknown number were generated by foreign visitors to the U.S. In order to develop and implement programs that will provide quality educational and recreational experiences for these visitors, contribute to effective marketing initiatives toward foreign visitors, and aid in the development of appropriate public policies regarding these visitors, the NPS needs comprehensive and up-to-date information about foreign visitors. While there appeared to be a great deal of information, both anecdotal and systematic, about foreign visitors to national parks, this information has never been codified and analyzed.

The research reported here was designed first of all to estimate the number of international visitors to the U.S. who visited individual National Parks on package tours. For the purposes of this study, "package tour" is defined as in the U.S. Department of Commerce's *Survey of International Air Travelers* questionnaire as travel where "airfare, lodging, ground transportation, or other items were prepaid (or charged) before departure".

In addition to the number of such international visitors to individual National Parks, the project also provides estimates of the number of visitor-days spent by package tourists in each park, and tour operator expenditures associated with individual parks.

The Inventory also explored characteristics of National Parks important to tour operators in their decisions to include parks in their tour packages. Finally, questions were included on what the NPS can do to improve visitors' experiences in the National Parks, and on what the NPS can do to facilitate tour operator efforts to bring visitors to the National Parks. A copy of the questionnaire used is included in Appendix B.

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<sup>1</sup> Following the terms defined by the United Nations and the World Tourism Organization in *Recommendations on Tourism Statistics*, UN Department for Economic and Social Information and Policy Analysis, 1994, p. 7, a foreign visitor to the U.S. is defined as "any person on a trip outside his/her own country of residence traveling within the U.S., irrespective of the purpose of travel and the means of transport used".

It should be made clear that this research covered only visitors to the 50 U.S. National Parks in 1998 and not all National Park Service Areas. NPS Areas numbered 342 in 1998 reporting nearly 287 million recreational visits. In addition to the National Parks, NPS Areas include National Historic Sites, National Memorials, National Monuments, National Recreation Areas, and other types of parks.

## **Staff**

The work outlined above was carried out by Dr. Douglas Frechtling, Associate Professor of Tourism Studies of the International Institute of Tourism Studies as principal investigator, and Ms. Kristin Lamoureaux, Ph.D. candidate in the School of Business and Public Management, both of The George Washington University.

## **Findings – international tour visitors’ impact on National Parks**

In 1998, the U.S. Department of Commerce *Survey of International Air Travelers* found that 23.7 million residents of overseas countries (i.e., all foreign nations except Canada and Mexico) visited the U.S., and about 21 percent (4.86 million) visited one or more National Parks while here. Twenty-four percent of these visitors were traveling on package tours for a total of 1.16 million overseas visitors to the U.S. visiting National Parks on package tours in 1998.

The top 11 countries of origin generated 931 thousand package tour visitors to U.S. National Parks, or about 80 percent of all such visitors to the U.S. Unfortunately, despite being repeatedly contacted, no tour operators from Taiwan participated in the principal data gathering phase of this study. However, the remaining 10 countries generated 881 thousand visitors, or 76 percent of all visitors to U.S. National Parks traveling on tour packages.

Table 1 shows this study’s estimates of number of tour package visits to U.S. National Parks for each of the 10 countries covered (column B). These are estimates of park visits rather than individual visitors to the U.S. One package tourist could have visited three National Parks while here and would be counted three times in these estimates. This convention is necessary to keep the visitor, visitor-day and visitor spending data consistent. The study indicates that the 881 package tour visitors from the 10 countries generated 2.7 million visits to U.S. National Parks in 1998. This comprises more than 4 percent of all recreational visits recorded for National Parks for the year.

The United Kingdom and France each produced about two-thirds million such visits to lead all other countries in 1998. New Zealand and Spain produced the smallest numbers of these visits.

Tour package visitor-days in the National Parks topped 3.4 million in 1998, according to this study (column C). The UK dominated visitor-days in the parks as it did visitors. France and Germany formed a second tier with more than one-half million visitor-days each. On the other hand, Spain and New Zealand produced the fewest visitor-days of the group.

Table 1: International Tour Package Visitors to U.S. National Parks by Selected Origin Country, 1998

| A. Origin country | B. Tour visits to National Parks (000) | C. Tour visitor-days in National Parks (000) | D. Tour visitor spending associated with National Parks (\$millions) |
|-------------------|--|--|--|
| Australia         | 163                                    | 162  | \$10.3   |
| Brazil            | 101                                    | 123  | 3.6  |
| France            | 656                                    | 737  | 39.3   |
| Germany           | 443                                    | 645  | 34.4   |
| Italy             | 293                                    | 337  | 27.1   |
| Japan             | 157                                    | 371  | 23.2   |
| Netherlands       | 128                                    | 144  | 7.6  |
| New Zealand       | 68                                     | 72   | 7.2  |
| Spain             | 22                                     | 30   | 2.2  |
| United Kingdom    | 699                                    | 840  | 52.7   |
| Total             | 2,731                                  | 3,460  | \$208  |

Source: International Tour Inventory

International package tour operators from the ten countries spent over \$200 million in or around the parks on behalf of their clients (column D). The UK led all countries in this tour visitor spending in 1998 with over \$50 million. France and Germany also exceeded \$30 million in this spending. Spain, however, generated only \$2.2 million.

Table 2 presents certain analytical measures for the origin countries in 1998. Overall, tour package visitors from these countries spent an average of 1.3 days per National Park visited in 1998, according to this study (column B). Japan led all origins with nearly two and one-half days per park visited on package tours. Australia posted the shortest time visiting each National Park at an average of one day.

The average tour package visitor to U.S. National Parks in 1998 accounted for \$76 in spending associated with an individual park visit (column 3). This spending by the operators of the tours they purchased covered such items as lodging, food, local transportation, admission and other fees in the parks or near the parks visited. Japan tour operators led all countries with nearly \$150 per package visitor to a National park. Spain and New Zealand also produced spending of \$100 or more per visit. On the other hand, Brazil shows only \$36 per visit according to this study. It should be noted these expenditure estimates do not include what visitors spent themselves while in or around a National Park.

Table 2: Analytical Measures of International Tour Package Visitors by Selected Origin Country, 1998

| A. Origin country | B. Mean days per visit to National Park | C. Mean spending per visit associated with National Parks | D. Mean spending per visitor-day associated with National Parks |
|-------------------|---|---|---|
| Australia         | 1.0                                     | \$63  | \$63  |
| Brazil            | 1.2                                     | 36  | 30  |
| France            | 1.1                                     | 60  | 53  |
| Germany           | 1.5                                     | 78  | 53  |
| Italy             | 1.1                                     | 92  | 80  |
| Japan             | 2.4                                     | 148   | 63  |
| Netherlands       | 1.1                                     | 60  | 53  |
| New Zealand       | 1.1                                     | 106   | 99  |
| Spain             | 1.4                                     | 100   | 73  |
| United Kingdom    | 1.2                                     | 75  | 63  |
| Total             | 1.3                                     | \$76  | \$60  |

Source: International Tour Inventory

Finally, Table 2 indicates the average spending associated with international tour packages to U.S. National Parks in 1998 at \$60 per visitor-day (column D). This ranged from a high of \$99 per visitor-day for New Zealand tour operators, to a low of \$30 per visitor-day for Brazilian tour operators.

Table 3 lists the 50 U.S. National Parks in 1998 in alphabetical order and the number of international package tour visits to each. Also shown are estimated visitor-days in each park and visitor spending associated with the park visit. The study found no measurable impact of these visits in seven parks, as indicated by the zeroes in columns B, C and D.

