



A P R I L 2 0 2 2

How to reconcile attractiveness and preservation of the ecosystem in Regional Nature Parks

Survey's principal findings





FEEL REBORN HERE



Auvergne
Rhône-Alpes
Tourisme

AGENDA

1. **Introduction:** objectives, methodology, sampling
2. **Notoriety,** image of the Regional Natural Parks
3. **Motivations,** expected benefits, satisfaction and unmet expectations of RNP visitors
4. **Prospects** likely to consume a RNP offer: obstacles, offers and expected services
5. **Conclusions and recommendations**

FEEL REBORN HERE



Auvergne
Rhône-Alpes
Tourisme

01

INTRODUCTION

Introduction



The context and objectives of the study

Better understand the tourist clienteles likely to consume a RNP offer throughout the year

Auvergne-Rhône-Alpes Tourism and the Regional Natural Parks (RNP) wanted to carry out a study of notoriety and image making it possible to draw up the profile, behaviors and expectations of customers who may find a favorable echo in a RNP offer on the whole of the year.

To do this, different tourist targets have been defined:

- **prospects**, i.e. who have not stayed in a RNP in Auvergne-Rhône-Alpes (AuRA) in the last 3 years but are likely to stay there;
- **occasional/regular visitors**, i.e. who have stayed in a RNP in AuRA at least once in the last 3 years and
- **first-time visitors**, i.e. who have stayed in a RNP for the 1st time in 2020.

The strategic objective of this study is to identify how to improve the promotion and the marketing of the "Regional Natural Parks" theme, and to better characterize the audiences to be targeted and the means of communication to be favored.

More specifically, the objectives revolve around the following points:

- Identify the typologies of receptive clienteles, according to demographic characteristics or according to sensitivity to sustainable development,
- Evaluate the reputation of Regional and National Natural Parks in France and the competitive positioning of the Auvergne-Rhône-Alpes region,
- Measure the perceived image of Natural Parks and understand the perceived differences between a National Park and a Regional Natural Park,
- Assess the possible role of the health crisis on the attractiveness of RNP,
- Determine the motivations, the expected benefits, the actual or projected behaviors according to the targets, the expectations not (or badly) covered and the types of offers to be developed.

