

MARKETING OF PROTECTED AREAS AS A TOOL TO INFLUENCE VISITORS' PRE-VISIT DECISIONS



Mike Reid, Stephen Wearing and Glen Croy

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SUMMARY

Overview

As the result of the increasing influence of tourism, natural and protected area management is evolving from one primarily focused around onsite management and conservation to one that more broadly encompasses a greater range of holistic recreation and tourism experiences. In dealing with this evolution, national parks and protected area managers are now required to balance onsite interpretation activities with marketing and demand management activities.

In essence, managers need to consider how to change the way national parks and protected areas are 'marketed' to people. This requires managers to consider changing recreation demands and visitor expectations upfront and integrating marketing strategies into communication and interpretation to promote parks effectively and to achieve more realistic expectations of what visitors can expect.

Marketing, as visitor and stakeholder communication, especially pre-visit communication, can be influential in a visitor's decision regarding where to go and what to do. Strategic and tactical communication can also influence how visitors behave by providing information in a manner that reinforces desired onsite behaviours.

Establishing experience and behavioural expectations prior to visiting a protected area is central to ultimate visitor satisfaction as well as environmental protection. In designing pre-visit communication that promotes park and protected area visitation, as well as shapes behavioural expectations, managers must have a framework with which to both plan and implement effective pre-visit communication strategies.

Objectives

This report seeks to integrate three important contemporary themes in order to provide the foundations for improving pre-visit communication:

1. The changing mandate for park and protected area managers and the issues regarding the marketing of protected areas.
2. Pre-visit communication models derived from the academic and practitioner literature incorporating models of destination choice and decision-making by visitors and the contribution they can make.
3. The concept of Integrated Marketing Communication and the implications of this concept for the marketing of national parks and protected areas, and the planning and implementation of pre-visit communication strategy.

Drawing together the three themes, and considering the likely implications for natural and protected area management and marketing, this project specifically seeks to:

1. Undertake a review of the typical marketing communication practices employed by protected area agencies (and associated agencies) to influence pre-visit decision-making of prospective visitors
2. Evaluate the perceived effectiveness of these communication practices in meeting desired communication and behavioural objectives.
3. Examine the current visitor data (market research) being collected and employed by protected area managers and associated agencies in the development of pre-visit marketing communication strategies.
4. Develop a market segmentation table or matrix for use in pre-visit marketing communication strategy.
5. Provide practical guidance on how to monitor the effectiveness of specific protected area marketing practices.

Methodology

A series of in-depth face-to-face interviews were conducted with protected area managers and marketers and provided insight into the nature of marketing, visitor and stakeholder communication and in particular pre-visit communication within park agencies.

Secondary data and web-based analysis was employed to further understand practices related to pre-visit communication management.

A quantitative survey was also conducted to more fully understand pre-visit communication practices and perceptions from a range of organisations, including national park and protected area agencies, state and regional tourism organisations, visitor centres, and tourism operators.

Three case studies of Australian park pre-visit communication practices were also undertaken and provide further insight into issues and complexities related to this area.

Key Findings

Understanding visitor decision-making

The research examined the data related to and understanding of the decision-making process of potential visitors. Such data and understanding is critical to making appropriate pre-visit communication strategy decisions.

- Generally, respondents felt they had a reasonable understanding of the demographic and lifestyle influences on pre-visit decision-making. Similarly, respondents also felt they had a reasonable understanding of previous satisfaction with the park product supplied, the experiences sought by visitors, and their post-visit satisfaction.
- Areas of weakness were noticeable in the more detailed and behavioural aspects of understanding pre-visit decision-making, including when people start thinking about visitation, the time taken in decision-making, the information acquisition and analysis process and the difficulties in accessing information about where to go and what to do.

Integrated pre-visit communication management

In consultation with interviewees and reference group members, the research examined the way in which pre-visit communication is planned, implemented and managed. In particular it focused on three areas; strategy foundations, strategy development, and strategy implementation. Understanding these areas will enable managers to improve the pre-visit communication.

- It was found that overall satisfaction with the planning, implementation and overall outcomes of pre-visit communication was somewhat low and that scope for improvement existed. An analysis of the integrated pre-visit communication management (IPCM) themes highlights areas which, if improved, are likely to result in greater satisfaction and tangible benefits for the organisation and potential visitors.
- With regard to the *strategy foundations* area, development of a *vision and mission* to guide pre-visit communication efforts was reasonably well practiced and a relatively strong characteristic of respondents' pre-visit communications management. This reflects the work undertaken over the last several years by many organisations to become more strategic in their communications.
- *Internal stakeholder integration* within organisations was also a relatively strong area of the IPCM process.
- The poorest performing area of strategy foundations was *external stakeholder connection and integration*. Overall, the results for this section suggest that there is scope for improvement, particularly in the management of cross-functional integration and inter-organisation integration and connection.
- In the area of *strategy development* the poorest performing component was *visitor connectivity*. Visitor connectivity represents how the voice of targeted visitors and tourists is heard in the organisation and helps direct development of pre-visit communication strategy and the allocation of resources to the communication mix. This is a crucial element of IPCM and as such requires particular attention.
- The *pre-visit planning process* itself was also identified as an area of poor performance and will need to be improved in order to ensure that managers can attain the desired response from target visitor or consumer segments.
- The result for *clarity of objectives*, whilst having slightly better performance than the other two dimensions, also suggests that improvements can be made.
- In the final area of *strategy implementation*, respondents indicated that they have a reasonably good level of consistency in the communication activities they undertake.
- The area of *availability of resources* for undertaking pre-visit communication was the poorest performing dimension overall. The resourcing of marketing and visitor communication is an important issue for all organisations to address, especially in tight economic times. Resourcing should be viewed as an investment and, given the changing mandate for national park and protected area managers to undertake an expanded marketing role, needs significant consideration.
- Overall, there appears to be significant scope for improvement in the way in which integrated pre-visit communications is managed, implemented, and resourced.

Segmentation

Understanding who you wish to communicate to and what you will offer them is central to making and devising an appropriate communication strategy. This understanding is also central to making effective communication planning and implementation decisions. This research examined issues related to the segmentation employed by agencies.

- It was found that agencies generally lack a well-developed segmentation strategy and that development of this area will significantly help decision-making for pre-visit communication.

- There was a need for improved access to visitor data and primary research on potential visitors to understand the experiences they desire, the barriers to participating in park-related experiences, and the use of various information sources used in making decisions about where to go and what to do.
- There is a need to adopt a Recreation Opportunity Spectrum (ROS) based segmentation strategy in order to best develop a portfolio and map of the relationships between the various national parks and protected areas and the different visitor segments. This approach enables an improved matching of parks and people and improves the ability to design messages for each group.

Recommendations

The report concludes that pre-visit communication has become an essential part of visitor demand management and managing visitor expectations of national parks and protected areas. Protected area managers and agencies are making significant steps to improve planning and implementation of pre-visit communication.

The 14 recommendations are based on our overall observation of the management of IPCM and also on the specific responses to qualitative and quantitative data presented earlier:

1. Institute a regular IPCM audit.
2. Develop a motivational vision and mission statement.
3. Refine pre-visit communication roles and responsibilities within the organisation. Managers must continue to refine and clarify the roles and responsibilities of individuals and departmental groups within parks and protected area agencies with regard to planning and implementing pre-visit communication strategy and activities.
4. Strengthen relationships with state and regional tourism organisations.
5. Improve the integration of visitor data into strategy development and campaign planning.
6. Improve the clarity of objectives regarding which visitor segments to target and products (parks and protected areas) to market.
7. Institute a more systematic and data driven pre-visit communication planning process.
8. Maintain current efforts in the development of strategic marketing collateral and brand livery.
9. Improve the resourcing of pre-visit communication management and activities.
10. Develop a clear brand vision and brand identity.
11. Utilise the segment matrix to develop a product/segment portfolio matrix based on experiences sought by visitors.
12. Undertake specific visitor segment level pre-visit decision-making research.
13. Include information source and experience sought questions in visitor surveys.
14. Determine the usefulness and effectiveness of the website in facilitating visitor decision-making.

Chapter 1

INTRODUCTION

This report focuses on the issues salient to developing and implementing pre-visit communications in the context of protected area marketing and management.

Natural and protected areas around the world have been used as sites of recreation, leisure and tourism for centuries (Butler & Boyd 2000). In the past three decades, however, we have seen an enormous expansion in the numbers and types of users, in Australia as well as overseas. Participants used to be almost exclusively male, better-educated, active recreationists (Booth 1989), but they have been joined in recent years by a broader range of users, including word-of-mouthers and older people (Kearsley & Croy 2001). This trend of increased popularity and usage of natural areas for recreation is also being identified around the world (Pigram & Jenkins 1999). Additionally, both recent trends and future projections point toward continued increases in the number of participants in outdoor recreation trips and activities (English, Cordell & Bowker 1999).

Much of the appeal of outdoor recreation is based on open access to valuable natural resources like national parks, forests, parklands and wilderness. As pressure grows on these increasingly scarce natural resources, the quality of the setting and people's outdoor recreation experiences will be compromised further (Moyle & Croy 2007). The scenic and aesthetic appeal of these natural resources contributes greatly to their attraction as well as the satisfaction of users. It is this aesthetic appeal that has and continues to be used as a fundamental basis for marketing and promoting such destinations to potential markets.

This popularity, partially due to its importance as a tourism promotion tool, has also brought about increased impacts, and management agencies are being faced with significant visitor management issues. Visitors to these inherently fragile natural areas induce a variety of impacts on the natural and historic values of these areas (Booth & Cullen 1995). Nonetheless, in addition to the physical impacts, increasingly significant impacts of crowding and displacement are also occurring (Kearsley, Coughlan, Higham, Higham & Thyne 1998; Kearsley, Russell, Croy & Mitchell 2001; Moyle & Croy 2007). These perceptual impacts are predominately occurring, not surprisingly, in the accessible areas of the protected areas' front country (Vaske, Donnelly & Whittaker 2000). These impacts, both physical and perceptual, are compounded through the increased diversity of recreational activities undertaken in natural areas (Booth & Peebles 1995; Kearsley & Croy 2001).

This diversity has increased with the development of technology, especially in the forms of motorised and non-motorised all-terrain transport, including four-wheel-drive vehicles, trail bikes, and mountain bikes, and general outdoor recreation equipment. This has provided increased access to natural areas, and additionally provided for increased access within them. It is largely these two factors of increased importance and increased access that are attributed the physical and perceptual impacts.

In summary, the greatest challenge facing national park and protected area managers around the world is balancing growing community expectations to use and enjoy parks with the need to protect them for future generations. Pre-visit communication is therefore important for shaping expectations and for directing users to appropriate parks.

Project Aims

This project aims to support the marketing decisions of national park and protected area managers with regard to the planning, implementation and effectiveness of pre-visit communications designed to shape visitor expectations and behaviour. Specifically the project sought to:

1. Undertake a review of the typical marketing communication practices employed by protected area agencies (and associated agencies) to influence pre-visit decision-making of prospective visitors.
2. Evaluate the perceived effectiveness of these communication practices in meeting desired communication and behavioural objectives.
3. Examine the current visitor data (market research) being collected and employed by protected area managers and associated agencies in the development of pre-visit marketing communication strategies.
4. Develop a market segmentation table or matrix for use in pre-visit marketing communication strategy.
5. Provide practical guidance on how to monitor the effectiveness of specific protected area marketing practices.

Scope

The nature of protected area communication is evolving from one primarily focused around onsite interpretation with a focus on enjoyment and learning and conservation, to one that includes an increasing emphasis on pre-visit communication and managing demand (Figure 1). For protected area managers to meet their changing service delivery responsibilities it is essential that they 1) provide quality services and promote appropriate visitor behaviour, and 2) encourage realistic community awareness, understanding and appreciation of the conservation responsibilities of park agencies, the values inherent in protected areas, and opportunities for appropriate visitor use. Marketing offers a valuable management tool in fulfilling all three of these macro roles (Wearing, Archer & Beeton 2006)

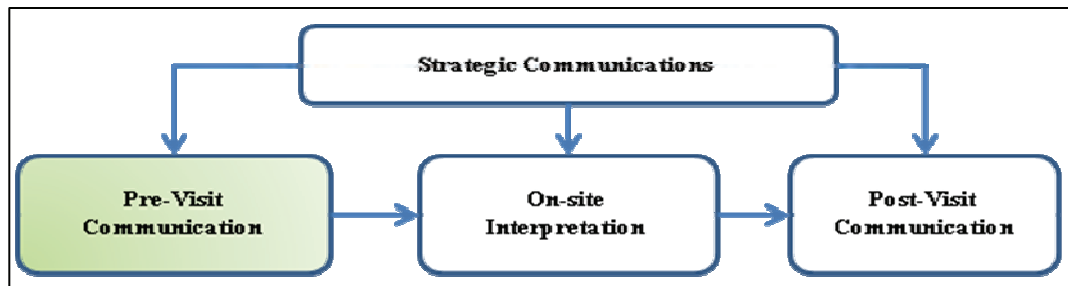


Figure 1: Scope of integrated pre-visit communications

Given the mandate to manage issues of demand balanced with conservation, the scope of this report is quite broad and attempts to integrate the following three themes:

1. The changing mandate for park and protected area managers and the issues regarding the marketing of protected areas.
2. Pre-visit communication models derived from the academic and practitioner literature incorporating models of destination choice and decision-making by visitors and the contribution they can make.
3. The concept of Integrated Marketing Communication and the implications of this concept for the marketing of national parks and protected areas, and the planning and implementation of pre-visit communication strategy.

To focus this report we have employed the term Integrated Pre-visit Communications (IPC) to reflect the best practice approach of the broader integrated marketing communication philosophy emerging in both academic research and industry and consulting research. More broadly, the scope of this report deals with the management of IPC—Integrated Pre-visit Communication Management (IPCM).

Industry Involvement

This report has benefited greatly from the direct input of managers from a range of protected area and tourism organisations. In particular, discussion, consultation, and feedback from Parks Victoria, Tasmania Parks and Wildlife Service, and Department of Environment and Conservation, Western Australia, has been instrumental in the development and production of this report.

Methodology

This project adopts a mixed method approach to achieving its objectives. A series of in-depth face-to-face interviews were conducted with protected area managers and marketers. These were conducted in order to gain strong insights into the nature of marketing, visitor and stakeholder communication and in particular pre-visit communication within park agencies. Secondary data and web-based analysis was also employed to further understand practices related to pre-visit communication management. A quantitative survey was also conducted to more fully understand pre-visit communication practices and perceptions from a range of organisations, including national park and protected area agencies, state and regional tourism organisations, visitor centres, and tourism operators. Several case studies of Australian park pre-visit communication practices were also undertaken to provide further insight into issues and complexities related to this area.

Literature review

The project was informed by two main bodies of literature. Firstly, literature was reviewed that related to destination decision-making by tourists and visitors. This literature exposes key models and concepts related to

the way in which decisions are made, the key contact points that should be leveraged by managers charged with communicating protected area experiences and behavioural requirements. The literature also points to different communication tools that may be appropriate to use in communication campaigns. The second body of literature relates to integrated marketing communication and best practice associated with establishing a dialogue with potential visitors and other stakeholders, and for building awareness and positioning for national park and protected area agencies as a source of preferred information. The literature review is not exhaustive but leverages a number of key papers in each area.

Interviews

A series of in-depth face-to-face and telephone interviews were conducted with protected area managers and tourism marketers in order to gain insight into the nature of marketing, visitor and stakeholder communication and, in particular, pre-visit communication. Interviews were conducted over several time periods with key informants from Parks Victoria, Tasmania Parks and Wildlife Service, Tourism Tasmania, West Australian Department of Environment and Conservation, Tourism Western Australia, South Australia Department for Environment and Heritage, South Australia Tourism Commission, New South Wales National Parks and Wildlife Service, and Tourism New South Wales. These key informants were interviewed because they could contribute meaningful insights to inform the project. This interview approach follows previous studies which have examined the views and experiences of senior marketing executives (Beard 1996; Duncan & Everett 1993). Multiple in-depth interviews enabled issues to be probed more deeply and also enabled a sense of the ongoing traction that key issues in pre-visit communications have in these organisations. Telephone interviews were also conducted with several organisations in order to develop brief case examples that further helped to contextualise the study and provide insight into specific pre-visit communication practices.

Secondary data analysis

Information was also sourced from a range of secondary sources. The information was sourced particularly in the investigation of segmentation of natural and protected area markets. Market segmentation information was sourced systematically, starting with the state park agencies, as well as from websites, especially searching for visitor markets and or experiences. Largely, this information, where available, was within park management documents. Additionally, visitor market and experience documents were also obtained directly from the park agencies. The park agency specific information was supplemented by searching the state tourism organisations for their market segmentation information. The supplementary information was collected to identify similarities in visitor segmentation practices.

Survey

A major data collection avenue for the report involved quantitative research in the form of a cross-sectional survey. The survey consisted of a structured questionnaire examining a range of pre-visit communication issues and practices. The target respondents for the survey were those managers actually responsible for planning and implementing pre-visit communication strategies and activities. The respondents targeted with this survey were also representatives along multiple points of the communication network, including parks management, state and regional tourism management, visitor centres, and private tourism operators. The questionnaire was undisguised and standardised for all respondents with pre-specified alternatives provided.

Questionnaire design

The questionnaire was developed using a literature review on best practice in integrated marketing communication management and insights from the qualitative interviews with managers. The questionnaire was pretested by the industry reference group. The questionnaire was also reviewed by a member of the Department of Marketing at Monash University who had particular expertise in the area of integrated marketing communications research. The questionnaire contained several sections (see Appendix 1), in particular:

1. An overview of the responding organisation and respondent's position
2. Overall satisfaction with IPCM as undertaken by the organisation
3. Degree to which the organisation understands the pre-visit planning and decision-making process of visitors and main sources of information used in this understanding
4. A best practice assessment of IPCM
5. Communication tools employed by respondents and perceptions of their effectiveness

Administration

Data collection utilised both online and mail survey techniques. The predominant mechanism was the mail survey. Overall, the design of the survey comprised the survey 'package', including the presentation style and

accompanying information. The mail survey included outgoing and reply paid return envelope, cover letter and the actual questionnaire.

Sample

A total of 1000 organisations were sent questionnaires. Their contact details were acquired from a commercial mailing list provider and were checked through web analysis of business details available on major state tourism organisations. The person completing the questionnaire was either the marketing manager or an individual with significant involvement in marketing communication in the organisation. The survey was administered over the period December 2007 to April 2008. The extended timeframe was a result of the Christmas timing and busy holiday period. The survey included an initial mail out and two reminder letters. The final response was 125 managers (13.4%). Research into non-response suggested that the questionnaire was somewhat difficult for very small businesses to complete because of the limited marketing activities undertaken. Further, several managers stated that they are 'over surveyed' by academia and government and refused to participate. There were 70 return-to-senders consisting of businesses no longer in operation and a general non-response. Importantly for this project there are responses representing parks agencies in South Australia, Tasmania, Queensland, New South Wales, Victoria and Western Australia. The final break down of respondents is shown in Figure 2.

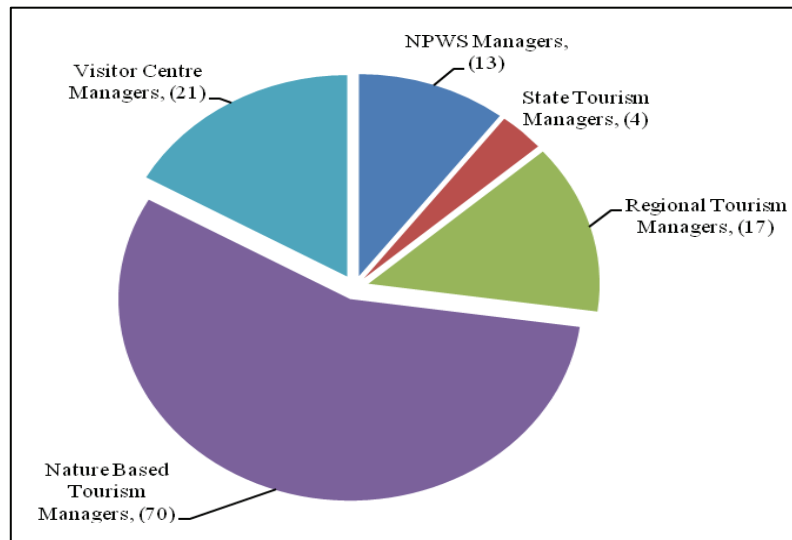


Figure 2: Organisation type

Data analysis

The data provided by respondents were coded for entry into the Statistical Package for Social Sciences (SPSS). Methods of analysis used to interpret the data included frequencies, cross-tabulations, and descriptive information including mean and median. Data are presented as tables and graphs illustrating behaviours, practices and perceptions related to pre-visit communication.

Conclusion

In summary, this report focuses on the issues salient to developing and implementing pre-visit communications in the context of protected area marketing and management. The report reflects the changing nature of protected area management from one primarily focused around onsite management with a focus on and learning and conservation, to one that includes a greater emphasis on a broader range of experiences and on pre-visit communication and managing demand. The report draws on the need for national parks and wildlife service (NWPS) agencies to meet their changing service delivery responsibilities through provision of quality services, promotion of appropriate visitor behaviour, and encouragement of community awareness, understanding and appreciation of the conservation responsibilities of park agencies. The report also recognises that a tourism imperative is also present in the changing national park and protected area management role and with it an increased imperative to generate funds to support desired park activities.

The report will firstly examine the changing role of parks related agencies, and then examine the nature of consumer or visitor decision-making. The report will then examine the concept of integrated marketing before presenting insights into the management of pre-visit communications. Finally the report presents a segmentation model which has implications for the development of pre-visit communications and concludes with recommendations for management.

Chapter 2

THE CHANGING ROLE OF PARK COMMUNICATION

Prior to focusing on marketing and marketing communication as it applies in park and protected area management, it is necessary to first consider the broader responsibilities and roles of park management agencies.

As with most public sector organisations, parks agencies differ from private enterprise in that, unlike the private sector, they tend to have multiple purposes. Public sector organisations engage not only in the direct delivery of services to the public, but many also have additional, different purposes (Donnelly 1999); these additional purposes include building community pride, a community governing itself, promoting choice, building diversity and channels for learning. Park management agencies are, of course, public organisations and thus the complexities facing them are considerable given the diverse range of stakeholders to be considered, including not only park users, but future users, non-users, commercial sector partners, local communities, citizens, management, employees, and other public sector agencies (Wearing, Archer & Beeton 2006). This complex situation is further complicated by the fact that national parks and wilderness reserves in Australia are managed not by a single federal agency, but are the responsibility of individual state and territory governments. However, all these agencies have common responsibilities and mandates in relation to the preservation and management of their estates, both terrestrial and marine.

An increasingly primary focus among Australian park management agencies has been on delivering quality services to the public (Archer & Wearing 2002). This service delivery role typically includes, but is not restricted to, the protection of natural and cultural values; provision of quality recreation and tourism opportunities; information, interpretation and educational services; weed and feral animal eradication; and fire management. Park management agencies also have an important role to play in building broader community awareness and facilitating a sense of community value, ownership and affinity with national parks. The protection and conservation of Australia's natural and cultural heritage depends on not just addressing the needs of park users, but also on building a level of community understanding and acceptance of the history, place and value of national parks as representative examples of natural and cultural diversity. Meeting these responsibilities is increasingly difficult as significant management and external challenges are faced by national parks agencies in Australia (Coaldrake & Stedman 1998; Foster 2000; Wearing & Nelson 2004).

At the same time, park managers have come under increasing pressure to accommodate more visitors to their estates. The general reduction in public funding has pressured park management agencies to seek alternative sources of revenue, and led to a situation where visitor numbers are now a central component of agency performance measurement (Wearing & Nelson 2004). Additional pressure has also come from the private sector, with the tourism industry calling for the provision of more opportunities to meet the increasing demands of international and domestic tourists (Foster 2000). National parks and the natural environment are now strategically positioned in planning documents and marketed aggressively by the tourism industry and marketing organisations in all Australian states and territories. This in turn is placing pressure on park management agencies to provide visitors with quality services. Visitor satisfaction is also used by park management agencies as a key indicator of management performance in delivering quality services and programs. Ensuring that park users are satisfied encompasses more than just providing settings and facilities. People bring with them various expectations, experiences, needs and motivations for visiting a national park (Kearsley & Croy 2001). Likewise, their own personal values and attitudes to national parks also play a key role in their level of satisfaction (Wearing, Archer & Beeton 2006).

In an evolutionary sense, it is possible that the continued delivery by park managers of quality park experiences may bring about a change in visitor and wider community attitudes towards the natural environment (Forestell 1990). There is some evidence to suggest that when visitors to national parks obtain a satisfying experience, often they will come closer to supporting the underlying philosophy of park management (McArthur 1994). It is possible to identify three macro roles that park management agencies have to fulfil:

- The preservation and conservation of natural and cultural heritage, a role that always should take primacy;
- Delivery of a wide range of services to multiple community and stakeholder groups, especially recreation and tourism opportunities; and
- Building broad community awareness, valuing, ownership and affinity with our natural and cultural heritage.

The first of the aforementioned roles—preservation and conservation—is, and must always remain, the core focus of park managers. In relation to the other two macro roles, if park management agencies are to meet their service delivery and community building responsibilities it is essential that they provide quality services, promote appropriate visitor behaviour, and encourage community awareness, understanding and appreciation of

the conservation responsibilities of park agencies, the values inherent in protected areas, and opportunities for appropriate visitor use. Marketing offers a valuable management tool in fulfilling all three of these macro roles (Wearing, Archer & Beeton 2006).

Defining Marketing

Traditionally, marketing has centred around the notion of profit-oriented buyer-seller relationships based on exchange transactions between a producer or service provider and a purchaser or client. However, marketing has increasingly been adopted in not-for-profit contexts where economic considerations are balanced by the delivery of social and environmental benefits for both provider and visitor (Sheth & Usley 2007). In its later guises the marketing concept has come to incorporate outcomes other than profit, such as long-term environmental conservation, improved customer (visitor) awareness, appreciation of the natural environment, delivery of societal benefits, and customer (visitor) satisfaction. Two definitions that illustrate the evolution of marketing are from the American Marketing Association:

Marketing is an organisational function and a set of processes for creating, communicating, and delivering value to customers and for managing customer relationships in ways that benefit the organisation and its stakeholders. (American Marketing Association 2008)

Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large. (American Marketing Association 2008)

Hence, the redefining of the traditional marketing concept has resulted in part from rapidly changing global market environments which have acted as triggers for alternative marketing approaches to be developed, including relationship marketing, social marketing, ecological marketing and demarketing (Ringold & Weitz 2007). Profit may determine a product's viability but, increasingly, is not the sole measure of its success. Organisations in the public sector domain, like charities, municipalities and protected area management agencies, also find themselves operating in an exchange relationship context. The need for marketing arises once there are alternatives and choices for visitors. This notion of voluntary exchange is central to the concept of marketing and is based on the organisation offering want-satisfying goods or services that visitors perceive to be of value (Sheth & Usley 2007). The long-term survival of an organisation, including park agencies, depends to an extent on deriving and sustaining a competitive advantage by satisfying the needs of its visitors.

Marketing and Park Management in Australia

This section highlights work undertaken by a range of authors with regard to the changing nature of protected area and park management, and highlights the changes and conflicts that are emerging in balancing the commercial and conservation objectives.

Whereas interpretation and education programs have long been established within protected area management, Archer and Wearing (2002) observed that marketing as a management concept has a relatively short history in Australian agencies. There has been, according to Archer and Wearing (2002), a perception among some within park management that the larger interests of the community and environment are at risk of being overwhelmed by marketplace and commercial interests associated with the commercial sector, including the tourism industries.