Table 3: International Tour Package Visitors from Selected Countries to U.S. National Parks, 1998

| A. National Park visited                 | B. Tour visits to National Park (000) | C. Tour visitor-days in National Park (000) | D. Tour visit spending associated with park (\$millions) |
|--|---------------------------------------|---|--|
| 1. Acadia National Park, ME              | 20.0                                  | 35  | \$2  |
| 2. Arches National Park, UT              | 94.5                                  | 102   | 6  |
| 3. Badlands National Park, SD            | 15.6                                  | 16  | 1  |
| 4. Big Bend National Park, TX            | 0.0                                   | 0   | 0  |
| 5. Bryce Canyon National Park, UT        | 265.0                                 | 341   | 21   |
| 6. Canyonlands National Park, UT         | 90.5                                  | 90  | 6  |
| 7. Capitol Reef National Park, UT        | 45.9                                  | 46  | 3  |
| 8. Carlsbad Caverns National Park, NM    | 0.1                                   | *   | **   |
| 9. Crater Lake National Park, OR         | 7.7                                   | 13  | 1  |
| 10. Death Valley National Park, CA       | 299.3                                 | 320   | 18   |
| 11. Denali National Park, AK             | 5.3                                   | 10  | 1  |
| 12. Dry Tortugas National Park, FL       | 19.1                                  | 38  | 2  |
| 13. Everglades National Park, FL         | 58.3                                  | 79  | 5  |
| 14. Glacier National Park, MT            | 10.2                                  | 13  | 1  |
| 15. Glacier Bay National Park, AK        | 9.7                                   | 9   | 1  |
| 16. Grand Canyon National Park, AZ       | 482.1                                 | 632   | 38   |
| 17. Grand Teton National Park, WY        | 37.0                                  | 37  | 2  |
| 18. Great Basin National Park, NV        | 0.0                                   | 0   | 0  |
| 19. Great Smoky Mountains Nat'l Park, TN | 6.3                                   | 6   | **   |
| 20. Guadalupe Mountains Nat'l Park, TX   | 0.0                                   | 0   | 0  |
| 21. Haleakala National Park, HI          | 9.8                                   | 8   | **   |
| 22. Hawaii Volcanoes National Park, HI   | 14.1                                  | 17  | 1  |
| 23. Hot Springs National Park, AR        | 0.0                                   | 0   | 0  |
| 24. Isle Royale National Park, MI        | 0.0                                   | 0   | 0  |
| 25. Joshua Tree National Park, CA        | 102.6                                 | 111   | 6  |
| 26. Katmai National Park, AK             | 3.1                                   | 6   | **   |
| 27. Kenai Fjords National Park, Alaska   | 6.8                                   | 8   | 1  |
| 28. Kings Canyon National Park, CA       | 35.0                                  | 29  | 2  |
| 29. Kobuk Valley National Park, AK       | 3.3                                   | 2   | **   |
| 30. Lake Clark National Park, AK         | 6.4                                   | 8   | **   |
| 31. Lassen Volcanic National Park, CA    | 5.7                                   | 11  | 1  |
| 32. Mammoth Cave National Park, KY       | 5.3                                   | 5   | **   |
| 33. Mesa Verde National Park, CO         | 81.4                                  | 90  | 5  |
| 34. Mount Rainier National Park, WA      | 26.9                                  | 28  | 2  |
| 35. North Cascades National Park, WA     | 14.3                                  | 25  | 1  |
| 36. Olympic National Park, WA            | 15.4                                  | 27  | 1  |
| 37. Petrified Forest National Park, AZ   | 12.5                                  | 12  | 1  |

|                                      |      |    |   |
|--------------------------------------|------|----|---|
| 38. Rocky Mountain National Park, CO | 33.9 | 42 | 3 |
| 39. Saguaro National Park, AZ        | 35.2 | 35 | 2 |
| 40. Sequoia National Park, CA        | 98.7 | 99 | 5 |

Table 3: International Tour Package Visitors from Selected Countries to U.S. National Parks, 1998 - continued

| A. National park visited                 | B. Tour visitors to national park (000) | C. Tour visitor-days in national park (000) | D. Tour visitor spending associated with park (\$millions) |
|--|---|---|--|
| 41. Shenandoah National Park, VA         | 12.6                                    | 24  | 1  |
| 42. Theodore Roosevelt National Park, ND | 0.0                                     | 0   | 0  |
| 43. Valley Forge National Park, PA       | 3.7                                     | 4   | **   |
| 44. Virgin Islands National Park, USVI   | 0.6                                     | 1   | **   |
| 45. Voyageurs National Park, MN          | 0.0                                     | 0   | 0  |
| 46. Wind Cave National Park, SD          | 7.3                                     | 7   | **   |
| 47. Wrangell-St. Elias National Park, AK | 1.8                                     | 2   | **   |
| 48. Yellowstone National Park, WY        | 98.0                                    | 182   | 11   |
| 49. Yosemite National Park, CA           | 370.8                                   | 586   | 35   |
| 50. Zion National Park, UT               | 258.8                                   | 303   | 19   |
| Total                                    | 2,731                                   | 3,460                                       | \$208  |

\*less than 500

\*\*less than \$500,000

Source: International Tour Inventory

The Grand Canyon National Park dominates the list with 18 percent of all tour visits, visitor-days, and associated visitor spending. Yosemite National Park was second in impact, followed by Death Valley, Bryce Canyon and Zion National Parks. At the other end of the scale, Virgin Islands and Carlsbad Caverns National Parks show the least measurable impact of foreign tour package visits in 1998.

Table 4 presents certain analytical measures of the foreign tour visits to the 43 parks with measurable impact. Column B shows the mean number of visitor-days spent in each park by tour package visitors. Dry Tortugas and Katmai National Parks show the highest mean days per foreign tour package visit at 2.0, against the average for all National parks of 1.3 visitor-days. On the other hand, Glacier Bay, Haleakala, Kings Canyon and Kobuk Valley National Parks indicate mean visitor-days for these packages of less than one.

International tour operators spent \$76 for the average international tour package visitor to U.S. National Parks in 1998. This ranged from \$131 for visitors to Denali National Park, to less than \$50 for visitors to Haleakala and Kings Canyon National Parks. On a per-day basis, tour operators spent \$60 on the average in and around National Parks for their international package tourists in 1998. This ranged

from \$73 for visitors to Denali National Park to below \$52 per day at Kings Canyon National Park.

In conclusion, the International Tour Inventory estimated that 881 thousand visitors on package tours from ten countries spent \$208 million associated with individual National Parks in 1998. If these spending patterns are representative of all foreign visitors to National Parks for the year, then expenditures by these 4.86 million visitors totaled around \$1.1 billion directly associated with visiting individual National Parks. If visitor expenditures associated with other NPS areas (e.g., National Historic Sites, National Monuments, National Recreation Areas) were included, the expenditure total might be twice as much or higher- a significant portion of the \$71 billion spent in the U.S. by all international visitors in 1998.