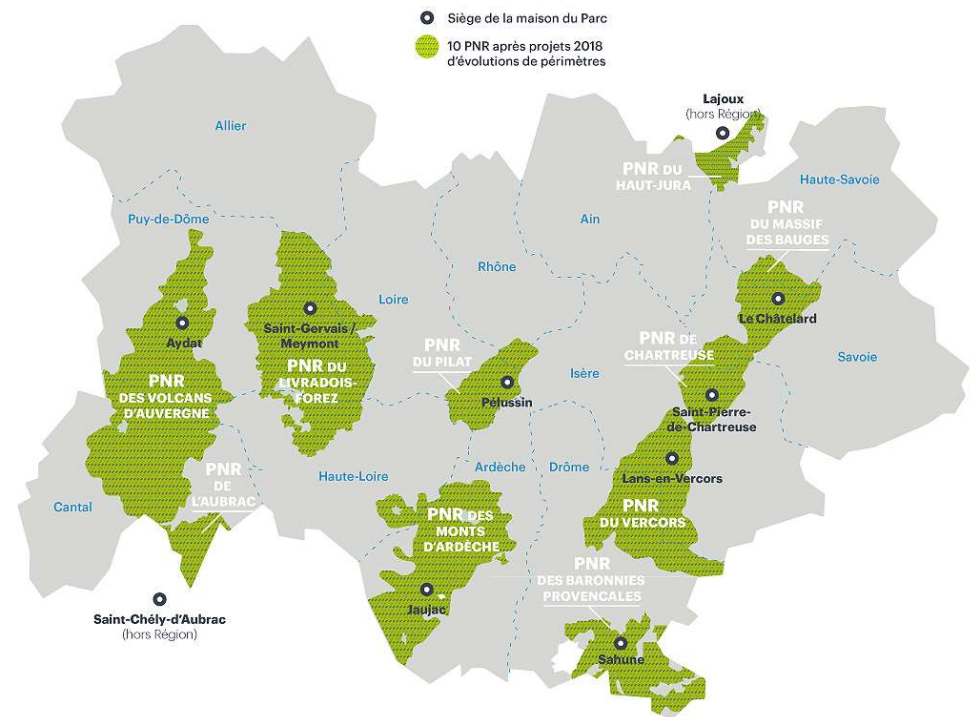
FEEL REBORN HERE



Auvergne
Rhône-Alpes
Tourisme

02

RECOGNITION AND IMAGE OF RNP



AWARENESS



Spontaneous awareness of National Parks and Regional Natural Parks (for the French population)

	National Parks	
1	National Park Mercantour	30%
2	National Park Vanoise	30%
3	National Park Écrins	18%
4	National Park Cévennes	16%
5	National Park Calanques	9%
6	National Park Pyrénées	8%
7	National Park Port-Cros	3%
8	National Park Réunion	2%
9	National Park Guyane	2%
10	National Park Guadeloupe	1%
11	National Parks forêts	1%



Regional Natural Parks– TOP 10	
RNP Volcans d'Auvergne	23%
RNP Vercors	15%
RNP Camargue	8%
RNP Morvan	7%
RNP Verdon	6%
RNP Pilat	6%
RNP Monts-d'Ardèche	4%
RNP Livradois-Forez	4%
RNP Chartreuse	3%
RNP Massifs des Bauges	3%

Awareness & image of PNRs



Auvergne-Rhône-Alpes and sustainable tourism...

An image of a sustainable destination... reinforced by the visit to a Regional Natural Park!

- Nearly 9 out of 10 RNP visitors consider the region to be ahead in terms of sustainable tourism, whether they are regular or occasional customers such as 2020 first-time visitors. The share of "Definitely" is even higher among first-time visitors (38%): visiting an RNP clearly promotes the image of Auvergne-Rhône-Alpes on this point.
- Although the results are lower than the other targets, nearly three-quarters of prospects (72%) believe that Auvergne-Rhône-Alpes is a leading destination in terms of sustainability. Note, however, a greater degree of uncertainty, with 1 prospect out of 5 not deciding.
- Among sub-regional customers, 79% consider the region ahead in terms of sustainability; however, the proportion of "Certainly" remains lower than among RNP visitors; 10% believe that the region is not ahead, the highest proportion.

For you, is the Auvergne-Rhône-Alpes region a leading destination in terms of sustainable tourism?

	Prospects	RNP Visitors	Primo-visitors 2020	Regional Residents
Yes	72%	89%	86%	79%
Yes, certainly	20%	32%	38%	22%
Yes, probably	52%	57%	48%	56%
No	9%	8%	8%	10%
No, probably not	8%	6%	7%	9%
No, certainly not	1%	2%	1%	1%
Don't know	20%	3%	7%	11%

FEEL REBORN HERE



Auvergne
Rhône-Alpes
Tourisme

03

3.1. Primo-visitors

Customers who stayed in an Auvergne-Rhône-Alpes RNP for the first time in 2020

Primo-visitors



Reasons that led to the choice of a stay in a RNP

A desire for unspoiled nature, calm to recharge your batteries and practice outdoor activities

- **The stay in an RNP in 2020 was mainly influenced by the fact that the destination was located in a Regional Natural Park. Indeed, 58% of first-time visitors say that the RNP had more influence in the choice of stay than the destination, resort, city chosen**
- The stay in an RNP was motivated by a desire **to enjoy nature**: diversity and beauty of the landscapes, preserved spaces but also the possibility of practicing activities in an outdoor environment.
- A real desire to **be in peace**, away from busy sites, to de-stress, disconnect, be outdoors after periods of confinement. It was also an opportunity to introduce children to nature.
- An interest in **discovering the local** is also clearly expressed through the tasting of local products, the discovery of know-how or even the meeting with the inhabitants.