Wearing and Brock (1991) suggest that such scepticism is understandable in view of the tendency of park managers with considerable experience to come from natural science backgrounds, and with limited knowledge or understanding of the use of social scientific enquiry or market-driven commercial considerations in park management. Furthermore, Archer and Wearing (2002) argue that marketing expertise within Australian park management agencies, at the planning and policy levels, has historically been either non-existent or sparingly applied, and political and resource realities have also been factors in the reluctance to subsume marketing strategies within park management. Additionally, Hall and McArthur (1996) argue that marketing has to be recognised as a tool for achieving protected area management aims and objectives and not just being conducted for its own sake.

It is only relatively recently that marketing has begun to establish itself as a valued concept in the management of protected areas (Wearing & Bowden 1999). Mindful of their increased accountability and obligations to meet performance criteria, including high visitor satisfaction and increased visitor numbers, parks agencies have in recent years adopted marketing principles within their strategic management frameworks. This has been typified by planning and policy documents that explicitly outline the desire to be more outwardly focused and more accurately reflect individual and community needs and expectations.

Corporate plans now typically state the need to establish a more market-driven strategic direction, the need to develop strategic partnerships with other key stakeholders, more actively promote commercial outdoor recreation and tourism opportunities, and make a more conscious effort to provide clear parameters for public use of natural

resources (Wearing & Archer 2001). Indeed, marketing strategies are now recognised by protected area management agencies as central to developing broad public support for the long-term protection of environmental and cultural integrity.

The Conflict between Demand Creation and Conservation

Wardell and Moore (2004) have determined that protected area management must strike a balance between two objectives: the conservation of the natural environment and the recreational enjoyment of the public. This is a task made particularly difficult by a number of factors.

Inconsistent information about potential hazards

While providing unique and often exceptional natural environments, protected areas also frequently contain harsh and demanding environments. Protected area management must ensure that adequate information about potential hazards and the risks associated with certain activities in the area is available to visitors when planning their trips. Current marketing usually focuses on the positive aspects of a site and so this requirement for consistent information about such issues or hazards may be absent from information available from sources other than the agency itself (Wearing & Nelson 2004).

Culturally appropriate behaviour

As well as the conservation of environmental resources, parks agencies are also required to ensure the protection of cultural resources in protected areas. This often means ensuring culturally appropriate behaviour of visitors (e.g. respect for Anangu wishes not to climb Uluru). Once again the consistency of the information provided to visitors can be a problem in achieving this outcome.

Ensuring parks are accurately promoted

Marketing information provided should ensure that protected areas are accurately portrayed and promoted to avoid unrealistic visitor expectations. For example, the marketing by the tourism industry of sites where access may be restricted due to seasonal conditions can have a negative effect on visitor satisfaction and consequently reflect poorly on park management.

Conflict between different user groups and activities

The growth in demand for most forms of outdoor recreation is one of the main reasons for rising conflicts. Further complicating the effects of rising demand are changes in the way some activities are pursued. Technology-driven activities like off-road motorised vehicle driving, mountain-biking, and jet boating are rising in popularity. Numbers of participants in activities like wildlife viewing, bird watching and nature photography also are growing very rapidly. The prospects for conflicts between these activity groups are considerable. The limited supply of suitable public land has meant that the chronic popularity and rising conflicts evident in many outdoor recreation settings has forced protected area agencies to implement strategies aimed at discouraging and reducing demand for a setting or service.

Crowding and carrying capacity

Issues surrounding crowding and carrying capacity across a range of visitor experiences and types of outdoor recreation have resulted in park agencies in some cases using the marketing mix for discouraging participation. Some agencies are taking steps to work more closely with regional and provincial recreation and tourism marketing organisations to educate them about the stresses on ecological integrity caused by current or increased use levels, and to encourage them to incorporate appropriate ecological integrity messages in their marketing programs.

Lack of prioritisation of conservation messages in promotion and marketing communications

Promotional and marketing materials tend not to include messages relating to conservation. This was borne out in a recent study by Wearing and Nelson (2004) who content analysed 56 holiday brochures distributed by state tourism organisations and travel agents. Their study found that almost all mentioned national parks but only four contained any kind of environmental or conservation message.

Researching existing and potential visitor markets and their needs

The use of tools such as market research, so critical in any marketing program, for understanding visitor markets and their needs has increased, but park management agencies often do not have documented procedures for prioritising which audiences to target, which messages and programs to deliver, and how to deliver them.

Ineffective distribution of information

People often lack information about options for visiting natural and cultural heritage places, what the values and themes of specific heritage places are and how to link places in developing their itinerary. More importantly, people do not know where to look for such information. The multi-level system of administration for national parks presents particular problems for international visitors intending to travel to several states or territories during one trip (Wearing & Nelson 2004). The parks information dispersal and promotion system is not easily navigable for international tourists.

Recognition has been given to the need for national parks agencies to do more to inform the general public about what they have to offer through the mass media, as this is perceived as the most accessible information source (National Tourism and Heritage Task Force 2003; Griffin & Vacaflares 2004; Moyle & Croy 2006). Recently, New South Wales and Queensland focus groups indicated a general understanding and support for conserving areas in their natural state, but there was a lack of awareness of the broader range of recreational opportunities parks offered and the attractive features they possessed (Griffin, Wearing & Archer 2004).

Confusion as to who markets/promotes national parks to existing and potential visitors

The dispersed and fragmented nature of 'stakeholders' with an interest in marketing national parks and other protected areas raises issues of unnecessary duplication and possible confusion or miscommunication of information being delivered to existing and potential visitors. Information promoting national parks is disseminated by a wide range of organisations, including protected area agencies, visitor information centres, tour operators, state tourism organisations, regional tourism organisations and corporate businesses.

Ineffective use of information brokers

In terms of protected areas, information brokers are those groups (and individuals) who provide various types of information to a potential visitor. They control what and how much information is delivered, hence the term 'broker'. This can include the tour operators as well as travel agents, media and the protected area managers themselves.

As noted, not only does the protected area management agency market their areas for tourism, but so does the tourism industry itself. In this way, the tour operator becomes an influential information broker through its own marketing. A significant issue has been that the messages presented by a tour operator may be quite different from that of the management agency (see Armstrong & Weiler 2002). Accreditation and licensing tourism businesses is one way to ensure that the 'correct' message is being presented to visitors; however such compliance mechanisms require resource allocations that many of the publicly funded management agencies cannot provide.

Promotion through journalism and the general media can give park managers free editorial coverage to a wide audience. The quality and frequency of editorial coverage depends on providing journalists with opportunities to write good stories by offering them site visits, press releases and other communication tools. These can be provided not just by park management agencies but also by tourism operators and agencies.

Lack of control over mass media and other information sources used by visitors

Information on national parks is provided through a combination of the public and private sectors. Many individuals and organisations produce the books, brochures, films and websites that provide information to the public. While protected area managers may be able to control the messages provided to visitors onsite, such as through signage, maps and leaflets, they have much less control over the external promotion and messages circulating about the protected area through film, guidebooks, tourist brochures and the like (Moyle & Croy 2006).

While park agencies have a responsibility to ensure that accurate, up-to-date information is available, they are limited in their ability to control the type of information received by potential visitors, particularly as visitor surveys indicate that word-of-mouth generally plays an important part in influencing visitation to national parks (Eagles & McCool 2002). The internet has been confirmed as a major travel planning and marketing tool (Luo, Feng & Cai 2004) but it is currently utilised for profiling natural and cultural heritage places for travellers.

Themes need to be developed to blend environment, heritage and tourism from a demand perspective, i.e. what people are interested in (National Tourism and Heritage Task Force 2003).

Developing partnerships with the tourism industry

The tourism industry has primarily been concerned with quality of the visitor experience whereas the main objectives of park agencies have historically been the conservation of Australia's natural and cultural heritage (although this is changing). At the nexus of these seemingly variant objectives occur the main obstacles which need to be overcome in order to promote National Parks in a cooperative manner. An understanding of the roles that each play and objectives that each seeks to achieve can lead to collaborations and partnerships in the promotion and marketing of parks and the delivery of a high quality product (Laing, Wegner, Moore, Weiler, Pfueller, Lee, Macbeth, Croy & Lockwood 2008).

The key to developing successful partnerships through packaging of products lies in the stakeholders' mutual understanding and respect for the differing objectives of the participants. For the tourism industry the focus will be on commercial advantage (e.g. specified increase in market share). For park agencies the goals will be community and environment related—preservation and conservation. Both parties need to recognise that they operate under different legal, social, economic and environmental constraints. Partners also need to be clear that the audience they are addressing in any joint promotion is appropriate for all parties (Kelly 2001; Buckley & Sommer 2001).

Integrating Supply and Demand

In summary, the issues outlined above demonstrate that the relationship between park management and appropriate tourism use and demand creation is a complex one. The development of mechanisms to pursue a way forward needs the industries involved to ensure an integration of the supply and demand sides in a manner where each can understand the complexities of these industries from the others' perspective. In 'Pursuing Common Goals' (Department of Industry, Tourism & Resources 2003: 5) the Australian Government has suggested that the diversity of partnerships in Australia shows a willingness of the tourism industry and government agencies to become involved in arrangements in order to pursue common goals. If the involvement of the tourism industry in the promotion and marketing of national parks and other protected areas is to be achieved, particularly in relation to pre-visit communication, then it needs to be based on a clear understanding of the planning and management of those areas as outlined above. This understanding can then be integrated into existing and potential markets and the process for marketing and promotion. When these factors can be integrated into the visitor experience they provide the basis for further activities in marketing and promotion

Case Study 1: Tasmania Parks and Wildlife Service

The following case study of the Tasmania Parks and Wildlife Service, Strategic Communications Project, highlights how an organisation has started to deal with many of the issues raised above by Wardell and Moore (2004) and have sought to promote a balance between the conservation of the natural environment with the recreational enjoyment of the public. The project demonstrates that providing clear and consistent messages to the public requires a significant planning effort. Furthermore, it emphasises the need to understand the target market and to create a brand identity for the organisation that resonates with the public and helps make their marketing efforts more effective.

Case Study 1: Tasmania Parks and Wildlife Service Strategic Communications Project

Background

The Strategic Communications Project commenced in March 2005. While an initial development budget was provided to develop the Strategic Plan the ongoing implementation will come from the general operating budget. The project was established to provide a clear and consistent communication for the Tasmania Parks and Wildlife Service and it was seen as a unique opportunity to develop a strategy that previously did not exist in any coherent form for the organisation.

Project Objectives and Target Audience

The key target audience for the project was determined to be the Tasmanian community although all visitors would benefit from the consistency of communication. Tasmanian visitors were targeted as they were determined to be the visitors that valued the parks and reserve system in Tasmania the least. While overseas and interstate visitors often sought out information on visitation and experiences available in Tasmania, Tasmanians themselves often knew little about their own extensive reserve system. The Parks and Wildlife Service aimed to become more active in engaging the Tasmanian community in terms of the management of the parks and reserves and saw a need to get the message out there in political terms that the park and reserve system is well managed but in need of continued resources.

The key goals for the project were identified as:

- To raise Tasmanians' knowledge of the Parks and Wildlife Service.
- To increase the value that Tasmanians place on the parks and reserves system.
- To highlight the management of Tasmania's parks and reserves as being best practice.
- To highlight the important role the Parks & Wildlife Service staff plays in protecting and presenting Tasmania's parks and reserves system.

As well as ensuring a clear and consistent message, the strategy aims to provide staff with the tools and confidence to deal with the community, the media and tourism operators.

The core objectives of the project were not necessarily identified as increasing visitation. Within the Department, from a conservation point of view, any increase in visitation was often seen as a negative outcome as higher visitation has implications for higher impacts and consequently greater management requirements. This project however, aimed to not necessarily increase usage at the most popular sites (recognised as Cradle Mountain, Mt Field National Park and Freycinet National Park) but rather aimed to change the pattern of usage in other areas. Pre-visit communication and marketing focuses on seasonal usage and identifies the different experiences that can be had outside peak seasons. It also encourages Tasmanians to use 'their local park' and investigate the experiences available in their immediate area.

Sub Projects within the Strategic Plan

The project was developed as a series strategic sub projects. These included:

- *Strategic Project 1:* Develop Parks and Wildlife Service Brand. This is an independent sub brand to the Tasmanian State Government brand developed previously.
- *Strategic Project 2:* Undertake research about the target audience and the value they place on the Tasmanian parks and reserve system as well as their expectations for leisure experiences within the system.
- *Strategic Project 3:* Increased image library—establish a standard range of images to be used for all pre-visit communication and marketing by Parks and Wildlife Service and other tourism operators.
- *Strategic Project 4:* Develop Parks and Wildlife Service Style Guide—to provide a clear and consistent style for all signage and publications that are developed for pre-visit communication, marketing and interpretation/information within the parks.
- *Strategic Project 5:* Review existing publications for consistency with style manual and to ensure information is current and appropriate.
- *Strategic Project 6:* Develop interpretation and engagement frameworks to provide guidelines for staff when dealing with visitors and the media.
- *Strategic Project 7:* Website redesign to be consistent with style manual.
- *Strategic Project 8:* Develop outdoor sign manual to ensure consistency of all signage throughout the parks and reserve system.

Coordination with Other Organisations

Once the Strategic Communications Plan was completed it was recognised that there were limitations to in-house expertise in the field of communication. Consequently a professional services brief was developed and

a communications partner was called for. The communications partner guided the Department for the execution of the project and had an understanding of both marketing and branding as well being able to deal with the bureaucracy and limitations inherent to a government organisation. This has enabled the Tasmania Parks and Wildlife Service to be recognised within state government as a formal 'sub-brand' which provides them with considerable leverage to present appropriate conservation and recreation messages.

The Parks and Wildlife Service also has significant links with other government departments but the Communications Strategy provides quality and consistency by providing a series of guidelines to follow when developing marketing and pre-visit communication. Consistent advertising presents consistent key goals of the department rather than a series of adhoc advertising for individual sites. This also simplifies the approval process for marketing and pre-visit communication.

Project Outcomes

While specific funding was provided for the development of the Strategic Communications Project implementation of the project relies on the general operating budget and so it is expected that the next three to five years will be crucial for implementation. Research will be ongoing during this period to identify outcomes.

Initial information indicates that most recent visitors link the concepts of conservation and recreation when visiting Tasmania's National Parks. Visitors who visit national parks and reserves often place a higher value on the natural environment and often have a much greater sense of why the reserves exist even if they use them purely for recreational purposes. The Strategic Communications Plan aims to continue to develop this value system within the Tasmanian Community.

Project Challenges

One of the greatest challenges facing the organisation was gaining agreement with the Government and across other government departments to develop a specific 'sub-brand' for Tasmania Parks and Wildlife. Without this success it is questionable whether the projects would have achieved the identified outcomes.

Another significant challenge identified when developing this project was perceived to be a lack of specialist expertise within the organisation. This has meant that a limited number of staff have had to drive the project. However, ultimately this has had both advantages and disadvantages. It meant that it was a relatively small group working to develop the key ideas and goals—which was often easier to coordinate. However, often specific tasks were outsourced to bring in the expertise that was required.

Ultimately this lack of expertise also meant that there was a requirement to educate other staff to gain their support and ensure they were able to implement the ideas developed. In particular a number of staff questioned the need for 'branding' as they had limited understanding of the value or power of branding in terms of visitor communication. A brand platform with which to build all their ongoing communication is considered key to the success of any communication strategy. Unfortunately conservation organisations and their staff don't often understand the purpose and value of brands and so in the past have rarely utilised them successfully.

Chapter 3

CONSUMER DESTINATION DECISION-MAKING, IMAGE FORMATION AND SATISFACTION

A central theme in this report is demand management and, within that, the need to ensure that potential visitors are exposed to appropriate conservation and experience messages regarding the various parks and protected areas.

As stated previously it is possible to identify three macro roles that park management agencies have to fulfil:

1. The preservation and conservation of natural and cultural heritage, a role that always should take primacy;
2. Delivery of a wide range of services to multiple community and stakeholder groups; and
3. Building broad community awareness, valuing, ownership and affinity with our natural and cultural heritage.

In considering the latter two macro roles, and enhancing the delivery of the primary macro role, it is important to consider how visitors are satisfied, and what the foundation of this satisfaction is. The models that underpin destination choice and satisfaction are critical in the planning and implementation of pre-visit communication strategies.

Destination Image and Decision-making

Destination image has been identified as a crucial aspect of tourism, recreation and leisure (Hall, Croy & Walker 2003; Croy 2004). The authors argue that destination image is important:

- For destination selection;
- For creating expectations;
- For marketing strategy or market segmentation;
- As a form of consumption;
- In the construction and reinforcement of images of people and place;
- In its effects on prospective markets; and
- In visitor satisfaction.

Each of these important roles of destination image relates to natural and protected areas and the management of these. Even with this recognition of importance, why and how these roles of destination image are important needs further clarification. To elucidate the role of destination image in pre-visit communication and thus in protected area management, this chapter provides an introduction to the two conceptual areas of destination decision-making or selection and image formation as well as the interplay between these two.

Destination image is built through general images associated with a region, images specific to the destination within that region, and person specific attributes. The awareness of a destination, or destination image, is the all-encompassing image that a potential visitor has of the destination. Thus, awareness occurs through general exposure to messages and images about the destination, and includes knowledge of a possible destination existing (Croy & Wheeler 2007).

The greater the exposure to images of the destination, the greater the familiarity and complexity of the image held (for further discussion see Smith & Croy 2005; Croy & Wheeler 2007). These images then form the foundation of destination decision-making (Figure 3). To describe the destination decision-making process, tourists base their decisions on a set of aware, available and positively perceived destinations (Woodside & Sherrell 1977).

The availability of destinations is determined by perceptions of fundamental decision factors, such as time available, money, distance, family, attraction and the like (Gunn 1972). The availability of a destination is also determined through the complexity of the image of the destination in question. The greater the complexity of the image, the more knowledge of the specific decision-making factors (Croy & Wheeler 2007). The formation of a positive perception is determined by evaluative components of image. This would facilitate a potential visitor's ability to decide between alternate destinations so that the evoked set (the set that forms the final considered destinations) is small (Woodside & Sherrell 1977). In this process, from awareness, to availability, through to deciding on an evoked set, destination image is the deciding factor (Lawson & Baud-Bovy 1977; Richardson & Crompton 1988).

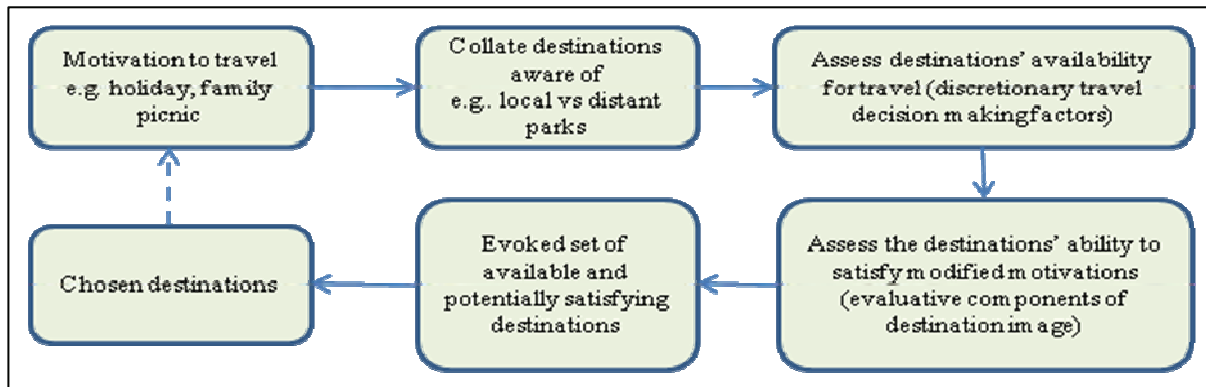


Figure 3: Destination selection model

Source: Croy 2004

Other authors have similarly presented destination decision models (van Raaij & Francken 1984; Moutinho 1987; Woodside & Lysonski 1989; Um & Crompton 1990; Goodall 1991). They all presented similar available, consideration, or opportunity sets, and stated holiday attributes as the deciding factor to obtain equivalents to Woodside and Sherrell's (1977) evoked set. Previous studies have implied that people assess up to 100 components of a destination's image to make these decisions (Pike 2002). Further research considering the image used for destination selection decisions has further uncovered the diversity of image components and within this the complexity of imagery used in these decisions (Croy 2002; Croy 2005). What should be apparent from this is that destination image plays a crucial role in destination selection. The next aspect that is crucially important for managers is how these destination images get created and subsequently communicated.

Destination Image Formation

Croy and Wheeler (2007) suggest that image formation is an engaging and extended process, much more extended than is often portrayed or considered. The temporal nature of image formation goes back as far as we can remember, and quite potentially a bit further. The spatial nature of image formation is increasingly global the more we are exposed to multiple locations, especially through the media (Hall, Croy & Walker 2003).

Images are generally formed through three agents, being organic, induced and real (Croy & Wheeler, 2007). Organic agents are those from general life experiences; induced are those supplied by the destination marketer, e.g. national park and protected area agencies, state or regional tourism organisations; and real agents are drawn from the actual destination experience. Gartner (1993) further distinguishes these agents (Table 1), especially designating an autonomous agent of media (previously encapsulated within the broader term organic) and naming organic as related to real. Within these agents, real are the most credible, followed by organic, and induced agents are identified as the least credible. With long-term exposure to relatively credible agents, the impact the destination or marketing agency can have on these perceptions (with low perceived credibility agents) can be limited. Nonetheless, it has been proposed that the organic agents are more motivating, building emotive associations with the place, whilst the induced agents are used more for functional perceptions of a location (Croy & Wheeler 2007). So whilst the marketed images may have less influence on underlying motivations for destination selection, they will have a much greater role in developing place specific attachments and expectations, including experiences, behaviours and facilities (Moyle & Croy 2006). This will of course influence the perception of availability to a degree, through the evaluation of the site's ability to satisfy the modified motivations (Table 1).

Table 1: Image formation agents

Formation agent	Examples	Credibility	Market penetration	Destination cost
Overt induced I	Traditional forms of advertising	Low	High	High
Overt induced II	Information received from tour operators, wholesalers	Medium	Medium	Indirect
Covert induced I	Second party endorsement of products via traditional forms of advertising (e.g. celebrity)	Low / medium	High	High
Covert Induced II	Second party endorsement through apparently unbiased reports (e.g. newspapers, travel section articles, familiarisation tours)	Medium	Medium	Medium
Autonomous	News and popular culture documentaries, reports, news stories, movies, television programmes	High	Medium / high	Indirect
Unsolicited Organic	Unsolicited information received from friends and relatives	Medium	Low	Indirect
Solicited organic	Solicited information received from friends and relatives	High	Low	Indirect
Organic	Actual visitation	High	-----	Indirect

SOURCE: Gartner 1993

In linking this back to destination selection Baloglu and McCleary (1999: 869) have noted that “the initial image formation stage before the trip is the most important phase in tourists’ destination selection process”. Similarly, Fakeye and Crompton (1991) in their model of image formation note the importance of image upon destination selection (Figure 4). In this model it is obvious that pre-visit communication plays a significant role in the consumers’ decision-making process. The images and messages received and interpreted by potential visitors will likely have significant influences on both choice and indeed satisfaction. Managers need to ensure that they have a sound understanding of the decision-making process in order to inform both communication strategy and tactics.

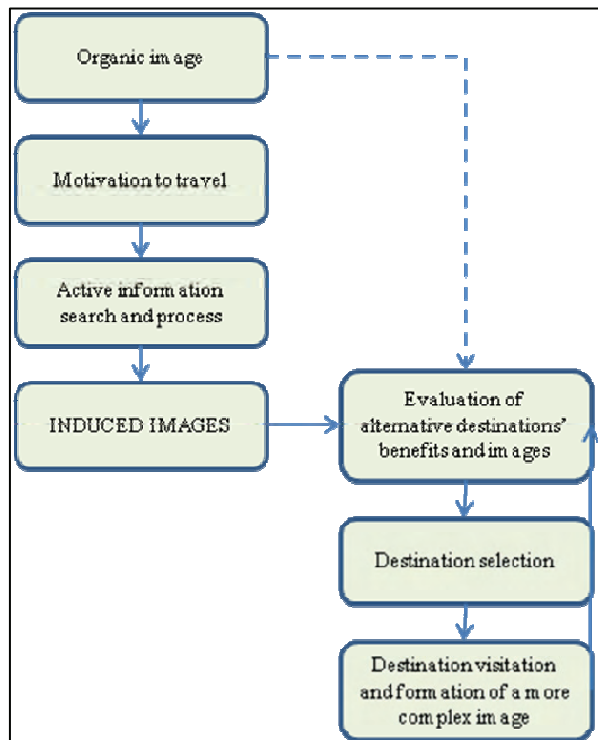


Figure 4: Model of tourist’s image formation

Source: Fakeye and Crompton 1991: 11

Recreational Visitor Satisfaction

Through research undertaken in natural and protected areas in New Zealand, an inclusive model has been developed to provide indications of the role of the agents in the recreationists' experience (Croy & Kearsley 2002). Figure 5 draws on recreational experience, image formation, decision-making, benefit based management and satisfaction models. The model below highlights the importance of pre-site management and pre-visit communication in providing a satisfying recreational experience, and the important role of the image agents.

Image is important for the decision to visit a place. The image initiates motivations, determines the expectations for the experience, consequent experiential satisfaction, and longer-term benefits. Thus pre-visit communication is crucial to creating a satisfying visitor experience. Additionally, pre-visit communication is also crucial to creating a satisfying protected area experience. The activities, behaviours and choices that visitors make onsite are also in part determined by the pre-site expectations and image.

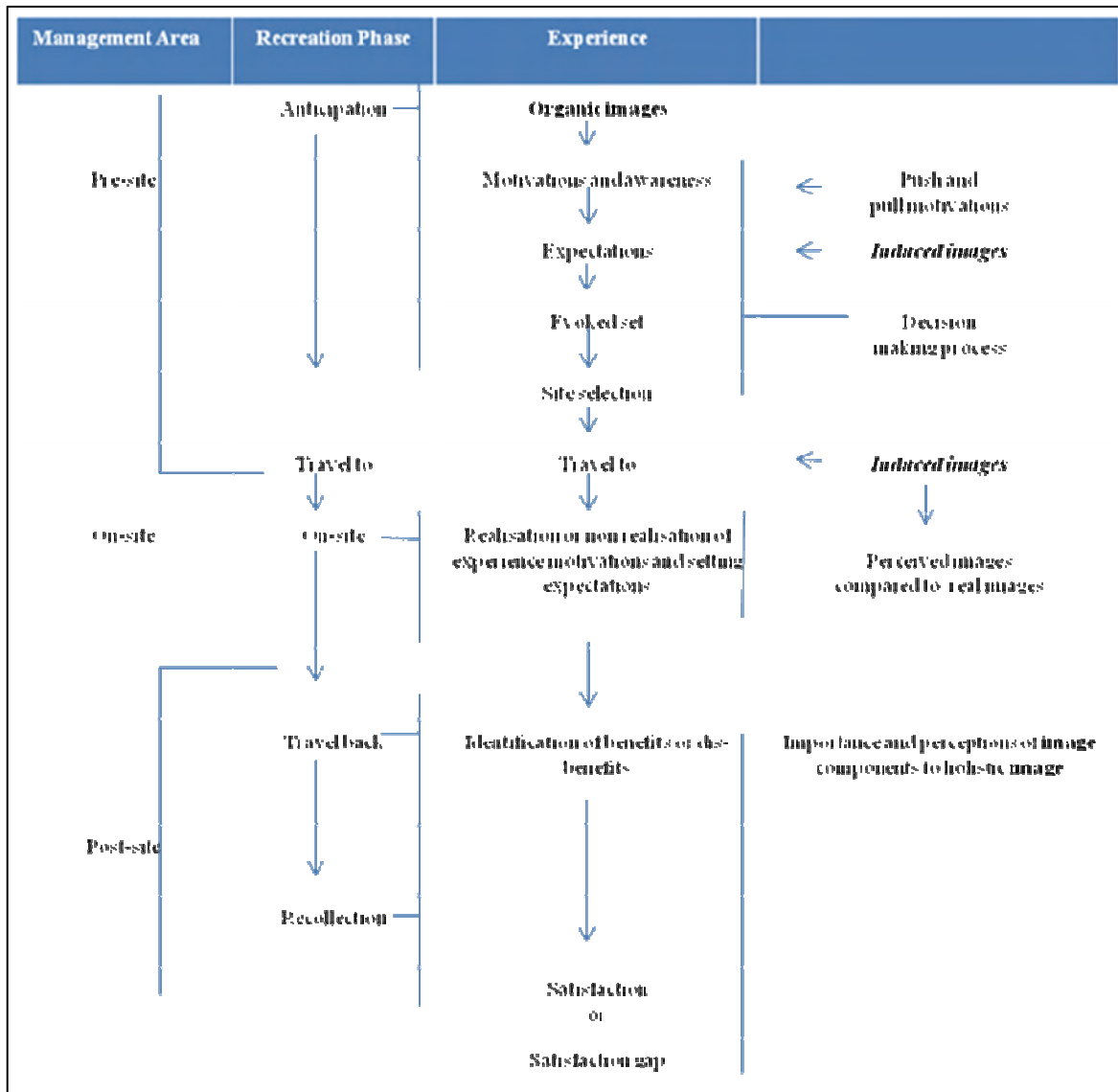


Figure 5: A model of tourist's image formation and role as the basis to the satisfying experience

Source: Croy & Kearsley 2002

Industry Understanding the Pre-visit Decision-Making Process of Visitors and Potential Visitors

An important question for national park and protected area managers and, indeed, other tourism industry managers is “how well do we understand the decision-making process of the target segments we promote to?”. Using data collected as part of this project, Figure 6 outlines managers’ perceptions of the level of understanding of pre-visit decision-making by prospective visitors. The scale is from 1= very poor understanding through to 5 = excellent understanding.