Table 4: Analytical Measures of International Tour Package Visitors from Selected Countries to U.S. National Parks, 1998

| A. National Park visited                    | B. Mean visitor-days | C. Mean spending per visit | D. Mean spending per visitor-day |
|---|----------------------|----------------------------|----------------------------------|
| 1. Acadia National Park, ME                 | 1.7                  | \$96                       | \$55                             |
| 2. Arches National Park, UT                 | 1.1                  | 68                         | 63                               |
| 3. Badlands National Park, SD               | 1.0                  | 69                         | 69                               |
| 4. Bryce Canyon National Park, UT           | 1.3                  | 80                         | 62                               |
| 5. Canyonlands National Park, UT            | 1.0                  | 67                         | 67                               |
| 6. Capitol Reef National Park, UT           | 1.0                  | 57                         | 57                               |
| 7. Crater Lake National Park, OR            | 1.7                  | 114                        | 65                               |
| 8. Carlsbad Caverns National Park, NM       | 1.0                  | 53                         | 53                               |
| 9. Death Valley National Park, CA           | 1.1                  | 61                         | 57                               |
| 10. Denali National Park, AK                | 1.8                  | 131                        | 73                               |
| 11. Dry Tortugas National Park, FL          | 2.0                  | 107                        | 53                               |
| 12. Everglades National Park, FL            | 1.4                  | 78                         | 57                               |
| 13. Glacier National Park, MT               | 1.3                  | 82                         | 63                               |
| 14. Glacier Bay National Park, AK           | 0.9                  | 69                         | 76                               |
| 15. Grand Canyon National Park, AZ          | 1.3                  | 79                         | 61                               |
| 16. Grand Teton National Park, WY           | 1.0                  | 63                         | 63                               |
| 17. Great Smoky Mountains National Park, TN | 1.0                  | 58                         | 58                               |
| 18. Haleakala National Park, HI             | 0.8                  | 49                         | 61                               |
| 19. Hawaii Volcanoes National Park, HI      | 1.2                  | 67                         | 57                               |
| 20. Joshua Tree National Park, CA           | 1.1                  | 63                         | 58                               |
| 21. Katmai National Park, AK                | 2.0                  | 107                        | 53                               |
| 22. Kenai Fjords National Park, AK          | 1.2                  | 77                         | 63                               |
| 23. Kings Canyon National Park, CA          | 0.8                  | 44                         | 54                               |
| 24. Kobuk Valley National Park, AK          | 0.5                  | 50                         | 99                               |
| 25. Lake Clark National Park, AK            | 1.2                  | 77                         | 63                               |
| 26. Lassen Volcanic National Park, CA       | 2.0                  | 126                        | 63                               |
| 27. Mammoth Cave National Park, KY          | 1.0                  | 65                         | 62                               |
| 28. Mesa Verde National Park, CO            | 1.1                  | 62                         | 56                               |
| 29. Mount Rainer National Park, WA          | 1.1                  | 69                         | 65                               |
| 30. North Cascades National Park, WA        | 1.8                  | 95                         | 53                               |
| 31. Olympic National Park, WA               | 1.8                  | 96                         | 54                               |
| 32. Petrified Forest National Park, AZ      | 1.0                  | 54                         | 54                               |
| 33. Rocky Mountain National Park, CO        | 1.2                  | 79                         | 64                               |
| 34. Saguaro National Park, AZ               | 1.0                  | 61                         | 61                               |
| 35. Sequoia National Park, CA               | 1.0                  | 51                         | 51                               |
| 36. Shenandoah National Park, VA            | 1.9                  | 118                        | 62                               |
| 37. Valley Forge National Park, PA          | 1.0                  | 99                         | 99                               |
| 38. Virgin Islands National Park, USVI      | 1.0                  | 53                         | 53                               |

|  |     |      |      |
|--|-----|------|------|
| 39. Wind Cave National Park, SD          | 1.0 | 62   | 62   |
| 40. Wrangell-St. Elias National Park, AK | 1.0 | 99   | 99   |
| 41. Yellowstone National Park, WY        | 1.9 | 116  | 62   |
| 42. Yosemite National Park, CA           | 1.6 | 93   | 59   |
| 43. Zion National Park, UT               | 1.2 | 72   | 61   |
| Overall                                  | 1.3 | \$76 | \$60 |

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## Findings – National Park features important to international tour operators

International Tour Inventory questions were also designed to identify what qualities tour operators value most when deciding whether to include an individual National Park in a package tour itinerary. Each respondent was asked to rate 17 features on a scale of zero through 4, with 4 being “very important” and zero being “not important”, each of the qualities listed. The questions were developed from the workshop discussion with tour operators, tour wholesalers, receptive service operators, park concessionaires, and others experienced in the behavior and preferences of international travelers visiting the United States held during the first phase of this project and described in the earlier report, *An Exploratory Study of International Travel to U.S. National Parks, Volume I*.

The responses from participating tour operators by individual country and overall are summarized in Table 5. Appendix D includes the overall statistical analyses of these questions, as a whole, and also broken down by country.

Overall, when all of the responses are analyzed collectively, it appears that “scenic beauty and other natural features” with a mean of 3.9, is the leading quality that tour operators look for within a park, followed closely by “visitor safety and security” at a mean of 3.5. “Good roads to and from the park” as well as “educational or interpretive programs by National Park staff in visitors’ native language” also rated highly at 3.3 and 3.2, respectively. Of least importance within the overall group appears to be “campgrounds and other facilities” and “airport proximity to the park” at 1.6 and 1.8, respectively.

Looking at each country separately is also important because each one may well generate different types of visitors with varying needs and interests. Therefore, qualities important to one may not necessarily be important to others. The following is a brief analysis of the results from each country.

**Australia:** Tour operators from Australia rated “scenic beauty and other natural features” and “good roads to and from the park” both at 3.9, followed by “high quality accommodations” and “good roads within the park” at 3.6. Least important to the Australian respondents is “campgrounds” at 1.3 and “deserts or other areas that have been featured in Hollywood movies” at 1.9.

**Brazil:** Only two responses were received from Brazil, therefore it is impossible to generalize to a larger Brazilian international tour operator population. However, both respondents felt that “scenic beauty” and “visitor safety and security” were most important. Of least importance is “campgrounds”.

**France:** Tour operators bringing visitors from France noted that “scenic beauty” was most important at 4.0, followed by “visitor safety and security” at 3.6 and

“wilderness trails and other natural experiences” at 3.29. Of least importance to these respondents is “education and interpretive programs by National Park staff in English” at 0.7 and “campgrounds” at 1.1.

**Germany:** German tour operators followed the general trend by responding that “scenic beauty” and “good roads to and from the park” were the most important at 3.5 each. Of least importance are “airport proximity” at 1.5 and “high quality accommodations” at 1.9.

**Italy:** Respondents from Italy agreed that “scenic beauty” and “visitor safety” are most important at 3.8, followed by “educational brochures/maps in native language” at 3.5. “Campgrounds” were rated least important at 1.3.

**Netherlands:** Tour operator respondents from Holland rated “scenic beauty” at a maximum of 4.0, followed by “good roads within park” at 3.2. Of least importance is “airport proximately” at 1.4.

**New Zealand:** New Zealand tour operators also rated “scenic beauty” as the most important quality for including a National Park in their packages with 4.0, followed by “visitor safety and security” at 3.8. “Deserts” and “campgrounds” rated least at 1.2 and 1.6, respectively.

**Spain:** Spanish tour operators also rated “scenic beauty” as the most important National Park feature at the maximum 4.0, along with “educational brochures/maps in native language”. This was closely followed by “visitor safety and security” at 3.7. Least important were “educational and interpretive programs in English” at 0.5 and “campgrounds” at 1.3.

**United Kingdom:** “Scenic beauty” rated most important among these tour operators at 3.9, followed by “visitor safety and security” at 3.6. The least important quality for British respondents is “campgrounds” at 1.0 and “airport proximity” at 1.3.