Primo visitors



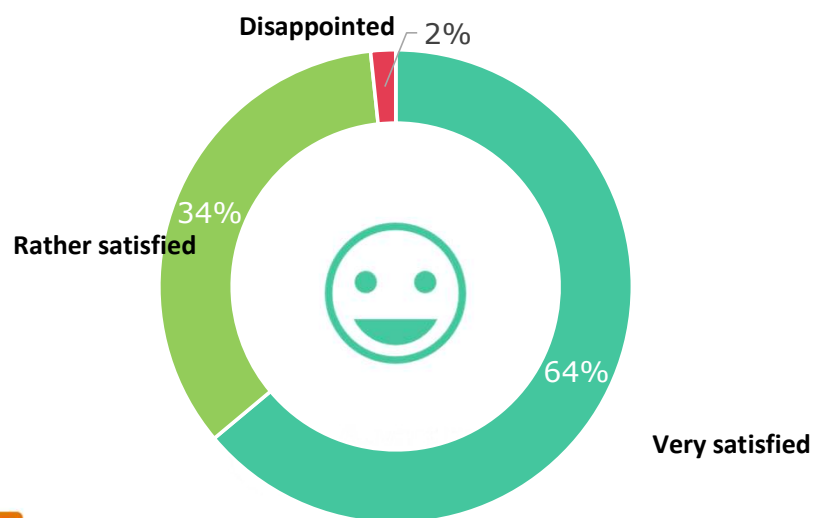
Satisfaction and change of opinion with regard to a first experience in a PNR

A first experience in an Auvergne-Rhône-Alpes (AURA) RNP successful for 98% of first-time visitors

- This first stay satisfied almost all first-time visitors, with more than 6 out of 10 visitors even declaring themselves "Very satisfied". A quality of experience that seems to have been there!
- The relationship with RNP is favorably affected: 6 out of 10 visitors say they have a better opinion and could consider returning to stay in an RNP in the region. Loyalty potential to be converted!

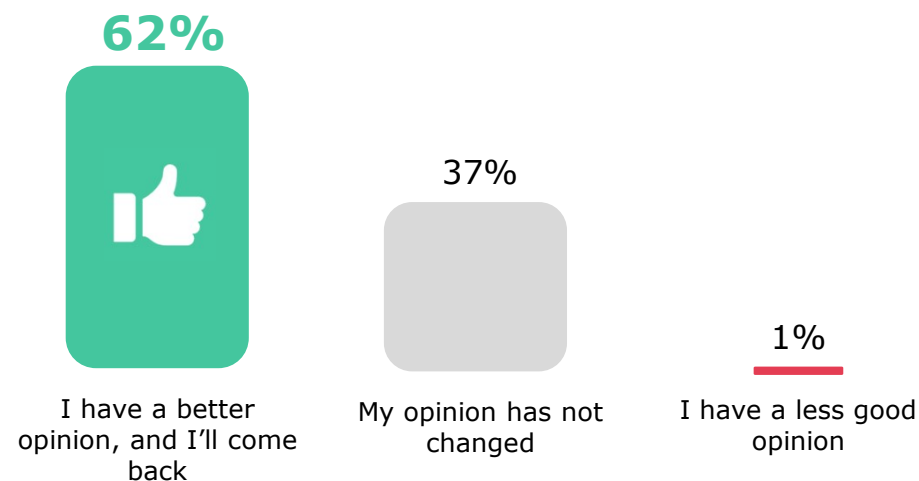
Satisfaction with the RNP experience in AuRA

Are you satisfied with the experience you had during your stay in an Auvergne-Rhône-Alpes Regional Nature Park?



Opinion and loyalty potential

After your stay in 2020, would you say about your relationship with Regional Natural Parks in Auvergne-Rhône-Alpes?





