

Park visitor segmentation to inform park management, marketing and product development.

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Introduction

National parks and protected areas in Victoria, Australia, are managed by a state government agency, Parks Victoria (PV). PV are responsible for managing an expanding and diverse estate covering more than 4 million hectares, about 17 per cent of the state. Victorian protected areas have high levels of visitation, with 42 million annual visits to national parks, state parks and conservation reserves. In order to manage these high visitor loads, PV developed a benefits based visitor segmentation in 2007 (Zanon *et al.* 2014). This segmentation is based on face to face surveys conducted in park. Broad benefit domains were determined based on the activity undertaken during the visit. This approach identified seven visitor segments and provided a concise visitor typology applicable across a range of different parks. The visitor segments focused on the relationship between the level and type of services and facilities and visitor satisfaction for different park types and have been used to drive the development of visitor service strategies, park planning and management over the last ten years.

Current agency priorities include increasing visitation through development of improved visitor experiences and nature base tourism product development. When reviewing data available to inform this priority, it was identified that the current segmentation provides information of visitor segment activities and required services and facilities in park, but did not provide sufficient information on attitudes, behaviors and motivations of visitors, required to inform marketing, communications and product development. It was determined that the visitor segments needed to be validated and refined, in order to ensure that they were up to date and able to inform various components of protected area management.

Approach

The data set that informs PV visit segments has been collected every second year over the last ten years, using face to face interviews in 30 different parks across the state. This data set was reviewed to determine temporal trends in current segments proportions and demographics.

A visitor profiling survey was developed and delivered online with a sample size of 1,500 Victorians. The survey included PV's segmentation variables, and New South Wales Parks and Wildlife Service (a neighbouring Australian state protected area management agency) 'needs based' segmentation variables. This allowed for each respondent to be classified into both state's segments, providing an opportunity for exploration of parallels between parks visitors to the two Australian states and leverage NSWs relevant category profiling information.

The survey also included additional questions that aimed to explore:

- Key needs, motivations, attitudes and behaviours in relation to parks, nature, culture, heritage, activity, health and wellbeing, family and friends.
- The likelihood of undertaking different types of visit experiences;
- Trusted sources of influence / information;

- Familiarity with and use of technology (devices and platforms);
- Key destination decision drivers and barriers.

Thirty three questions from the survey were converted to seven factors using principal component analysis, using a varimax rotation. A k means cluster analysis was then run to on the factors to determine a new segmentation solution. These visitor profile segments were then cross validated with PV's segments and NSW Parks and Wildlife segments.

Results

Review of PV's data showed that the visitor profile has shifted over the last ten years. Nature Admirers, who visit for a novel, visual nature experience, make up 10% more of total visits than in 2007. This segment also has an increased number of younger people than previously, a trend mirrored in overall visitation demographics. Trail users, who visit for a variety of trail activities, have also increased by 8%. This segment now has a more varying demographic with young singles and families with older children both represented. Urban Socials, who visit typically for a large social gathering within the park make up a smaller proportion of total visitation, as do Activity Centrics, visit to undertake high energy and/or water based activity.

PV's benefits based segments and NSW's needs based segments only showed minimal overlap. The PV segment "Urban Socials" overlapped with the NSW segment "Socialisers", with a 50% match. There were no other significant relationships between the two segments. Four new segments were identified using the visitor profiling data; Active in nature, Social in nature, Me time in nature and Experience seekers. For the Active in nature segment staying in good physical condition is important (69% vs. 31%) and parks are a place where they can engage in physical activities (25% vs. 9%). Social in nature enjoy spending time with people they know (57% totally agree vs. 40%) and it's important for them to socialise with family and friends in natural settings (31% very important vs. 24%). Me time in nature make an effort to get some 'me time' and to spend time by themselves (43% totally agree vs. 25%). Parks are a way of disconnecting from daily life (36% totally agree vs. 23%) where they can unwind and relax (46% very important vs. 38%). Experience seekers seek out new experiences (25% totally agree vs. 17%), they're well informed about Victorian parks (23% totally agree vs. 8%), they feel the parks are well maintained (33% totally agree vs. 17%).

Management Implications

The functional needs identified for each visitor profile segment support the development of tailored visitor experiences in suitable locations. For example, Me time in nature are seeking experiences that emphasise opposite to busy, hectic, life pressures. Primarily wellness activities in a natural setting that are convenient and not challenging.

Marketing and communication approaches can be informed by the social values and emotive drivers of each segment. These can be targeted through identified information sources and influences trusted by each segment, as well as familiarity with and use of different technology.

Reference

Zanon, D., Hall, J., Lockstone, L., and Weber, D. (2014) Development of a whole agency approach to market segmentation in parks. *Journal of Leisure Research* 46. 563-592.