Overall, it would appear that “scenic beauty” is by far the most important quality desired by tour operators when deciding whether to include a National Park in a tour package. Visitor safety, good roads to and from the park, and educational brochures/maps in native language were also scored as important.

Table 5: Tour Operators' Importance of Selected Features for Including a National Park in a Tour Package

| National Park feature  | All responses | Australia | Brazil | France | Germany | Italy | Japan | Netherlands | New Zealand | Spain | United Kingdom |
|--|---------------|-----------|--------|--------|---------|-------|-------|-------------|-------------|-------|----------------|
| 1.1 Scenic beauty and other natural features                   | 3.9           | 3.9       | 4.0    | 4.0    | 3.5     | 3.8   | 4.0   | 4.0         | 4.0         | 4.0   | 3.9            |
| 1.2 Wilderness trails and nature experiences                   | 2.9           | 2.9       | 3.0    | 3.3    | 2.8     | 2.8   | 4.0   | 2.8         | 2.8         | 2.7   | 2.6            |
| 1.3. High quality accommodations in or near the park           | 2.6           | 3.6       | 2.0    | 3.0    | 1.9     | 2.8   | 2.0   | 2.4         | 2.4         | 2.3   | 2.6            |
| 1.4. Medium quality accommodations in or near the park         | 2.9           | 2.9       | 2.5    | 3.0    | 2.8     | 2.7   | 3.0   | 3.2         | 3.6         | 2.0   | 3.0            |
| 1.5. Campgrounds and other camping facilities                  | 1.6           | 1.3       | 1.0    | 1.1    | 2.3     | 1.3   | 4.0   | 2.2         | 1.6         | 1.3   | 1.0            |
| 1.6. Low park entry fees                                       | 2.6           | 2.3       | 3.0    | 2.1    | 2.5     | 2.8   | 3.0   | 2.6         | 3.6         | 2.3   | 2.1            |
| 1.7. Historic or cultural sites, like Native American villages | 2.8           | 3.1       | 2.0    | 3.0    | 2.5     | 2.8   | 4.0   | 2.5         | 3.0         | 2.7   | 2.6            |
| 1.8. Deserts or other areas featured in Hollywood movies       | 2.3           | 1.9       | 2.5    | 3.1    | 2.1     | 3.2   | 3.0   | 2.4         | 1.2         | 2.3   | 2.0            |
| 1.9. Good roads to and from park                               | 3.3           | 3.9       | 3.5    | 2.6    | 3.5     | 3.5   | 3.0   | 3.5         | 3.0         | 2.3   | 3.0            |
| 1.10. Good roads within park                                   | 3.0           | 3.6       | 3.5    | 2.3    | 3.0     | 2.8   | 3.0   | 3.2         | 3.2         | 2.7   | 3.0            |
| 1.11. Airport near park  | 1.8           | 2.3       | 2.0    | 1.6    | 1.5     | 2.2   | 3.0   | 1.4         | 2.4         | 2.7   | 1.3            |

Note: scale ranged from 0 (no importance) to 4 (very important)

Table 5: Tour Operators' Importance of Selected Features for Including a National Park in a Tour Package  
- continued

| National Park feature   | All responses | Australia | Brazil | France | Germany | Italy | Japan | Netherlands | New Zealand | Spain | United Kingdom |
|---|---------------|-----------|--------|--------|---------|-------|-------|-------------|-------------|-------|----------------|
| 1.12. Educational or interpretive programs by NPS staff in English          | 2.2           | 2.7       | 2.5    | 0.7    | 2.1     | 2.0   | 3.0   | 2.6         | 3.0         | 0.5   | 2.6            |
| 1.13. Educational or interpretive programs by NPS staff in native language  | 2.8           | 2.8       | 2.5    | 3.3    | 2.8     | 3.8   | 3.0   | 2.4         | 2.3         | 3.3   | 2.0            |
| 1.14. Educational brochures and maps in your visitors' native language      | 3.2           | 3.2       | 3.0    | 3.7    | 3.1     | 3.5   | 4.0   | 2.8         | 3.3         | 4.0   | 2.3            |
| 1.15. Directional and informational signs in your visitors' native language | 2.6           | 2.3       | 2.5    | 2.4    | 2.5     | 3.2   | 4.0   | 2.1         | 3.0         | 3.7   | 2.2            |
| 1.16. Uncrowded roads and sites in park                                     | 2.7           | 2.3       | 3.0    | 3.1    | 2.1     | 2.3   | 3.0   | 3.1         | 3.4         | 3.0   | 2.3            |
| 1.17. Visitor safety and security in park                                   | 3.5           | 3.3       | 4.0    | 3.6    | 3.3     | 3.8   | 4.0   | 3.1         | 3.8         | 3.7   | 3.6            |

|                     |    |   |   |   |   |   |   |    |   |   |   |
|---------------------|----|---|---|---|---|---|---|----|---|---|---|
| Number of responses | 57 | 7 | 2 | 7 | 8 | 6 | 1 | 11 | 5 | 3 | 7 |
|---------------------|----|---|---|---|---|---|---|----|---|---|---|

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Note: scale ranged from 0 (no importance) to 4 (very important)

Source: International Tour Inventory

## Findings – tour operators views on visitor facilitation

The International Tour Inventory instrument asked tour operators to enumerate in an open-ended format (a) what the NPS can do improve tour package visitors' experiences and (b) what the NPS can do to facilitate the operators' efforts to bring visitors to National Parks.

Overall, those that completed this portion of the survey suggested improvement in three general areas, which are:

- Increase marketing, particularly in foreign languages. This includes marketing in overseas media as well as placing informational offices in other countries.
- Increase educational material available. It appears that a single brochure that includes information about each National Park would be very helpful.
- Simplify price structures and stabilize costs. Various respondents requested either the simplification of the NPS price structure or the development of an "International Pass" similar to the Golden Eagle Pass. Respondents also asked that NPS consider their need to establish tour prices a year in advance when considering increasing park admission fees.

Following are the verbatim comments by country of tour operator taken from those respondents that completed this portion of the survey, broken down by country. The question posed was: **"What can the National Park Service do to improve your visitor's experiences in U.S. National Parks?"**

### Australia

1. The main reason Australians travel to visit the National Parks in U.S. is to experience their uniqueness and natural beauty. Australia, like the U.S. is fortunate to be home to unique wilderness areas that have been designated as NP so they will be preserved for the enjoyment of future generations. Surely, the most important responsibility of the NPS is to preserve these areas. If they are successful, visitors from Australia will continue to frequent the U.S. NP in years to come. In other words, if the NPS is able to protect the parks from commercialism, our visitor's experiences will continue to live up to their lofty expectations.
2. Most of our customers travel on escorted coach tours from a nearby gateway city however, some drive and we find it difficult to secure enough accommodation on a year round basis nearby or inside the parks. Most like to be within an hour of the park where possible.

3. Ensure roads are open as much as possible. Make sure advises are sent out to wholesalers when roads are closed. Ensure up to date information is sent out on the parks.
4. Brief interpretive programs/ presentations no longer than one-half to one hour in length.
5. Evening presentations
6. Native presentations (not park rangers)
7. Provide restroom facilities
8. Make literature more accessible in our country

### **Brazil**

1. Portuguese or Spanish speaking guides in the parks
2. Nothing

### **France**

1. Use of a foreign language by more staff
2. Although it is not deciding if we include a park in a program, clients would appreciate if the Park staff could speak their language (especially for a guided visit).
3. Information kits (including maps) to be mailed upon request to either travel agencies or clients. We (travel agencies) understand that shipping may have a cost and are prepared to pay some fees
4. More documentation in foreign languages in all the National Parks and monuments.
5. Have multilingual staff and/or brochures so that foreigners can benefit fully from their park experience.
6. Give more room availability
7. Avoid the visitors complaints on their way back home for the park accommodation rates we are charging, which are higher then your published rack rates, due to the low commission policy you have (NP) tour operators must receive a suitable commission in order to pay the retail agents.

