



STRATEGIC PLAN

Compatible Economic Opportunities

AT THE NATURE CONSERVANCY EMIQUON PRESERVE





Prepared by:
FERMATA, Inc.
PO Box 5485
Austin, TX 78763-5485
512-472-0052



Under contract to:
The Nature Conservancy
Illinois River Project Office
11304 N. Prairie Road
Lewistown, IL 61542
309-547-2730

All photos, unless noted otherwise, copyright: Ted Lee Eubanks, Jr./FERMATA, Inc. Front cover photo: Illinois River near Chillicothe; Back cover photo: Illinois River Cruiser; this photo: Northern Pintail.



TABLE OF Contents

I. EXECUTIVE SUMMARY	2
II. NATURE TOURISM OPPORTUNITIES ASSESSMENT AND RECOMMENDATIONS	5
• Recommendation One	7
• Recommendation Two	9
• Recommendation Three	9
• Recommendation Four	11
III. ECONOMIC DEVELOPMENT OPPORTUNITIES	12
• Feasibility and Market Assessment	14
• Economic Impacts of Experiential Tourism Development on Local Communities	17
• Economic Development Opportunities	20
• Approaches for Measuring Social Impact/Quality of Life as a Result of the Recommended Sustainable Developments at Emiquon	21
IV. GENERAL INTERPRETIVE THEMES AND MARKETING ACTIVITIES FOR EMIQUON	22
• Interpretive Theme	22
• Imagery	23
• Marketing Plan	23
V. APPENDIX I	
• Matrix of Opportunity™: An Innovative Approach to Sustainable Economic Development through Experiential Tourism	25
VI. APPENDIX II	
• Population of Metropolitan Areas within a Six Hour Drive of the Emiquon Preserve	28

EXECUTIVE Summary

Introduction

The acquisition of the Emiquon Preserve by the Illinois Chapter of The Nature Conservancy (TNC) represents the largest private conservation transaction in Illinois' history. This nearly 7600 acre parcel of Illinois River floodplain located south of Peoria and between Lewistown and Havana presents the Chapter with unprecedented opportunity to restore native wetlands, forests, and prairies and to re-establish what was one of the most significant floodplain ecosystems in the entire Upper Mississippi Valley.

Today, as in the past, Emiquon provides hope — different hopes for different people. Some anticipate outdoor recreation (such as hiking, biking, wildlife observation, hunting, and fishing). Others look for economic opportunities. Still others envision an outdoor laboratory to aid science in understanding the complexities of nature and the importance of healthy ecosystems in sustaining biological diversity and quality of life. The Conservancy has the desire and expectation that Emiquon will become a model for floodplain river restoration, helping preserve the biological abundance and diversity of the Illinois River (Blodgett 2002).

An “*Emiquon Science Advisory Council*,” composed of 40 leading scientists from around the country who represent diverse disciplines, was formed to

guide the restoration process. Additional partners include the Illinois Department of Natural Resources, U.S. Fish and Wildlife Service, U.S. Army Corps of Engineers, and the University of Illinois. Local communities are also deeply involved to help develop significant recreation, education, and economic benefits. (*An Overview: The Emiquon Founders Circle*, TNC 2002).

The Approach

Community and economic development, conservation, preservation, and education are inextricably linked to the natural environment of Emiquon. Introduction and development of a relationship between urbanites and the region's natural habitats and related experiences is vital if great places such as Emiquon are to be restored. Moreover, according to the Conservancy, community support is essential because the health of the Illinois River ultimately depends on more projects like Emiquon. Also, in its statement of core organizational values, the Conservancy asserts its respect for the needs of local communities by developing ways to conserve biological diversity while at the same time enabling humans to live productively and sustainably on the landscape. (*Conservation by Design, A Framework for Mission Success*, TNC 2003).



The Nature Conservancy's Emiquon project is a perfect example of how tourism, economic development, and conservation efforts can work in concert.

Incredible opportunities and real challenges exist in order to take advantage of all that the experience-based nature tourism industry offers. If communities are willing to invest time, money, and effort they will help to develop a new economy and preserve a way of life.

The Nature Conservancy and FERMATA worked throughout the project to solicit community and other involvement. A number of public meetings and presentations were held to describe the Emiquon restoration goals and to seek input on developing nature tourism opportunities that are compatible with a broad vision of sustainable nature-tourism in the Illinois River based on current restoration plans for Emiquon.

FERMATA utilized an innovative approach to consider the potential for future sustainable tourism development at the Preserve and in the Illinois River Valley. This *Matrix of Opportunity*™ approach involves first defining a zone of influence and identifying the natural resources of the region and those cultural and historical resources that are derived from nature. The approach then calls for a methodical planning and organization framework for developing experiential tourism offerings and promotion; and finally provides a way of applying sustainable tourism efforts to bring about long-term local economic development. See Appendix I.

Following site visits and interviews with Conservancy staff and local stakeholders, FERMATA assessed recreation opportunities and visitor services. FERMATA developed recommendations, compatible with the Conservancy's mission, for different levels of infrastructure development based upon the premise that the least experienced nature traveler needs the most support.

The central interpretive theme recommended for the Emiquon Preserve is one that recognizes the Preserve's relationship to the entire Illinois River Valley. FERMATA sees Emiquon as a metaphor for the River. As such, the recommended broad theme for the region is *A Healthy River*.

Also recommended are the development, production, and marketing of an array of regionally branded products and services that reflect the nature, culture, and history of the area. We recommend the establishment of several different types of compatible business ventures be undertaken by various public and private entities, including The Nature Conservancy in the Illinois River Valley.

As urbanites realize their relative isolation from natural and cultural resources still found in rural America, they opt for vacations out of the cities in an effort to reconnect to their roots. Therefore,



Red-eared Slider

According to the Travel Industry Association of America (TIA), "81 percent of U.S. adults who traveled in the past year, or 118 million, are considered historic/cultural travelers." In fact, "for 30 percent of historic/cultural travelers, their destination choice was influenced by a specific historic or cultural event or activity." Outdoor recreation and/or visiting national or state parks are also one of the top activities for U.S. travelers taking leisure trips within the U.S. One in four (27%) leisure person-trips includes some form of outdoor recreation and/or a visit to a national or state park.



Powdered Dancer (Argia moesta)



experiential travel is one of the most significant travel sectors in the U.S. and one that continues to expand. As such, it represents a significant economic driver for rural communities. Experiential tourism is contributing to the economic vitality of rural America and it does indeed “work for America.”

The Illinois River has many attractions that would appeal to people who enjoy the outdoors and who look for opportunities to plan mini-vacations and regional excursions. For those who seek to learn about history and culture, for example, the Dickson Mounds Museum near Lewistown provides an interesting overview of Native American culture and the people who inhabited the Illinois River Valley for over 12,000 years.