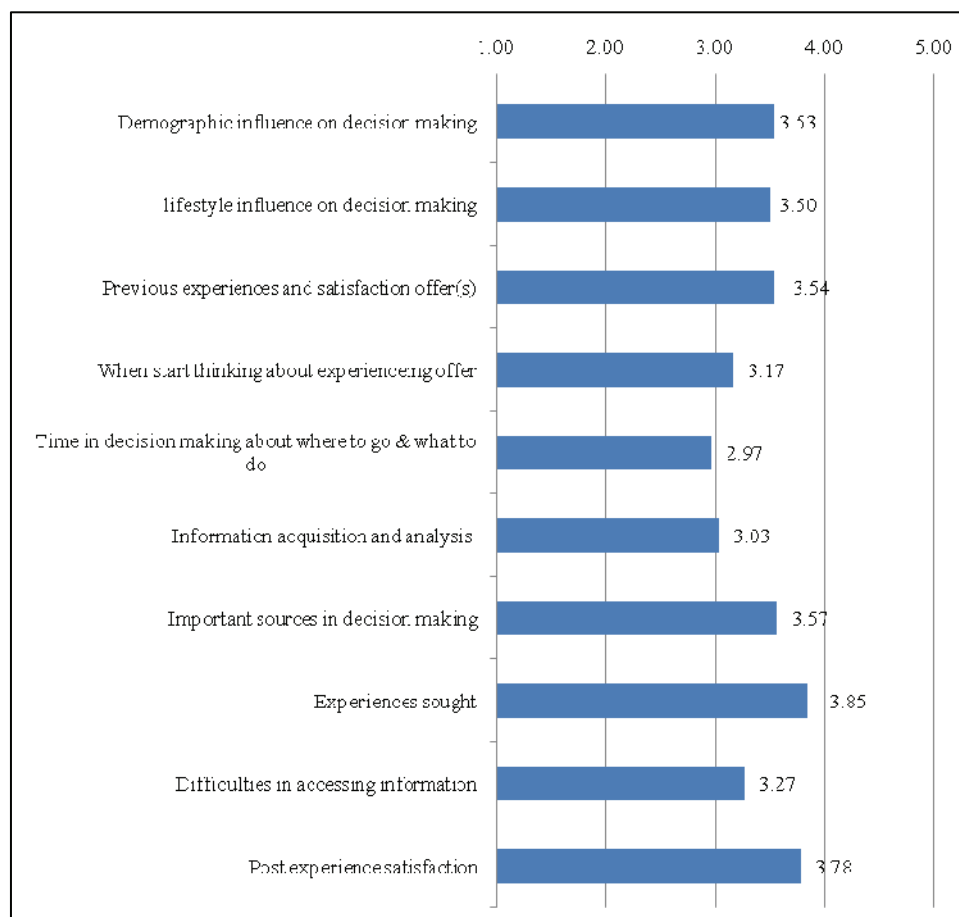


Figure 6: Understanding pre-visit decision-making

NOTE: Data based on responses from 124 managers

In aggregate, respondents felt they had a reasonable understanding of the demographic and lifestyle influences on pre-visit decision-making. Similarly, respondents also felt they had a reasonable understanding of previous satisfaction with the park product supplied, the experiences sought by visitors, and their post-visit satisfaction. Areas of weakness were noticeable in the more detailed and behavioural aspects of understanding pre-visit decision-making, including when people start thinking about visitation, the time taken in decision-making, the information acquisition and analysis process and the difficulties in accessing information.

A further breakdown of results by each respondent group is provided in Table 2. It is noticeable in this breakdown that national park and protected area respondents were somewhat unhappy with their understanding of visitor pre-visit behaviour across a number of areas. They were only somewhat apprised of demographic and lifestyle influences in destination decision-making. They felt they were quite unknowledgeable about the more in-depth insights related to previous experiences and satisfaction, and the information acquisition, analysis, and timing process. Importantly they felt they were lacking insight about the difficulties potential visitors had in accessing information to help shape their park and protected area destination choices.

Table 2: Understanding by each respondent group

	STOs	PAMs	RTOs	TOs	VICs
Demographic influence on decision-making	4.75	3.08	3.53	3.70	3.29
Lifestyle influence on decision-making	5.00	3.00	3.12	3.76	3.30
Previous experiences and satisfaction offer(s)	4.25	2.85	2.71	3.94	3.25
When start thinking about experiencing offer	4.25	2.23	2.53	3.44	3.35
Time in decision-making about where to go & what to do	4.25	1.85	2.41	3.31	2.90
Information acquisition and analysis	3.75	2.38	2.47	3.31	2.95
Important sources in decision-making	4.50	3.69	3.24	3.71	3.25
Experiences sought	4.50	3.69	3.35	4.13	3.40
Difficulties in accessing information	3.75	2.92	2.65	3.56	2.95
Satisfaction experiencing offer	3.75	3.77	2.65	4.19	3.30

Information on demographics and lifestyle is useful in understanding basic issues and behaviours in destination choice decision-making. A deeper understanding of influences, however, is likely to be developed by a richer investigation of visitors' cognitive processes, such as when they start thinking about visitation, where they actually go to access information, and the extensiveness of information search and evaluation. As well, there is also some weakness in understanding the difficulties that potential visitors have in accessing information. Understanding barriers to accessing information is critical in designing communication campaigns. Developing rich consumer insights will mean that more qualitative and ethnographic methods will need to be added to existing quantitative survey approaches

Use and effectiveness of marketing communication tools

In targeting visitor segments, organisations can use many different tools as part of their communication mix, each having different roles to play in any campaign. Figure 7 presents an aggregate analysis of responses about which particular elements of the communication mix are used and how effective they are perceived to be. The numerical figure in brackets represents the number of respondents using the particular tool, whilst the other figure represents a mean level of effectiveness for the particular tool. The scale is 1= highly ineffective to 5= highly effective.

The two most popular and effective communication tools appear to be the organisation's website and brochures (including leaflets and booklets) available in key tourism hubs. These were followed by internet advertising, participation in consumer fairs, direct email, product placement (in television programming), and direct mail. In a marketing communication sense most of these are interactive or experiential marketing tools. They are generally lower cost options relative to purchasing space in the main broadcast media, particularly television.

The importance of the website as the hub of an organisation's marketing and communication cannot be overstated. More than simply a static content provision tool, the website now plays a significant role in building and enhancing visitor relationships with the organisation. Managers need to adhere to a few simple rules to ensure their website works well for them and their potential visitors. Importantly, making sure that the site is easy to navigate by conducting trials with visitors to assess navigability; balancing text and images to ensure that the site loads quickly and is not slow to function. Again, trial on a range of computers with limited graphics capability is useful. Making sure not to over-use 'plug-ins' such as movie players and Flash graphics. Finally, making sure that content is refreshed regularly and that new park experiences are also highlighted, as consumers often 'window shop' and are attracted to new content.

Email and other direct mail approaches to communication are also powerful for targeting visitors and potential visitors and used by 49 and 61 companies respectively (see above table). Opt-in permission marketing enables the development of a strong relationship with visitors who may act as word-of-mouth sources for those who may be less familiar with visiting parks and protected areas. Rather than being seen as spam, the use of permission-based approaches, such as newsletters, experience highlights and the like, are an avenue for improving awareness of parks and available park experiences. Like all of these tools, it has to be resourced to provide new content and contact on a regular basis. Furthermore, research is needed to determine format and content needs to targeted consumers.

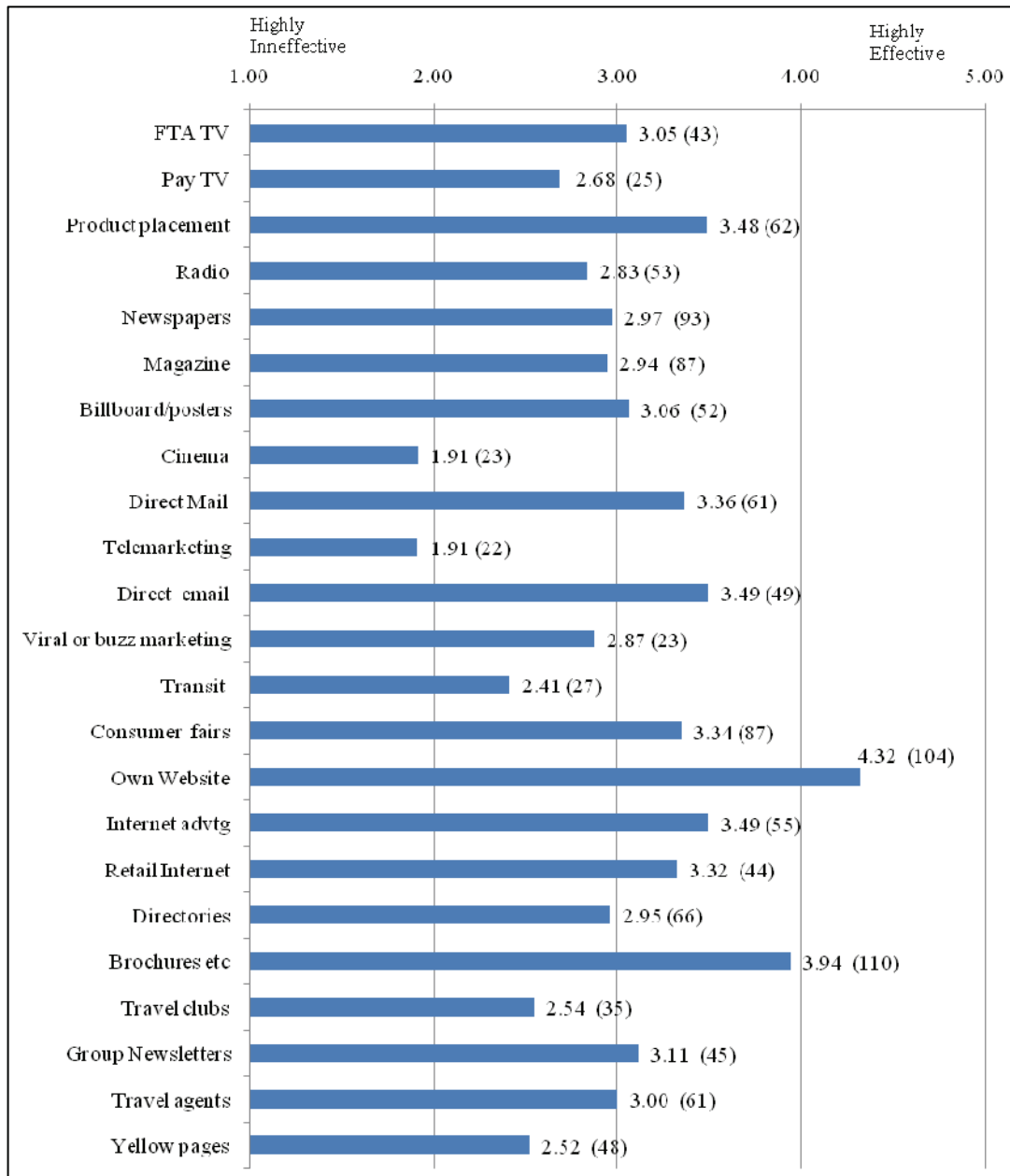


Figure 7: Use and effectiveness of marketing communication tools

The use of online internet advertising is also interesting to note and is important given the movement by consumers to spend more time on the internet, especially reading online newspaper content. Internet advertising also offers benefits of greater interactivity, increased flexibility about placement and often the message, more precise targeting, and importantly increased measurement (hits, click-throughs, downloads, requests for further information, bookings etc). The increased range of options for presenting internet advertising includes simple display and banners ads through to more animated pop-ups, interstitials, and video ads.

A further breakdown of perceived effectiveness by individual respondents is presented in Table 3.

Table 3: Perceived effectiveness by each respondent group

	STOs	PAMs	RTOs	TOs	VICs
Free-to-Air TV	4.25	3.33	3.83	2.48	3.17
Pay TV	3.50	3.00	3.33	2.20	3.67
Product placement	4.00	3.43	3.67	3.35	3.63
Radio	1.00	3.60	3.10	2.41	3.50
Newspapers	3.75	3.30	3.20	2.61	3.47
Magazine	4.00	3.33	3.14	2.70	3.06
Billboard/posters	3.25	3.50	3.00	2.97	3.22
Cinema	2.50	2.00	3.50	1.57	2.00
Direct mail	2.00	3.57	3.11	3.53	2.80
Telemarketing	1.00	1.00	2.00	2.06	1.50
Direct email	3.25	3.67	4.33	3.29	3.80
Viral or buzz marketing	3.33	1.00	3.67	2.93	1.50
Transit	2.67	1.00	3.33	2.29	2.33
Consumer fairs	3.00	3.20	3.45	3.09	4.06
Own website	4.50	4.00	4.43	4.41	4.07
Internet advertising	4.33	3.75	3.88	3.36	3.00
Retail internet	4.00	3.00	3.67	3.27	2.67
Directories	2.50	2.83	3.44	2.72	3.38
Brochures etc	3.75	4.08	3.94	3.85	4.19
Travel clubs	1.00	3.00	3.00	2.43	2.67
Group newsletters	3.33	3.00	4.00	2.94	3.25
Travel agents	3.67	3.00	3.00	3.02	2.40
Yellow pages	na	na	3.25	2.34	2.89

Recent insights on the potential use and sourcing of information prior to visitation at a national park or protected area (Wearing, Edinborough, Hodgson & Frew 2008 forthcoming) highlight some interesting points of note for national park and protected area managers (Figure 8). The authors found that 22.5% of people they interviewed did not obtain information prior to their visit. 24.2% used word-of-mouth sources to make destination choices, whilst 22.5% use tourist visitor hubs as their source of information. The reported use of parks internet sites was somewhat lower than might be expected at 12.1%. The result for use of internet as an information source has implications for national park and protected area managers who have highlighted it as their most effective visitor communication tool (Table 3). The results suggest that an opportunity exists to raise the awareness of national park and protected area websites as a central source of information and ensure that visitors who might otherwise 'just turn up', have access. Figure 8 also highlights the importance of word-of-mouth from friends and relatives and the need to utilise techniques and messages to promote this form of communication. It should be noted that many departmental websites are quite general and do not necessarily focus on promoting particular parks but are rather a functions tool to access the department. This often makes them difficult to navigate and not consumer friendly. Perceptions of the quality and value of parks related websites need to be challenged and sites evaluated.

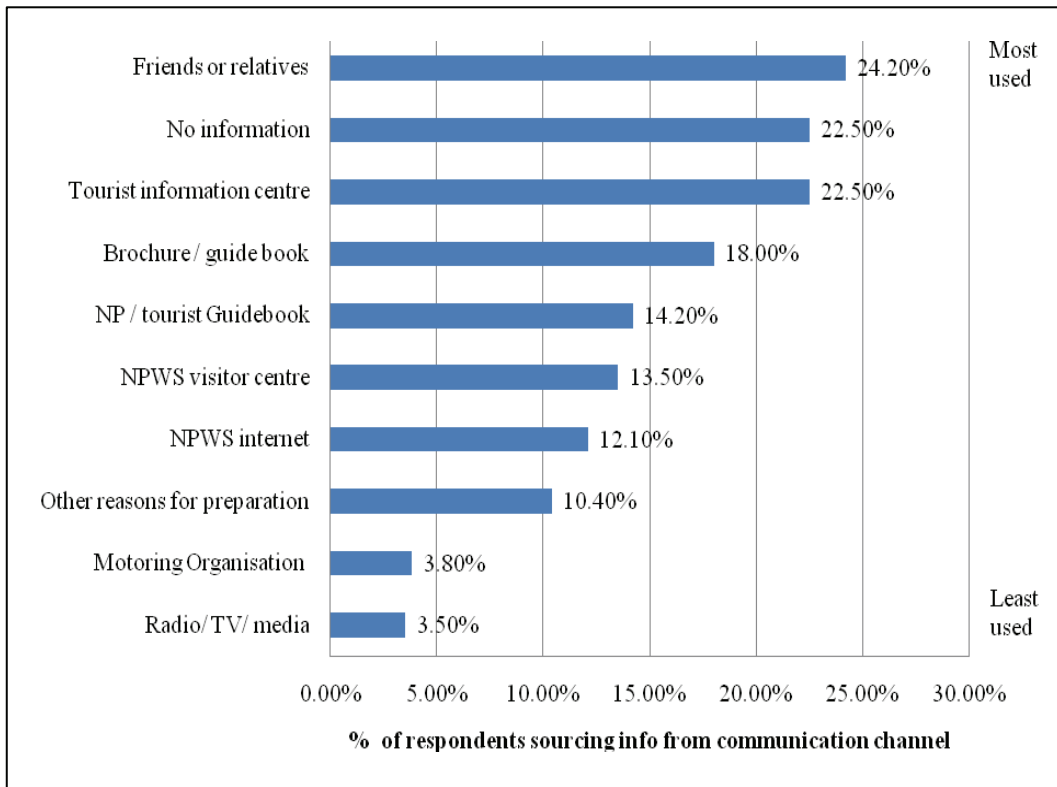


Figure 8: Pre-visit sources of park information

SOURCE: Based on Wearing et al. 2008 (forthcoming)

In the absence of available research evaluating the relative performance of the communication mix, in terms of delivering national park and protected area communications objectives, it is difficult to suggest which particular tools are more or less beneficial. What is evident is that the organisation's website is a central tenet of marketing and communicating and as such more research is required to evaluate potential visitors' use of this tool and to assess its usefulness and ease of use in providing sought information for destination decision-making.

Summary

It is evident that the above discussions on the changing national park and protected area management role, and visitor destination choice, are heavily anchored in the planning and implementation of marketing communication strategies designed to influence the perceptions, attitudes and behaviours of park visitors. More strategically, the concepts discussed stress the need to develop an integrated approach to planning, implementing, and controlling marketing communication over the long-term. The concept of Integrated Marketing Communication (IMC) is likely to provide a philosophy (way of thinking) and a process for planning, implementing and managing marketing communications in such a way that the issues of conservation and demand creation are represented in a balanced way. An IMC approach will also help managers balance both longer term communications goals with more immediate campaign level outcomes. The concept of IMC and its usefulness is discussed more fully in Chapter 4.

Chapter 4

INTEGRATED MARKETING COMMUNICATION

Current best practice in the area of marketing communication management has argued for the adoption of Integrated Marketing Communication (IMC) (Duncan & Mulhern 2004; Reid, Luxton & Mavondo 2005). Whilst often discussed and reported in the context of building consumer brands the concept and practice of IMC can readily be integrated into national park and protected area management and promotion. In particular, the adoption of an IMC approach for the planning and implementation of pre-visit communication would offer opportunities for creating a balance between conservation messages and demand management messages, and for building the brand or profile of the national park and protected area agency. Adoption of IMC principles would also provide a basis for strengthening the relationship between national park and protected area agencies and their counterparts in tourism. An IMC mindset would provide a way of thinking about how to encourage all organisations to be responsible in how they use national parks and protected areas in their marketing and promotion, and it would encourage national park and protected area management to become more familiar with designing and implementing strategic communication.

Defining Integrated Marketing Communication

In its simplest form, IMC is the bringing together of all visitor and stakeholder communication activities to achieve stated communication objectives. More than this, it seeks to improve the connection between the strategic planning of communication and the tactical implementation of communication (Reid, Luxton & Mavondo 2005). As a consequence of integration, all marketing communication is more likely to be strategically consistent, driving greater efficiency and effectiveness in achieving desired communication objectives (Pickton & Hartley 1998). Duncan & Mulhern (2004) state that IMC is considered to be both an organisational philosophy and a management process related to strategically managing all brand messages in a way that contributes to the building of strong brands. Specifically, Duncan (2005: 3) defines IMC as:

...a process for managing the customer relationships that drive brand value. More specifically, it is a cross-functional process for creating and nourishing profitable relationships with customers and other stakeholders by strategically controlling or influencing all messages sent to these groups and encouraging data driven, purposeful dialogue with them.

Kitchen, Brignal and Tao (2004) stated that IMC is a new paradigm that will facilitate the management of marketing communication. IMC is centred on building and leveraging visitor and consumer interests and relationships. This relationship orientation ties IMC to one-to-one marketing and customer relationship management (CRM) and challenges managers to deal with the integration, alignment, measurement, and accountability of both traditional and new interactive marketing approaches (Baker & Mitchell 2000). The aim of IMC as it is presented here links very strongly into the needs of protected area managers, especially in relation to managing channels of communication, developing cross-functional and inter-functional relationships, and utilising visitor insights to develop and implement communication programs that shape behavioural expectations.

National park and protected area managers should consider the opportunity cost of not striving for integration in communication. A lack of integration could be counter-productive and create difficulties when one aspect of the communication mix or pre-visit message contradicts, or is at odds with, another. The extent of integration deemed to be necessary is further complicated by the 'level' of integration required, which can vary from the corporate level down to park level or even to very local, one-off promotional activities (Pickton & Hartley 1998). In the case of national park and protected areas, such contradictions might relate to creating demand for park visitation and fun experiences, with messages about protecting the area for conservation reasons. Integration in IMC does not mean that every organisation is required to present exactly the same message; rather it refers to a more general agreement on how the expectations of potential visitors should be shaped by the tone and thematic consistency of the messages.

A cross-section of the activities and principles of IMC as depicted by several key researchers is illustrated in Table 4.

Table 4: Key integrated marketing communication practices and principles

Duncan and Moriarty (1997)	Pickton and Hartley (1998)	Duncan and Mulhern (2004)	Kliatchko (2005)
<ul style="list-style-type: none"> •Organisational infrastructure—the strength of cross-functional relationships in the organisation that affect the brand including, internal marketing, cross-functional understanding of the strength of various communications tools, linking with external agencies, amongst others. •Interactivity—the processes that link customers to the company and the brand including such things as customer complaints, database development and accessibility of use, and the balance between mass and more targeted media. •Mission marketing—having a mission statement that directs creation of shareholder value, customer value, development of appropriate corporate culture, and legitimisation of communications activities and processes. •Strategic consistency—the coordination of all messages and market mix elements that create and support brand images, positions and reputations in the minds of customers and other key stakeholders. •Planning and evaluation—the consideration of all key target audiences, the creation of profitable relationships, the strategic integration of media and messages, and the adoption of a zero-based approach to employing various marcom tools. 	<ul style="list-style-type: none"> •Clearly identified marketing communications objectives which are consistent with other organisational objectives. •Planned approach which covers the full extent of marketing communications activities in a coherent and synergistic way. •Range of target audiences—not confined just to customers or prospects, nor just to imply end customers but include all selected target audience groups. •Management of all forms of contact which may form the basis of marketing communications activity. •Effective management and integration of all promotional activities and people involved. •Incorporates all product/brand ('unitised') and 'corporate' marketing communications efforts. •Range of promotional tools—all elements of the promotional mix including personal and non-personal communications. •Range of messages—brand (corporate and products) propositions should be derived from a single consistent strategy. This does not necessarily imply a single, standardised message. The integrated marketing communications effort should ensure that all messages are determined in such a way as to work to each other's mutual benefit or at least minimise incongruity. •Range of media—defined as any vehicle able to transmit marketing communication messages and not just mass media. 	<ul style="list-style-type: none"> •Customer-focused (based on outside in thinking). •Advertising and promotion driven by cross-functional planning and monitoring. •All advertising and promotion messages strategically consistent. •Brand positioning integrated into all brand messages. •All customer touch points impact the brand and brand equity, not just advertising and promotional messages. •Planning based on prioritised SWOTs. •Interactive, two-way communication just as important as one-way mass media messages. •Customer expectations, not customers, are managed. •Retaining and growing customers as important, if not more so, than acquiring customers. •Transactions are 'relationship' building blocks—each transaction strengthens or weakens a customer-brand relationship. •Segmenting and targeting is database driven. •IMC is an ongoing, interactive process (that incorporates linear campaigns). •Planning driven by financial measurements. 	<ul style="list-style-type: none"> •A sound knowledge of the organisation's stakeholders, acquired through two-way interaction with these parties. •Communication tools selected on the bases of the organisation's resources, and their favourability to the intended recipient. •The strategic coordination of various communication tools in a manner consistent with the organisation's brand positioning, and which maximises their synergistic effect so as to build strong brands and stakeholder relationships. •The use of appropriate, timely, and data driven evaluation and planning to determine the effectiveness of this process. •Strong interfunctional and inter-organisational relationships with those responsible for implementing marketing communication campaigns.

A review of this table identifies a number of consistent principles underpinning IMC (Reid, Luxton & Mavondo 2005):

- A sound knowledge of the organisation's customers and stakeholders, acquired through two-way interaction with these parties.
- Strong inter-functional and inter-organisational relationships with people and entities responsible for implementing customer and stakeholder communication and marketing campaigns.
- The strategic coordination of various communication tools in a manner consistent with the organisation's mission, and which maximises their synergistic effect so as to build strong customer and stakeholder relationships.
- Communication tools selected on the bases of the organisation's resources, and their favourability to and use by the intended recipient.
- The use of appropriate, timely, and data driven evaluation and planning to determine the effectiveness of this process and the associated campaigns.

These principles and practices can be further separated into both strategic and tactical components (Duncan & Mulhern 2004; Schultz & Schultz 1998; Kliatchko 2008). It is commonly understood that the strategic dimension of marketing management is the framework that provides guidance for actions (tactics) to be undertaken. Tactical dimensions relate to the shorter-term activities to be used in implementing those strategies in order to achieve planned marketing and communication objectives for specific target segments.

The interrelationship between strategic and tactical dimensions is reflected in Schultz and Schultz (1998) and Schultz and Kitchen's (2000) representation of integration as a series of stages from simple tactical coordination of messages through to financial and strategic integration with the organisation (Figure 9).