### **Germany**

1. Advertise in German media to increase interest.
2. Create special packages with any kind of added value for German customers.
3. More advertisement within Germany to increase interest
4. Make it safe and easy to arrive

5. Give international visitors a chance to pre-buy entrance fees - or invent an international pass valid for all parks at a flat fee (foreigners will have more time to see all parks) - which could support a ---- in USD.
6. Friendly open services
7. Interesting information about the park
8. Unique park merchandise in park stores
9. Maintain high quality accessibility through good roads and signage; advertising and awareness programs.
10. Maintain safety and security programs - make our visitors feel that they are welcome and that there is always help and/or assistance nearby (though they would hardly ever avail themselves of it!)
11. More information in German language
12. Native language brochures and maps are top-priority

## Italy

1. Probably one of the most relevant issues is the one about the “educational or interpretive programs by National Park staff” in Italian. This is mainly due to the general lack of fluency that most of our clients have with English language.
2. As you specified in some of the 17 points is really important to have: Italian guides, information about safety, itineraries concerning natural areas, promotional videos in Italian language, guided tours, more connections between tourism and culture, natives and history.
3. Referring the accommodation, think you already have good choices. All these information should be addressed to tour operators.
4. Interpreters - high season accommodations at affordable prices for families.
5. We believe that National Parks in USA are well maintained but sometimes we need more space in hotels near the park or in the park.
6. It would be necessary to have brochures of the parks in Italian
7. Narrated “Imax theater” in language or other video “means” so that if visitor has limited time, can get a good idea of what to see and what not. Visitors with enough time, on the other hand, can program the visit as they see it best.
8. Highlight better through the media the National Parks in the USA or cooperative through the Italian tour operators by supporting the catalogues that have NP's in their brochures.

## Japan

1. Teach camping life

## **Netherlands**

1. Less expensive, more guidance, better roads, reduce number of visitors, interactive with wildlife and natives, more hotel accommodations in local style and lower rates for these accommodations
2. Provide more information about hikes in park (start/length/scenery).
3. Provide more service in restaurants in park – very limited.
4. More information available here in Holland to inform guests better about expectations.
5. Limit the amount of people allowed to enter the park at the same time.
6. Maybe have an area where visitors will be able to see all the different wild animals, who live in that park. Some kind of wild animal park, because many times you visit the park, you are just not lucky to get to see any wildlife.
7. Also, give more spiritual information, about the native way of living. For example, how they threatened their ill people around fire with music, etc. Very important for the world to understand that way of living and also talk about the problems the natives have to survive in high tech USA. They should be helped instead of discriminated and the American and other countries visitors could learn a lot of very important things about life from the natives. Appreciate them in the parks instead of discriminate them.
8. More brochures available that we can send to clients with map. Activities, possibilities for overnight stay.
9. Have one contact person for all the parks.
10. Have up-to-date info (especially on the different prices) available on the internet.

## **New Zealand**

1. Lower entrance fees
2. Have good sign/directional signs
3. Cleanliness of the park
4. Feedback through participant evaluation forms is consistently very positive. You are doing an excellent job!
5. More maps and information available prior to the arrival in the USA
6. Proactively advertise in conjunction with inbound operators to make customers aware of the park and signs
7. Training for our staff on the main parks
8. Develop more natural viewing platforms or areas so that guests can sit and watch the wildlife in their natural habitat, for example around watering holes or breeding areas.

## Spain

1. Under my personal point of view, everything is OK
2. Good food and beverage facilities.
3. Information in Spanish.
4. More hotels in and around the parks
5. Provide extensive information detailed information on brochures and written documents for visitors.

## United Kingdom

1. Allow us to provide visitors with Golden Eagle Passports before they leave the UK. This would enable us to include the cost in their holiday package that most customers would prefer and save the customer time at the parks.
2. Rates for National Park properties must be decided the previous year, latest September once rates have been agreed they must be held for the year. No increases midway through the season.
3. Make booking of accommodations and services (such as trail riding, mountain biking, guided tours within the parks) easier (via internet?) and commissionable to booking agents.
4. To date the feedback we receive is that most passengers really enjoy the visits to the parks as I have mentioned in question 4. Europeans can generally find the facilities in the parks of a much better standard than Europe.
5. Having information safety signage in multiple languages can be a big help.
6. Offer better standards of accommodations at key parks such as Grand Canyon
7. We provide coach tours - it would be great if the NPS could provide step-on guides/rangers to give guided tours.

Following are the verbatim comments by country of tour operator taken from those respondents who answered the following question: **“What can the National Park Service do to facilitate your efforts to bring visitors to National Parks?”**

## Australia

1. Co-op promotion
2. Provide brochures/ maps in advance )
3. Provide color transparencies and/or CD-Rom images )
4. Provide promotional video (both VHS and PAL formats)
5. Low entrance fees

6. Simple fee structure
7. Concessionaires who are easy to work with.
8. Improve availability of accommodation within parks and have wholesale rates available by Pow Wow each year
9. Keep costs minimal, where lodging is run by the parks. Ensure they are kept up to date, repaired wise and clean
10. Encourage more small hotels to be built in and outside the NP.
11. Make it easier to book accommodation in the park. It is far too bureaucratic
12. Also pricing is not released well enough in advance
13. The travel business (wholesalers) are not protected enough with commission structures. Therefore, there is a reluctance to sell the product.
14. The majority of Adventure World clients travel to US NP on tours where the parks have been included as a highlight in their itinerary. Does the NPS publish a single booklet that provides descriptions of all US NP? If there were a single reference piece that listed details such as history, facilities, accessibility, seasonality, accommodation, activities, contact details, etc it would be of great value. There are a host of NP listed on page 3 for which I have no information, therefore it is unlikely they would ever be considered for inclusion in the itinerary of an Australian on vacation. If such a directory does exist, a wider distribution, including overseas tour operators would be highly recommended.
15. Make available more info-material and slides to wholesalers and brochure producers. This will help to promote the parks – but also to voice your concerns about nature and development (42)

## **Brazil**

1. Seminars for travel agents
2. Fam tours
3. Videos
4. Come to Brazil to promote the parks

## **France**

1. Create an overseas visitors pass
2. Brochures and maps edited in French to put in the documents before departure
3. More availability in the accommodations within the parks (French market is a late booking market, and it is a problem regarding this fact).
4. Give us timely, up to date information in foreign language so that we can educate staff and travel agents about NP experience
5. Better exposure on the foreign markets (advertising public and trade shows, press, trips and various promotional materials to be and trade distributed on the markets)
6. More information (in French) and a tourist office in Paris

7. Promotion in France through TV/movies/magazines
8. Detailed and professional information for the travel agencies, like the travel planners edited by the states convention bureaus