FEEL REBORN HERE



Auvergne
Rhône-Alpes
Tourisme

03

3.2. Visitors of the RNP

Customers who have stayed at least once in
an Auvergne-Rhône-Alpes Regional Nature
Park in the last 3 years

RNPs' visitors

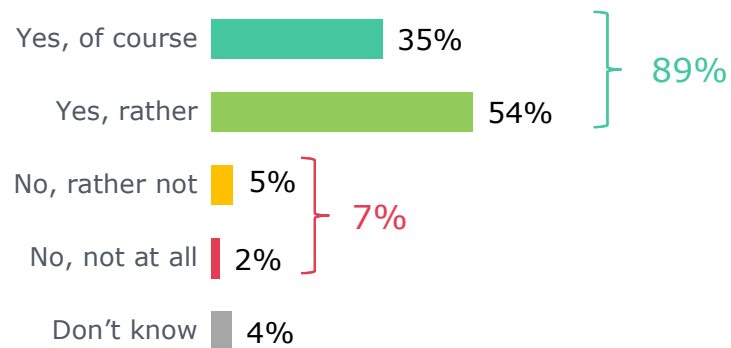


Regional Natural Park and ecological transition...

RNPs as "catalysts" of regional ecological transition

- 89% of RNP visitors consider the Regional Natural Parks as places favoring a faster ecological transition.
- A perception in line with the image enjoyed by the Auvergne-Rhône-Alpes region, which is rather well anchored in sustainable tourism compared to the competition.

In your opinion, are the Regional Natural Parks in Auvergne-Rhône-Alpes places that promote a faster ecological transition?



RNPs' visitors



Difference between a stay in an RNP in the region and a stay outside

The diversity of landscapes and respect for the environment, two major assets of RNPs in Auvergne-Rhone-Alps

- When making a decision, 72% of RNP visitors state that the fact that the destination is located in an RNP has more influence than the chosen destination, station or city (score > 50).
- The two main markers of a stay in an RNP in the region are based on the diversity of landscapes and respect for the environment.
- Also, and in resonance with the health context, staying in an RNP is also a guarantee of fewer crowds.
- The facilitated soft mobility, the variety of activities in the natural environment and the discovery of the local (products, cultures, inhabitants and know-how) are other factors of differentiation.

Source: TCI Research
Auvergne-Rhône-Alpes
Tourisme

RNPs' visitors



Reasons for staying in a RNP

Motivations that resonate strongly with the (new) aspirations of the post-Covid-19 era...

- Motivations centered on natural, preserved spaces. Fresh air and outdoor activities conducive to rejuvenation.
- Also, the RNP allow you to take advantage of the heritage and natural wealth of recognized landscapes.
- The discovery of the local is also sought through the tasting of local products, the meeting with the inhabitants and the discovery of know-how.



* (Reminder of scores among first-time visitors)