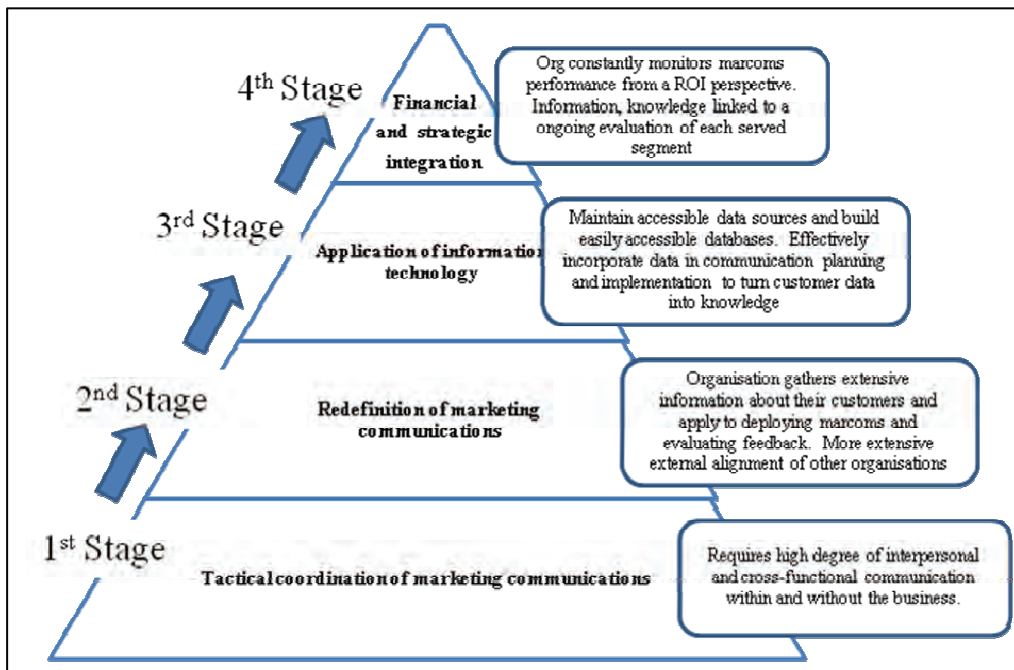


Figure 9: Integrated marketing communication organisational transitions

SOURCE: Based on Schultz & Schultz 1998; Schultz & Kitchen 2000

Stage 1 focuses on the coordination of all the elements of marketing communications to achieve synergy and consistency. The main focus is on the effective delivery of outbound communication activities in order to achieve "one sight, one sound" in the overall IMC program. Whilst the main emphasis is coordination of the communication mix and message channels, the main aim is to deliver a clear and consistent message to achieve desired impacts (Schultz & Schultz 1998; Kliatchko 2008).

Stage 2 focuses on broadening the scope of marketing communications to include all possible visitor contact points. Greater emphasis is placed on coordinating all channels and increased emphasis is placed on understanding the customer's (stakeholder's) viewpoint, i.e. identifying those channels that customers or prospects prefer and find most relevant (Kliatchko 2008). This focus helps in crafting and delivering more relevant messages (content) that connect more effectively with the target customers (Schultz & Schultz 1998).

Level 3 focuses on a deeper use of information technology in order to get to know, understand and better identify relevant customers (Schultz & Schultz 1998). The key to this stage is the development and application of databases that contain empirical data. This stage brings the concept of customer retention (in a parks sense

repeat visitors)] to the fore rather than customer acquisition (constantly getting new visitors). This stage is also about developing a deeper knowledge of customers to help managers connect more effectively with their audiences and create more targeted messages (content). These messages are better delivered as managers develop a better understanding of preferred contact points (channels). The application of information technology also means that managers have a greater capacity to measure results (Schultz & Schultz 1998; Kliatchko 2008).

The final level 4 senior management is concerned with resource allocation and organisational alignment, and is able to put in place closed-loop measurement systems that enable them to analyse more accurately the relation between returns and investments on marketing communications (Schultz & Schultz 1998). Organisations that are at this level are those that more fully understand the demands of integration and exhibit best practices in the applications and management of IMC (Kliatchko 2008). The ability of organisations to measure and achieve desired return on customer investments further assumes that an organisation has been able to accurately define and understand its most appropriate and desirable target customers and stakeholders (Kliatchko 2008). This also implies that managers have been able to identify the most relevant and preferred contact points of its stakeholders (channels) and have successfully achieved interaction, dialogue and some degree of relationship through an exchange of meaningful messages (Schultz & Schultz 1998; Kliatchko 2008).

The emerging quasi-commercial and pre-visit communication mandate of national park and protected area agencies means that most managers are grappling with a shift between levels 1 and 2—from coordination of messages about parks and protected areas to a more visitor-focused marketing approach incorporating a richer understanding of visitor brand or park contact points (points where different visitor groups might source information about national parks and protected areas generally in order to facilitate decision-making).

Barriers to Implementing Integrated Marketing Communication

A number of barriers have been identified through a review of literature and qualitative interviews with national park, protected area and tourism managers. Barriers to undertaking IMC oriented pre-visit communications are both internal and external. Internal barriers include mindset and culture, taxonomy and language, internal politics, lack of expertise, organisational structure, task magnitude, and divergence of planning (Duncan & Mulhern 2004; Reid, Luxton & Mavondo 2005). The main external barrier is the diversity of customers and markets that have to be coordinated and promoted to. Each of the barriers will be briefly outlined.

Mind-set and culture

The pre-existing organisational culture, tradition and history, if it reflects a poorly integrated environment, will act as an impediment to introducing an IMC process or philosophy (Schultz 1993; Beard 1996; Reid, Luxton & Mavondo, 2005). For national park and protected area managers, resistance to the concept of marketing exists, although this appears to be changing as an improved awareness of what marketing means is diffused through the organisations.

IMC assumes that organisation-wide change and implementation is best. It is noted, however, that organisational change in terms of the design, structure, and systems required to implement IMC is likely to engender resistance rather than facilitate it (Hartley & Pickton 1999). The common human resistance to change together with a fear of loss of control felt by individuals associated with the organisation or wider industry are also major factors affecting people's state of mind (Carson & Gilmore 2000). This is due to the fact that change is often imposed rather than 'owned' by employees (Stewart 1996).

Taxonomy and language

The language used to describe the communications mix (i.e. personal selling, advertising, sales promotion, sponsorship, publicity and point-of-purchase communications etc) has a detrimental effect on the integrative process as it promotes a perception that promotional activities are discrete entities. Historically, particularly in national park and protected areas, 'marketing' and 'advertising' have often been seen as less than desirable organisational activities. Similar misunderstandings exist around the definition or activities associated with other elements of the communication mix.

This potential barrier is exacerbated by the fact that many organisations relegate visitor and stakeholder communication activities to the tactical level and fail to appreciate their strategic significance in planning future organisational direction (Pickton & Hartley 1998). Integration, as it relates to pre-visit communication, has to take the broadest view, both strategically and tactically.

Turf wars and internal politics

One of the most commonly cited barriers to effective IMC implementation is 'turf wars' over ownership and authority of marketing related communications (Smith 1996; Baker & Mitchell 2000). The move to improve integration can lead to power battles where overly-protective managers resist having some of their budgets and

decisions shared or, worse still, made by someone from another department (Smith 1996; Carson & Gilmore 2000).

Closely associated with turf wars is the role of internal politics. Politics and turf wars involve dysfunctional interpersonal and inter-group conflict, and the management of individual egos (Beard 1996; Baker & Mitchell 2000). Political power in an uncommitted or cynical work environment will work against the successful implementation of IMC (Beard 1996; Baker & Mitchell 2000). Pickton and Hartley (1998) suggest that this is destabilising for the IMC process and that while such positions are held it is unlikely that they will come as equals to the 'promotional discussion table' to determine what is best for the total marketing communications effort. In a pre-visit communication sense this may be evident in 'who' is responsible for such communication, with regional or park level managers possibly conflicting with the central marketing entity in the organisation.

Lack of expertise

The need for cross-disciplinary skills creates a barrier to IMC. Integration demands personnel to be expert across the diverse range of communication alternatives. However it has been suggested that there are not many people who have real experience in the application of all the marketing communications disciplines (Smith 1996; Kitchen & Schultz 1999). The expertise issue is exacerbated by the emergence of new channels such as blogs, podcasting, SMS and MMS. The lack of know-how may also result in a lack of commitment or 'buy-in' to integration (Smith 1996; Duncan & Mulhern 2004).

Structure of organisations and functional silos

The question of what a 'truly integrated marketing or communication department' looks like (Smith 1996) does not yet have a categorical answer. Traditional rigid organisational structures do not always readily accommodate an integrated approach, and are often protected with well entrenched power bases, principalities and fiefdoms (Smith 1996; Hartley & Pickton 1999).

The problem is that some organisational structures isolate parts of the communication mix (e.g. public relations and others), data, and even managers from each other. For example, the specific details of press coverage about parks and protected areas may not be communicated from the corporate public relations department to the park management or marketing unit. Conversely, a marketing group may not keep corporate public relations informed about possible new promotional campaigns, or the outcomes of those already in place.

The potential benefits of integration and improved cooperation that have been cited in the literature include enhanced efficiency, specialisation opportunities for specific capabilities and expertise, and more straightforward management through concentration on one department (Pickton & Hartley 1998). Furthermore, lack of integration has been described as producing potentially negative effects if the messages promoted to potential park visitors are conflicting or confusing.

There is an underlying assumption that formal coordination of stakeholder communication creates positive synergy; however there is evidence that organisational structure and 'top-down' coordination may actually produce negative synergy if driven by personnel who do not have a firsthand understanding of the value chain in which the communication must operate (Stewart 1996). That is, coordination of pre-visit communication must be driven by managers who fully understand the marketplace.

Magnitude of the task

The undertaking to improve cooperation and indeed to integrate all communication efforts within an organisation should not be underestimated. Tasks extend from conceptualisation of the big picture and brand strategy through to harnessing all the organisational resources and people needed to achieve integration (Pickton & Hartley 1998; Reid, Luxton & Mavondo 2005). Successful adoption of IMC requires the involvement of the whole organisation and its marketing partners. It also needs focus and coordination from the highest corporate level down to the day-to-day implementation of individual tactical activity, e.g. at the park level. Consequently there are many levels and dimensions where individual and collective difficulties can occur. Many organisations may also find implementation problematic due to under-developed database systems that inhibit transfer of information on which to base strategic and tactical communication decisions (Gonring 1994).

Divergence of planning priorities

Conflict may occur due to the disparity between time horizons and the goals for specific aspects of communication (Gonring 1994; Smith 1996). For example, image advertising, designed to nurture the national park and protected area agency brand or the tourism product over the longer-term, or communication intended to change visitor attitudes, may conflict with shorter-term promotional goals such as short-term demand reduction for specific parks. These objectives can be accommodated, but only if careful 'strategic' planning of pre-visit communication takes place at an early stage. This clearly has implications for resource management, particularly

personnel who may have very diverse portfolios and the subsequent juggling of various planning priorities. Furthermore, integration is difficult to implement in practice, due to problems such as little organisational agreement about target visitors or about communication objectives (Duncan & Everett 1993).

Diverse markets and customers

The primary external barrier relates to the nature of the market and visitor. Extensive product portfolios and diverse markets also act as barriers to IMC. This is especially the case if global markets are involved, where it becomes increasingly difficult to communicate consistently to diverse audiences who interpret similar messages very differently (Smith 1996). An implication of integration is the increasing customisation of communications which may result in:

- Different costs associated with reaching particular visitors; and
- A differential return on investing in these visitors.

This barrier is likely to be quite significant for national park and protected area organisations as they deal with many different types of visitors and many different types of products or parks and experiences.

Integrated Marketing Communication in Summary

From an operational perspective, IMC provides benefits in the coordination of visitor communication across organisational areas and between the many organisations involved in the implementation of park and protected area marketing campaigns. Cornelissen, Lock and Gardner (2001) present such benefits as psycho-social, including reduced conflict and decreased transaction costs across functions. Additional means of cost savings relate to organisational infrastructure, where increased cooperation between departments in an organisation avoids unnecessary duplication of communication strategies and activities, thereby improving operational efficiency and message consistency (Hartley & Pickton 1999; Linton & Morley 1995).

Barriers to IMC implementation can be reduced by acknowledging and utilising shared/integrated knowledge and skills across functional areas wherever possible (Schultz 1993). Departmental silos, for example, can be addressed via inter-functional coordination (Duncan & Everett 1993; Gonring 1994). Indeed, researchers suggest coordination and integration are key organisational processes that lead to more effective and efficient work (Beard 1997). Encouraging integration facilitates managerial cohesion and competence in utilising all available marketing communication tools, promotes internal marketing to optimise employee productivity and creativity, and the unbiased commitment of resources across synergistic teams (Duncan & Moriarty 1997). In the context of protected area management, the issue of coordination and cooperation extends beyond an individual NWPS agency into the network of state, federal, and private, tourism and protected area entities.

In summary, the concept and process of IMC operates at many levels including corporate, strategic and tactical levels. One would expect national park and protected area managers who adopt the principles and processes of IMC for pre-visit communication would have an improved ability to achieve their stated campaign and communication objectives. Such objectives might include increased park and protected area awareness, improved knowledge about the experiences available at different parks, and improved attitudes and behaviours by visitors when they visit parks and protected areas. Importantly, national park and protected area managers would have an improved capacity to build the agency brand and profile with both visitors and the various tourism organisations that market such destinations.

Chapter 5

INTEGRATED PRE-VISIT COMMUNICATION MANAGEMENT

Drawing on the concepts identified in Chapter 4, this chapter presents findings from in-depth interviews and a survey into the management of pre-visit communication. In this chapter we employ the term Integrated Pre-visit Communication Management (IPCM) to represent the interrelationship between the broader concept of IMC and the pre-visit communication focus of this report.

To understand the nature of pre-visit communication in national park and protected area agencies, a series of interviews were undertaken with protected area managers and tourism offices. The interviews were designed to generate insights into marketing, visitor and stakeholder communication, and in particular pre-visit communication. The interviewees represented a range of organisations and different levels of planning and integration of communications, from highly evolved to emerging.

The interviews, in conjunction with the literature review, enabled the development of a survey instrument which contained the elements of an IPCM mini audit. The focus of the results is predominantly from the perspective of national park and protected area agencies, although a broader industry perspective was captured in the survey.

The IPCM mini-audit has both evaluative and formative value. It is evaluative in that it provides a 'snapshot' of where an organisation currently stands in terms of its pre-visit communication capacity or performance. It is formative in that it also points to areas in which the organisation can strengthen its pre-visit capability and performance. The IPCM audit does not focus on the results or outcomes of an organisation's communications practices after they are implemented or among their target audiences. Rather, it focuses on the organisation itself, its practice and capacity to undertake effective pre-visit communication.

The core of the IPCM survey was built around seven main themes grouped into three main strategy phases (Table 5). Strategy Foundations includes the tasks of setting a vision and mission and building linkages between departments and facilitating organisations. Strategy Development includes activities related to understanding target markets, setting goals and objectives, and undertaking the pre-visit communication planning process. Strategy Implementation includes activities related to ensuring strategic consistency of messages and resourcing pre-visit communication activities and programs. The full set of items can be seen in Appendix 1.

Findings from the interviews and survey will be presented. Firstly, overall satisfaction with IPCM will be outlined and this will be followed by an overall aggregate analysis of the performance on IPCM factors. Following this, each of the seven themes will be analysed according to the different respondent groups, including state tourism organisations (STOs), parks and protected area agencies (PAMs), regional tourism organisations (RTOs), nature-based tourism operators (TOs), and visitor centres (VICs). In each case the data will be further presented by the individual items that make up each theme.

Table 5: Main integrated pre-visit communication management constructs

IPCM Phase	Main Audit Theme	Description
Strategy Foundations	Vision and Mission	<ul style="list-style-type: none"> • Existence of clear vision and mission statement that positions the goals and actions of the marketing group within the organisation, with related organisations, and within the marketplace. • Communication of the vision and mission so that other stakeholders are clear about the marketing entity and its goals and charter.
	Internal and External Stakeholder Integration	<ul style="list-style-type: none"> • Degree of internal cross-functional integration that exists in the organisation as well as inter-organisational integration and cooperation essential for development and implementation of strategic pre-visit communications.
Strategy Development	Visitor Connectivity	<ul style="list-style-type: none"> • Degree to which the voice of the visitor (park visitor / tourist) is heard inside the organisation and directs pre-visit communication activities. • Existence of information on the visitor decision-making process and specifically the information search process related to national park / protected area destination choice. • Ability to establish a dialogue with target markets so that a relationship is facilitated.
	Clarity of Objectives	<ul style="list-style-type: none"> • Existence of clear, unambiguous performance indicators and objectives related to balancing visitor demand and conservation in protected areas. • Clear association between objectives and target audiences / market segments regarding visitation and behavioural expectations and attitudes towards protected areas.
	Planning Process	<ul style="list-style-type: none"> • Having a written plan that guides pre-visit communication activities. • Use of a SWOT analysis to help direct the application of marketing communications tools. • Flexibility of pre-visit planning and strategy to enable the entity to take advantage of ad hoc opportunities to communicate with visitor segments.
Strategy Implementation	Strategic Consistency	<ul style="list-style-type: none"> • Planned coordination by an organisation or marketing group of all pre-visit messages they send related to parks and protected areas regardless of what media channels (controllable or leveraged) they employ.
	Resource Commitment	<ul style="list-style-type: none"> • The availability of adequate resources for the pre-visit communication tasks asked of the marketing group, including provision of time, skilled and knowledgeable staff, and sufficient funding.

Based on Duncan & Moriarty 1997; Duncan & Mulhern 2004; Reid, Luxton & Mavondo 2005

Overall Satisfaction with Integrated Pre-visit Communication Management and Outcomes

Satisfaction with IPCM and the outcomes of communication activities were measured by three items representing satisfaction with 1) the integrated pre-visit communication (IPC) planning process, 2) the implementation of IPC and 3) overall outcomes of IPC (Figure 10). The results indicate that satisfaction with planning, implementation, and outcomes of pre-visit communication is not high and that scope for improvement is likely to exist. The scale is 1=highly dissatisfied to 5=highly satisfied.

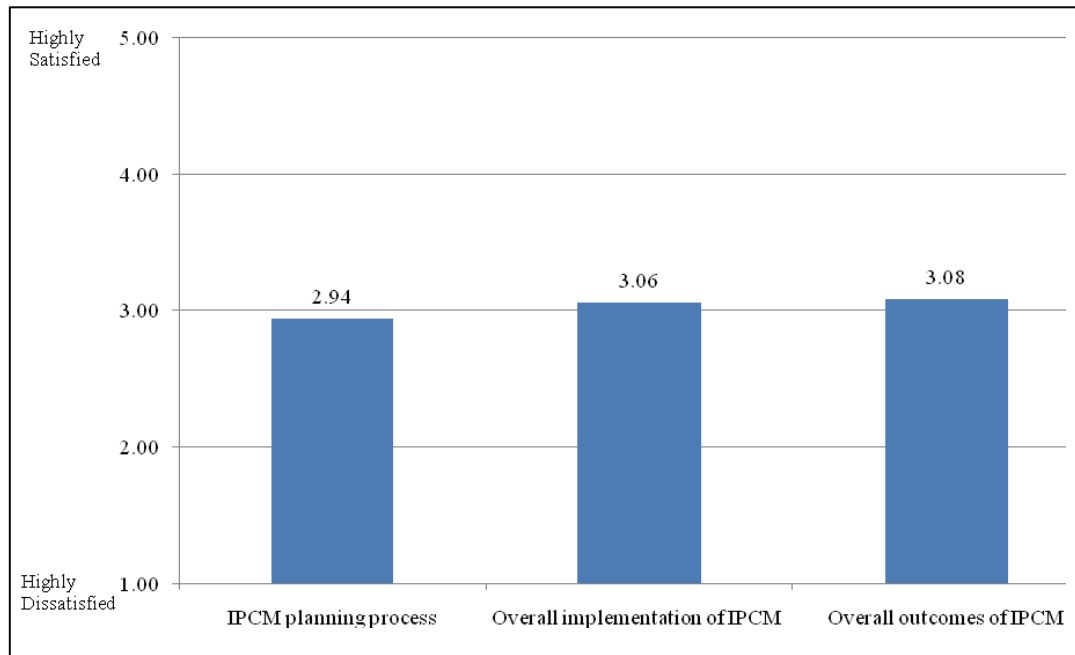


Figure 10: Satisfaction with integrated pre-visit communication management

A further breakdown of the satisfaction results by the different responding groups is outlined in Table 6. The results indicate that dissatisfaction is mostly felt in groups other than the main STOs. This is not surprising given the leadership and marketing role played by these organisations in each state with respect to marketing and promotion. National park and protected area related respondents expressed particular dissatisfaction with the planning process. Whilst STO respondents were most satisfied with overall outcomes of their marketing efforts, there is still scope for improvement, particularly in the planning of integrated pre-visit communications.

Table 6: Satisfaction by respondent group

	STOs	PAMs	RTOs	TOs	VICs
IPCM planning process	4.25	2.50	2.41	3.21	2.43
Overall implementation of IPCM	4.75	2.75	2.65	3.29	2.48
Overall outcomes of IPCM	5.00	2.92	2.59	3.34	2.33

NOTE: STOs = State Tourism Organisations; PAMs = State Based Parks and Protected Area management Agencies; RTOs = Regional Tourism Organisations; TOs = Nature Based Tourism Operators; VICs = Visitor Information Centres

The results in Table 6 suggest a real opportunity to improve the planning and implementation of pre-visit communications across the industry generally, and specifically for national park and protected area managers. Further exhibits in this chapter will present what does and does not characterise IPCM, and help identify where dissatisfaction and poor performance might be coming from within the different types of organisations. Particular emphasis will be placed on national park and protected area managers with regard to IPCM issues.

Case Study 2: Department of Environment and Conservation, Western Australia

The following case study on the Tree Tops Walk, Department of Environment and Conservation, Western Australia, illustrates some of the difficulties faced by national park and protected area managers in planning and implementing marketing communications and achieving satisfactory outcomes. In this case, managers are faced with rebuilding demand for a destination product and having to deal with bureaucracies, somewhat conflicting goals of different stakeholders, and infrastructure difficulties that hamper the promotion of the offer. The case illustrates how adoption of different communication mix tools and the leveraging of secondary brand associations, e.g. a celebrity, are to be used to increase the value perception of the offer.

Case Study 2: Tree Tops Walk Department of Environment and Conservation, Western Australia

Background

The Valley of the Giants Tree Top Walk, based at the Wilderness Discovery Centre, is located east of Walpole, only 10 minutes from Nornalup, Bow Bridge and Peaceful Bay, in the Walpole-Nornalup National Park in Western Australia, and forms part of the Walpole Wilderness area. The Wilderness contains nearly 363,000 hectares of karri and tingle forests as well as significant areas of coastal heath. The rugged coastline, peaceful inlets and rivers are a major feature of the park's attraction.

The park has long been one of the area's most popular tourist destinations. The Tree Top Walk in the Valley of the Giants is a walkway that rises up to 40 metres above the forest. It is easily accessible for all ages and provides a unique view of the canopy of the magnificent tingle forest. Visitors get a different perspective on the shapes, sounds and movement of the forest.

In addition to the Tree Top Walk, the Ancient Empire is a 600 metre ground level walkway through the tingle forest, providing visitors with an opportunity to enjoy getting closer to the tingle trees and the natural environment.

A recent addition to the Tree Top Walk is the Discovery Centre which features interpretive displays where visitors can learn what makes the Walpole Wilderness special.

History of Visitation and Marketing

The Tree Top Walk in the Valley of the Giants was originally built 12 years ago and featured in a successful state-wide marketing campaign involving the well-known Australian model Elle McPherson conducted by Tourism WA. Initial promotion of the attraction was highly successful and visitor numbers peaked at 220,000 per year in the first few years. Since then visitation has declined by approximately 5% to 7% each year and is currently down to approximately 167,000 per year. While there has been a decline in overall visitation numbers, this is to some extent expected given that the majority of visitors were intrastate and visited the attraction when it was new. Some consider that 'there is nothing new' to see and repeat visitation is therefore less likely.

However, there has been a halt to the decline in the past financial year (2007/8) and in fact visitor numbers have risen by 0.2%.

Target Audience

Each visitor that comes through the Tree Top Walk is surveyed to identify where they are visiting from (intrastate, interstate or overseas). This provides significant information to management about which target audiences to aim pre-visit material at. Tourism WA also collects visitation statistics; however, their data is generally collected from accommodation sources and does not indicate specific visitation to the Walpole Wilderness area or the Tree Top Walk.

Visitation varies throughout the year, with different times of the year attracting different visitor groups. During peak season around Christmas holidays, visitors are predominantly family groups from within WA. Outside school holidays, visitors are predominantly retirees and 'caravaners' from interstate, as well as overseas visitors. Throughout the school year the site also receives significant visitation from school groups.

Current Aims of Marketing and Pre-visit Communication

The success of any pre-visit communication and marketing of the area is measured using visitor numbers. Peak season occurs in the summer months around the Christmas school holidays. A strategy for increasing visitation to the site, particularly during the off-peak season, has been identified as one of the highest priorities for the organisation. Currently resources are adequate for peak usage but underutilised during the winter months. However, management does recognise that visitation may be influenced by factors beyond the control of the organisation. For instance, current high petrol prices and the distance of the area from the capital of Perth may affect visitor numbers.

Pre-visit Communication—the Current Situation

Due to recent staffing vacancies, the marketing of the site has been done by renewing previous marketing campaigns; however, the organisation is sounder in its management structure and is currently going through a strategic planning process to identify future directions for future marketing of the facility and the sustainability of the site. Overall planning aims to identify how best to market the Tree Top Walk specifically in conjunction with the Walpole Wilderness area where the facility is located.

In order to encourage visitation to the area and counteract the perception that there is 'nothing new' at the site, a Discovery Centre has recently been developed. This free attraction is a display that gives visitors an introduction to the wilderness and encourages them to explore the area more fully. The Department of Environment and Conservation has invested in other recreationsites across the wilderness area and includes Mt Frankland, Swarbrick "Art in the Park", Circular Pool and Fernhook Falls.

The Discovery Centre has also been extensively promoted to key stakeholders (visitor centres, tourism operators, media, local businesses, Tourism WA and Australia's South West so that they can encourage visitation through indirect marketing and pre-visit information. This factor alone is immeasurable.

Pre-visit communication is undertaken across a broad cross section of mediums and organisations—including the visitor centre network across WA, travel magazines, holiday magazines, accommodation magazines etc. In general pre-visit communication is not targeted at children because it is the adults that make the holiday decisions.

The organisation has a Memorandum of Understanding with Tourism WA and an agreement with Australia's South West—the regional tourism organisation. Most of the interstate and international marketing of the site is undertaken as part of a larger tourism campaign for the state or region or by tour operators who include the attraction in their tours.

Future Marketing and Pre-visit Communication

Following strategic planning and a recognition of the need to market the facility to better reflect changing consumer trends, management has developed an innovative marketing campaign called the 'Giant meets the Giants' to complement the existing marketing schedule. The campaign involves promotion of the site by Aaron Sandilands, Fremantle Docker, the tallest man in the Australian Football League. Standing at 211cm, Aaron Sandilands represents the giant of the football league linking with the giants of the tingle forest and this in itself has created renewed interest, local community support and commendation for a government agency showing innovation and a commitment to do something different.

The campaign was kick-started in July 2008 and future promotional materials will include the Tree Top Walk figurehead and ambassador. Aaron Sandilands will also participate in special activities and events during the year. While this campaign will predominately be targeted at intrastate visitors, it is these visitors that have been identified as causing the drop in visitation.

As part of a new and revitalised communications plan, new advertising material and messages have been developed, such as "A giant of an experience". These include promotional brochures, banners, advertisements, and tickets.

With the appointment of an Interpretive Officer, based at the site, new activities will be developed, particularly to cater for school groups and members of the public and families during school holidays.

Merchandise in the retail outlet has been refurbished to reflect the niche demands of the current tourist. Smart windcheaters and t-shirts for example are branded with the Tree Top Walk, representing an excellent way of promoting the facility far and wide into the future for zero dollars.

The focus of the retail outlet is to be a showcase of the local artistic products from across the region, thereby illustrating the commitment of government to support local businesses.