### **Germany**

1. Sending updates on changes, accessibility, fees, etc.
2. Keep us on mailing list, if possible provide CD-Rom for planning NP visits
3. More space in and near parks.
4. More advertising and awareness. Tour operator and travel agent info programs (mailings/brochure availability, etc). Participation in trade and public exhibitions (TIA Pow Wow/ITB/WTM, etc).
5. Help make the government fund a tourist office (formerly USTTA) - Absolutely scandalous that the richest country in the world doesn't have one!
6. Joining fares as Pow Wow or ITB
7. Participate in tour operator brochures, ads, or marketing funds.
8. Helping in fam trips/press trips

### **Italy**

1. More advertising in Italian national magazines would be one of the possible actions to obtain more attention from the public in our country.
2. You can make available to use better prices for tours, services, hotel rates in order to let us better work in economic terms. So that we ask service, prices and information. Just a few but in a good way.
3. Make website links between yours and ours.
4. The product is very little known to travel agency staff. More videos and educational.
5. More information (brochures, magazine) in the Italian market. It would be great to have a representative in Italy of the U.S. National Parks.
6. Provide maps/brochures to tour operators in order to be able to have at least an idea of exact location and features of the park
7. Videotapes of the parks
8. Decrease the entrance fee (at least for groups or large parties coming from abroad)

### **Japan**

1. Please inform detail access to reach the National Parks for visitors come from other country

## Netherlands

1. More promotion into the Dutch market in the Dutch market in magazines, trade magazines, internet, TV, supplier like CD-Roms with images that can be used for our own promotional brochures.
2. Support media exposure
3. Support cooperation in advertising
4. Promotion on the Dutch market, not only the "big" ones that are known.
5. Provide maps of National Parks already in travel documents in the Netherlands.
6. If the National Park service decides to raise their entrance fees they should realize that tour operators, receptive operators in the USA and Canada pre-cost their programs a year in advance! So when change is needed inform everybody especially the tourism sector in the states about the increase, so we will not loose all this money. Once you print a price you cannot increase it for European visitors. Especially on a west coast tour where they visit 5 to 6 parks and are charged per person. This in general is costed a year in advance and so when you decide to change fees from .50 cents to \$2 the operators eats the difference (happened approximately 10 years ago). So please think about the tourism sector when you change prices.
7. Also, bus drivers and tour guides should not have to pay to the park service. They are selling the park and explain the park to the passengers on the bus.

## New Zealand

1. Put out a publication covering all the National Parks in one book, listing the facilities, accommodations, etc in each park.
2. Brochure, in small easy to read pamphlets.
3. Advise how to get there from nearest major cities.
4. Twice a year mailing of new products/services/opportunities.
5. Availability of videos introducing each park or a group of parks in the same region – natural resources, wildlife, visitor services, accommodations, etc.
6. A centralized information/booking service for all of your parks
7. Every 2 or 3 years, an invitation for group tour managers specializing in this area to visit several parks.
8. Maps/Information
9. Develop a comprehensive website that also updates with seasonal activity and information.

## Spain

1. Seminars to our marketing staff

2. Promotion to inform general public about parks beauty
3. Consumer indirect publicity (through TV programs and magazine articles)
4. Provide sets of general information about the parks (we receive information only from very few parks)
5. Also should be interesting to get direct contracts between the hotels and lodges and best sellers tour operators specialized on USA

### **United Kingdom**

1. Provide us with good quality photographs (both slide and digital images JPEG & GIF) to assist us in website and brochure production.
2. A regular newsletter emailed to us to keep us up to date on what's happening at the parks, traffic management, weather conditions (pass opening and date estimates), ranger programs, etc.
3. Ease of booking availability.
4. No additional taxes to be applied once the rates have been agreed. Rates given should not be published later on clients arrival.
5. A supply of the map guides for each and every, National Park would be useful point of sale – How about a ring binder or manual with all this information collectively held?
6. Perhaps each park could list all relevant bullet points such as climate, seasonal access, contact phone/fax/email, etc.
7. Would it be possible to enable annual park passes to be sold through UK tour operators or travel agents? This would ensure a commitment before they travel.
8. Europeans will generally visit National Parks as part of a tour of places like the Grand Canyon and Yosemite as part of a driving holiday. I think obtaining very detailed information on the parks, facilities, closet major city, best route from closest major cities, etc., best times of the year to visit major features, etc.
9. Provide better international tour rates to operators for accommodation at National Park lodges. We must be able to access net discounted rates – currently receptives only offer retail rates and charge booking fees to make reservations – this puts clients and operators such as ourselves off of offering the products.
10. Very little – the parks are great, but our problem in the UK is encouraging customers to buy the holidays in the first place!
11. Ease of obtaining reservations in National Park locations and the release of the following year's rates early enough to use in any planned program.

## Methodology

This International Tour Inventory is based on two questionnaires sent to a sample of international tour operators bringing their nationals to the United States on package tours. The first wave questionnaire was sent to identify those foreign tour operators who bring foreign visitors to the U.S. and include at least one U.S. National Park within their itineraries. The second wave questionnaire was sent only to those respondents to the first wave who stated that they included at least one National Park in their tour packages in 1998.

### General Population Characteristics

The survey population used in the study consists of foreign tour operators who offer package tours to the United States to their residents. Eleven countries were chosen based on number of visitors to the U.S. who visited NPS areas as identified through the U.S. Department of Commerce's 1998 *Survey of International Air Travelers*. The first wave questionnaire was sent to tour operators in Australia, Brazil, France, Germany, Italy, Japan, the Netherlands, New Zealand, Spain, Taiwan and the United Kingdom.

### Target Population and Sample Units

Unfortunately, there is no one consolidated source listing all of the international tour operators who bring visitors to the United States. However, the Travel Industry Association of America (TIA) holds an annual "International Pow Wow" that annually brings together foreign tour operators who transport visitors to the U.S. It is believed that the great majority of international tour operators who conduct package tours to the U.S. attend this meeting, and that the roster of attendees is the best possible list of such tour operators eligible for this study. Therefore, probability samples from each of the 11 countries were drawn from the database of the 1999 International Pow Wow attendees to ensure that all attendees listed had a known, nonzero chance to be selected for this study. The total sample numbered 375.

### Response Rates

Of the 375 International Tour Inventory forms sent out in wave one to tour operators, 98 were returned for a response rate of 26 percent. Of those that responded to this first questionnaire, 96 indicated that they did conduct tours within the U.S. involving one or more National Parks. The second Inventory questionnaire was then sent to those 96 companies. Of those who were sent the second form, 58 responded, resulting in a response rate of 60 percent. Given the complexity of the survey instrument, such a low response rate is to be expected. However, such a low response rate casts doubt on the validity of the proposition that the respondents represented all

international tour operators bringing foreign visitors to the U.S. from the 11 countries selected. Indeed, no tour operators based in Taiwan returned the second wave questionnaire. Consequently, this study should be considered exploratory rather than conclusive on the information sought.

### Response Enhancement

Several steps were taken in order to enhance survey response. Letters transmitting the questionnaires were individually addressed and signed by the principal investigator. Faxes were sent to tour operators who had not responded asking them to do so. A monetary incentive of \$20 for completing the first wave inventory form was offered and paid to respondents. A second \$40 award was offered to those completing wave 2, along with a report on the results of the inventory. Once this report is approved by the NPS, the monetary incentive and reports will be mailed to second wave respondents. Staff quickly followed up on emails, faxes and telephone inquiries from the sample. See Appendix C for a log of these activities.

### Reference Period

In addition to the information collected in through the survey instruments, it was also necessary to utilize the information from the U.S. Department of Commerce In-flight Survey. Because 1998 is the year of the latest *Survey of International Air Travelers* published by Department of Commerce in late 1999, all data are intended to reflect 1998 activity. Given that most of these countries enjoy relative economic stability, it is not believed that the two-year time lapse from 1998 to the present will greatly impact the study outcomes.