Experiential tourism allows Illinois to utilize the existing natural, cultural, and historical resources of the state to attract additional travelers. These travelers will invest in a variety of amenities that are valued by residents as well. As the amenity base and quality of life improves, Illinois and the Illinois River region will be better positioned to attract high-end industries that would have developed or fled elsewhere. Combined with specific efforts to develop a diversity of local products and services for this travel market such as value-added agricultural products and experiences, Illinois River residents have much to gain from the business of nature.

Experiential tourism allows Illinois to utilize the existing natural, cultural, and historical resources of the state to attract additional travelers.

Assessment & Recommendations

Task

Identify potential partners for The Nature Conservancy in this initiative. Conduct three sets of public meetings at the beginning, mid-point, and end of the project.

Task

Assess and recommend nature tourism opportunities that are compatible with (1) the Conservancy's mission and (2) a broader vision of sustainable nature-tourism in the Illinois River based on current restoration plans for Emiquon.

FERMATA interviewed Conservancy staff and other local stakeholders, held meetings for Convention and Visitor's Bureaus and service clubs, and conducted site visits in March - October 2003. Based upon the information gathered from these various sources, FERMATA prepared a resource inventory and assessment of recreation opportunities and visitor services.

FERMATA also suggested that the Conservancy develop (or strengthen existing) partnerships to help with the implementation of this project. These partners include:

- U.S. Fish and Wildlife Service (at the adjacent 2200-acre Emiquon National Wildlife Refuge and at the 4500-acre Chautauqua National

Wildlife Refuge on the east side of the Illinois River across from the Emiquon Preserve).

- Illinois Department of Natural Resources (IDNR) including Dickson Mounds Museum; state fish and wildlife areas (SFWAs) - Banner Marsh SFWA, Rice Lake SFWA, and Anderson Lake SFWA; Sand Ridge State Forest; and Double T Goose Refuge. There are also IDNR-owned lodges at Starved Rock and Pere Marquette State Parks.
- Peoria Area Convention and Visitors Bureau.
- Illinois Lieutenant Governor office and the Illinois River Coordinating Council.
- Illinois Department of Transportation.
- Illinois Department of Commerce and Economic Opportunity and the Bureau of Tourism.
- Spoon River College (that could provide education/training support for local compatible economic development).
- University of Illinois Springfield (that is working on establishing a multi-disciplinary, multi-institutional research and education center at the Emiquon Preserve to focus on ecology, chemistry, archaeology, and teacher education).
- Other nearby Universities including Western Illinois University, Bradley University, Illinois College, and MacMurray College.
- Local school districts (elementary, junior high, and high schools).



American White Pelican

The mission of The Nature Conservancy is to preserve the plants, animals, and natural communities that represent the diversity of life on Earth by protecting the lands and waters they need to survive.



Generations Ridge at Emiquon.

- Planned Peoria Riverfront Museum and River Discovery Center.

In addition, FERMATA identified other partnership opportunities to aid The Nature Conservancy in the operation and promotion of the Emiquon Preserve and its nature tourism opportunities once restoration has begun. These include:

- Illinois DOT who could help with the future recommended designation of a Great Lakes to Great Rivers State and National Scenic Byway adjacent to the Emiquon Preserve; and through whom Federal enhancement funds could be made available for visitor service improvements at Emiquon;
- Illinois Department of Commerce and Economic Opportunity;
- USDA Rural Development who has access to rural business enterprise grants that could assist goods and services (such as guides) providers with starting or expanding companies in the area;
- U.S. Economic Development Administration who could furnish economic development grants for surrounding communities;
- U.S. Environmental Protection Agency who could help with funding for water quality monitoring and river restoration and enhancement projects.

FERMATA's recommendations include typical enhancements, such as trails and access areas that are appropriate for construction on the Emiquon Preserve. All nature tourism recommendations are compatible with the Conservancy's mission to *preserve the plants, animals and natural communities that represent the diversity of life on Earth by protecting the lands and waters they need to survive.*

Emiquon serves as an *icon destination* for the Illinois River. An *icon* epitomizes a specific habitat, and offers the public the opportunity to experience nature in its most authentic and unaltered form. An icon embodies the characteristics of the respective habitat, symbolizing nature in its most unadulterated or unmodified state. An icon transports the visitor back in time, offering a glimpse of the natural world in a primeval form.

Emiquon's offerings need to be developed so that the area can function effectively as a *portal* to the natural world of the river and bluff ecosystems. A *portal* offers the traveling public a destination, a door through which to enter nature. A portal site combines the tourism function of a welcome center with the educational and recreational capabilities of a nature center. Portal sites, such as Emiquon serve as a gateway to usher the traveler/general public into the natural world and to facilitate and nurture the uninitiated nature tourist.

People are swept with a disarranged set of sensations when first confronted by nature. Sounds, smells, feel – sensations that are at once pleasant, at times perplexing, or even repulsive. Perhaps the aesthetics of a location, such as the South Rim of the Grand Canyon, takes one’s breath away. Perhaps the feeling of accomplishment colors the experience, such as when a birder finally identifies their first Connecticut Warbler skulking through the brush. In each case the experience is distinctive, and in each case people react to the experience in an equally singular fashion.

Travelers enter nature to expand upon their life experience, and to extend these singular moments beyond the immediate. They gather or collect experiences through the act of travel, and as they gain a familiarity in nature, these once-jarring sensations become increasingly orderly and logical. As each facet of nature is distinct, so are nature travelers equally diverse and practiced.

Based upon the premise that the least experienced nature traveler needs the most support, FERMATA offers the following four recommendations that respond to different levels of support needed and associated infrastructure development. The general approach we suggest to implementing these recommendations is to begin with some modest level of build out of enhancements, programming development, and marketing and promotion for all of the recommendations. As visitation increases, and the