RNPs' visitors

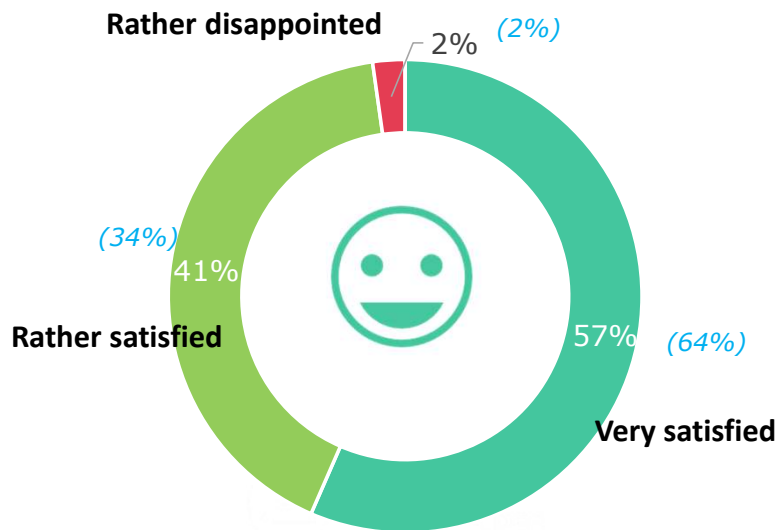


Satisfaction with RNP in Auvergne-Rhône-Alpes

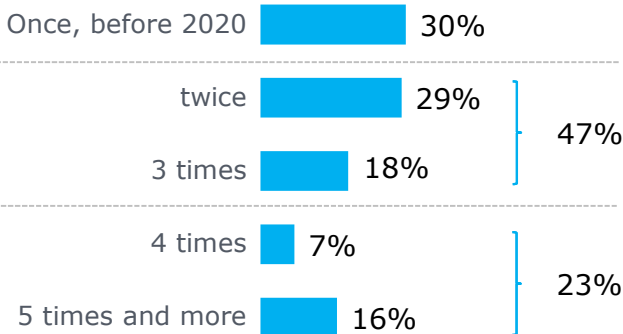
High satisfaction after at least one visit before 2020...

- Almost all visitors say they are satisfied with nearly 6 in 10 visitors even saying they are "Very satisfied". However, a lower score for first-time visitors (-7 points), the share of "Rather satisfied" being higher among RNP visitors (41% vs. 34%).
- An RNP offer that knows how to convince over time: 7 RNP visitors out of 10 having already visited an RNP in Auvergne-Rhône-Alpes at least twice. That said, most came 2 or 3 times (47%) vs. 16% very loyal (5 times or more).

How satisfied are you with the experience you have during your stay(s) in a Regional Natural Park in Auvergne-Rhône-Alpes?



How many times have you already been to a Regional Natural Park in Auvergne-Rhône-Alpes?





Auvergne
Rhône-Alpes
Tourisme

03

3.3 QUALITATIVE IN-DEPTH

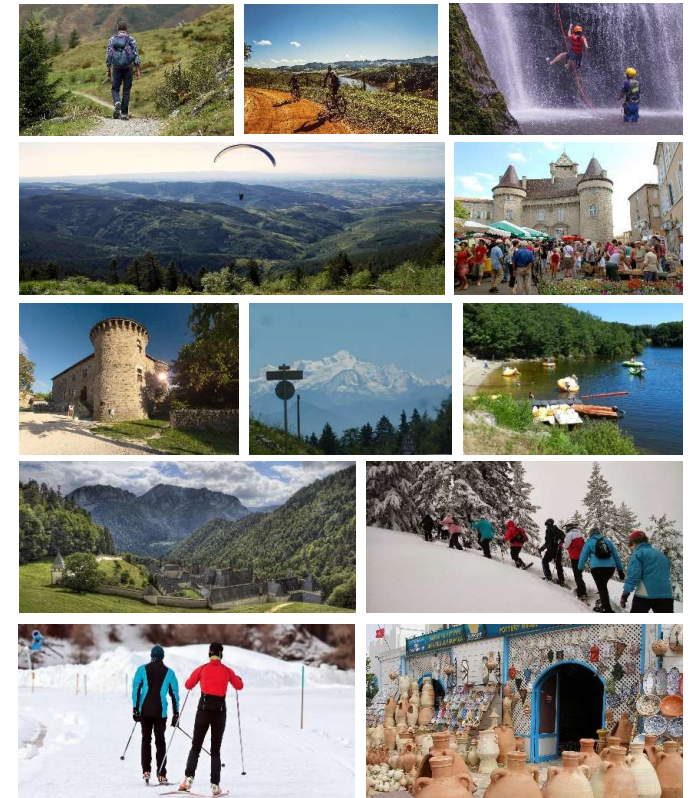
Analysis of customer testimonials posted
on opinion platforms

QUALITATIVE IN-DEPTH

Main experiences lived within the RNP of Auvergne-Rhône-Alpes

An eco-tourism experience, driven by outdoor activities and the discovery of heritage