### Venue and Collection Methods

Both inventory instruments were distributed via airmail. After one to two months, questionnaires were sent to nonrespondents by fax to encourage response.

### Data Collection Instrument and Cover Letter

The questionnaire was developed by IITS and then submitted for approval to the NPS. Each question was developed on the basis of the problem definition and data required. Copies of the two inventory instruments are included in Appendix B.

A cover letter explaining the importance of the study was distributed along with the survey. The cover letter explained the monetary incentive for completing the survey.

### Pilot Survey

Prior to distributing the survey to the entire sample, a pilot survey was sent to tour operators from each of the eleven countries. Two tour operators were selected at random from each country from the TIA list to receive the first wave instrument. Those who responded positively were then sent the second instrument. Several minor adjustments were made to the International Tour Inventory instruments as based on results of the pilot survey.

### Tabulations

Normal data entry processes were used in order to record and tabulate survey results. Responses to question 1 of the wave 2 questionnaire were analyzed through SAS Statview to obtain basic statistical tables. Responses to questions 4 and 5 were entered into MS Excel spreadsheets for estimation and analyses of the number of visitors, visitor-days and expenditures associated with the individual National Parks.

## Appendix A

**REVISED STUDY WORK PLAN**  
**NATIONAL PARK SERVICE COOPERATIVE AGREEMENT NO. 1443CA000194018**  
**MODIFICATION NO. 00009,**  
**“EXPLORATORY STUDY OF INTERNATIONAL TRAVEL TO U.S. NATIONAL PARKS”**

1. Discussions with the International Federation of Tour Operators indicated that the best list of overseas tour operators bringing their nationals to the U.S. is the Travel Industry Association of America’s International Pow Wow *Delegate Registry*. The International Institute of Tourism Studies (hereafter, “we”) will obtain the most recent version listing names, addresses and other information regarding overseas tour operators in order to conduct an international tour package inventory.
2. We have reviewed tabulations from the U.S. Department of Commerce’s In-flight Survey of International Air Travelers for 1998 and found the following set comprises the top ten countries generating package tour visitors, or visitors to U.S. National Parks:
  - Australia
  - Brazil
  - France
  - Germany
  - Italy
  - Japan
  - Netherlands
  - New Zealand
  - Spain
  - Taiwan
  - United Kingdom
3. We will select a maximum of 50 tour operators from each country from the *Delegate Registry*, for a total of 350 or more tour operators in total to be contacted.
4. We will develop report forms for this group with the approval of the National Park Service. Questions recommended for discussion appear in Annex A to this plan. These are designed to elicit the information needed to estimate the number of foreign tour package visitors to individual National Parks, and to gather information on how tour operators choose parks for their itineraries and how the NPS could

facilitate their efforts. The latter are taken from the recommendations in the initial report on this project.

5. We will develop a schedule of mailings of report forms to the selected tour operators. We will offer appropriate incentives and follow-up contacts to encourage returns of the forms. We anticipate the first mailing will occur in September, 1999, and the tabulations of the final returns will occur in mid-October.
6. We will obtain tabulations from the U.S. Department of Commerce's In-Flight Survey of International Air Travelers for 1998 covering all visitors from the country set in (2) above traveling on individual and group package tours. This provides the base numbers of individual and group tour visitors to the U.S. Data from the tour package inventory will indicate the proportion of each of these two sets visiting one or more National Parks, and the actual parks visited. Applying these proportions to the base for each country will generate estimates of the number of these visitors to each park. Average expenditures from the In-flight Survey along with information collected from the tour operators will be used to estimate total expenditures in the U.S. by these visitors.
7. A draft report will be submitted to the National Park Service by October 31, 1999. Assuming comments are received by November 30, 1999, the final report will be submitted by December 31, 1999.

**APPENDIX B: INTERNATIONAL TOUR INVENTORY DATA COLLECTION FORMS**

**International Tour Inventory I**

Thank you for helping us with this inventory. Please answer all of the questions below as accurately as possible and return this completed form to us within one week. If you have any questions, please fax them to USA 202-994-1630 attention "International Tour Inventory", or e-mail them to frechtli@gwu.edu

10. For 1998, how many different tour programs (different tour itineraries) did you offer to the United States?

NUMBER OF TOUR PROGRAMS: \_\_\_\_\_

11. For 1998, how many visitors did you transport to the U.S. on these tour programs?

NUMBER OF VISITORS: \_\_\_\_\_

12. In 1998, did any of these tour programs include visits to any National Parks?

YES

NO

13. To whom should the payment for US\$20 be made out?

NAME: \_\_\_\_\_

Please indicate your correct name and address here:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please return this completed form in the envelope provided via air mail to:  
International Tour Inventory, 600 21<sup>st</sup> St. NW, George Washington University,  
Washington, DC 20052, USA.**

**THANK YOU FOR YOUR HELP!**

## International Tour Inventory, Part II

Thank you for helping us with this inventory. Please answer all of the questions below as accurately as possible and return this completed form to us within one week. If you have any questions, please fax them to USA 202-994-1630 attention "International Tour Inventory". or e-mail them to [frechtli@gwu.edu](mailto:frechtli@gwu.edu)

1. Listed below are a number of features of U.S. National Parks that tour operators have found important in deciding whether to include a park in a tour program or not. Please indicate by circling the appropriate number next to each feature how important it is to your decision to include a particular National Park in a tour itinerary: from zero meaning the feature has no importance at all to your decision, to 4 meaning that the feature is very important to this decision.

| FEATURES OF U.S. NATIONAL PARKS  | NO<br>IMPOR-<br>TANCE |   |   |   | VERY<br>IMPOR-<br>TANT |
|--|-----------------------|---|---|---|------------------------|
| 1. Scenic beauty and other natural features . . . . .                              | 0                     | 1 | 2 | 3 | 4                      |
| 2. Wilderness trails and nature experiences . . . . .                              | 0                     | 1 | 2 | 3 | 4                      |
| 3. High quality accommodations in or near the<br>Park . . . . .                    | 0                     | 1 | 2 | 3 | 4                      |
| 4. Medium quality accommodations in or near<br>Park . . . . .                      | 0                     | 1 | 2 | 3 | 4                      |
| 5. Campgrounds and other camping facilities . . . . .                              | 0                     | 1 | 2 | 3 | 4                      |
| 6. Low Park entry fees . . . . .   | 0                     | 1 | 2 | 3 | 4                      |
| 7. Historic or cultural sites, like Native American<br>villages . . . . .          | 0                     | 1 | 2 | 3 | 4                      |
| 8. Deserts or other areas that have been featured in<br>Hollywood movies . . . . . | 0                     | 1 | 2 | 3 | 4                      |
| 9. Good roads to and from the Park . . . . .                                       | 0                     | 1 | 2 | 3 | 4                      |
| 10. Good roads within the Park . . . . .   | 0                     | 1 | 2 | 3 | 4                      |
| 11. Airport nearby the Park . . . . .  | 0                     | 1 | 2 | 3 | 4                      |

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 12. Educational or interpretive programs by National Park staff in English .....                        | 0 | 1 | 2 | 3 | 4 |
| 13. Educational or interpretive programs by National Park staff in your visitors' native language ..... | 0 | 1 | 2 | 3 | 4 |
| 14. Educational brochures and maps in your visitors' native language .....                              | 0 | 1 | 2 | 3 | 4 |
| 15. Directional and information signs in your visitors' native language .....                           | 0 | 1 | 2 | 3 | 4 |
| 16. Uncrowded roads and sites in the Park .....   | 0 | 1 | 2 | 3 | 4 |
| 17. Visitor safety and security in the Park. ....   | 0 | 1 | 2 | 3 | 4 |

2. What can the National Park Service do to improve your visitors' experiences in U.S. National Parks? (Use the back of this form if you need additional space.)