Recommendation One

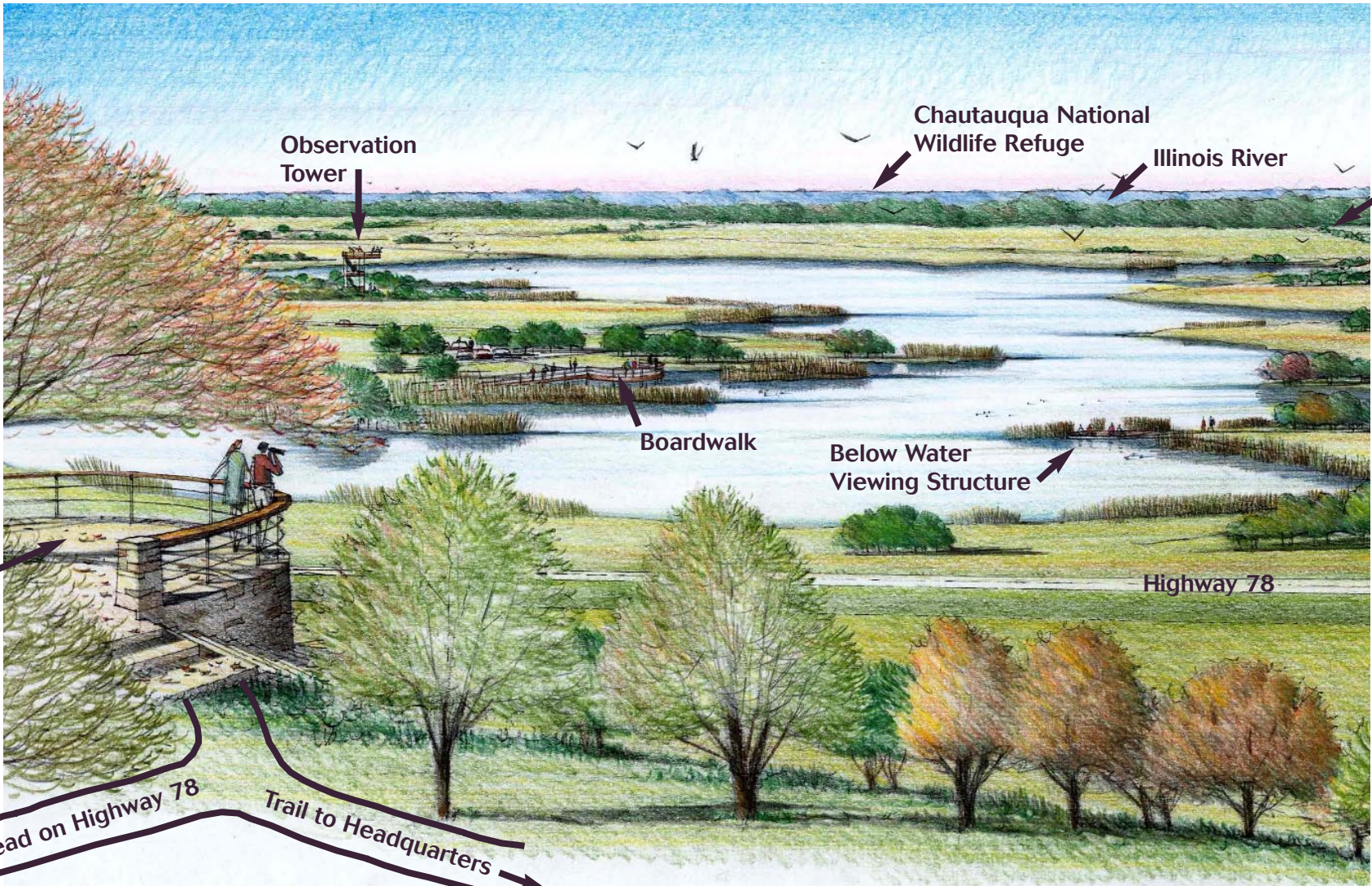
Responding to the support needs of the uninitiated nature traveler, we recommend developing a partnership with the Dickson Mounds State Historic Site. This attractively maintained building and grounds with many thoughtfully designed and executed interpretive displays, an interesting open-air observation deck, and knowledgeable staff can serve as the most developed, or controlled, visitor service environment. It will be an entry point to the area for nature travelers of all abilities to become familiar with the Emiquon landscape and view the entire Preserve.



Photo: Dickson Mounds Museum.

Modest upgrades that include specific interpretive panels, both indoors and on the deck, will help to connect Dickson Mounds and the Emiquon Preserve. The estimated cost of these interpretive panels (including copy writing, production, and installation) is \$5,000.

Conservancy and others assess impacts of visitation on the environment (and assure that there are no, or few, negative effects), then proceed with additional levels of development to serve growing needs. It is always easier to begin with smaller amounts of recreation use and carefully measure the impacts of the use, than starting with greater levels of recreation and then needing to pull back on offerings to address resource issues.



Observation Tower

Chautauqua National Wildlife Refuge

Illinois River

Levee/Levee Trail

Emiquon National Wildlife Refuge

Boardwalk

Below Water Viewing Structure

Highway 78

Viewing Platform

Trailhead on Highway 78

Trail to Headquarters

TNC Headquarters

Dickson Mounds

Illustration 1

Recommendation Two

Also serving as a developed environment, FERMATA recommends constructing a viewing platform just north of the Preserve headquarters building on the west side of the highway. See Illustration 1. Access to the new platform would be via a foot trail accessed from one of two trailheads – on the north end from the planned highway roadside parking area and from the south end near the headquarters; or depending on future land agreements adjacent to Dickson Mounds.

The platform would include a series of interpretive panels with information on the unique ecosystems, the geology of the river valley from bluff to beach, and the Conservancy's restoration efforts on the Preserve; and the impacts of the restoration on the entire river and its watershed. The estimated cost for this visitor enhancement (including trail, trailhead areas, platform, and interpretation) is \$50,000.

Recommendation Three

On the river side (east of the highway), we recommend developing the one-to-two mile segment of one-lane gravel road managed by the Conservancy, and paralleling the highway, into a one-way drive-and-park loop. See Illustration 2.

Moving down the continuum of development and control, this new facility would still provide visitors with some degree of support but would not provide as facilitated of an experience as the other two developments. This site would include interpretive signage urging travelers to explore the wetlands by foot. Foot travel would be supported through the recommended development of hardened pathways and boardwalk-based trails (see Illustration 4) and from an observation tower (see illustration 3).

Also recommended for development at this location is a viewing structure that is at or below water level. This would provide visitors with an in situ perspective on the wetlands restoration effort. See Illustration 5. Estimated cost for this visitor enhancement (including, parking, interpretation, and viewing structures) is \$125,000.