Difficulties with Pre-visit Communication

Difficulties in implementing effective pre-visit communication and marketing campaigns have been associated within the restrictions of being a government agency. However, this situation can offer an element

of credibility and also see promotional opportunities that would not be offered to a commercial operator. Current marketing has required a significant lead time to establish contracts with relevant parties and gain necessary approvals. This has in the past resulted in some missed opportunities for promotion and can limit creativity.

Tourism operators also work closely with the agency to market and provide pre-visit communication but there is often an expectation that the conservation agency—being a government department—should provide significantly more support to businesses that access the area. Business operators consider it the agency’s role to promote the region but this is the role of the regional tourism organisations or the state tourism agency. It is often difficult to meet the expectations of local businesses.

While it is recognised that effective marketing needs to be undertaken by a coordination of organisations and agencies, to date this only happens in a limited way. However, an important step forward has been the establishment of the Wilderness Marketing Group, which consists of seven visitor centres located within the Wilderness and representatives from Tourism WA, Australia’s South West and the Department of Environment and Conservation. The group has agreed to coordinate a more cross-regional approach to the marketing of the Wilderness area.

The Tree Top Walk, as well as the Walpole Wilderness, does not have an independent website but rather is only accessed via the general department website—whose focus is appropriately conservation and its other environmental functions. It is difficult to develop a business and marketing strategy for the area without the appropriate website support. The focus of the departmental website can sometimes limit the tourist promotional message. To overcome this, the Wilderness Marketing Group will explore the possibility of developing its own webpage. The agency has been invited to provide material and intellectual capital to the industry group and the proposed website.

Aggregate Integrated Pre-visit Communication Management Performance

Adopting an integrated approach to pre-visit communication is not easy and requires managers to carefully analyse how they approach planning and implementation of activities. In this section the report looks at how managers feel they perform on critical IPCM factors.

Figure 11 outlines an overview of how respondents felt they performed on the main IPCM audit factors. Each of these factors was measured by a number of individual items that were then aggregated to provide insight into what characterises IPCM overall. The results indicate mixed performance across the three areas of strategy foundations, strategy development, and strategy implementation.

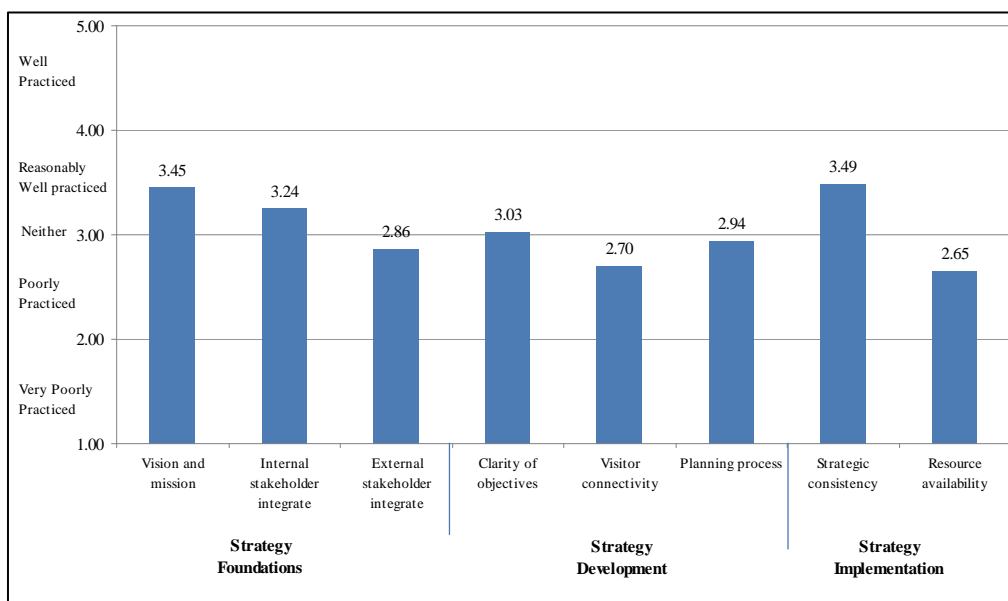


Figure 11: Overall integrated pre-visit communication management performance

With regard to the strategy foundations area, development of a vision and mission to guide pre-visit communication efforts was reasonably well-practiced and a relatively strong characteristic of respondents' pre-visit communications management. This reflects the work undertaken over the last several years by many organisations to become more strategic in their communications. Internal stakeholder integration within organisations was also a reasonably strong aspect of the IPCM process. The poorest performing area of strategy foundations was external stakeholder connection and integration. Overall, the results for this section suggest that there is scope for improvement, particularly in the management of cross-functional integration and inter-organisation integration and connection.

In the area of strategy development, the poorest performing component was visitor connectivity. Visitor connectivity represents how the voice of targeted visitors and tourists is heard in the organisation and helps direct development of pre-visit communication strategy and the allocation of resources to the communication mix. This is a crucial element of IPCM and as such requires particular attention. There will need to be significant improvements to visitor connectivity in pre-visit communication to maximise the return from scarce organisational marketing resources. The pre-visit planning process itself was also identified as an area of poor performance and will need to be improved in order to ensure that organisations can attain the desired response from target visitor or consumer segments. The result for clarity of objectives, whilst having slightly better performance than the other two dimensions, also suggests that improvements can be made.

In the final area of strategy implementation, respondents indicated that they have a reasonably good level of consistency in the communication activities they undertake. The area of availability of resources for undertaking pre-visit communication was the poorest performing dimension overall. The resourcing of marketing communication is an important issue for all organisations to address, especially in tight economic times. Resourcing should be viewed as an investment and, given the changing mandate for national park and protected area managers to undertake an expanded marketing role, needs significant consideration. Overall, there appears to be significant scope for improvement in the management and implementation of IPCM. The following results examine each of the above dimensions more fully in order to highlight specific items which are associated with the performance integrated pre-visit communications (IPC).

IPCM Phase 1: Strategy Foundations

Strategy foundations consist of three main constructs; vision and mission, internal stakeholder integration, and external stakeholder integration. Each factor is further defined by sub-constructs. The detailed results for each will be presented in turn.

Vision and mission

Having a vision and mission to help focus, guide and legitimise how integrated pre-visit communication fits into the organisation is central to shaping effective pre-visit operations and outcomes. Several issues related to ensuring the development of appropriate mission and vision statements were identified through discussions with managers. These insights help qualify national park and protected area managers' responses to the survey. Issues included:

- The cultural impact of the redefinition of the protected areas and park offer to a more experiential model is difficult for some staff to adjust to. There is a need to adjust the 'mental model' of the organisation to promote a balance between visitor demand generation and management, and conservation and sustainability.
- The need to ensure pre-visit communication has an appropriate focus in the organisation and the need to balance or improve the relationship between pre-visit communication, onsite interpretation programs and more broadly, other conservation activities.
- The requirement to balance the conservation and recreation message in a non-conflicting way.
- The need to communicate the new mission of protected area marketing and management throughout the organisation and through to other external stakeholders.

Figure 12 presents the aggregate results of the survey on the area of mission marketing and illustrates that both STO and national park and protected area respondents felt that their IPCM was reasonably well characterised by a well-articulated mission statement.

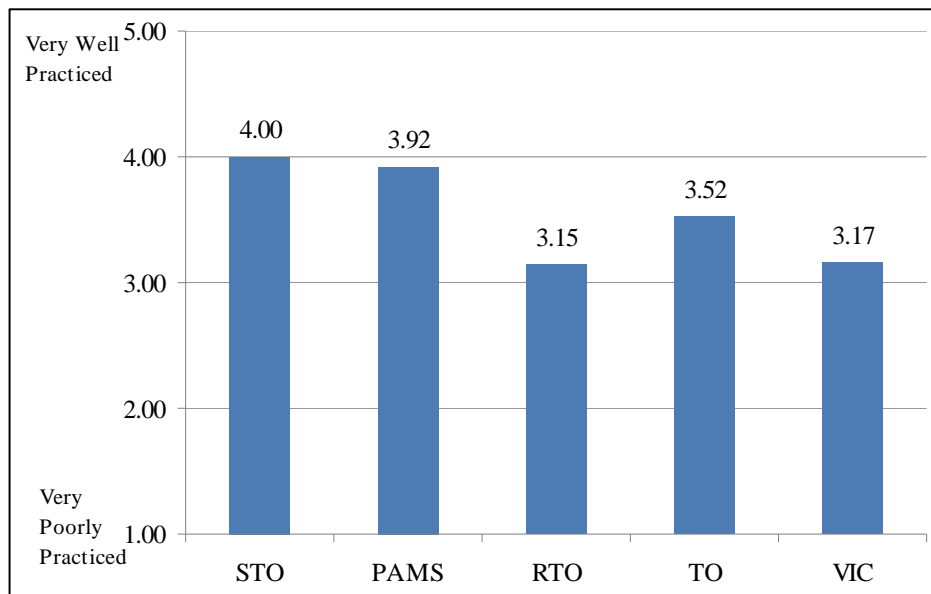


Figure 12: Overall mission marketing

A further breakdown of the results in Table 7 does suggest that national park and protected area agencies need to re-examine and perhaps adjust their vision and mission statements to ensure that they are properly balanced in both the need for conservation and the mandate to broaden their visitor and user profile regarding the promotion of parks and park related experiences.

Table 7: Mission marketing items by respondent group

	STOs	PAMs	RTOs	TOs	VICs
We have a well-articulated mission statement related to promoting our offer to visitor segments	4.50	3.75	3.29	3.50	3.29
Our mission statement carefully balances conservation values with generating demand for our products	3.50	4.08	3.00	3.54	3.05

Overall, the findings suggest that national park and protected area managers need to continue to promote and champion this mission across the organisation in order to facilitate adjustment of traditional organisational mental models related to the conservation vs. marketing relationship.

Internal stakeholder integration

Internal integration including both vertical (different levels of management and staff) and horizontal (across different organisational areas) communication and cooperation is essential for ensuring that consistent and coordinated pre-visit messages about protected area visitation and experiences are promoted in an accurate and responsible manner. In face-to-face discussions with managers two key issues were highlighted:

- An improved delineation of roles and responsibilities within national park and protected area agencies regarding contact with potential visitors both within the state and interstate so that messages are consistent, money is spent in the most appropriate manner, and the potential impact of communications is increased with targeted stakeholders
- Improved working relations, cooperation, and integration between other aspects of the organisation that also communicate with visitors and other stakeholders, e.g. corporate communication and public relations functions is needed to gain efficiencies and synergies in communication.

Figure 13 outlines an aggregate view of how respondents felt they performed on the internal stakeholder connectivity factors.

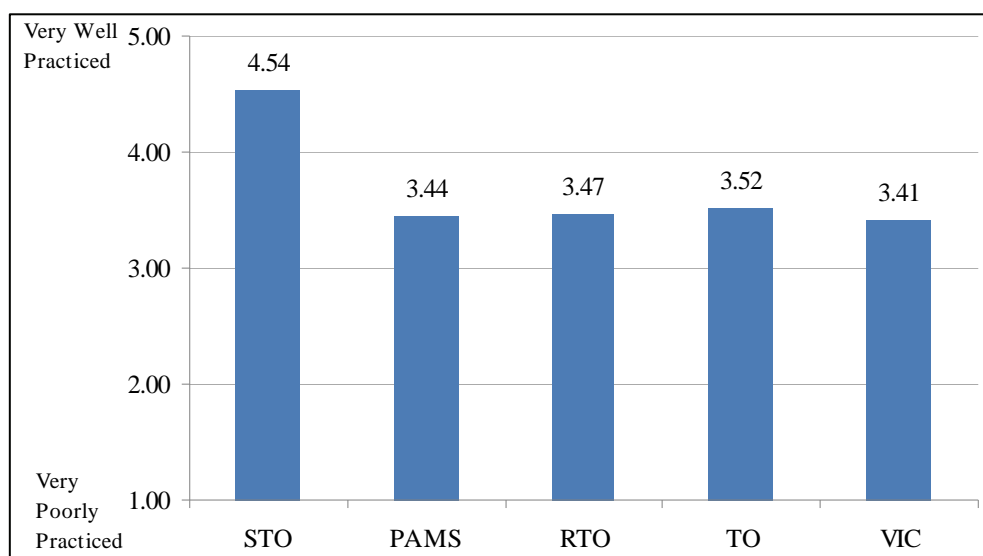


Figure 13: Overall internal stakeholder connectivity

STO respondents felt they had extremely good internal integration. All other respondents indicated that management of IPC was characterised by a reasonable level of internal integration. The results do suggest that organisations examine the way in which internal integration is managed in order to improve communication about pre-visit strategy and program or campaign implementation. A further breakdown of results is presented in Table 8.

Table 8: Internal stakeholder integration items by respondent group

	STOs	PAMs	RTOs	TOs	VICs
Pre-visit communication planning involves people and groups from many different parts of the organisation	4.75	3.50	2.53	2.89	3.05
Top management champions the importance of pre-visit communication planning and activities	5.00	3.17	3.29	3.41	3.05
The roles and responsibilities of each person in the organisation regarding pre-visit communication is clearly articulated	4.75	2.75	2.94	3.39	3.29
All people and groups involved in planning pre-visit communication campaigns work cooperatively	4.25	3.08	3.29	3.71	3.19

A significant issue for national park and protected area managers highlighted in Table 8 appears to be a lack of clear articulation of the roles and responsibilities of each person and group in the organisation regarding pre-visit communication strategy and activities. An implication of this may be that whilst people are working cross-functionally, the lack of clear determination of roles and responsibilities might be undermining the ability to achieve desired outcomes. The lack of role definition is likely to result in duplication of some aspects of pre-visit communication and a lack of attention to other important communication tasks.

A further examination of Table 8 suggests that for national park and protected area agencies, a general weakness exists in the overall integration and involvement of people and groups from many parts of the organisation. This difficulty results from and can result in an overall lack of cooperation in both planning and implementation of pre-visit communication strategy. Cross-functional integration is important for transferring knowledge, achieving buy-in to pre-visit strategy, and facilitating the opportunity for coordinated strategy.

A final issue for senior national park and protected area management to address is the championing of pre-visit communication and related planning activities. Simply to broaden the mandate and demand that further emphasis be placed on pre-visit communications is insufficient, and senior management needs to legitimise such activities through both words and actions.

External stakeholder integration

External stakeholder integration calls for proactive management of the relationships between other organisations an entity must deal with and whom are also involved in delivering messages to consumers or visitors. Strengths in cross-organisation integration help achieve consistent messages, enable leveraging of message and media channels, and enable insights to be shared about how best to target particular visitor or consumer groups. Several issues were highlighted by managers regarding external stakeholder integration:

- There is a need for improved articulation of roles and responsibilities of external stakeholders, in particular with state and regional tourism organisations, in delivering protected area related messages to potential visitors.
- There needs to be improved alignment with the overarching state based tourism marketing strategy, thereby improving the integration of the 'protected area' message into the marketing collateral of STOs and RTOs.
- There is a need to have an improved understanding of the marketing programs of external stakeholders, and how these might offer national park and protected area agencies the opportunity to piggyback off marketing campaigns designed to target potential visitor segments. This might offer the opportunity for a more focused development of messages targeted at tourism market segments.
- More broadly there is a critical need to create strong working relationships with media channels, apart from the main STO and RTO groups. This includes the mainstream media and other local specialised channels, including auto clubs, map producers and the like. Improved media relationship management offers scope for improved park and product publicity or public service messages to be carried at lower cost.

Figure 14 outlines an aggregate view of how respondents felt they performed on the internal stakeholder integration factors. Overall, all respondents felt that this aspect of IPCM was practiced well.

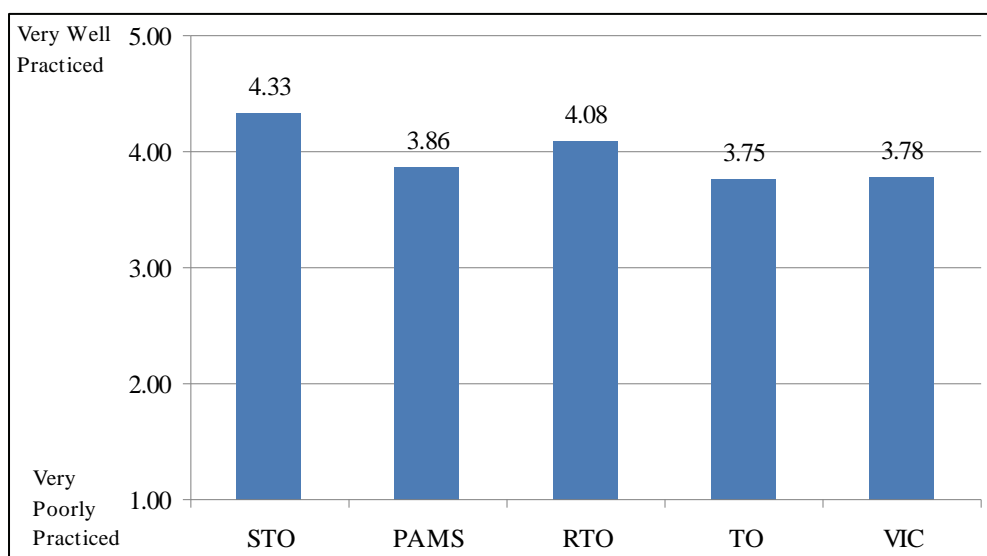


Figure 14: External stakeholder integration

An examination of Table 9 suggests that for national park and protected area managers, improvements could be made in terms of proactive engagement with STOs and RTOs and, more broadly, with tourism operators marketing products into protected areas and national parks. For the other groups a lack of proactive engagement with parks organisations is also evident.

Table 9: External stakeholder connectivity items by respondent group

	STOs	PAMs	RTOs	TOs	VICs
Proactively manage relationships with all park and protected area management stakeholders	4.00	4.00	3.59	3.70	3.33
Proactively manage relationships with all state and regional government tourism stakeholders	4.75	3.92	4.12	3.80	3.71
Proactively manage relationships with other tourism operators in our market area	4.25	3.67	4.53	3.76	4.29

IPCM Phase 2: Strategy Development

The second main phase or stage of IPCM relates to Strategy Development. Strategy Development consists of three main constructs; visitor connectivity, clarity of objectives, and the pre-visit planning process itself.

Visitor connectivity

Visitor connectivity relates the activities that aid the organisation in hearing the voice of the visitor and using this to help direct pre-visit communication activities. Importantly, this construct extends beyond simply hearing the visitor's voice (their needs and wants) to incorporate the ability to develop a dialogue between the organisation and potential visitors about the experiences they desire and the experiences they perceive. The face-to-face in-depth interviews uncovered a number of issues, including:

- A desire to gain more detailed visitor insights and segment information to enable improved communication channel choices and message design.
- That not fully knowing target market segments means that pre-visit communication activity can be ad hoc and driven by problems experienced in the field. Managers expressed a need to replace ad hoc reactive communications with strategically driven messages to better shape visitors' behavioural expectations and experience perceptions.
- Managers suggested that they needed to better understand what visitor information is potentially available through other agencies (STOs, RTOs, government and operators) and how they can more easily access such information to make communication decisions.
- There was also a desire to improve the way in which visitor surveys were implemented and that more resources needed to be devoted to improved analysis of the data gathered. Similarly it was felt that there was a need not to be overwhelmed by the information that is potentially available.

Figure 15 outlines an aggregate view of how respondents felt they performed on the visitor connectivity construct.

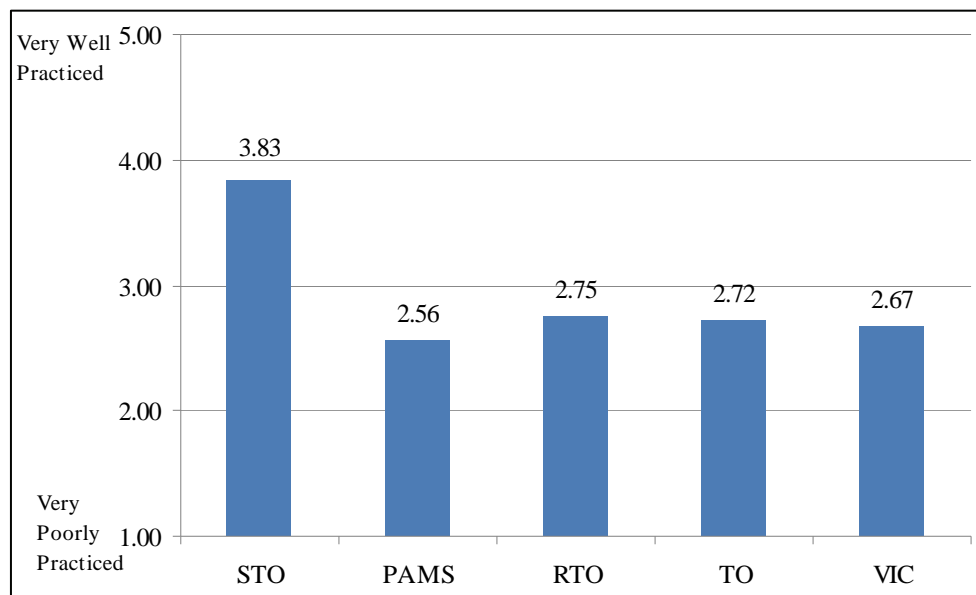


Figure 15: Visitor connectivity

Overall, respondents indicated that this was an area that was poorly performed and where quite significant weakness likely existed. The results suggest that organisations need to examine the way in which they manage visitor connectivity in order to improve their ability to target key groups and segments with appropriate pre-visit communication messages. Table 10 details how each respondent group felt they performed on individual items.

Table 10: Visitor connectivity items by respondent group

	STOs	PAMs	RTOs	TOs	VICs
We conduct market research to understand the pre-visit decision-making	5.00	2.08	2.41	2.39	2.19
We actively seek market research insights about segments from government and others	4.75	3.17	3.29	2.67	2.81
We use systematic tracking to evaluate our relationship with segments	4.50	1.75	2.18	2.29	2.24
We use systematic tracking to evaluate our relationship with our key industry and government stakeholders	2.75	2.17	2.53	2.24	2.24
We have a program in place to collect feedback from the visitor segments we focus on	3.00	3.92	3.24	3.73	3.57
We store all visitor segment data and insights in a user-friendly database	3.00	2.25	2.88	2.99	3.00

STO respondents indicated that their IPC was characterised by a strong visitor research focus, actively conducting their own market research into pre-visit decision-making, actively seeking further insights from other government and other tourism organisations, and using systematic tracking to evaluate the relationship with visitor segments. Areas of possible weakness existed in items related to tracking relationships with other key industry and government stakeholders who are also involved in tourism related activities. The table also highlights a weakness in the area of systematically collecting feedback from visitor segments. Storing data related to visitors in a user-friendly database was also highlighted as a potential issue to address.

A similar pattern of responses is illustrated across the other respondent groups and suggests that organisations must devote attention to improving the research they conduct into visitor needs and behaviours, establishing a dialogue with the visitors they target, and using the information from such engagements to help direct their pre-visit communication planning and implementation. Again, this reflects the interview responses.

National park and protected area respondents, in particular, suggested that their IPC approach was not well-developed in this area. Whilst respondents indicated that a program was in place to collect feedback from visitor segments after their visit to a national park or protected area, there is still some concern regarding the systematic nature of such activities. Improvements in tracking enable a more robust understanding of experiences and importantly for pre-visit communication, i.e. where visitors are sourcing information from prior to their park experiences. Storage of visitor segment data in a user-friendly database was also highlighted as a weakness. It is important that insights about visitors are able to be easily accessed and employed in making marketing and communication related decisions.

Of particular importance, especially given the greater marketing requirement of national park and protected area managers, is the low level of market research being undertaken to understand pre-visit decision-making. This in part may be a function of the type of agency and the transition phase of national park and protected area agencies to a greater visitor focus. Nevertheless, it is also illustrated that there is a relatively poor result for the item related to actively seeking insights from other government agencies such as STOs or federal agencies. In the absence of the ability to conduct market and visitor research, there needs to be a proactive approach to sourcing appropriate insights from elsewhere. There also needs to be an emphasis on shaping the data that is collected and analysed by other organisations which may benefit the marketing mix and communication decisions of national park and protected area managers.

Clarity of objectives

Development of IPCM strategy is predicated on having clear objectives related to which visitor segments to target, products to market (i.e. protected areas, national parks and their associated experience values), and the management and marketing objectives associated with each product (e.g. demarket, increase visitation, and adjust knowledge of experiences available). Associated with this is the explicit identification of what will be measured to determine how well communication activities shape the behaviour and experience expectations of targeted visitor segments. Face-to-face interviews with protected area managers resulted in a number of issues that fit within this context, including:

- The emerging mandate to ‘sell product’ and to be ‘profitable’ is becoming a new conflict with existing conservation priorities of the organisation and one which is often difficult to reconcile.
- National park and protected area managers are now required to now develop demand / visitor and profit related targets that might be difficult to achieve given budget and operational restrictions. Such restrictions include staffing, time, and financial resource constraints.

- Determining the effect of marketing and promotion related activities on visitors is often difficult with a limited capacity to measure outcomes—there is often a reliance on data collected by other organisations to obtain any form of measure.
- Determining whether specific tools are achieving desired outcomes with target segments is difficult but necessary. In particular, measurement of website usage and usefulness as an information source is important to understand—hits, downloads, click throughs and the like.
- Importance of determining whether the brand message and specific parks level messages are being processed and acted on by target segments.

Figure 16 outlines an aggregate view of how respondents felt they practiced activities related to achieving clarity of objectives.

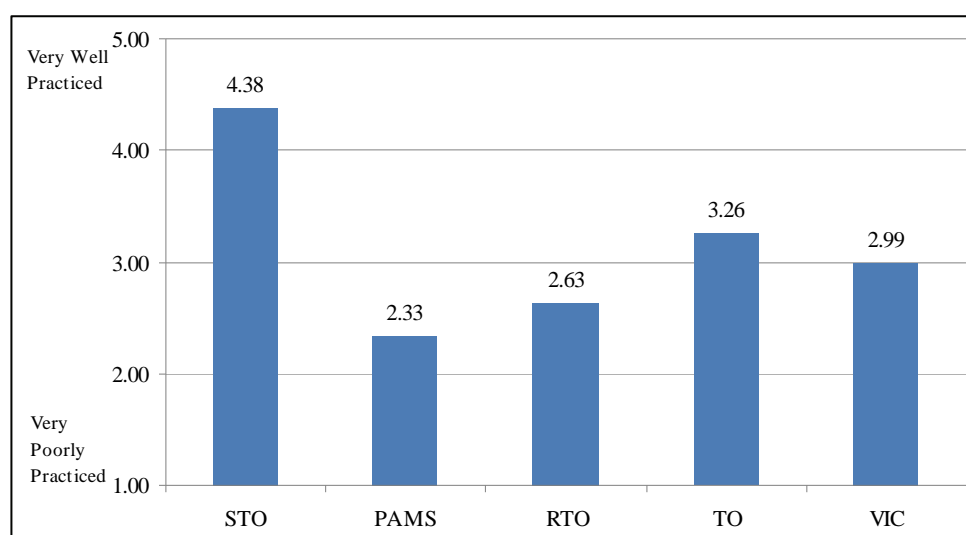


Figure 16: Clarity of objectives

Overall, STO respondents felt their IPC approach was strongly characterised by clear objectives and measurement. National park and protected area respondents felt less confident about practices related to this aspect of IPCM. Other respondent groups similarly felt that they performed poorly on this aspect of IPCM. Table 11 further details responses in this area.