- Hiking is the flagship activity practiced by visitors, regardless of the PNR,
- ... a "simple" pleasure to enjoy an exceptional natural heritage: landscapes, superb, magical viewpoints / panoramas... (view of Mont-Blanc, the Alps, the Chaîne des Puys etc.),
- Routes to be taken on foot as well as by bike/mountain bike (or even by motorbike),
- The presence of lakes, waterfalls, rivers gives the possibility of practicing many aquatic activities: swimming, canyoning, canoeing etc.
- Aerial activities also with many spots dedicated to the practice of paragliding,
- The discovery of a rich built heritage: visit of monuments such as castles, monasteries, places of memory
- Culture, with museums, sometimes directly installed in RNP houses markets, villages, etc.
- The discovery of human heritage and know-how, local crafts: visits or workshops of pottery, cutlery, lace, etc.
- Winter activities: snowshoeing, cross-country skiing, tobogganing allowing you to enjoy wide open spaces outside the large sliding areas, and discovering another face of the RNP in comparison with the summer period.



QUALITATIVE IN-DEPTH

What are the main emotions, sensations conveyed?

- The immensity and beauty of the spaces within the RNP truly invite you to let go, to disconnect from everyday life: a physical and mental "great breath of fresh air" that reduces stress, soothes. Calm outside... to find inner peace, more serenity.
- A feeling of fullness, of harmony with nature and with oneself: disconnect to reconnect with oneself and with others.
- Also, feelings of freedom, of escape are also frequently expressed, a need probably exacerbated by the containment measures.
- The feeling of traveling in a responsible or "smart" way, going to a territory that will know how to manage the flows and the potentially negative impacts of tourism. Uninhibited tourism?





RENAÎTRE ICI



Auvergne
Rhône-Alpes
Tourisme

04

PROSPECTS

Study of customers likely to consume a
Regional Natural Park offer in Auvergne-
Rhône-Alpes

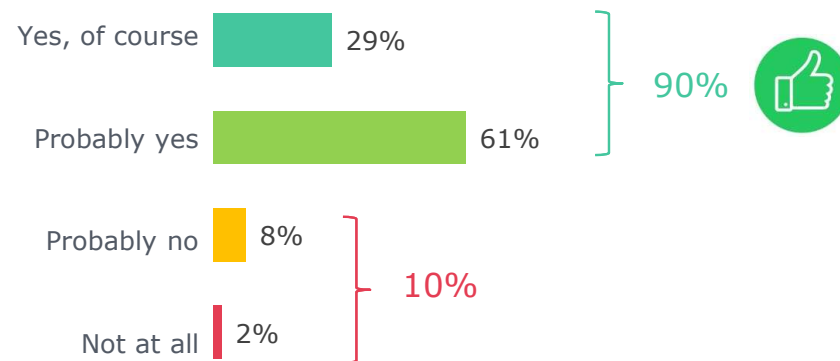
Prospects



Influence of destination location in a PNR

Being located in an RNP favorably influences the choice of a destination in Auvergne-Rhône-Alpes

Could the fact that an Auvergne-Rhône-Alpes destination is located within a Regional Natural Park have a positive influence on your choice to stay there?



- 35% of prospects declare a strong concern about Covid-19 (Vs 52% among RNP visitors and 47% among 2020 first-time visitors): they are significantly less worried.
- For 90% of prospects, the fact that a destination is located in a Regional Natural Park could positively influence their choice to stay in Auvergne-Rhône-Alpes: a "plus" to seduce and attract customers.
- For 10% of prospects, it wouldn't change anything.

Auvergne-Rhône-Alpes
Tourisme

Prospects



Perceived benefits of a stay in an RNP in Auvergne-Rhône-Alpes

Being close to nature, quiet, in an authentic and preserved environment...

How could the fact that a destination is located within a Regional Natural Park favorably influence your decision? What are all the benefits that you associate with the fact that a destination is located in a Regional Natural Park?

- For 38% of prospects, the main benefit is based on the proximity to (beautiful) nature, in beautiful landscapes (a guarantee), in the open air (pure!), less polluted spaces, the possibility of seeing animals.
- A space associated with calm, far from the crowd, conducive to disconnection and rejuvenation, in a healthy and preserved, authentic environment.
- The preservation of heritage, traditions, local (know-how, human, built) appear as significant benefits.
- Similarly, staying in an RNP appears to be enriching, a way of doing tourism in a responsible, more ecological way.
- Finally, the quality of the services (accommodation, catering, refuges, etc.) is also seen as a benefit, even if the mention rate is low.