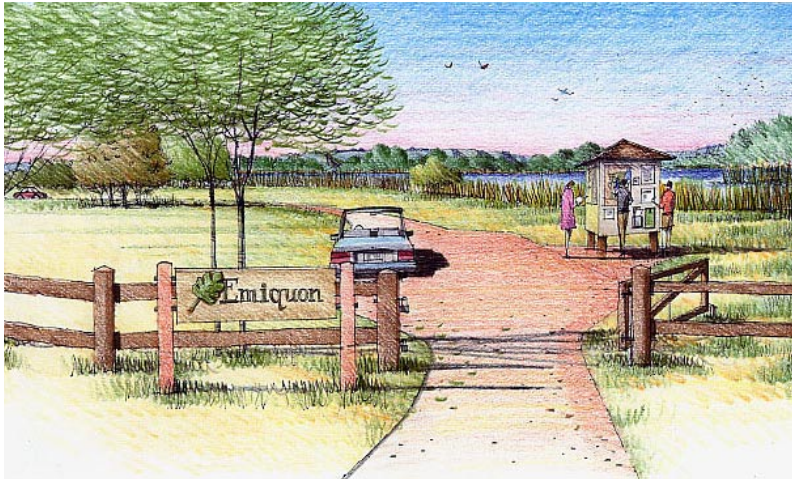


Illustration 2

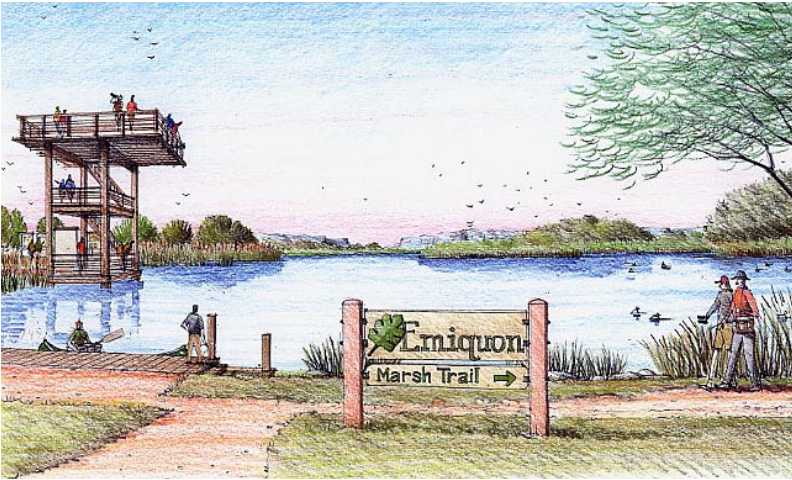


Illustration 3



Illustration 4



Illustration 5

Recommendation Four

In the near-term, we recommend developing and designating the existing levee road/levee trail and access roads for walking or biking only. This would be the least supported of the visitor experiences proposed for the facility. Nonetheless, it furnishes visitors with the unique perspective of being physically positioned out in the marshes and wetlands. This would also be the type of wetland development with the lowest possible environmental impact. Following careful evaluation of the impacts to the ecosystem of this level of development and visitor access (and assuming that there are few or no negative effects evident), then consider developing a seasonal limited access driving route along the same, or adjacent, configuration as the walking and biking trail. Estimated cost for this visitor enhancement in the short term (trail designation signage and surfacing) is \$25,000. In the long term the driving route enhancement estimated cost is \$75,000.



ECONOMIC Development Opportunities

In addition to the traditional economic impacts from tourism (direct, indirect, induced), there are two additional benefits that are critically important to Illinois:

Environmental impacts. There are negative effects that occasionally are attributed to tourism (such as the draining of a marsh to build a golf course). But ecologically (and culturally) sensitive tourism development undoubtedly benefits the environmental health of a region. Tourism revenues allow communities to invest in green spaces, hike-and-bike trails, interpretative centers, and a variety of amenities that are enjoyed by travelers and residents alike. In fact, The Nature Conservancy's Emiquon project is a perfect example of how tourism, economic development, and conservation efforts can work in concert.

"Enabling" benefits that flow from tourism. Experiential tourism development in Illinois River communities such as Havana, Canton or Lewistown will directly lead to an enhanced quality of life in the region. As stated above, amenities demanded by tourists also benefit residents. A diverse offering of restaurants, theaters, retail shopping, and cultural centers represents an amenity base upon which future economic development efforts may be constructed.

Task

Recommend economic development opportunities for review by the Emiquon Planning Team.

Task

Recommend possible compatible business ventures for various public and private entities, including The Nature Conservancy, to undertake in the Illinois River Valley. Prepare a broad feasibility and market assessment for these possible business ventures.

Task

Recommend measures of success to track the economic impact of the Emiquon project on the local community as a result of possible new developments.

Task

Recommend a method to measure social impact/quality of life as a result of the recommended sustainable economic developments at Emiquon.



Eastern Kingbird

The U.S. is comprised of 50 states vying to be the next economic growth engine. Most have realized that the future of high-end industry in this country depends on human resources. There are countless communities in the U.S. that want to attract a biomedical research lab or a nanotechnology center. All are able to extend tax abatements, offer new shell buildings, and pipe in the next generation Internet services. The few communities that will succeed will be those who recognize that the human resource will be the critical deciding factor. In the end, the next nanotechnology center will be dependent on researchers deciding where they want to live and raise their families.

Excerpt from *Central Illinois' Untapped Jewel: Illinois River Valley ideal attraction for nature-based tourism* (PJStar.com, January 4, 2004). By Thomas E. Hines, K. Douglas Blodgett, and Ted Lee Eubanks, Jr.

There are important questions and issues that community leaders and business people should consider when developing a nature-based tourism agenda.

- What particular groups of people are most likely to enjoy and take advantage of natural resources and travel opportunities?
- What new activities and interests may be fostered through some of these changes and developments? The Emiquon project is resulting in a return of birds and plants. These natural resources, many of which are unavailable in large parts of the country, will become a major attraction for those who enjoy the outdoors.
- Who are some of the partners that would be interested in working with people in central Illinois to market and promote these opportunities? Some might include travel agencies, chambers of commerce, providers of tours, schools, researchers, builders, Realtors and many other small-business owners and managers.

There are many attributes and initiatives that contribute to the quality of life and growth potential in central Illinois. However, the reclamation and enhancement of the Illinois River basin may be one of the greatest opportunities this region has experienced in decades. It is up to residents, community leaders, and business people to take advantage of the opportunity and to shape a vision that will create new jobs and economic development for years to come.

“Nature-based tourism will indeed be a natural economic opportunity given the history of central Illinois. With all of the talk about the beauty of the Illinois River Valley, downtown development along the waterfront, and the quality of life to recruit creative young professionals to live on the waterfront, it certainly makes sense that we would use the Illinois River Valley to enhance the quality of life and growth potential of the Peoria region”
– W. Michael Bryant
(InterBusiness Issues, February 2004).



Feasibility and Market Assessment

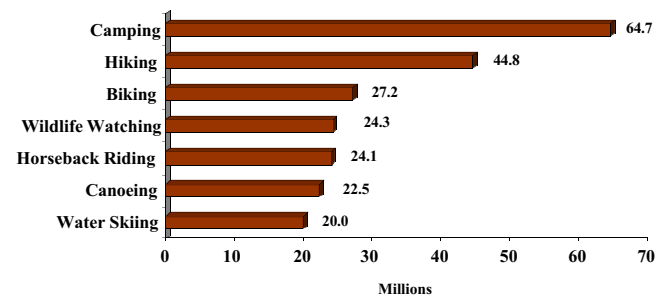
Experiential tourism encompasses a broad range of travel interests and activities that elevate and enhance the individual experiences of the traveler. These interests are disparate, only bound together by the shared goal of each traveler to expand their personal horizons. Personal enrichment, enlightenment, stimulation and engagement are among the primary motivators for these travelers. All of these motivators drive visitors to natural sites and protected areas. FERMATA seeks to analyze those motivators as a way to recommend specific strategies.

Numerous market segments or niches are sheltered underneath the experiential tourism umbrella, and many of these experiential niches are among those most rapidly expanding within the general tourism market. According to the Travel Industry Association of America (TIA): enrichment, health/revitalization/enhancement, and eco-tourism/soft adventure are among the genres of tourism most likely to grow in the U.S. market (TIA 1998). Wildlife-associated recreation, as opposed to outdoor recreation in general, now involves millions of Americans in hunting, fishing and a variety of non-consumptive activities such as birding, bird feeding and wildlife photography.