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3. What can the National Park Service do to facilitate your efforts to bring visitors to National Parks? (Use the back of this form if you need additional space.)

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4. For 1998, please list below all of your tour programs that involved a visit to one or more National Parks, and the other information requested. If you offered more than 5 such tour programs, please list the 5 largest in terms of visitors.

| A. Individual tour programs/ itineraries | B. National Parks Visited (please use numbers from list below)* | C. Number of days in the U.S. | D. Number of days visiting National Parks | E. Number of visitors from your country | F. Price of this tour program per visitor in your currency |
|--|---|-------------------------------|---|---|--|
| Tour 1:                                  |   |                               |   |   |  |
| Tour 2:                                  |   |                               |   |   |  |
| Tour 3:                                  |   |                               |   |   |  |
| Tour 4:                                  |   |                               |   |   |  |
| Tour 5:                                  |   |                               |   |   |  |

\*U.S. National Parks

1. Acadia National Park, Maine
2. Arches National Park, Utah
3. Badlands National Park, South Dakota
4. Big Bend National Park, Texas
5. Bryce Canyon National Park, Utah
6. Canyonlands National Park, Utah
7. Capitol Reef National Park
8. Carlsbad Caverns National Park, New Mexico
9. Crater Lake National Park, Oregon
10. Death Valley National Park, California
11. Denali National Park, Alaska
12. Dry Tortugas National Park, Florida
13. Everglades National Park, Florida
14. Glacier National Park, Montana
15. Glacier Bay National Park, Alaska
16. Grand Canyon National Park, Arizona
17. Grand Teton National Park, Wyoming
18. Great Basin National Park, Nevada
19. Great Smoky Mountains National Park, Tennessee
20. Guadalupe Mountains National Park, Texas
21. Haleakala National Park, Hawaii
22. Hawaii Volcanoes National Park, Hawaii
23. Hot Springs National Park, Arkansas
24. Isle Royale National Park, Michigan
25. Joshua Tree National Park, California
26. Katmai National Park, Alaska
27. Kenai Fjords National Park, Alaska
28. Kings Canyon National Park, California
29. Kobuk Valley National Park, Alaska
30. Lake Clark National Park, Alaska
31. Lassen Volcanic National Park, California
32. Mammoth Cave National Park, Kentucky
33. Mesa Verde National Park, Colorado
34. Mount Rainer National Park, Washington
35. North Cascades National Park, Washington
36. Olympic National Park, Washington
37. Petrified Forest National Park, Arizona
38. Rocky Mountain National Park, Colorado
39. Saguaro National Park, Arizona

40. Sequoia National Park, California
41. Shenandoah National Park, Virginia
42. Theodore Roosevelt National Park,  
North Dakota
43. Virgin Islands National Park, U.S. Virgin  
Islands
44. Valley Forge National Park,  
Pennsylvania
45. Voyageurs National Park, Minnesota
46. Wind Cave National Park, South Dakota
47. Wrangell-St. Elias National Park, Alaska
48. Yellowstone National Park, Wyoming
49. Yosemite National Park, California
50. Zion National Park, Utah

5. For the typical group tour package including a National Park in 1998, what was the approximate percentage breakdown of your expenses?

- A. International air transportation \_\_\_\_\_%
  - B. Accommodations \_\_\_\_\_%
  - C. Other expenses incurred in the U.S. \_\_\_\_\_%
  - D. Other expenses incurred outside the U.S. \_\_\_\_\_%
- Total 100 %

6. To whom should the payment for US\$40 be made out?

NAME: \_\_\_\_\_

7. If you would like a copy of the report on this study, please check here:

If any information in the address label below is wrong, please indicate corrections here:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Please return this completed form in the envelope provided via air mail to:**  
**International Tour Inventory,**  
**George Washington University,**  
**600 Twenty-first Street, N.W., Washington, DC 20052, USA**  
**or fax to USA 202-994-1630**  
**THANK YOU FOR YOUR HELP!**

### Appendix C: Activity Log for the International Tour Inventory

| Activity Performed  | Date             | Notes  |
|---|------------------|--|
| 1. Pilot Survey Distributed   | 10/5/99          | 22 tour operators received pilot survey  |
| 2. Reminder Fax for Pilot sent  | 10/14/99         | 22 faxes distributed, 17 faxes successfully sent to pilot participants, 4 faxes were wrong number and 1 had already returned survey. |
| 3. 2 <sup>nd</sup> Reminder Fax for pilot sent                                | 10/29/99         | 17 sent  |
| 4. Responses sent to respondents of pilot with check                          | 12/16/99         | 3 negative responses<br>8 positive responses<br>Total = 11 out of 17   |
| 5. Positive pilot responses returned with the second wave of survey           | 12/16/99         | 8 Pilot Survey of wave 2 sent  |
| 6. Survey wave 1 sent to entire sample  | 11/30/99         | 375 surveys sent via mail  |
| 7. Reminder fax for entire sample sent  | 1/23-<br>2/11/00 |  |
| 8. Survey wave 2 sent to respondents of wave 1 along with monetary incentive. | 2/28/00          | 96 surveys sent plus 2 thank you letters and checks to negative respondents. Total = 98  |
| 9. Reminder fax sent to respondents of wave 1                                 | 4/1-<br>4/15/00  |  |
| 10. Data Collection and Analysis  | 6/1-<br>7/20/00  | Total 57 final responses   |



### **Appendix D: Statistical Analyses of Question 1 of International Tour Inventory, Part II**

The following are detailed statistics on respondent answers to International Tour Inventory Part II question 1 (see Appendix B for copy of the questionnaire):

1. Listed below are a number of features of U.S. National Parks that tour operators have found important in deciding whether to include a park in a tour program or not. Please indicate by circling the appropriate number next to each feature how important it is to your decision to include a particular National Park in a tour itinerary: from zero meaning the feature has no importance at all to your decision, to 4 meaning that the feature is very important to this decision.

Tabulations of the results from 9 countries are provided for each of the countries and one overall table covering all 57 responses. There is no table for Japan because only one tour operator responded from that country.

The "Mean" column shows the arithmetic mean of all replies, a measure of central tendency. The mean of a probability sample, such as responding tour operators from Australia, provides an unbiased estimate of the mean of the population from which it was drawn, e.g., all Australian tour operators providing tours to U.S. National Parks.

The "Std. Dev." column shows the standard deviation of the responses around each mean. This is a measure of dispersion and indicates how closely the respondents agree on their ratings. A relatively large standard deviation suggests little agreement while a relatively small standard deviation indicates a rather tight consensus of the respondents.

The "Std. Error" column presents a measure of the standard deviation from the population from which the sample was drawn. It represents the degree of agreement or consensus for the entire population and is closely related to the standard deviation of the sample.

"Count" shows the number of respondents providing a rating for a given feature.

The "Minimum" and "Maximum" columns show the lowest and highest ratings circled for each feature. These columns indicate the range of responses, which also suggests the amount of agreement over the rating for a feature.

"# Missing" indicates the number of respondents to the question who failed to provide a rating for a given feature.