Table 11: Clarity of objectives items by respondent group

	STOs	PAMs	RTOs	TOs	VICs
Clear portfolio strategy—we know which products/parks will be promoted to different segments	4.50	2.67	3.06	3.69	3.29
Clear communication objectives for each visitor segment we focus on	5.00	2.83	2.94	3.74	3.33
Clear metrics set for every pre-visit communication campaign we implement	4.50	1.92	2.47	2.73	2.71
Can easily measure the response by a visitor segment	3.50	1.92	2.06	2.89	2.62

National park and protected area respondents felt they did not have a clear portfolio strategy that guides how different products, in this case various parks and protected areas, will be marketed or matched to different visitor segments. The emerging national park and protected area mandate to be more market-focused and to adopt some of the principles of marketing management means that this aspect of IPC is likely to be in its early development phase. The development of a market/product portfolio matrix is an important tool in planning how to communicate with particular segments and to build demand or demarket certain protected areas. The involvement in nature-based marketing strategies of STOs is likely to help facilitate this portfolio thinking.

Apart from STO respondents, other groups, including national park and protected area agencies, felt that having clear communication objectives for each targeted segment was also not well embedded in their IPC process. Clear communication objectives including product or issue awareness, attitude formation, and actual behaviours are important to set for targeted segments as they help direct message development and the best communication mix for reaching and influencing these potential visitors.

As a result of weaknesses in setting objectives, respondents were also weak on having set clear metrics for communication campaigns they implement, and in having the ability to measure the outcomes of communication campaigns. For national park and protected area respondents, this may be a function of pre-visit communication being an emerging area of business and the skills and process for undertaking such tasks being in a developmental stage.

Pre-visit communication planning process

The process of planning actual pre-visit communication strategy and its associated segment or park related campaigns is central to being successful at achieving stated communications and visitor related objectives. The outcome of such a process should result in an actionable plan for communication with visitor segments. The plan should draw on a SWOT analysis examining key visitor contact points, strengths and weaknesses of the organisation and its ability to implement pre-visit communications, and threats to products (i.e. parks and protected areas) from the actions of others, e.g. other organisations who may be communicating inappropriate messages. Furthermore, such plans should enable a degree of flexibility in their execution to be able to take advantage of ad hoc and tactical opportunities for communications with key visitor segments.

Face-to-face interviews with managers highlighted a number of issues related to planning, including:

- A real need to improve the marketing planning process, especially as it relates to communication with visitor segments.
 - Managers must ensure a visitor and stakeholder plan actually exists with due consideration given to pre-visit communications.
 - Managers must ensure that pre-visit communication is consistent with the organisation’s other key management priorities, i.e. conservation message should be included in pre-visit communication (along with experience messages).
- Better understanding of how to orchestrate the communications mix for pre-visit communication. In particular, understanding the role and contribution of each potential tool in the communication mix (e.g. website, brochures and magazines, broadcast media, email and the like).
- Better understanding of the role of emerging communication tools, e.g. 3G, SMS, MMS, podcasts, blogs.
- Ensuring the main internet channel works to the best advantage of the organisation in terms of functional message delivery and building brand identity.
- Understanding how to integrate the communications mix for each main stakeholder group and across stakeholder groups. Each stakeholder group requires a contact plan but synergies need to exist across the groups, i.e. STOs, RTOs, tourism operators, visitors centres, and potential visitors.
- Balancing ongoing strategic communication with ad hoc communications opportunities. This requires ensuring that sufficient flexibility is maintained to take advantage of marketing opportunities and ensuring that the core messages are delivered consistently over time though core channels.

Figure 17 outlines an aggregate view of how respondents felt they practiced pre-visit communication planning.

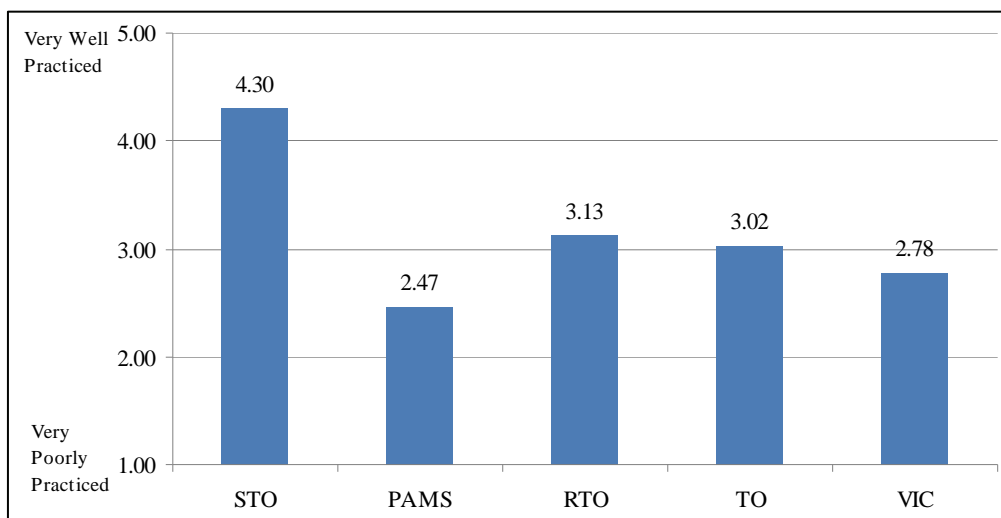


Figure 17: Overall pre-visit communication planning

Figure 17 identifies that STO respondents felt their IPC approach was characterised by strong pre-visit communications planning. This is not surprising given that this is one of their core business processes. National park and protected area respondents, in particular, felt significantly less confident about the way they practiced pre-visit communication planning, and that it was a weak aspect of IPCM. Other respondents groups also indicated that this aspect of IPCM as not practiced well. Table 12 further details the planning process by its constituents.

Table 12: Pre-visit communication planning items by respondent group

	STOs	PAMs	RTOs	TOs	VICs
Have a written marketing plan that strategically guides our pre-visit communication activities	4.75	2.58	3.53	3.03	3.00
Conduct a new SWOT analysis to help direct our pre-visit communication planning and activities	3.75	1.83	2.47	2.44	2.24
Pre-visit communication plans always consider how to use each of the different communication tools	5.00	2.75	3.35	3.09	2.76
Pre-visit communication planning strategically balances promoting to visitor segments with promoting to industry and the media	4.25	2.42	3.24	2.94	2.86
Pre-visit communication plan is flexible and enables us to take advantage of ad hoc opportunities	3.75	2.75	3.06	3.60	3.05

An examination of national park and protected area responses to the specific items in Table 12 identifies a number of areas to be addressed. Respondents only somewhat agreed that they had a marketing plan that strategically guides their pre-visit communications activities. The development of a written plan acts as a vehicle to consolidate thinking and agreement on the strategy and on the implementation tactics for particular visitor segments. Having a written plan is however no use if it is unable to be implemented through resource constraints and other inhibiting factors.

Respondents did not conduct a SWOT analysis to help direct planning and communications activities. The SWOT analysis is a structured evaluation of internal strengths and weaknesses in the ability to undertake communications and the opportunities and threats that can help or hurt the organisation in its communications. Importantly this analysis enables SWOTs to be prioritised in order to help allocate limited resources and in determining which communication tools are best to employ.

National park and protected area respondents felt that the degree to which a range of communications options or tools is considered in planning is also somewhat weak. With the emergence of new communications tools and channels (e.g. podcasts, SMS), and a fragmentation of tradition media (e.g. print and broadcast), it is necessary at this time to challenge the status quo with regard to what might be employed. Evaluating the best choice of communication tools is also necessary when considering the achievement of different communication objectives for various visitor groups, including broad awareness vs. specific behavioural modification for a recreation or visitor segment.

Similarly, the development of communication plans, which balance promoting to consumers or visitors, and to important message channels such as the media and other members of the tourism industry, was also poorly practiced. For organisations who rely, in part, on their message being carried for free by others, it is important to allocate planning and resources to such tasks and to consider strategically how to improve their ability to leverage 'free' channels.

Finally, there is some indication that plans are not as flexible as they might be in order to take advantage of ad hoc opportunities to make contact with visitors. Maintaining flexibility in communication plans is difficult, especially where media has to be purchased some time in advance and where resources are limited and tend to be exhausted quickly. Flexibility is however necessary as somewhat volatile market conditions often require emphasis to be switched from one visitor group to another or in the case of protected areas to demarketing or targeting particular recreation groups.

IPCM Phase 3: Strategy Implementation

The third main phase or stage of IPCM relates to Strategy Implementation. Strategy Implementation consists of two main constructs; strategic consistency and resources for pre-visit communication.

Strategic consistency

The successful implementation of integrated pre-visit communications is reliant upon being able to strategically communicate a consistent message to the target market. Consistency has two levels. One-voice, one-look consistency applies primarily to individual campaigns. Strategic consistency applies to all ‘brand’ messages, not just marketing communication messages. The challenge facing all organisations is working at both levels to facilitate the building of a strong brand.

In face-to-face interviews with managers a number of issues related to strategic consistency were identified, including:

- Improving consistency of the ‘protected area product’ message across multiple stakeholders and media channels. The need to have planned utilisation of semi-controllable media channels and stakeholders—tourist operators, media, RTOs, STOs. There was also a need to improve consistency in more controllable sources—national park and protected area agencies’ own marketing collateral.
- Balancing building a brand identity for national park and protected area agencies with delivering functional park and protected areas related messages.
 - Getting the entity recognised as ‘the’ source of information on protected areas for prospective visitors. That is, build both brand awareness and knowledge about usefulness. This will require coordination with other agencies and potential sources of information on protected areas.
 - The need to be proactive in establishing clear visual standards across all protected area marketing collateral and maintaining them in the face of organisations and individuals who make ‘unauthorised’ adjustments.
 - Balancing the brand message with the experience and functional messages.
- Ensuring that information carried by other entities about national park and protected area product is refreshed on a frequent basis.
 - Ensuring that the marketing collateral of STOs/RTOs and the statements/information on websites is constantly refreshed is necessary but costly and time consuming.
 - That national park and protected area agency websites have the most up-to-date information on immediate protected area activities and occurrences (e.g. track conditions, facility modifications, etc.) as well as more product/experience related information in a tourism sense.
 - Dealing with political cycles often means that messages change and consistency is difficult to achieve as political stakeholders often do not value or maintain prior strategy and direction.

Figure 18 outlines an aggregate view of how respondents felt they performed on the items related to strategic message consistency.

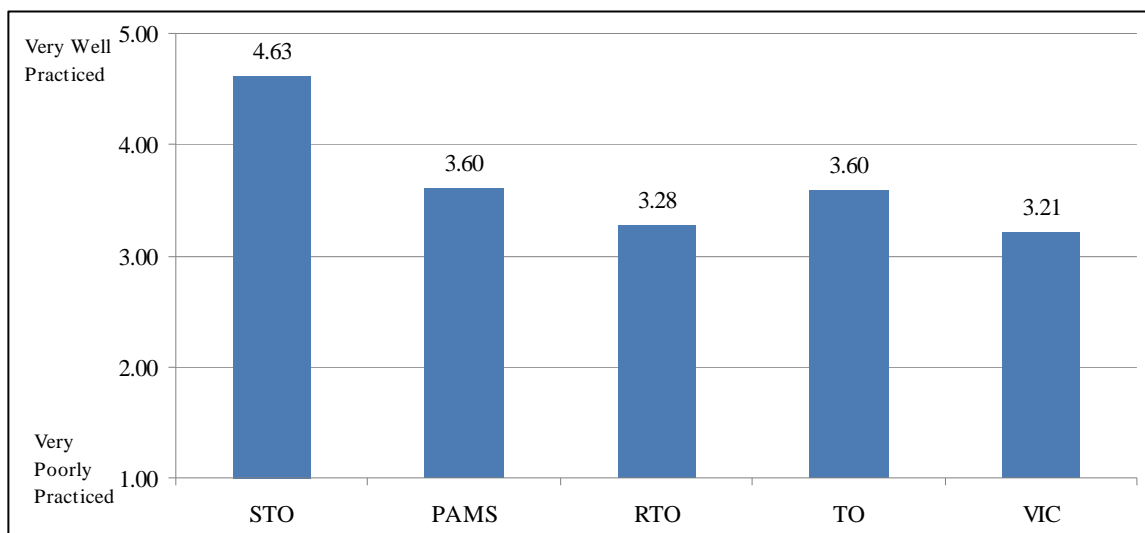


Figure 18: Strategic message consistency

Figure 18 identifies that all respondents felt they practiced this aspect of IPCM reasonably well. STO respondents felt particularly strongly that their IPC approach was characterised by a high level of message

consistency. National park and protected area respondents also felt somewhat positive about this aspect of IPCM. This reflects significant work undertaken by NWPS agencies over the last several years in designing consistent templates for marketing collateral and websites. Table 13 further details the responses to individual items.

Table 13: Strategic message consistency items by respondent group

	STOs	PAMs	RTOs	TOs	VICs
The promotional messages delivered to segments carefully balance experience with conservation values	3.71	4.00	3.29	4.00	3.24
Established consistent visual standards across all communication collateral (e.g. print and electronic formats)	5.00	3.75	3.71	3.87	3.48
Strictly enforce visual standards across all media or communication channels and industry stakeholders	5.00	3.67	3.24	3.61	3.10
Effectively integrate pre-visit communications across all of the industry stakeholders and media channels used to deliver messages	4.50	3.00	2.88	3.01	3.05

An examination of national park and protected area responses to the specific items in Table 13 identifies that respondents are satisfied with the way in which they have been able to design and deliver messages that balance both experience and conservation values. It will be important to maintain and refresh such messages and to ensure that the messages are being heard and responded to by targeted visitor segments when visiting parks and protected areas.

National park and protected area respondents are somewhat satisfied that they have been able to establish consistent visual standards across their marketing communication collateral. This consistency is a significant factor in building brand recognition for any organisation and for enabling visitors to link information back to the source. This learning has flow-on benefits in terms of the source being recalled by visitors and used in subsequent visit planning. Elements of consistency include symbols and logos, colours and design, thematic consistency (e.g. experience and conservation statements and values), and verbal consistency in taglines and slogans.

Table 13 also suggests that national park and protected area respondents are somewhat satisfied with their enforcement of visual standards across various channels. Finding a balance between absolute control over materials and allowing other content providers or message channels to utilise images or text is a difficult task, but one that is significantly important if the right messages are to be reinforced and the national park and protected area brand image built as desired.

National park and protected area respondents were less satisfied with their ability to effectively integrate communication across all of the stakeholders and channels they employ. This in part is a reflection of weaknesses in the planning process and the strategic evaluation of message channels (including other government organisations and the tourism industry) to determine what messages should be carried by whom, and how best to ensure commonality and complementarities in the messages carried by each group.

Resource availability

Essential to the success of IPCM is the availability of resources to effect the planning, implementation and measurement of communication strategies. Resources extend beyond simply funds to pay for specific campaigns and include the recruitment and retention of staff that have the capability to manage both specific communication campaigns and the building of the park's brand over time. Importantly, this construct also recognises the need to train staff and to have the capacity to engage consultants to facilitate strategy. Importantly, this construct also extends to having senior management who view communication related activities as an investment rather than a cost.

Face-to-face interviews with managers identified a number of issues related to resource availability, including:

- Marketing generally has a very small share of the organisation's budget and is always under pressure. Some parks organisations do not have individual marketing budgets but instead have a budget to cover 'education, interpretation and marketing'. This leads to even greater pressure on available funds and makes consistent marketing difficult to achieve.
- Working within the constraints of a small budget means that it is imperative to maximise available funds to achieve all the communication tasks required of the group.
- Working out how to access and leverage 'free' communication channels from other organisations such as tourism operators, STOs and RTOs is imperative.

- Employing staff with the skills and capabilities to undertake the necessary communication tasks in terms of planning and implementing pre-visit communications and marketing generally.
- Determining the effect of pre-visit marketing related activities on visitors is often difficult with a limited capacity to measure outcomes—there is often a reliance on data collected by other organisations to obtain any form of measure.

Figure 19 outlines an aggregate view of how well respondents felt they practiced these aspects of IPCM.

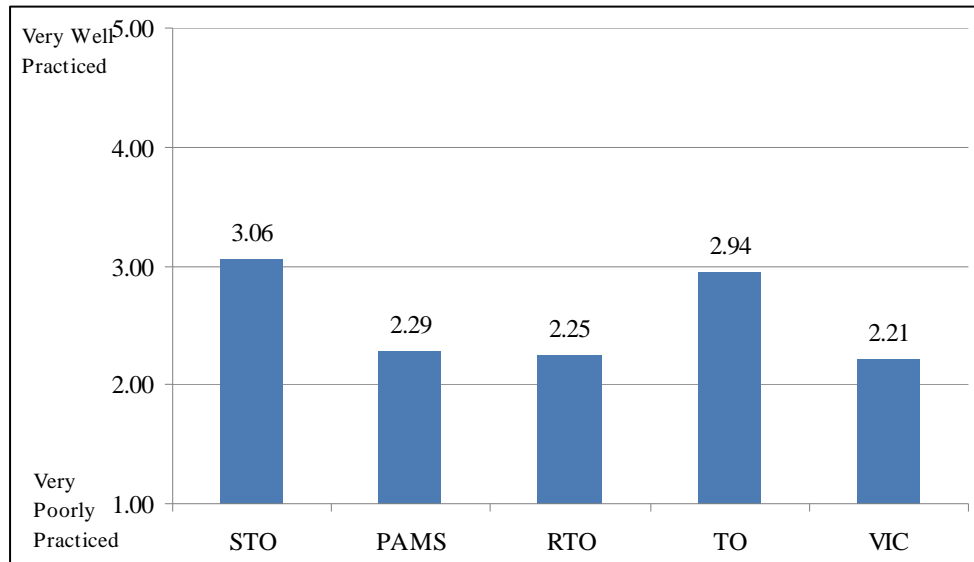


Figure 19: Resource availability

Figure 19 identifies that, across the board, respondents felt that this was a poorly practiced aspect of IPCM. STO and TO respondents felt they practiced this aspect moderately well, but an examination of Table 14 suggests this is a function of a particular item related to top management understanding the need to invest in pre-visit communication. A more detailed analysis of items related to resource availability is presented in Table 14.

Table 14: Resource availability items by respondent group

	STOs	PAMs	RTOs	TOs	VICs
Pre-visit communication budget is based on what needs to be done, rather than on a predetermined or set budget amount	1.75	2.25	2.29	3.11	2.33
An appropriate level of funding available to achieve the communication objectives set for each segment	3.25	2.42	1.94	2.47	1.81
Extra funds can be easily made available to take advantage of ad hoc communication opportunities segments	2.25	2.00	1.71	2.57	1.90
Top management understands that pre-visit communication with segments is an investment and not a cost	5.00	2.50	3.06	3.61	2.81

An examination of national park and protected area responses to the specific items in Table 14 identifies a significant level of poor practice in all areas of resources. Best practice in integrated marketing communication suggests that firms adopt a zero-based budgeting approach or an objective-task approach. This approach argues that an organisation needs to determine what the task is regarding communication for the planning period and then determine how much communication is necessary to achieve desired outcomes. This objective-task understanding then enables a realistic assessment of the resources necessary to affect the strategy. By going through the objective-task approach managers will be in a better position to understand the gap between what they have and what they need, and this may be used in future funding negotiations.

Commercial reality would suggest that resources, particularly money for the purchase of media space and creative agency work, is and never will be sufficient. The common state of having a set or predetermined budget means that managers must be able to prioritise the communication activities for the planning period. This again highlights the importance of the previously highlighted elements of the IPCM—clear product/market portfolio,

sound understanding of 'marketing' objectives, clear sense of what is wanted from targeting specific visitor segments, and being able to leverage opportunities for 'free' message delivery through other stakeholders.

Apart from the STO respondents, it is particularly interesting to see that respondents felt senior management did not subscribe to the concept of pre-visit communication as an investment rather than a cost. By viewing activities of pre-visit communication as a cost, managers unwittingly make all of the efforts associated with this area illegitimate, and it is not uncommon for management to make both formal and informal statements decrying its value. With the changing mandate for national park and protected areas, senior managers must adjust their mental models and seek to make pre-visit communications resourcing a legitimate part of the overall communications activities of the organisation.

Summary of Integrated Pre-Visit Communication Survey Findings

This chapter has provided insight into the management of IPCM. The IPCM results are built around seven themes grouped into three strategy phases; Strategy Foundations, Strategy Development, and Strategy Implementation. The IPCM findings are evaluative in that they provided a "snapshot" of where national park and protected area agencies and other organisations currently stand in terms of their pre-visit communication capacity or performance. The findings also point to areas in which organisations can strengthen and improve their pre-visit capability and performance. As stated, the IPCM audit does not focus on the results or outcomes of an organisation's communications practices after they are implemented or among their target audiences. Rather, it focuses on the organisation itself, its practice and capacity to undertake effective pre-visit communication.

It was found that overall satisfaction with the planning, implementation and overall outcomes of pre-visit communication was somewhat low and that scope for improvement existed. An analysis of the IPCM themes highlights areas which, if improved, are likely to result in greater satisfaction and tangible benefits for the organisation and potential visitors.

With regard to the *strategy foundations* area, development of a vision and mission to guide pre-visit communication efforts was reasonably well practiced and a relatively strong characteristic of respondents' pre-visit communications management. This reflects the work undertaken over the last several years by many organisations to become more strategic in their communications. Internal stakeholder integration within organisations was also a reasonably strong aspect of the IPCM process. The poorest performing area of strategy foundations was external stakeholder connection and integration. Overall, the results for this section suggest that there is scope for improvement, particularly in the management of cross-functional integration and inter-organisational integration and connection.

In the area of *strategy development* the poorest performing component was visitor connectivity. Visitor connectivity represents how the voice of targeted visitors and tourists is heard in the organisation and helps direct development of pre-visit communication strategy and the allocation of resources to the communication mix. This is a crucial element of IPCM and as such requires particular attention. There will need to be significant improvements to visitor connectivity in pre-visit communication in order to maximise the return from scarce organisational marketing resources. The pre-visit planning process itself was also identified an area of poor performance and will need to be improved in order to ensure that organisations can attain the desired response from target visitor or consumer segments. The result for clarity of objectives, whilst having slightly better performance than the other two dimensions, also suggests that improvements can be made.

In the final area, *strategy implementation*, respondents indicated that they have a reasonably good level of consistency in the communication activities they undertake. The area of availability of resources for undertaking pre-visit communication was the poorest performing dimension overall. The resourcing of marketing communication is an important issue for all organisations to address, especially in tight economic times. Resourcing should be viewed as an investment and given the changing mandate for national park and protected area managers to undertake an expanded marketing role, needs significant consideration. Overall, there appears to be significant scope for improvement in the management and implementation of IPCM.

The following results examine each of the above dimensions more fully in order to highlight specific items which are associated with the performance of IPC.

Chapter 6

SEGMENTATION: MATCHING SUPPLY WITH DEMAND

One of the significant issues highlighted in the previous chapter is the need to understand targeted visitors and to determine appropriate segments of the market to focus on with varying pre-visit communications activities. Unlike the typical product marketing approach, national park and protected area marketing is often about matching demand for recreation experiences with supply and to de-market areas which may have excess demand. Eagles and McCool (2002: 99-102) have proposed the following four fundamental visitor management principles for natural and protected areas:

- Understanding park visitor characteristics, motivations and expectations is key to effective management policies;
- Visitor related developments generally represent both the best opportunity for appreciation of the park and the key internal threats to its biophysical or cultural integrity;
- While tourism is a market driven industry, the management of national parks and protected areas is determined by legislative mandates; and
- Negative impacts from visitor use follow predictive patterns that can be used to structure management systems and actions.

Within the context of this report, what is being proposed is an indirect method of visitor management. Building a planned and targeted indirect pre-visit management strategy will enable a better planning environment for direct management techniques to be implemented. Manning and Lime (2000: 36) presented guidelines for indirect techniques implemented through pre-trip information. The guidelines direct planning considerations for the delivery of pre and onsite information and education:

1. Use of multiple media to deliver messages is often more effective than use of a single medium.
2. Information and education programs are generally more effective with visitors who are less experienced and less knowledgeable. Young visitors may be an especially attractive target audience.
3. Brochures, personal messages and audiovisual programs may be more effective than signs.
4. Messages may be more effective when delivered early in the recreation experience, such as during trip planning.
5. Messages from sources judged highly credible may be most effective.
6. Computer-based information systems can be an effective means of delivering information and education.
7. Knowledgeable volunteers, outfitters and commercial guides can be effective and efficient in communicating information and education to visitors.
8. Information on the impacts, costs and consequences of problem behaviours can be an effective information and education strategy.
9. Role modelling by park and wilderness rangers and volunteers can be an effective information and education strategy.
10. Personal contact with visitors by rangers or other employees, both before and during the recreation experience, effectively communicates information and education.
11. Messages should be targeted at specific audiences where possible. Target audiences that might be especially effective include those who request information in advance and those who are least knowledgeable.

Using indirect pre-visit management techniques places importance on the information being provided, how it is provided, and who it is provided to. Basically, a pre-visit management technique turns natural and protected area visitor management to a demand led approach: providing the user with what they want. Importantly, there is limited ability for park agencies to modify onsite supply, which places further significance on matching the users with the necessary information to aid their decision-making. The necessary information is to match the demanded experience with an appropriate area to provide that experience. Given the limited ability to modify supply, some potential users may miss out, and some may not want the possible experiences.

With a focus on the visitor and their demanded experience, it is important to understand what the visitor experience is, and what determines a satisfying visitor experience. Visitor satisfaction is dependent on the holistic visitor experience, which occurs over five phases (Smith & Croy 2005; Croy & Wheeler 2007).

1. Anticipation;
2. Travel to;
3. Onsite;
4. Travel back; and

5. Recollection.

Any phase has the potential to be the anticipation and recollection of another experience; the five phases are very much interrelated and cyclic. For indirect management and pre-visit communication, the key focus is in the anticipation and travel-to phases (Smith & Croy 2005; Croy & Wheeler 2007).

The anticipation phase includes information sourcing, both passive and active, that informs major aspects of overall visitor experience and behaviour (Croy & Wheeler 2007). The anticipation phase includes and influences awareness, image formation and modification, expectation building, motivations, and decision-making (Hall, Croy & Walker 2003). A range of information creates these overall expectations, or images, and most are unable to be controlled by the attraction (Gartner 1993; Kearsley & Croy 2001; Wearing, Edinborough, Hodgson & Frew 2007; Moyle & Croy 2006). It is also important to note, that the images created can be incorrect, and create unachievable expectations of experience. Visitors creating inaccurate expectations can determine visitation levels (low, just right or high), and the consequential satisfaction with the experience (low, just right or high) (Kearsley & Croy 2001; Moyle & Croy 2007).

From this brief review, four points are highlighted:

6. The visitor experience and management of the experience needs to start in the anticipation phase (and continue into the recollection phase);
7. Actual, latent and non-visitors create images of the potential experience available at different sites, and their decision is based upon these expectation;
8. The image is created through a range of sources, many beyond the control of the management agency; and
9. The image created will be the foundation for visitors' assessment of satisfaction for the holistic experience.

These four points together stress that the experience demanded is matched to an appropriate supplied experience, and there is managed and targeted communication to the visitor to create the match. Thus, a site needs to answer four key questions. First, the site will need to know what experiences are able to be supplied. Even moving to a demand led approach, natural and protected areas cannot modify, to any large degree, the experiences available, thus there will need to be an understanding of what can be supplied to visitors. Second, a site will need to know what experiences are demanded, and importantly who is demanding these experiences. Who demands the experiences implies visitor segments, and segments divided by experience demanded. Third, a site will need to know the potential match between supplied experiences and appropriate demand segments. Fourth, the site needs to know what and how to communicate with the matched segments.

A site will not be able to supply many experiences, potentially just one. Thus to cater for a diversity of visitor segments, the identification of experiences available should be undertaken at the macro level—the state level. Different areas of the conservancy will provide different experiences, and hopefully over the conservation estate, the diversity of segments can be catered for with satisfying experiences.

Case Study 3: Kakadu National Park and World Heritage Area

The following case study illustrates how a segment focus on the 'experience seeker' helps the branding and re-branding activities of a major attraction. The case also illustrates how pre-visit communication must take into account and leverage a number of cooperative partners. There is an established marketing relationship with Tourism NT which promotes all tourism in the Northern Territory. Kakadu is one of the principle attractions in the region and as such the park is widely promoted by Tourism NT.