“In addition to enjoying great scenic beauty and outdoor activities, ecotourists like to learn about local indigenous peoples and their cultures. Authentic crafts, and craft-making demonstrations combined with credible cultural performances heighten the tourist experience” (V. Lederman in the *International Ecotourism Society Newsletter*, 2001).

Focusing even more specifically, Illinois River is well situated to address the needs of experiential tourists interested in ecotourism and soft adventure. As illustrated in the chart below, nearly 25 million Americans are involved in travel to watch wildlife. When combined with low-impact soft adventure activities, Illinois River promoters are presented with a sizeable target audience at which to aim their efforts. According to the TIA, over half of Americans are adventure travelers, with most of those (46%) engaged in soft adventure travel.

The most rapidly growing types of soft adventure, according to the TIA, are as follows:



Most rapidly growing types of soft adventure travel.

The *National Survey of Recreation and the Environment* (NSRE 2000) indicates that viewing and photographic activities such as birding, watching bear, deer, moose, and viewing wildflowers and natural vegetation or scenery continue as popular activities in the United States. According to this data, “an estimated 129 million people took the time to stop and observe the natural scenery around them and an estimated 96 million people also took the time to view wildlife or wildflowers, while 71.2 million people viewed birds.” Compared to previous figures, this represents about a 55 percent increase over the mid-1990s.

Three factors are believed to be generating nature related travel interests (Eagles and Higgins, 1998):

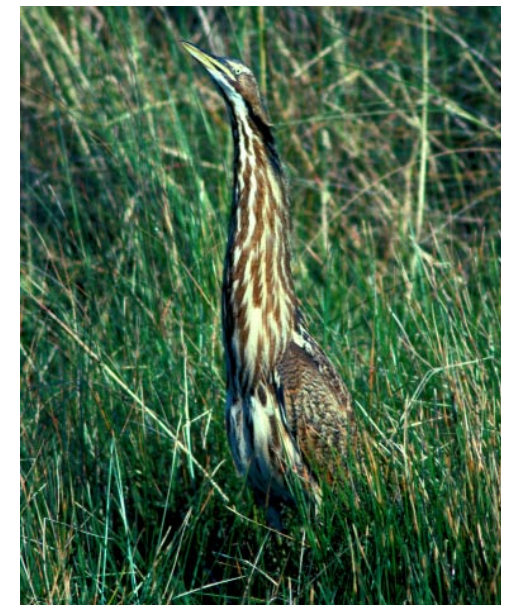
1. Widespread changing environmental attitudes based upon the recognition of the inter-relationships of species and their environment, the finite character of the earth, and the innate value of all life.
2. Development of environmental education in primary and secondary schools that has produced a generation of environmentally literate citizens who regularly seek out environmentally stimulating activities in their leisure time.
3. Development of the environmental media that is reinforcing ecological attitudes and helping to spread these concepts across society.

FERMATA’s research indicates a market segmentation in nature tourism. The uninitiated tourist is considered a general tourist whose recreational interests are incidental. The casual tourist is an experiential tourist and peripheral recreationist involved in adventure, as well as cultural/historical travel. However, according to Wight (1996), both the more generally interested consumers and the experienced nature tourists enjoy multiple activities. The following table compares the most important elements of a nature-based vacation for both experienced and general consumers.

Research has documented that specific types of travelers have emerged. One such category, called the *Cultural Creatives*, is made up of people whose lifestyles are experiential, authentic, and holistic (Ray and Anderson 2000). They are consumers of arts and culture who seek vacations that are experiential, educational, authentic, and altruistic.

Elements of a nature-based vacation by market segment.

Market Segment	Important Element/Feature for Trip
Experienced Nature Tourist	<ol style="list-style-type: none"> 1. Wilderness setting 2. Wildlife viewing 3. Walking/hiking/trekking 4. Visiting national park/other protected area
General Consumer	<ol style="list-style-type: none"> 1. Casual walking 2. Wildlife viewing 3. Learning about other cultures 4. Visiting national park/other protected area 5. Wilderness setting



American Bittern



FERMATA's proprietary research profiles the nature tourist as 52.1 years of age, almost equally divided by gender, college-educated, and with a household size of 2.45 persons. Photo: Mary Jeanne Packer/ FERMATA, Inc.

Similar to the 50 million *Cultural Creatives* worldwide are the *Bobos*, or bourgeois bohemians. This term used by David Brooks (2000) describes a new affluent group in society. *Bobos* as travelers seek to be differentiated from passive tourists, sightseers, and bus-tour participants. They don't just want to see sights, they want to "try on other lives." Brooks identifies a distinct set of travel preferences and motivations for *Bobos*. They want to get away from their affluent worlds and seek "spiritually superior worlds" and more authentic native/local culture, foods, and crafts. *Bobos* want to go to uncrowded, undiscovered places where "simple people live in abundance."

The Experience Economy, by Joseph Pine and James Gilmore (1999), defines a class of consumers who favor the consumption of experiences over traditional goods and services. They buy experiences to spend time enjoying memorable events that are personally engaging. Experiences are a distinct economic offering that occur when "a company intentionally uses services as the stage and goods as the props to engage an individual." Richard Florida (2002) also describes the purchasing decisions of the *Creative Class* (2002) as focused on products best categorized as unique and authentic.

According to ORCA, the trade association for the outdoor industry, demographic indices strongly favor a further increase in nature-based tourism. Improved health, longer lifespan, retiring Baby

Boomers, and a wealthier traveling public all support past trends that indicate growth rates in nature-based tourism activities of at least ten percent annually. Growth in wildlife watching has increased annually at rates far in excess of this, according to the most recent NSRE.

In addition, the Baby Boomers now number 76 million and researchers agree that they will have a powerful impact on travel, due in large part to their sheer numbers. Between 1992 and the end of the decade, the number of individuals in the 45-64 age group grew by 30 percent, while the younger 25-44 set increased 5 percent. The 45-plus age group has more time and money for travel than their younger counterparts. Discretionary income is about 28 percent higher than the younger age group.

Nature tourism, in fact, demonstrates exceptional adaptability to most economic cycles. During booms, international and long haul markets can be targeted, and during recessions the focus can be geared down to regional, auto-travel. No such flexibility exists for artificial, attraction-based venues, which depend exclusively on long-haul markets.

Increased visitation comes primarily from creating new markets or expanding existing markets. Possible current markets into which messaging about experiential tourism at the Emiquon Preserve could be expanded to include metropoli-

tan areas across a five-state radius (Iowa, Illinois, Indiana, Missouri, and Wisconsin) within a day's drive (six hours) of the Emiquon. FERMATA's research shows that most (76.5%) nature travelers originate in urban or suburban areas. The NSRE (1994-1995) indicated that 85 percent of nature lovers traveled by auto to locations more than 5 hours distant. Since distance visitors typically spend more than those who live close by, this market could greatly increase the economic potential.