Prospects



Image of the RNP in Auvergne-Rhône-Alpes

Synonyms of preserved spaces, fresh air, calm, enhancement of the local and an enriching experience...

- A stay in an RNP in the region is a guarantee of healing, fresh air, to find yourself in peace, in preserved natural spaces.
- The tasting of quality local products and the discovery of local know-how are also part of the planned experience of a stay in an Auvergne-Rhône-Alpes RNP, as well as the practice of outdoor activities.
- It is also an opportunity to live an original and enriching experience for 94% of prospects: an expectation, a promise.

Hiking and discovering the local: the activities that attract prospects the most!

- Nature-related activities dominate: hiking (70%), guided fauna/flora observation (54%) and visits to animal/leisure parks (50%).
- Being able to discover the "local" is also very attractive through the tasting of local specialties, markets, fairs, festivals and visits to farms, fruit dairies, mountain pastures.
- Cultural visits are also highly sought after (58% of mentions).
- Residents of Auvergne-Rhône-Alpes continue to express a greater interest in relaxation activities (wellness/spa).



FEEL REBORN HERE



Auvergne
Rhône-Alpes
Tourisme

05

CONCLUSION

CONCLUSION



RNPs guarantee more sustainable tourism: a lever for the region

- RNPs are associated with a role of **preservation and proximity to nature** allowing escape, rejuvenation and the practice of gentle activities. RNP visitors also see it as a way to share moments with the locals.
- Regional Nature Parks are perceived as guarantors of more **sustainable tourism**, i.e. tourism that is more respectful of natural and cultural heritage and inhabitants for more than 9 respondents out of 10. Note: the level of conviction is even better among those who have already experimented with an RNP offer (45% certainly). A good point insofar as RNP visitors and first-time visitors are very sensitive to the subject of sustainability.
- The Auvergne-Rhône-Alpes **region is also considered to be rather advanced in terms of sustainability**, particularly among those who have already experienced an RNP in the region: nearly 9 out of 10 visitors consider the region to be ahead (Vs 72% among prospects and 79% among sub-regional customers).
- A good point for the region, which can therefore rely on the RNP offer to respond to the opinion of tourist customers.

PRIMO VISITORS 2020



They are satisfied... and eager to discover the destination!

- First-time visitors are characterized by a high level of concern about the **Covid-19 epidemic** (47% say they are extremely or very worried); thus, the health situation played an essential role in the decision-making process / choice of an RNP: 72% of them say that the health crisis played a role at least "somewhat important".
- The search for "**open air**" has motivated first-time visitors: a real desire to enjoy nature and what it has to offer (diversity of landscapes, preserved areas in particular) but also the possibility of practicing outdoor activities. 'outside. The search for calm and disconnection were also powerful driving forces. A desire to "breathe" and break ... in a safe environment in terms of health. Staying in a PNR also means being able to enrich yourself by discovering a local environment: 1 first-time visitor out of 2 declared to have an interest in the local area through the tasting of local products, the discovery of know-how or even meeting with the inhabitants.
- Moreover, the place of stay was mainly influenced by the fact that the **destination is located in a Regional Natural Park**: 58% of first-time visitors declare that the RNP had more influence in the choice of the place of stay than the destination itself.
- After this first experience in a Regional Natural Park, first-time visitors are 64% to declare themselves "**Very satisfied**". A satisfaction that is based on this preserved and authentic nature, the landscapes qualified as magnificent, the calm / tranquility after a period of confinement conducive to tensions of all kinds, but also the human welcome and the local cultures. An experience that has met the expectations expressed.
- The relationship with RNP appears to be positively affected: 6 out of 10 visitors express having a better opinion and could repeat the experience in the region. A base of first-time visitors... to build **loyalty**!
- To encourage revisiting, a few levers have been identified: better support for first-time visitors (who are less familiar with this environment) and more mediation to take full advantage of the experience (guided/supervised activities, education on the natural environment, discovery of the fauna / flora, meetings organized with the locals, etc.). Also, the offer of cultural visits and the possibility of staying in typical / original accommodation are expectations expressed by this target!