Case Study 3: Pre-visit Communications and Marketing Kakadu National Park and World Heritage Area

Background

Kakadu National Park is in the Northern Territory of Australia, 171 km east of Darwin. It is a Commonwealth Reserve covering almost 20,000 square kilometres, and includes the traditional lands of a number of Aboriginal clan groups. Aboriginal people have occupied the Kakadu area continuously for at least 40,000 years and consequently it is renowned for the richness of its Aboriginal cultural sites. Kakadu is managed jointly by its Aboriginal traditional owners and the Australian Government's Director of National Parks.

Kakadu National Park is one of the few World Heritage Areas that have been listed for both their cultural and natural heritage. The park protects one of the finest and most extensive collections of rock art in the world, a tangible reminder of Aboriginal people's long and continuing association with the area. Kakadu also protects

examples of most of Australia's Top End habitats, including the entire catchment of the South Alligator River. From this range of habitats stems a remarkable abundance and variety of plants and animals. Many are rare or not found anywhere else and new species continue to be discovered.

Kakadu National Park is a major tourist attraction in the Northern Territory. Visitation in 2005 was approximately 202,000 and continues to increase annually. Kakadu's dramatic landscape, Aboriginal cultural significance and diverse and abundant wildlife are what visitors are drawn to.

Marketing and Pre-visit Communication—The Current Situation

Within the organisation there is no significant budget set aside for marketing the park, although the operating budget does provide for pre-visit communication and providing visitor information. Much of this information, however, is about public safety within the park rather than promoting the park to visitors. Visitor safety is a key concern to management. It is dealt with by providing safety signs and information to visitors and tour guides and, when necessary, closing road access to areas where public safety would be endangered, such as areas that are flooded or inhabited by estuarine crocodiles.

Marketing of the park is predominantly undertaken in conjunction with a number of cooperative partners. There is an established marketing relationship with Tourism NT which promotes all tourism in the Northern Territory. Kakadu is one of the principle attractions in the region and as such the park is widely promoted by Tourism NT.

The park is also a member of Tourism Top End, which is an industry body that promotes their members.

Target Audience

Significant research was undertaken in 2003 to determine the target audience of visitation to the park. It indicates that current usage is dominated by the 'experience seeker'—the visitor that wishes to have a unique experience with both nature and indigenous culture. Marketing is consequently focused on this target market. Research is ongoing and a major park survey is currently underway.

The Future of Pre-visit Communication and Marketing

Kakadu is currently rebranding its image and developing a specific pre-visit information and marketing program based on the new 'brand'. The new brand is due to be launched on 31 July 2008 and key to this new marketing is the development of a new website managed and maintained by the park management, which is specific to Kakadu National Park. The website is due to be launched at the same time as the new brand. In this way Kakadu Park Management is taking the lead with website development and branding of the park.

With the development of the new brand there will be a significant facelift to park signage and interpretive information as well as the pre-visit information available both on the website and through publications. In particular a new visitor guide is being developed, which has a greater marketing focus as well as being rich in information about where to go and what you can do in the park. This is a significant change from previous publications which focused on visitor safety rather than promotion of the attraction.

Cooperative Partnerships

Kakadu National Park is managed by a Board of Management which includes representatives from the indigenous communities, National Parks Authority and other key stakeholders in the area including representatives from the tourism industry. This Management Board supports marketing of the park but wants to ensure that marketing messages are clear and consistent. In the past, marketing by private operators has often provided messages that are inconsistent with the safety and promotional goals of the Board, and this strategic approach to rebranding and marketing the park aims to ensure that the marketing message does not contradict existing management goals.

Pre-visit Communication and Marketing Goals

The key goals for marketing the park have been identified as follows:

1. To meet visitor expectations—to ensure that visitors arrive with realistic expectations of what they can do in Kakadu National Park, where they can go and how they access key attractions. This is particularly significant when considering the vast distances often travelled to reach individual sites within the park.

2. Six season promotion—to promote the opportunity of visiting during the '6 seasons' in the park. Marketing aims to inform visitors that they will have a different experience in the park depending on the time of year that they visit. Although increased visitation has not been identified as a key goal for marketing it does aim to encourage return visitation and encourage visitation outside the peak period.
3. To provide support to indigenous businesses and encourage them in the area. The involvement of the indigenous community in the management of Kakadu National Park provides the opportunity to ensure that the indigenous community is involved in all aspects of tourism in the area. Visitors to Kakadu are seeking contact with the indigenous culture, so management is attempting to encourage tourism that involves the traditional owners. While the indigenous community is generally content to present their culture to visitors, they do want to be able to control how it is presented and what visitors see and do.

Project Challenges

While marketing and pre-visit communication aims to encourage visitation throughout the year, the traditional owners and local businesses would prefer to encourage a longer stay rather than increasing total numbers. Unfortunately this provides a challenge to any marketing due to limited availability of accommodation in the region. Similarly, there is a general shortage of accommodation in Darwin as well. For this reason marketing aims to spread visitor usage throughout the year.

There is significant pressure for tourism in the park from Tourism NT and Northern Territory tourism operators. Kakadu is the major attraction in the region so the whole territory benefits from tourism to the park; however, marketing and management must be mindful to balance tourism with the goals of a National Park and World Heritage Area as well as ensuring that visitor expectations are met.

One of the most difficult issues faced when marketing the park is catering for all potential visitors. Marketing currently focuses on the adventure seeker but there is a broad range of visitors that access the park. There is demand for five-star accommodation as well as backpacker style accommodation. While marketing is focused on the experience, there will always be some visitors that will not be targeted. The message cannot always align with every visitor or potential market.

Project Outcomes

Marketing and pre-visit communication success will be measured by ongoing survey collection. Broad goals will be reflected directly by increasing visitor numbers throughout the year, but one significant issue to be determined by ongoing research is how far ahead visitors plan their holidays. It is recognised that results for marketing may not be immediate, particularly in a location like Kakadu. Often iconic locations such as Kakadu National Park are areas that people plan far ahead to visit—often as far ahead as their retirement. As the cost of travel increases, with increasing fuel costs and changing exchange rates, planning is often even longer term.

A number of lessons can be learnt from the process of marketing and rebranding Kakadu National Park. These include the need to focus marketing on key attributes of the area and clearly identify the key messages to be communicated. It is also essential to identify the market before starting. There is a requirement to have a clear understanding of who the target audience is and what they want to know about the area. The survey process needs to find out what the visitor requires, what their expectations are, if they are currently being met and if not what can be done to meet them.

For many locations there is also the issue of traditional owners and/or stakeholder concerns. It can be beneficial, before commencing to plan for marketing, to canvas all stakeholders to determine what they expect from tourism to ensure that the benefits of any marketing are widespread.

Branding is essential—it provides a positive image of the park and ensures that visitors are informed of key issues in the park.

Implementation: Identifying the Experiences Supplied

One method to identify supplied experiences, designed especially for natural areas, is the Recreation Opportunity Spectrum (ROS) (Eagles & McCool 2002). ROS was introduced into the United States Forest Service (USFS) by Clark & Stankey (1979), and has been implemented around the world, including Australia (Worboys, Lockwood & De Lacy 2005). The initial model was designed to provide a match between users and natural area managers

(Clark & Stankey 1979), though most implementations of the model have focused solely on the supplied experiences (Worboys, Lockwood & De Lacy 2005).

The ROS method has moved natural area visitor management from managing activities, such as keep your helmet on when mountain biking, or managing settings, such as keep to the path, to the combination and extension to manage a visitor experience. There is a higher level of visitor management, managing for longer-term visitor benefits (Burns, Driver, Lee, Anderson & Brown 1994). However, benefit based management techniques are very difficult to implement without control over most features of the experience (Allen & McGovern 1997), and hence very difficult, if not impossible, to implement on any large scale. Most benefit based management techniques, as per Allen and McGovern (1997), are implemented within organised and focused camps, such as for youth at risk. There was the consideration of longer-term benefits in Clark and Stankey's (1979) model, though not an explicit targeted outcome.

The ROS method assesses natural settings, available for recreation based upon the amount of modification to the physical, managerial and social environment (Clark & Stankey 1979). The assessment will indicate the likely experience able to be had, along a natural area recreation continuum. At one end of the continuum is an experience in a highly modified environment, high levels of physical modification, high levels of managerial presences and high levels of social encounters; an urban based park type experience (Eagles & McCool 2002). At the other end of the continuum is an experience in an unmodified natural environment, with no physical modification, no managerial presence and no social encounters. The resulting continuum or spectrum of recreational opportunities is divided into experience zones. Each of these conceptual zones is then realised by dividing the recreational conservation estate into recreational experience zones (Worboys, Lockwood & De Lacy 2005). The assessment and allocation of areas of the conservation estate into recreation experience zones acts as an indicator of the experience available and of management and social intervention needed—to be encouraged or limited.

To provide a visual representation of the ROS tool, Eagles and McCool (2002) presented a summary version of the USFS model. The complete version will be presented next. The sites are assessed over three summary attributes, being biophysical, social and managerial attributes. Different combined activity settings are then assessed along the three attributes, and placed upon the spectrum of recreational opportunities. In Eagles and McCool's (2002) representation of the spectrum, it is in six recreational experience zones. Thus the level of modification determines the potential experiences supplied by these sites.

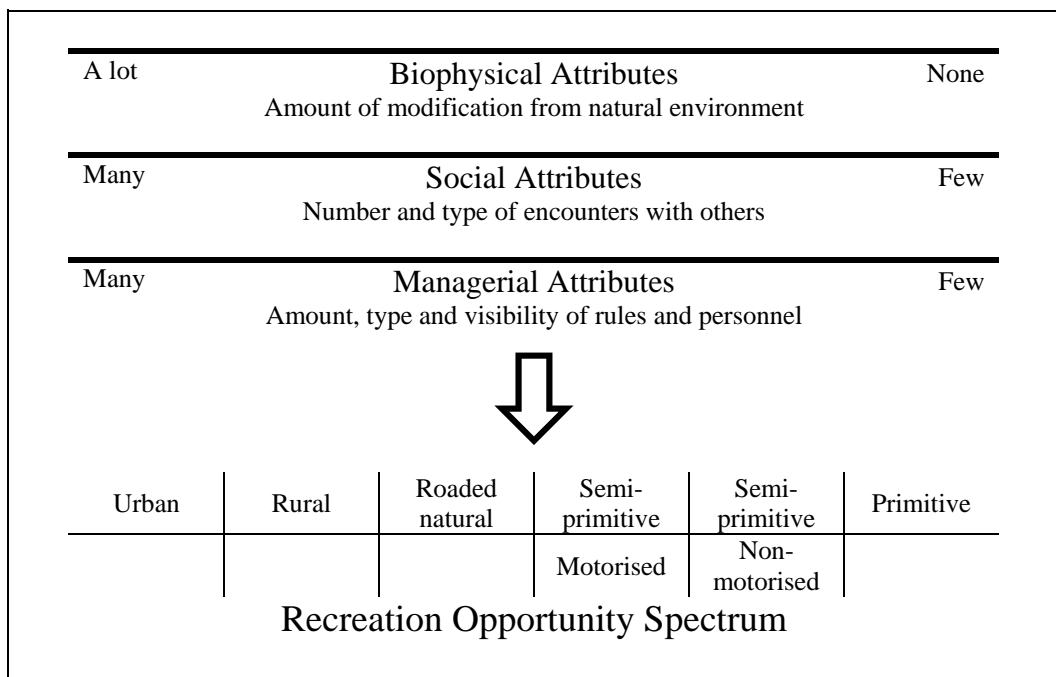


Figure 20: A summary version of the United States Forest Service

Clark and Stankey (1979) originally presented four recreational experience zones within their spectrum, and used a much more specified assessment process of six modification attributes, further sectioned with specific sub-attributes (Figure 20). These are obviously similar assessment frameworks, with Eagles and McCool's (2002) derived directly from Clark and Stankey's (1979), which was the first developed for the USFS (Figure 21).

Management Factors	Modern	Semi-modern	Semi-primitive	Primitive
1. Access				
a. Difficulty	Very easy	Moderately difficult	Difficult	Very difficult
b. Access system				
1. Roads	Freeways	Two-lane paved	Single-lane paved	Gravel or dirt
2. Trails		High standard	Low standard	Cross country
c. Means of conveyance				
		Motorised	Non-motorised	
	Vehicles on established roads	Vehicles on informal roads	Vehicles off roads	Horse
				Feet
2. Non-Recreational Resource Use				
	Compatible on a large scale		Depends on nature and extent	Incompatible
3. Onsite Management (modification)				
a. Extent	Very extensive	Moderate extent	Isolated locations	No development
b. Apparentness	Obvious changes		Primarily natural appearing	No changes
c. Complexity	Very complex	Somewhat complex		Not complex
d. Facilities	Many comforts, conveniences	Some comforts, conveniences	Minimum comforts, conveniences	Safety and site protection
				No facilities
4. Social Interaction				
	Frequent inter-party contacts	Occasional inter-party contacts	Infrequent inter-party contacts	No inter-party contacts
5. Acceptability of Visitor Impacts				
a. Degree of impact	High degree	Moderate degree	Low degree	None
b. Prevalence of impacts	Prevalent, broad areas	Prevalent, small areas	Uncommon	None
6. Acceptable Regimentation				
	Strict regimentation	Moderate regimentation	Minimum regimentation	None
Management Factors	Modern	Semi-modern	Semi-primitive	Primitive

Figure 21: Assessment frameworks for the recreation opportunity spectrum

As indicated by the shaded area, each combined activity setting assessed would have a similar rating on each attribute, for both frameworks. That is, if a site was rated as having no modification on the biophysical attribute, and few encounters on the social attribute, it would be expected, and necessary, to also have little visible presence on the managerial attribute. An inconsistency would be the first indication of a mismanaged site (that would need to change to provide consistency), or a mistake in the assessment.

As can be identified, the ROS framework can be a measurement and a design tool. It can also be transposed over a number of areas to provide comparable points upon the recreation opportunity spectrum and within specific zones. Specifically, the ROS framework can be implemented at a state and even national level, over a number of parks, and sites within parks.

As expected, there has been a lot of analysis of the activities and settings that Australian park agencies supply, as evidenced in park management plans. Noted again, park zoning also needs to account for the legislative mandate of the protected areas, scientific and cultural importance and integrity, wildlife and habitat protection, and buffer zones. Thus, of all areas managed by parks agencies, the amount available for recreation may only be a small proportion. This further demonstrates the importance of matching visitor demands to areas supplied, as use is expected to increase. All the same, a large proportion of park management plans identify activities and settings, rather than the experiences available.

An example of park experience zoning is from Kosciuszko National Park, where five recreation zones were identified (Worboys & Pickering 2004). These zones ranged from Class 5, a modified landscape where the built environment is a major component of the landscape, to Class 1, large areas with negligible evidence of non-traditional human activity. These classes reflect the Eagles and McCool (2002) and Clark and Stankey (1979) zones (each has the same spectrum or continuum of recreational experiences; they have just divided and titled the zones differently). In the Kosciuszko National Park report, the zones were also matched up to potential user experiences (Worboys & Pickering 2004). Other parks and conservancies in Australia have implemented a similar process (Worboys, Lockwood & De Lacy 2005), though it does not appear to have been implemented at a State level in Australia. As such, there are identifiable similarities between different park zonings, though there are also distinct differences. Zoning only at a park level, and having these differences, limits the ability to effectively communicate with potential user segments that may be considering a number of parks for a particular experience.

For national level implementation of the ROS technique, we just have to look across the Tasman. New Zealand's Department of Conservation (DOC) (1996) has undertaken a national recreational experience zoning of its conservancy. They have identified eight zones from urban to wilderness. These are compared to Clark and Stankey's (1979), Eagles and McCool's (2002) and Worboys, Lockwood and De Lacy's (2005) Australian ROS zones in Table 15.

Table 15: Comparison of recreational opportunity spectrum experiential zones

Studies		Recreation Opportunity Spectrum							
Clark & Stankey (1979)		Modern		Semi-Modern		Semi-Primitive		Primitive	
Eagles & McCool (2002)		Urban		Rural	Roaded Natural	Semi-Primitive Motorised	Semi-Primitive Non-Motorised	Primitive	
Department of Conservation (1996)		Urban	Urban Fringe	Rural	Back Country Drive-In	Back Country 4x4 Drive-In	Back Country Walk-In	Remote	Wilderness
Worboys, Lockwood & De Lacy (2005)	QLD	Urban		Intensive	Natural	Semi-Remote Motorised	Semi-Remote Non-Motorised	Remote	
	VIC			Developed	Semi-developed	Roaded Natural	Semi-Remote	Remote	
	NSW			Class 5	Class 4	Class 3	Class 2	Class 1	
		Urban		Front Country			Back Country		

A single park does not need to cover all zones, and some parks may only include one or two recreational experience zones. Overall, a state or nation's conservancy is likely to provide for all recreational experience opportunities. So it is important that potential users can easily identify distinctions between park or site provisions, and can also easily identify alternate parks or sites to obtain their desired experience.

Whilst the ROS assessment often has not been implemented to include visitor demand segments, an additional step has been developed by DOC (1996) to create this match, post hoc. DOC (1996: 23) assessed, it appears intuitively, the demanded experiences by potential visitor segments. They assessed the segments over seven criteria, closely reflecting the ROS assessment of supply:

1. The setting used
2. The accessibility of the area and the nature of the visit
3. Activities undertaken
4. Experience sought and the degree of risk present
5. The facilities and services sought
6. Make up of visitors and visitor numbers
7. Projected use

Using these criterions, DOC (1996) identified seven visitor experience segments. It was noted that whilst visitors will change between segments, in any one experience they will be in one segment. These visitor segments then matched up with ROS experience zones, creating a correlation like matrix table, with the exception of the Thrill Seekers segment, which was evident in every ROS zone.

1. Short Stop Visitors
2. Day Visitors
3. Over-Nighters
4. Backcountry Comfort Seekers
5. Backcountry Adventurers
6. Remoteness Seekers
7. Thrill Seekers

Whilst most Australian park agencies identify visitor segments, these are generally activity, geographically or demographically based. Additionally, there is sometimes cross-fertilisation of segments from state tourism agencies. It should be noted that most of Australia's state tourism agencies focus on values based segmentation, such as the segments identified by Roy Morgan, which are difficult to manage within a park setting. As examples of park market segmentation, the New South Wales Parks and Wildlife Service include a section in their park management plans called visitor opportunities and education.

The template illustrates the experiences available for visitors in each park. Similarly, the Tasmania Parks and Wildlife Service also outlines available visitor recreation opportunities in the *Tasmanian World Heritage Areas Management Plan* (1999), including activities and settings supplied. Within this as well the Tasmania Parks and Wildlife Service also identifies geographic market segments. More specifically in the *Walking Tracks Strategy and Management Plan* (1997), specific segments are also identified based upon user identification, such as independent user, guided walk, and walking club. Parks Victoria, for their Healthy Parks, Healthy People (2000) campaign identified key target segments, and specifically traditional non- or low-users. In the campaign they also included key stakeholder groups, such as politicians and Parks Victoria staff.

In a recent study by Darcy, Grabowski, Griffin, Moore, Wegner and Crilley (in press), they identified that most of Australia's park agencies identify core demographic, geographic and satisfaction data, though experiential information was identified as 'supplementary data'. The core data needs identified by Australian park agencies for visitor profiling are provided in Table 16. It is now argued that supplementary data should be considered essential, especially for the development of pre-visit communication strategies and campaigns.

Table 16: Core data needs for visitor profiling and feedback

Data needed for profiling	
<ul style="list-style-type: none"> ● Aggregate number of visitors state or territory-wide ● Visitor profile, including: <ul style="list-style-type: none"> ○ Age ○ Gender ○ Place of origin/residence ○ Ethnic background ○ Lifecycle stage ○ Socio-economic status (e.g. Income and/or occupational status and/or education) ● Frequency/regularity of use ● Activities/experiences ● Purpose/motivation for visit ● Visitor satisfaction <ul style="list-style-type: none"> ○ Overall visit ○ With specific services/facilities/attributes 	<ul style="list-style-type: none"> ● Determinants of satisfaction/quality or experience, including; <ul style="list-style-type: none"> ○ Importance of park/services/facilities/attributes ○ Sources of dissatisfaction ● Community attitudes, values and perceptions, e.g.: <ul style="list-style-type: none"> ○ Benefits of national parks ○ Barriers/impediments to use ● Trends <ul style="list-style-type: none"> ○ External factors/outlook affecting visitation to protected areas ○ Needs/expectations of emerging or new user groups

Source: Darcy et al. (in press)

As indicated, visitor experience-based segmentation has largely not been undertaken within Australian park agencies. All the same, the Tasmania Parks and Wildlife Service have released their *Strategic Framework for Visitor Services in Tasmania's Parks and Reserves* (2007). In this they identify three main market segments, being short-stop visitors, comfort seekers, and getaways. Short-stop visitors want a natural experience straight from the car park, though only for a short period of time. Comfort seekers want a social experience in the park for a longer period than short-stops. Getaways want adventure and challenging experiences.

Again, recently a survey of users by Parks Victoria has identified seven simulated experience based user segments, based on main reason for visiting and suggestions to become fully satisfied (Zanon, 2005). This provision of park user segments is the most comprehensive in Australia. All the same, limited by opportunities for survey implementation to higher use areas, these segments do not provide the full diversity of current park users, and especially those users that purposefully select low use areas. The experiential segments identified by Zanon (2005) had some similarities to the DOC (1996) experiential segments (Table 17). Additionally of note, it again appeared that the DOC (1996) segments were intuitively identified. The DOC segment profiles are presented in Appendix 2.

Table 17: Comparison of Parks Victoria (2005) and Department of Conservation (1996) experiential segments

Parks Victoria	Department of Conservation
Urban Socials Trail Users	
Access Made Easy Nature Admirers Passive and Other Users Country Vacationers	Short-Stop Travellers Day Visitors Over Nighters
	Back Country Comfort Seekers Back Country Adventurers Remoteness Seekers
Activity Centrics	Thrill Seeker

Table 17 highlights the high encounter or 'easy access' segments of Parks Victoria, compared to the potential diversity of demanded experiences indicated by the DOC segments. Additionally, what is further indicated is that even in specific user groups there may be further opportunity to segment even further. Importantly, as DOC (1996: 22) noted, "although some visitors can belong to different groups at different times, at any one time visitors will be in one of these seven groups".

A relatively simple means to assess visitors' preferred experience is through asking visitors to assess themselves over Eagles and McCool's (2002) summarised attributes. Importantly, these would need to be asked for visitors' ideal nature experience.

	A lot						None
When in a nature-based recreational site, how much biophysical modification to the natural environment do you expect?	1	2	3	4	5	6	7
	Many						Few
When in a nature-based recreational site, how many social encounters do you expect?	1	2	3	4	5	6	7
	A lot						None
When in a nature-based recreational site, how much visibility of rules and personnel do you expect?	1	2	3	4	5	6	7

Identifying visitor experiential segments and experiences supplied, a match can now be made. This is crucial for pre-visit management of the experience, and consequent satisfaction, and of course for the communication message to be provided. Table 18 provides a visitor matrix, based upon the DOC (1996) *Visitor Strategy* matrix. The header rows show the different ROS zones, whereas the leading columns identify the visitor experiential segments. The matrix cells show the match between demanded experience and experience supplied.

Importantly, Table 18 identifies the experience segments that should be targeted for those able to be supplied. This model provides a means to analyse a state or a specific park's ability to provide a range of experiences, to

identify potential markets matched to the supplied experiences, and provides experiential indicators of messages to create the match between supply and demand. The message should highlight the experiential characteristics of the supplied site, and these characteristics should trigger matches for users.

Table 18: Supply and demand visitor experience matrix

Visitor Markets		Recreation Opportunity Spectrum						
Clark & Stankey (1979)		Modern	Semi-Modern		Semi-Primitive		Primitive	
Eagles & McCool (2002)		Urban	Rural	Roaded Natural	Semi-Primitive Motorised	Semi-Primitive Non-Motorised	Primitive	
NZ Department of Conservation (1996)		Urban	Urban Fringe	Rural	Back Country Drive-In	Back Country 4x4 Drive-In	Remote Wilderness	
Worboys, Lockwood & De Lacy (2005)	QLD	Urban	Intensive	Natural	Semi-Remote Motorised	Semi-Remote Non-Motorised	Remote	
	VIC	Developed	Semi-Developed	Roaded Natural	Semi-Remote		Remote	
	NSW		Class 5	Class 4	Class 3	Class 2	Class 1	
Parks Victoria	Department of Conservation	Urban	Front Country			Back Country		
Urban Socials		*	*					
Trail Users		*	*					
Access Made Easy								
Nature Admirers	Short-Stop Travellers		*	*				
Passive and Other Users	Day Visitors		*	*	*	*		
Country Vacationers	Over Nighters		*	*				
	Back Country Comfort Seekers				*	*		
	Back Country Adventurers					*	*	
	Remoteness Seekers					*	*	
Activity Centrics^	Thrill Seekers*	^	*^	*^	*^	*	*	

Summary

In summary, the need to match supply and demand and to consider how specific protected areas align with different visitor segments is essential. The approach takes into account Eagles and McCool's (2002: 99-102) principles of understating visitor characteristics, motivations and expectations as a key to effective management. The experience based approach is likely to be more useful to NWPS managers than the broader values based segmentation often used by tourism agencies.

The experience based approach provides managers with their park (product) portfolio, the supply. The conservancy that can be made available to visitors is assessed against the experience attributes, categorising the diversity of experiences available. Generally, a natural and protected estate (collection of a range of parks) is segmented into five to seven experience zones, from easy access front country environs to wilderness areas. The diversity of experiences is then matched to specific demand visitor segments. Like the supply, visitors are also often segmented into about seven segments, from visitors at iconic short-stops, to multi-day wilderness seekers. Conservation estate segmentation can also include urban areas, and urban visitor markets, adding further supply experience zones and demanded experiences. Knowing and matching the experience being supplied to a specific visitor segment provides the opportunity to consider and direct marketing messages to the target audiences. Importantly, by knowing and matching supply and demand characteristics there is the enhanced opportunity to also use other indirect management techniques within the communication themes.

Chapter 7

CONCLUSIONS AND RECOMMENDATIONS

As the result of the increasing influence of tourism, natural and protected area management is evolving from one primarily focused around onsite management and conservation to one that more broadly encompasses a greater range of holistic recreation and tourism experiences. In dealing with this evolution, national park and protected area managers are now required to balance onsite interpretation activities with pre-visit marketing and demand management activities. In designing pre-visit communication that promotes park and protected area visitation, as well as shapes behavioural expectations, national park and protected area managers must have a framework with which to both plan and implement effective pre-visit communication strategies.

This report has examined a number of key areas associated with the management and implementation of pre-visit communication. In particular it has examined issues related to:

1. The changing mandate for park and protected area managers and issues regarding the marketing of protected areas.
2. Pre-visit communication models derived from the academic and practitioner literature incorporating models of destination choice and decision-making by visitors and the contribution they can make.
3. The concept of integrated marketing communication and the implications of this concept for the marketing of national parks and protected areas, and the planning and implementation of pre-visit communication strategy.

In developing an understanding of issues faced and practices undertaken by NWPS agencies, the report has triangulated a number of data sources and presented insights into:

1. The typical marketing communication practices employed by protected area agencies (and associated agencies) to influence pre-visit decision-making of prospective visitors
2. The perceived effectiveness of these communication practices in meeting desired communication and behavioural objectives.
3. The current visitor data (market research) being collected and employed by protected area managers and associated agencies in the development of pre-visit marketing communication strategies.