Economic Impacts of Experiential Tourism Development on Local Communities

Birding and other nature tourism development and promotion in other parts of the country have helped to make significant economic contributions to local communities; and the proposed developments at the Emiquon Preserve are expected to provide an important boost to the Illinois River Valley area economy. Bird watchers spent \$7.4 billion nationwide in 2001 for food, lodging, transportation and other trip related expenses; and another \$24.3 billion for wildlife watching equipment and other expenses (USFWS 2001).

FERMATA's proprietary research found that the typical spending of a nature tourist is about \$138/person/day. These travelers spent most of their money on food, lodging, and transportation. FERMATA's research also shows that nature tourists are willing to make additional purchases during their trip – mainly for products and services – but only if these items are made by or offered by local businesses. So, provided that local entrepreneurial goods and services enterprises are begun or are expanded in the region, it is possible that additional spending in the amount of \$202/visitor/trip could take place.

In 2001 the average annual spending by out-of-state wildlife viewers nationwide, including bird watchers, was \$488/person/year (USFWS 2001). In Illinois, where there are currently 181,500 out-of-state nature tourists each year, this amounts to \$88.5 million/year in visitor spending statewide. Nature tourism is big business for the state. And given the relative importance of the Emiquon/Illinois River Valley product offering in the current statewide nature tourism product mix, this figure can easily be expected to increase by 20% (36,300 additional visitors) once the new developments and integrated marketing promotions proposed for the Preserve are implemented.

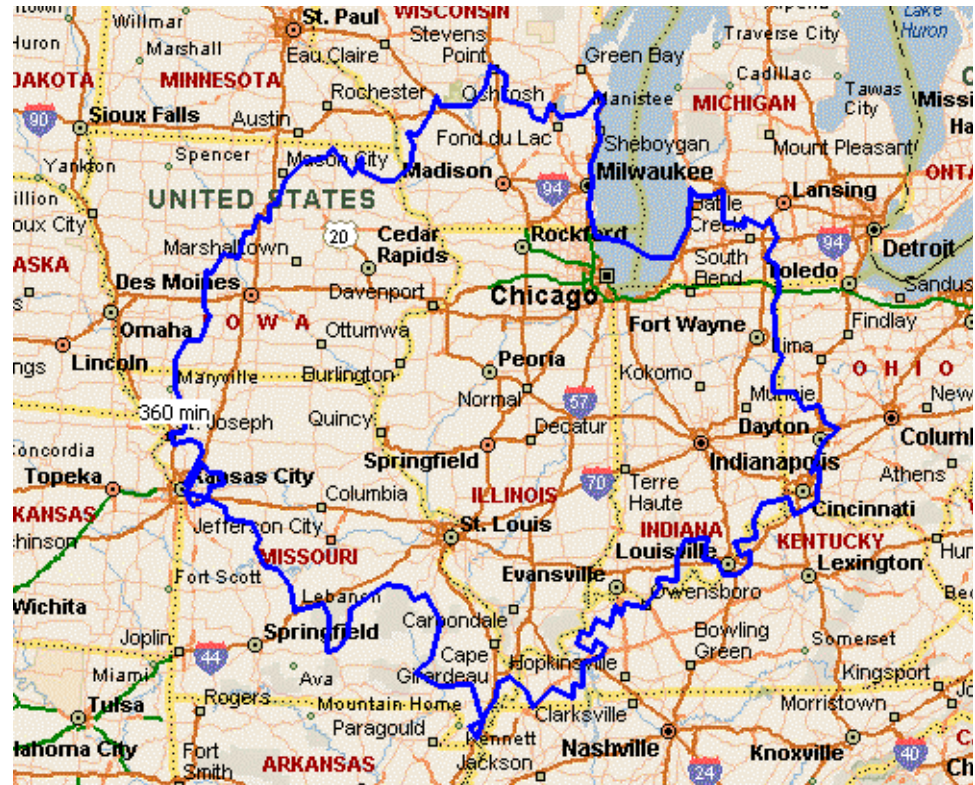


Great Egret

The major metropolitan areas within a six-hour drive of the Emiquon Preserve have over 28.3 million Americans, or almost ten percent of the nation's population. See Appendix II.

Using the NSRE figures from 1999 that 71.2 million people 16 years old or older (or 25% of all Americans) viewed birds, FERMATA theorizes that the same proportion of people within a six-hour drive would share this interest. This amounts to a potential market size of nearly 7.1 million people. This is a conservative figure given the relatively high proportion of Creative Class urban and suburban areas (and hence people more likely to want to participate in experiential tourism activities) that are included in this six-hour drive region. However, many of these 7+ million potential visitors may be unaware of the region's offerings or may have not yet decided to try a visit to the area. If only 1% of this market were to actually visit the Emiquon Preserve and Illinois River Valley region each year after the proposed recreation and interpretive enhancements were developed, this would amount to an additional 70,900 people per year visiting the area.

With the increased visitation in the range of 36,300 - to nearly double that - of 70,900 people per year that the proposed new developments at Emiquon is expected to create, an additional \$17.7 - \$34.6 million per year in expenditures can be expected. According to USFWS data, about 18



The geographic area within a six-hour drive (200 miles) of the Emiquon Preserve has almost 23 million Americans.

jobs are directly or indirectly supported by every 1,000 birders who visit a state. Therefore, as a result of this anticipated increased visitation, 681-1,332 new direct and indirect jobs can be expected in the Illinois River Valley area communities; and an additional annual increase of \$192,500 - 376,000 in state and federal tax revenues (including rooms and meals and sales tax on products and services) can be projected.



Emiquon Preserve from Dickson Mounds Museum observation deck.

The Economics of Experiential Tourism in the Illinois River Valley

For every 10,000 new visitors each year, the anticipated benefits to the region are:

- Additional visitor expenditures - \$4.9 million/year
- New direct or indirect jobs – 180
- Increased state and federal tax revenues - \$53,000/year
- For every year that the completion of the Emiquon project is delayed, these foregone new monies need to be viewed as opportunity costs.



Economic Development Opportunities

Based upon our inventory of the resources available in the region, the current tourism infrastructure would not be sufficient to support much expansion in visitation to the area above current levels. While this lack of infrastructure could be seen as a barrier to future tourism expansion, it also represents an excellent opportunity for significant involvement by the private sector in business development.

There are several categories of strategic investment that need to be made in the communities near the Preserve in order for this project to realize its full anticipated future success. As a result of these developments, we expect that the Emiquon project could become a model for other preserved lands and nearby communities elsewhere on the Illinois River and also in other states throughout the U.S.