VISITORS OF RNP



PNRs, a very appropriate "refuge" destination!

- Regular or occasional visitors to RNP are the most worried about the epidemic context: 52% say they are extremely or very worried! Like first-time visitors, RNP promote sustainability: 89% of RNP visitors consider Regional Nature Parks as places that promote a faster ecological transition.
- For them, the distinctive elements of a PNR offer are based on the diversity of landscapes and respect for the environment. For them, it is also a guarantee of fewer crowds, an important element in the current context and of their strong concern. Being able to move around using soft mobility (on foot, by bike, etc.), having easy access to the premises or having a range of varied activities are also part of the differentiating elements of the PNR offer.
- Their motivations for staying in an RNP are linked to the (new) post-Covid-19 aspirations: the search for large, natural and unspoilt spaces, being able to recharge their batteries by enjoying the fresh air, practicing outdoor activities whatever the season. But it is also an opportunity to enrich oneself: take advantage of the heritage and natural riches, recognized landscapes or even discover local customs through the tasting of local products, meeting the inhabitants or discovering local know-how.
- 57% of RNP visitors say they are "Very satisfied", a good score... but slightly lower than first-time visitors (64% "Very satisfied").
- Even if 13% of visitors spontaneously declare that the offer is already complete and satisfactory, expectations are formulated. The main one concerns accommodation (more accommodation, more diversity of accommodation, more ecological / original accommodation). Also, they would like to be able to benefit from more guides / guides, more activities, to be able to move around without a car or even better promotion of the local (crafts / local products). They believe that Tourist Offices should raise awareness on these aspects, and offer more activities related to the RNP / specificities of the territory.

PROSPECTS



Prospects to raise awareness of the RNP offer : reinforce presence in mind!

- Prospects are less worried / sensitive than visitors to the Covid-19 epidemic: 35% of them declare a strong concern (Vs 52% among RNP visitors and 47% among first-time visitors).
- If the usual obstacles to travel are cited (economic, lack of time, distance, etc.), it is essentially the lack of presence in mind of RNP offers that is noted: prospects do not think about it, or even do not know that you can stay in an RNP! Others are considering other destinations (particularly the coast) or types of stay (affinity) or even prefer to go there for the day... when possible (particularly sub-regional customers). However, for the vast majority (9 prospects out of 10), the fact that a destination is located in an RNP could positively influence their choice to stay in Auvergne-Rhône-Alpes. A lever to use to seduce?
- A stay in an RNP in Auvergne-Rhône-Alpes is associated with calm, rejuvenation, fresh air and contact with preserved natural spaces; similarly, they associate RNPs with the preservation of local traditions/customs. A thirst for diversity of landscapes (69% of mentions) and a target in demand for guided activities to discover the fauna / flora (58% of mentions).
- For them, a stay in an RNP would be an opportunity to live an original and enriching experience (94% agree). Expectations are formulated around cultural visits, the meeting organized with the locals, the tasting of local specialties, the visit of farms / mountain pastures or even the visit of markets / festivals / fairs.
- However, accommodation will remain an essential aspect of the ideal offer (50% of mentions). A certain originality in the accommodation is also sought (44% of mentions). The practice of outdoor activities is not to be outdone: 92% of prospects assimilate them to the planned experience in a Regional Natural Park, with hiking in mind (70% of mentions).

TCI
Research

CONTACT

Christelle Lepoutre

Responsible for studies, surveys and analyzes at the
Marketing Studies Department

and also responsible for this translation...

Mob : +33 (0)6 14 44 50 86

c.lepoutre@auvergnerhonealpes-tourisme.com

AUVERGNE-RHONE-ALPES TOURISME

11B Quai Perrache - 69002 Lyon - France ([localiser](#))

www.auvergnerhonealpes-tourisme.com