The types of investments that appear to present the greatest opportunities for the area and their developers are:

1. Lodging
2. Value-added agriculture
3. Tourism-related crafts and other products
4. Tourism services such as guides and equipment rentals
5. Information services including content development and management and web design and graphic design

Questions to consider in planning for the future development and marketing of regionally branded goods and products are:

- What is the broadest diversity of locally manufactured products that are feasible to be developed?
- Where are the most important markets for Emiquon and the Illinois River Valley products?
- How can these goods be branded most effectively and then introduced into markets?

Approaches for Measuring Social Impact/Quality of Life as a Result of the Recommended Sustainable Developments at Emiquon

It is important that after these and other experiential tourism and economic development activities are undertaken at the Preserve that there is a mechanism for measuring the success of the actions. There are three categories of benchmarks that would provide useful perspectives to the initiative – economic, social, and educational. Some specific measures for one or more of these benchmarks:

- Change in sales tax revenue;
- Employment rates by relevant job categories;
- Occupancy rates of lodging properties and patterns/seasons of occupancy changes;
- Rate of out-migration of young people;
- Number of field trips and other educational visits (and number of students and teachers participating) to the Preserve;
- Number of classrooms and other facilities using streaming video or on-line classes connected in some way to the Preserve;
- Number of people attending naturalist walks, guest lectures, and other programs at the Preserve including teacher training;
- Number of people/organizations conducting research at the Preserve.



Illinois River near the Conservancy's Merwin Preserve at Spunky Bottoms.

Themes & Marketing Activities



Dot-tailed Whiteface

Interpretive Theme

FERMATA recognizes the Emiquon Preserve as a critical component in any effort to develop experiential tourism through a broader Great Lakes to Great Rivers effort. The Illinois River is the connector between the Great Lakes and the Great Rivers. It is not only the physical connection, but also serves as the connection between the land and resources of the Illinois River Valley and its inhabitants and visitors.

As such, we recommend a central interpretive theme that also recognizes the relationship between the Emiquon Preserve and the entire Illinois River Valley. FERMATA sees Emiquon as a metaphor for the river. As such the recommended broad theme for the region is *A Healthy River*.

A healthy river needs to be much more than simply an interpretive theme or a tagline for a marketing campaign. A healthy river also needs to be a symbol for a healthy economy and a working river. A healthy river provides the foundation for a healthy economy.

As part of connecting the people and places thematically within the Illinois River Valley, we also recommend completing a Corridor Management Plan (CMP) for a Great Lakes to Great Rivers scenic byway. Following completion and approval of

Places must decide on not only how many tourists they want and how to balance tourism with other industries or strategies but also *what kind* of tourists they want. The choices will be constrained, of course, by the place's climate, natural topography and resources, history, culture, and facilities. Not every tourist is interested in a particular destination. A place would waste its money trying to attract everyone who travels. Instead of a shotgun approach, a place must take a rifle approach and sharply define its target markets. Excerpt from *Marketing Places* (Kotler, P. 2002).

Task

Recommend general interpretive themes for Emiquon that recognize the Preserve's relationship to the Illinois River Valley.

Task

Recommend publications, presentations, or other materials that The Nature Conservancy or others could produce to engage partners and capture the imagination and interest of potential major donors. Furnish one artist rendition of a future vision of the appearance of the restoration at Emiquon including the possible wetlands habitat, wildlife species, and viewing enhancements that could be used by the Conservancy or others in future publications, presentations, and other materials.

Task

Prepare a marketing plan for Emiquon that recognizes the Preserve's relationship to nature tourism in the Illinois River.

the CMP, as part of initial plan implementation, state scenic byway designation should be sought, and then National Scenic Byway designation should also be acquired.

While identifying the region's resources and promoting it as a tourism destination, an Illinois

River “brand” will effectively be created. The success of this destination brand will depend upon how its “personality” interacts with the target markets. Successful brands reflect and respond to changes in consumers’ lives. We like the idea of using the interpretive and marketing messages for the River as a way of not only connecting people to the River and the other natural resources of the area, but of also connecting people with the past and future of the River. Perhaps three storylines could follow the general idea of The Three Lives of the River – Past, Present, and Future. In each life, messages would be related to nature and culture.

Destination brand building is all about developing a rich, relevant brand personality. While the brand’s core values remain the same, its personality will continue to evolve (Morgan, Pritchard, and Price 2002). The position of the Illinois River and Emiquon as a land of both healthy natural resources and beauty will translate into the rational benefit of encountering history, heritage, and folklore. At the emotional level, visitors will experience awe of the elements and be rejuvenated by the experience.

Imagery

FERMATA recommends conveying the future vision for the appearance of the restoration and nature tourism developments at Emiquon graphi-

cally (see illustrations 1-5, pages 8 & 10). These images should include the future wetlands habitat, wildlife species, and viewing enhancements.

Images such as these could be used by The Nature Conservancy or others in publications, presentations, and other materials to engage partners and capture the imagination and interest of potential major donors. Based on strategies for marketing places (Kotler 2002), these renditions should enhance the attractiveness and help to develop its aesthetic qualities and values while supporting marketing messages in ways that are compatible with the natural environment.

Marketing Plan

FERMATA recommends a marketing plan for the Emiquon Preserve that recognizes the relationship to nature tourism in the Illinois River Valley. Developing the brand identity and core values must underpin all marketing activity — especially in literature text and illustrations — so that the brand values are cohesively communicated. A brand signature and design style guide will ensure consistency of message and approach, and reinforce brand values. The brand vision needs to be shared and supported by all stakeholders.

The level of marketing messages that various segments of the market require is inversely propor-



Northern Shoveler

To successfully create an emotional attachment a destination brand has to be:

- Credible
- Deliverable
- Differentiating
- Conveying powerful ideas
- Enthusing for trade partners
- Resonating with the consumer.

Destination Branding, (Morgan, N., Pritchard, A., and Pride, R., 2002).



Touch screen kiosks such as this at the Cornell Laboratory of Ornithology help visitors identify bird songs. Photo: Mary Jeanne Packer/FERMATA, Inc.

tionate to their avidity level. That is to say that the uninitiated general tourist has little or no awareness of the natural world nor the skills and equipment to access/appreciate it. The avid nature tourist on the other hand needs no additional information or training. Uninitiated tourists will invariably encounter advertising and messages developed for other segments and benefit from the information, as well.

We recommend using the Internet as the most affordable way to begin reaching key markets. A **dynamic web site** can target specific groups/niche markets. There is no printing cost associated with the web and as such The Nature Conservancy can continually update the site as improvements are refined. The web site can provide near real-time information, such as bird sightings, wildflower blooms, weather reports; information about hotels, attractions, and dining; a special section to highlight local craftsmanship, artisans and handcrafts that tell the river story; lists of weekend workshops, festivals and events; and recommended reading lists.

A **comprehensive brochure** can be developed using the suggested graphical representations. The publication should use a minimum of 50% recycled, unbleached paper and environmentally sound inks (such as soy-based). It can list facilities, hours of operation, and offerings.

Other marketing recommendations for the region include:

- Coordinate publication of **an events schedule** listing workshops, festivals, concerts, etc. that tell the Illinois River story;
- Initiate a customer satisfaction **marketing study**. Request additional information about sites visited;
- Host **familiarization tours** for outdoor writers, feature writers, travel writers, garden editors, and others;
- Develop a **press kit**;
- Develop a **press release** schedule;
- Create a **public awareness campaign** for citizens and residents;
- Pursue **promotional opportunities** with outdoor recreation retail shops;
- Develop an audio-cassette/CD **driving tour**;
- Install a travelers **car radio broadcast system** to provide visitors with near real time information as they are entering the area in their vehicles;
- Collaborate with Cornell Lab of Ornithology in the development and installation of touch screen kiosks at portal sites in the region to help introduce visitors to the birds and other natural attractions of the area.

Appendix One

FERMATA'S MATRIX OF OPPORTUNITY™: AN INNOVATIVE APPROACH TO SUSTAINABLE ECONOMIC DEVELOPMENT THROUGH EXPERIENTIAL TOURISM

Phase I - Preparation

1. Delineate the Zone of Influence (ZOI). What are the boundaries of the region in question and how were these boundaries determined? Obtain consensus of all parties that these boundaries are defined correctly.
2. Identify the natural resources of the destination and those cultural and historical resources that are derived from nature. This inventory information will be used to identify key market drivers to be protected or enhanced. Generally, not all resources in an area have been previously identified.
3. Identify the unique regional products and services that authentically reflect the nature, culture, and history of the destination. What exists? Who is doing what? For example look for furniture building using local produced wood, quilt making following traditional local patterns, and performances and demonstrations of local, nature-inspired, arts and crafts.



Side channel of the Illinois River down river from Emiquon.



Emiquon Preserve from Dickson Mounds Museum observation deck.

Phase II - Planning and Organization for Sustainable Tourism

4. Use the concept of travel trails as the means to shape, fashion, direct, and qualify travel to and within the destination. Utilize existing or proposed state or federal scenic byways and other designated routes as a backbone for these highway-based trails where possible.
5. Develop a destination brand identity based upon experiential travel and trails to help build awareness of the region; and establish the brand's core values. The destination's brand needs to be credible, deliverable, differentiating, convey powerful ideas, be enticing for all trade partners, and resonate with consumers.
6. Prepare a detailed travel and tourism marketing strategy to move specific, identified markets to the region and its products and services via the travel trails. Components of the marketing strategy should look at the role of guides and outfitters as marketers and outreach specialists for the region, should consider how special events and festivals can serve as marketing tools, should explore the possibility for conventions and meetings to drive visitation, and should also identify appropriate

integrated marketing communications tactics involving mass media (Internet, television, radio, and print) advertising and public relations.

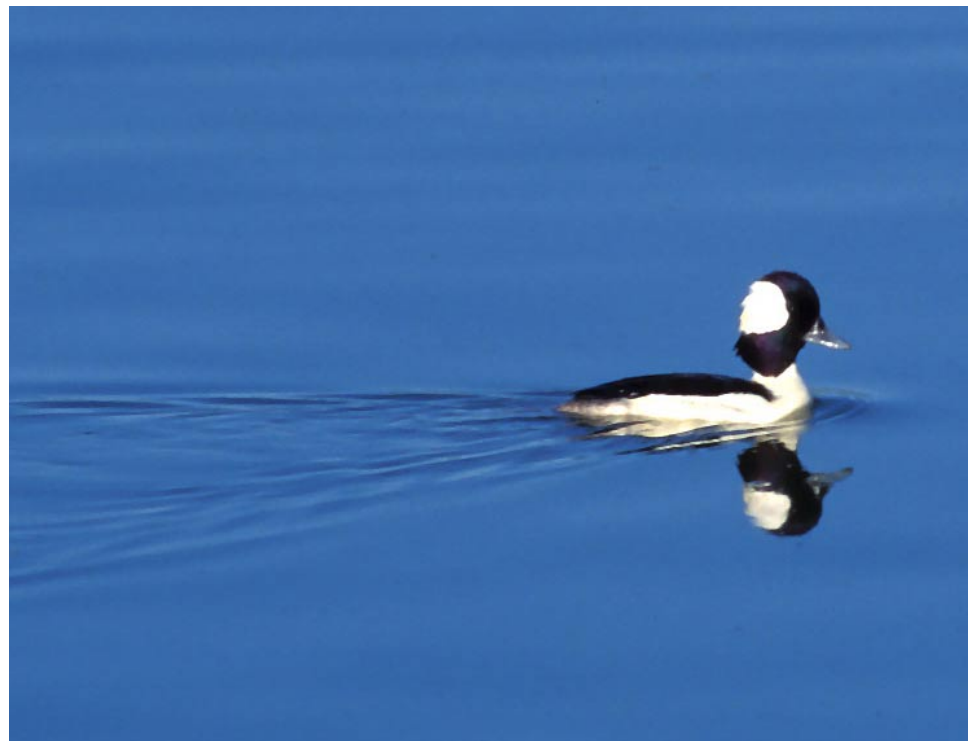
7. Use the content of the travel trails materials to signal specific products and service that reflect the nature, culture, and history of the destination. Ensure consistency in imagery and messaging in all materials, products, and services to reinforce the destination's brand values.

8. Use travel trails as a marketing platform for products and services from the region – especially post-travel.

Phase III - Application of Sustainable Tourism to Local Economic Development

9. Formulate a strategy to enhance and develop broader array of attractions to offer the traveling public such as visitor centers and trail networks.

10. Formulate a strategy to enhance and develop a broader array of unique local products and services to offer the traveling public.



Bufflehead

11. Use the new destination brand and regional identity to export products and expand services beyond local distribution to broader markets including people who have never traveled to the region.

12. Use the expanded amenity base of new attractions, products and services and the resulting improved quality of life in the region to reposition the destination to attract compatible and appropriate industries and jobs.

Appendix Two

Gray Treefrog



Populations of major urban and suburban areas within a six-hour drive of the Emiquon Preserve.

Greater Metropolitan Area	Estimated 2004 Population Based upon 1999 Census Data and Population Trends
Cedar Rapids, IA	196,254
Chicago, IL	8,292,756
Cincinnati, OH	2,020,535
Columbus, OH	1,573,231
Dayton, OH	944,404
Des Moines, IA	477,771
Evansville, IN	295,575
Fort Wayne, IN	499,025
Gary, IN	634,686
Indianapolis, IN	1,612,171
Kansas City, KS	1,854,622
Lansing, MI	453,047
Lexington, KY	488,416
Louisville, KY	1,041,550
Madison, WI	448,199
Milwaukee, WI	1,664,747
Nashville, TN	1,256,107
Peoria, IL	348,216
Rockford, IL	367,696
Springfield, IL	204,030
Springfield, MO	327,281
St. Louis, MO	2,607,796
Toledo, OH	602,911
Topeka, KS	172,488
Total	28,383,513