The main conclusion from our analysis is that NWPS organisations have recognised the need to adopt a marketing and customer focus in the way they approach the management of demand for parks and protected areas and have been making significant headway in developing processes and capabilities to affect marketing and pre-visit communication strategies. Nevertheless, NWPS managers are still dissatisfied with their pre-visit communication planning process, the way they implement pre-visit communication strategies, and the overall outcomes of those strategies. It appears that agencies and managers still have a significant challenge ahead of them to adjust the mental model of their organisations, to resource the marketing area appropriately and to leverage visitor insights and market research in developing pre-visit communication strategies. The recommendations for this report will be grouped under two broad headings:

1. Integrated pre-visit communication management (IPCM)
 - a. Strategy foundations
 - b. Strategy development
 - c. Strategy implementation
2. Segmentation driven communications
 - a. Understanding the visitor decision-making process
 - b. Understanding the communication mix
 - c. Approaching segmentation

Integrated Pre-visit Communication Management

Recommendations in this area are based on our overall observation of the management of IPCM and also on the specific responses to qualitative and quantitative data presented earlier.

Recommendation 1: Institute a regular IPCM audit

In order to enable continuous improvement it is recommended that NWPS management institute a regular review of pre-visit communication management using the IPCM mini-audit.

Regular evaluation highlights persistent problems in the management and implementation of pre-visit communication. Furthermore, regular evaluation will enable managers to track the results of improvement strategies they have implemented as a result of the problems they have identified. Managers can use the IPCM audit and xls tool presented in a subsequent report.

It will be important for managers to determine if the mini-audit will be conducted internally or by outside experts. The advantages to doing it internally are that direct costs are likely to be lower and the process may become an engaging organisational exercise that builds communications capacity in and of itself. The advantages to using outside experts are their objectivity, time and availability, the knowledge they bring from other organisations for comparison purposes, and the credibility that may accompany their credentials and expertise (Coffman 2004).

Recommendation 2: Develop a motivational vision and mission statement

Managers need to ensure that they have developed a vision and mission statement to help focus, guide, and legitimise how integrated pre-visit communication fits into the organisation.

A mission statement is an organisation's vision translated into written form. It makes concrete managements' view of the direction and purpose of the organisation with regard to pre-visit communication. This document is a vital element in motivating employees at different park levels and providing a sense of priorities related to demand management and pre-visit communication. The mission statement itself should be a short and concise statement of goals and priorities. In turn, goals are specific objectives that relate to specific time periods and are stated in terms of facts. Overall, the document legitimises pre-visit communication and for that reason must be something that senior management champions in actions and words both within the organisation and with key stakeholders, e.g. government and tourism organisations.

Recommendation 3: Refine pre-visit communication roles and responsibilities within the organisation

Managers must continue to refine and clarify the roles and responsibilities of individuals and departmental groups within the NWPS organisation with regard to conducting pre-visit communication.

Results suggest that whilst people are working cross-functionally, the lack of clear determination of roles and responsibilities might be undermining the ability to achieve desired outcomes. The lack of role definition is likely to result in duplication of some aspects of pre-visit communication and a lack of attention to other important communication tasks. Furthermore the lack of clarity of roles has implications for the overall integration and involvement of people and groups from many parts of the organisation. Cross-functional integration is important for transferring knowledge, achieving buy-in to pre-visit strategy, and facilitating the opportunity for coordinated strategy.

Recommendation 4: Strengthen relationships with state and regional tourism organisations

Managers must improve relationships with state and regional tourism agencies to enable closer sharing of insights about visitors and to facilitate a lowering of transaction costs associated with implementation of pre-visit messages.

Managers need to be proactive in building stronger relationships with other organisations involved in delivering messages to prospective visitors about parks and protected areas. This will involve improved articulation of roles and responsibilities in delivering protected area related messages to potential visitors. Improved relationships

will facilitate a closer alignment with state based tourism marketing strategy, thereby improving the integration of the 'protected area' message into the marketing collateral of STOs and RTOs.

More broadly there is a critical need to create strong working relationships with media channels. This includes the mainstream media and other local specialised channels, including auto clubs, map producers and the like. Improved media relationship management offers scope for improved park and product publicity or public service messages to be carried at lower cost.

Recommendation 5: Improve the integration of visitor data into strategy development and campaign planning

Managers must gain more detailed visitor insights and segment information to enable improved communication channel choices and message design.

Improving the resourcing, collection, analysis and application of visitor segmentation data for use in developing communication campaigns is essential. Organisations must devote attention to improving the research they conduct into visitor needs and behaviours, establishing a dialogue with the visitors they target, and using the information from such engagements to help direct their pre-visit communication planning and implementation

Of concern, especially given the greater marketing requirement of national park and protected area managers, is the low level of market research being undertaken to understand pre-visit decision-making. This in part may be a function of the type of agency and the transition phase of national park and protected area management to a greater visitor focus. In the absence of the ability to conduct market and visitor research, there needs to be a proactive approach to sourcing appropriate insights from elsewhere. There also needs to be an emphasis on shaping the data that is collected and analysed by other organisations which may benefit the marketing mix and communication decisions of national park and protected area managers.

Whilst NWPS organisations have a program of visitor data collection in place there is still some concern regarding the systematic nature of such activities. A more systematic approach to collection, analysis and if possible tracking of visitors will enable a more robust understanding of experiences and, importantly for pre-visit communication, where visitors are sourcing information from prior to their park experiences. Storage of visitor segment data in a user-friendly database was also highlighted as a weakness. It is important that insights about visitors are able to be easily accessed and employed in making marketing and communication related decisions.

Recommendation 6: Improve the clarity of objectives set regarding which visitor segments to target and products (parks and protected areas) to market

Managers must set clear objectives related to which visitor segments to target, products to market (i.e. protected areas, national parks and their associated experience values), and the management and marketing objectives associated with each product, e.g. de-market, increase visitation, adjust knowledge of experiences available and the like.

Research indicated that many organisations did not have a clear portfolio strategy that guides how different products, in this case various parks and protected areas, will be marketed or matched to different visitor segments. The development of a market/product portfolio matrix is an important tool in planning how to communicate with particular segments and to build demand or demarket certain protected areas. The involvement in nature-based marketing strategies of STOs is likely to help facilitate this portfolio thinking.

Setting communication and behavioural objectives for each targeted segment is also needed. These objectives must be actionable in terms of orchestrating and implementing pre-visit communication strategies and campaigns. Longer term objectives will likely relate to increasing the recognition and awareness of the national park and protected area agency brand, increasing top of mind recall of the agency as a premier destination information source, and improving consumer recognition of parks and protected areas as socially, experientially and culturally significant assets for the state. The setting of objectives results in clear metrics of indicators of performance or outcomes.

In developing such objectives and considering how best to measure outcomes, managers will need to consider budget and operational restrictions, including staffing, time, and financial resource constraints. Managers will need to consider how they might leverage the measurement activities of other organisations as surrogate indicators of communication activities and strategies. Improved resourcing is needed in this area generally.

Recommendation 7: Institute a more systematic and data driven pre-visit communication planning process

Managers must develop a marketing plan that strategically guides their pre-visit communications activities and that acts as a vehicle to consolidate thinking and agreement on the communication strategy and on the implementation tactics for particular visitor segments.

The process of planning actual pre-visit communication strategy and its associated segment or park related campaigns is central to being successful at achieving stated communications and visitor related objectives. Managers need to ensure the process results in an actionable plan for communication with visitor segments.

Managers need to utilise a regular SWOT analysis examining key visitor contact points, strengths and weaknesses of the organisation and its ability to implement pre-visit communications, and threats to products (i.e. parks and protected areas) from the actions of others, e.g. other organisations who may be communicating inappropriate messages. The SWOT analysis is a structured evaluation of internal strengths and weaknesses in the ability to undertake communications and the opportunities and threats that can help or hurt the organisation in its communications. Importantly this analysis enables SWOTs to be prioritised in order to help allocate limited resources and in determining which communication tools are best to employ. Furthermore managers need to ensure that such plans have a degree of flexibility in their execution to be able to take advantage of ad hoc and tactical opportunities for communications with key visitor segments.

Importantly, managers need to ensure that they consider a full range of communication tools rather than simply rolling over communication approaches year to year. With the emergence of new communications tools and channels (e.g. podcasts, SMS), and a fragmentation of tradition media (e.g. print and broadcast), it is necessary at this time to challenge the status quo with regard to what might be employed. This is often termed a “zero-based” approach whereby managers consider the objectives that need to be met and devise a best approach to achieving them. This then aids in determining the budget needed to achieve desired outcomes.

Managers must also ensure that such plans consider promoting to consumers or visitors, and to important message channels such as the media and other members of the tourism industry. Given limits on resources, planning must consider how best to leverage the resources of others in delivering pre-visit communication messages.

Recommendation 8: Maintain current efforts in the development of strategically marketing collateral and brand livery

Managers need to maintain their current efforts with regard to improving the consistency of the ‘protected area product’ message across multiple stakeholders and media channels. Managers need to maintain the current thrust of improving the style and consistent design of marketing collateral and, more broadly, the brand identity of the parks agency.

The successful implementation of integrated pre-visit communications is reliant upon being able to strategically communicate a consistent message to the target market. Consistency has two levels. One-voice, one-look consistency applies primarily to individual campaigns and relates to message and execution design consistency that impacts on the learning, cognitive and behavioural responses of the target audience. Strategic consistency also applies to the brand identity of the organisation and transcends individual campaigns. Elements of consistency include symbols and logos, colours and design, thematic consistency (e.g. experience and conservation statements and values), and verbal consistency in taglines and slogans.

Although our research indicates that managers have made significant steps to improve the design of marketing collateral and develop a consistent brand livery, they must move to the next step and consider the development of consistent brand messages and link these to park level messages. Managers need to be proactive in establishing clear visual standards across all protected area marketing collateral and maintaining them in the face of individuals within national park and protected area agencies that make ‘unauthorised’ adjustments, even with the best intention. Managers also need to be vigilant when allowing other agencies or organisations to utilise parks and protected area imagery and messages in their marketing communication. This relates back to identifying clear strategic goals and objectives for marketing and previsit communication and ensuring that these goals are communicated to all stakeholders. Consistency of message about available opportunities, activities, safety and access are vital to balancing the agency management goals of both conservation and visitor usage.

In achieving strategic consistency, a difficulty that must be managed is dealing with political cycles and political stakeholders who may desire change which is disruptive to prior strategy and direction and efforts to build and maintain consistency.

Recommendation 9: Improve the resources allocated to pre-visit communication management and activities

National park and protected area senior managers must adjust the way they view the resources allocated to the pre-visit communication activities of the organisation. Senior management must resist viewing activities associated with pre-visit communication as a cost and rather than an investment. The allocation of sufficient and appropriate resources provides an organisational signal as to the legitimacy of pre-visit communication as an essential element in the management of parks and protected areas.

The ability to undertake effective pre-visit communications is dependant on having sufficient resources to undertake the collection and commissioning of necessary visitor research, the development of effective marketing collateral, the purchasing of media space for the promotion of messages, and the recruitment and training of staff with skills to bolster the capability to undertake communication programs. Managers need to partition budgets for pre-visit communication activities from activities associated with interpretation programs. Failure to do this often leads to pressure on available funds and makes consistent marketing difficult to achieve.

Commercial reality often dictates that resources, particularly money for the purchase of media space and creative agency work, is and never will be sufficient. Managers need to ensure that other aspects of pre-visit communication management are working well in order to extract the maximum value for the resources they do have, e.g. have a clear product/market portfolio, a sound understanding of 'marketing' objectives, a clear sense of what is wanted from targeting specific visitor segments, and being able to leverage opportunities for 'free' message delivery through other stakeholders.

Best practice in integrated marketing communication suggests that managers utilise a zero-based budgeting approach or an objective-task approach. This approach argues that a manager needs to determine what the task is regarding communication for the planning period and then determine how much communication is necessary to achieve desired outcomes. This objective-task understanding then enables a realistic assessment of the resources necessary to affect the strategy. By utilising this approach, managers will be in a better position to understand the gap between what they have and what they need, and this may be used in future funding negotiations.

Visitor Focused Communication

This report has reported on the importance of having a clear and detailed understanding of targeted visitor segments and an antecedent to designing and implementing effective pre-visit communications.

Recommendation 10: Develop a clear brand vision and brand identity

National park and protected area managers must continue to develop a clear brand vision and brand identity in order to facilitate the development of marketing collateral and pre-visit messages. Clarity in these elements of branding helps effect the perception of the national park and protected area brand by potential visitors and the likelihood that the agency will be recalled as a primary source of information.

As national park and protected area agencies adopt a more market focused role and they are required to drive a strong revenue stream, it is essential that they develop a clear brand and branding strategy. Clear branding is still important even if not driving a revenue stream. In the context of pre-visit communication, a brand is a central factor in developing a stronger bond with potential visitors and visitors. Branding needs to be considered in terms of the development of a clear brand vision that management wishes to promote to the market and which employees can buy into in order to motivate adoption of a new managerial mandate. Brand vision needs to be translated into a brand identity which includes the way in which the organisation (including employees, marketing collateral, brand statements) is visually presented to the market in order to be recognised and understood. The brand also needs to be communicated to the market using brand identity cues to reinforce the desired vision and positioning of the national park and protected area agency to park users as a primary source of information for making destination decisions and for their role as custodians of the park environment.

Recommendation 11: Utilise the supplied experience zones to develop a product/segment portfolio matrix matched to experiences sought by visitors

Managers need to undertake an assessment of their conservation estate to identify and categorise the experiences able to be provided. Furthermore, managers also need to segment potential visitors on the basis of experiences sought, and match demand with experiences offered. The resulting product/segment portfolio matrix will be significantly useful in designing pre-visit communication campaigns and strategies.

As national park and protected areas need to cater for and manage a growing visitor market wanting a diverse range of experiences, the need to improve management techniques increases. Indirectly, delivering visitors to the place that will satisfy their motivations and expected experience will increase national park and protected area's ability to manage the visitor experience and consequent impacts for the visitor and park (positive and negative).

Recommendation 12: Undertake specific visitor segment level pre-visit decision-making research

It is important to undertake research that specifically relates to each of the key visitor segments being targeted by national park and protected area agencies. Such research must go beyond visitor demographics, values and lifestyle descriptions and develop an understanding of the decision-making processes leading to choice of destination. Importantly, this research needs to include information sources for each segment.

The ability to develop pre-visit communication strategies and to implement effective campaigns is predicated on understanding how best to target and influence prospective visitors. Having identified segments, it is important to have a more detailed understanding of their decision-making processes.

Overall, there seems to be a significant lack of detailed consumer research undertaken and utilised by national park and protected area agencies. Managers need to go beyond surveys and descriptive analysis to a deeper understanding of influences on information search and decision-making. Research designs need to generate insights into when individuals and families start thinking about visitation, where they actually go to access information, and the extensiveness of information search and evaluation. Importantly, managers must understand the difficulties people have in accessing and understanding information related to park and protected area destinations.

Developing rich consumer insights will mean that more qualitative and ethnographic methods will need to be added to existing quantitative survey approaches. A qualitative study for example would seek to map the decision-making process of a family or an individual as they are tasked with making a destination choice.

A difficulty faced by managers is sufficient budget for such research. If senior national park and protected area managers are serious about the role of pre-visit communication in shaping behavioural expectations and shaping demand for destinations, then monies need to be made available for such research.

Recommendation 13: Improve park information source and experience sought questions in visitor surveys

Managers need to revisit the design of visitor surveys and look to include a stronger battery of items probing experiences sought by visitors and sources of information used to make destination choices.

Although visitor surveys have acknowledged difficulties in terms of representativeness, they nevertheless provide an invaluable source of information for aiding in decision-making. As pre-visit communication emphasis increases, it is important to ensure that questions regarding information sources used to find out about a particular park are included in surveys. Examination of questions currently used in such surveys found that whilst questions are included, they are often so general as to provide very little direction for planning. Further, there is often no real sense of the relative importance of information sources in determining destination choice.

The data collected through such forms needs to be followed up with more detailed investigation of information sources and their importance (see Recommendations 11 and 12). As noted, the current experiential visitor segments, which cover the spectrum of recreational opportunities, are intuitively based, and intuitively they provide a match with the experience provision segments. All the same, in pre-visit communication, the key finding will be how to access these segments—what is the decision-making process used, when is it implemented and what information sources are used to create pre-visit motivations, expectations and decisions.

Recommendation 14: Determine the usefulness and effectiveness of the website in facilitating visitor decision-making

Managers need to assess the role and efficacy of the national park and protected area website in helping potential visitors make decisions about where to go and what to do. This assessment needs to be undertaken from the perspective and needs of the consumer and not the agency.

The likely importance of the national park and protected area agency website as the hub of the organisation's marketing and communication cannot be overstated. Nevertheless, the report has highlighted a possible disconnect between the beliefs of managers and park visitors with regard to the use and usefulness of the website as an information source and this needs to be examined. The website should play a significant role in building and enhancing visitor relationships with the organisation. Managers need to determine how well their website works, making sure that the site is easy to navigate, essential experiential information is easy to find and interpret or employed in decision-making, and ensuring that text and images load quickly. Managers also need to ensure that the website does not provide conflicting messages of conservation versus park usage. Key goals and outcomes need to be identified for both marketing and the use of the website to promote the visitation experience. The option of dedicated websites / microsites for key locations should be examined as they may be more effective than a general 'department' website.

As well, managers need to consider how to create a relationship or dialogue with potential visitors through use of email. Opt-in permission marketing enables the development of a strong relationship with visitors who may act as word-of-mouth sources for those who may be less familiar with visiting parks and protected areas. Permission based approaches, such as newsletters and experience highlights, are an avenue for improving awareness of parks and available park experiences. Like all of these tools, it has to be resourced to provide new content and contact on a regular basis. Furthermore, research is needed to determine format and content needs for targeted consumers.

Conclusion

This report focuses on the issues salient to developing and implementing pre-visit communications in the context of protected area marketing and management. In developing this report we have drawn together several distinct themes, including the understanding of visitor destination decision-making, the development of segments and the segmentation process, and, importantly, the idea of integrated pre-visit communication management.

The discussion and insights on destination decision-making are important as they facilitate thinking and planning related to making potential visitors aware of particular sources of information and the types of communication tools that may be appropriate to help shape decisions. The research highlights the need for further research into the process of decision-making and the actual use and experience of different communication tools.

The discussion and insights offered in the segmentation sections of the report highlight the importance of using a robust segmentation strategy in order to understand visitors and potential visitors and the experiences they seek. Segmentation using a Recreation Opportunity Spectrum (ROS) based approach enables managers to better manage demand for parks and better manage visitor expectations about the experiences they can have. The section argues that there is a need for parks managers to develop a more robust approach to segmentation and to adopt a ROS based approach to understanding the interaction between visitor segments and available parks and park related experiences.

The core of the report focused on how well pre-visit communications was managed in a range of organisations. The development and use of the IPCM audit offers managers an opportunity to understand how to improve both planning and implementation of pre-visit communications. This section found that significant scope existed for improvements but that such change will require support and legitimisation from senior levels of the organisation. The report finds that managers need to track IPCM over the long term in order to ensure they are making forward progress and for developing evidence of the need for change in particular areas.

In summary, the research found that NWPS managers have been making significant steps forward in coming to terms with the planning and implementation of pre-visit communication, and meshing this new area of business with the traditional interpretation activities and strategies. The report finds that as the 'mental model' of the NWPS agency evolves from one focused on protection and conservation, to one that encompasses a broader range of visitor based experiential consumption, the emphasis on pre-visit communication will also increase, leading to ongoing improvements in effectiveness and efficiency.

APPENDIX 1: INTEGRATED PRE-VISIT COMMUNICATION SURVEY

The following questions relate to the core items used in the survey. The first set of items relate to understanding the pre-visit decision-making process of potential park visitors. The remaining items relate to the IPCM audit. Basic demographic questions have not been included in this appendix. The full questionnaire is available from the authors.

THE PRE-VISIT DECISION-MAKING PROCESS

We would like to know the degree to which you feel your organisation understands the pre-visit planning and decision-making process of your customers or visitors.

The questions relate to your overall understanding of pre-visit behaviours and are not specific to any particular customer or visitor segment you might target. Please answer the questions as your organisation's understanding currently exists and not as you would like it to be.

	Very poor understanding		Excellent understanding		
a. The demographic characteristics of your potential customers / visitors and their influence on decision-making	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b. The lifestyle characteristics of your potential customers / visitors and their influence on decision-making	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c. The customers / visitors previous experiences and satisfaction with your offer(s)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d. When potential customers / visitors start thinking about visiting or purchasing your offer(s)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e. The length of time different potential customers / visitors take in making a decision (from inception to final choice) about where to go and what to do	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f. The degree of information acquisition and analysis undertaken by potential customers / visitors prior to deciding on an offer(s) to purchase or participate in	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g. The most important sources of information used by potential customers / visitors in making a choice	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h. The experiences that are being sought by potential customers / visitors segments when they purchase your offer(s)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i. The difficulties potential customers / visitors have in accessing information about your offer(s)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j. The satisfaction of customers / visitors with the offer(s) after experiencing it	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

THE PREVISIT COMMUNICATION PLANNING AND IMPLEMENTATION PROCESS

We would like to know the degree to which the following things characterise the management of pre-visit communication planning and implementation in your organisation.

The questions relate to your overall management and planning of marketing or visitor communication and are not specific to any particular customer / visitor segment you might target. Please answer the questions as your process currently exists and not as you would like it to be.

	Strongly disagree				Strongly agree
a. We have a well articulated mission statement related to promoting our tourism offer(s) to customer / visitor segments	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b. Our mission statement carefully balances conservation values with generating demand for our offer(s)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c. We have clear communication objectives for each customer / visitor segment we focus on (e.g. build awareness, increase visitation / sales)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d. We have a clear product portfolio strategy—we know which products will be promoted to different customer / visitor segments?	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e. We have clear metrics set for every pre-visit communication campaign we implement (e.g. number of bookings, % increase in visitor numbers, ROI, sales value)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f. We can easily measure the response by a customer / visitor segment to our pre-visit communication campaigns	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g. We conduct market research to understand the pre-visit decision-making process of the customer / visitor segments we focus on	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
h. We actively seek market research insights about customer / visitor segments from industry and government agencies	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i. We use systematic tracking to evaluate our relationship with different customer / visitor segments	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j. We use systematic tracking to evaluate our relationship with our key industry and government stakeholders	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
k. We have a program in place to collect feedback from the customer / visitor segments we focus on (e.g. complaints and compliments)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
l. We store all customer / visitor segment data and insights in a user-friendly database	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
m. Our pre-visit communication planning involves people and groups from many different parts of the organisation (e.g. marketing, customer service,)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
n. Top management champions the importance of pre-visit communication planning and activities	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
o. The roles and responsibilities of each person in the organisation, regarding pre-visit communication with customer / visitor segments, is clearly articulated	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

	Strongly disagree				Strongly agree
p. All people and groups involved in planning pre-visit communication campaigns work cooperatively	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
q. We proactively manage relationships with all park and protected area management stakeholders	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
r. We proactively manage relationships with all state and regional government tourism stakeholders	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
s. We proactively manage relationships with other tourism operators, in our market area	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
t. We have a written marketing plan that strategically guides our pre-visit communication activities	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
u. Our pre-visit communication activities generally follow what we did in the previous year	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
v. Each year we conduct a new SWOT analysis to help direct our pre-visit communication planning and activities	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
w. Our pre-visit communication plans always consider how we might use each of the different communication tools (e.g. advertising, events, internet, PR, SMS, email and the like)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
x. Our pre-visit communication planning strategically balances promoting to customer / visitor segments, with promoting to industry and the media	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
y. Our pre-visit communication plan is flexible and enables us to take advantage of ad hoc opportunities to promote to different customer / visitor segments	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
z. Our pre-visit communication budget is based on what we need to do, rather than on a predetermined or set budget amount	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
aa. The promotional messages we deliver to different customer / visitor segments carefully balance experience values (e.g. fun and excitement) with conservation values (e.g. looking after natural environments)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
bb. We have established consistent visual standards across all our communication collateral (e.g. print and electronic formats)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
cc. We strictly enforce our visual standards across all of our media or communication channels and industry stakeholders	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
dd. We effectively integrate our pre-visit communications across all of the industry stakeholders and media channels used to deliver our messages	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
ee. We have an appropriate level of funding available to achieve the communication objectives set for each targeted customer / visitor segment	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
ff. Extra funds can be easily made available to take advantage of ad hoc communication opportunities with targeted customer / visitor segments	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

	Strongly disagree				Strongly agree
gg. Top management understands that pre-visit communication with our customer / visitor segments is an investment and not a cost	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

OVERALL SATISFACTION WITH PRE-VISIT COMMUNICATION PLANNING AND IMPLEMENTATION PROCESS

We would like to know your overall satisfaction with the management of pre-visit communication planning and implementation in your organisation. Again, please answer the questions as your process currently exists and not as you would like it to be.

	Strongly disagree				Strongly agree
a. Overall we are very satisfied with the customer / visitor research we use in planning pre-visit communication activities	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b. Overall we are very satisfied with the customer / visitor segment profiles we use to plan pre-visit communication activities	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c. Overall, we are very satisfied with the planning process for our pre-visit communications activities	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d. Overall, we are very satisfied with the implementation our pre-visit communication plans	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e. Overall, we are very satisfied with the outcomes of our pre-visit communication activities	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f. Overall we achieve a high level of integration between the message channels and communication tools we use to send messages to customer / visitor segments	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

COMMUNICATION TOOLS AND THEIR IMPORTANCE

This final section examines the communication tools you use to communicate with target customer / visitor segments and how effective you feel they have been in achieving your stated communications objectives e.g. awareness, knowledge, and sales or visitation.

Please indicate how effective each of the following communication tools is. If you do not use something then you do not need to rate its effectiveness.

	Highly ineffective				Highly effective
a. Television advertising (Free to air)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
b. Television advertising (Pay TV)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
c. Product placement (e.g. in travel programs on TV)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
d. Radio advertising	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
e. Newspaper advertising	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
f. Magazine advertising	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
g. Billboard and poster advertising	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

	Highly ineffective			Highly effective	
h. Cinema advertising	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
i. Direct mail	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
j. Telemarketing	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
k. Direct permission based email	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
l. Viral or buzz marketing	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
m. Transit advertising (e.g. bus sides, taxi boards)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
n. Consumer travel fairs, expos or events	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
o. Internet—own website	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
p. Internet advertising (spot or feature advertising on other websites)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
q. Internet—exposure through retail sites (e.g. 'wotif', airlines etc.)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
r. Directories (e.g. car club directories, maps etc.)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
s. Brochures, leaflets, booklets at tourism hubs	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
t. Travel clubs	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
u. Group newsletters to specialist clubs and groups	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
v. Travel agents	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
w. Yellow pages	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>

APPENDIX 2: DEPARTMENT OF CONSERVATION VISITOR SEGMENT DESCRIPTIONS AND DEFINITIONS

Segments	Short-Stop Travellers	Day Visitors	Over Nighters	Back Country Comfort Seekers	Back Country Adventurers	Remoteness Seekers	Thrill Seekers
Settings and Accessibility	<p>This group uses the "natural edge" (for up to one hour's duration) along main access routes as part of a stop along a journey to a destination. Sites are located beside:</p> <ul style="list-style-type: none"> · highways, · including the main tourism highways · local access roads which are used predominantly by domestic visitors. <p>High vehicle accessibility</p>	<p>This group uses a wide range of settings from urban fringe to backcountry walk-in. Day visits range from one hour up to a full day (see SST). This group often uses sites that are access points for the backcountry such as roadends, easy day walks or scenic attractions. They also visit the coast or islands. High vehicle accessibility associated with a range of road standards, from gravel through to tar seal, and can involve significant travelling time to get there.</p>	<p>Campsites and overnight accommodation at rural or backcountry drive-in sites accessible by vehicle. The site may be accessible only by boat. The type of accommodation and the setting are often associated with a natural attraction that will determine the experience.</p>	<p>Natural setting (backcountry walk-in) with generally the only modification being the facilities provided. Largely foot access apart from where air and boat access is permitted. Often requires and has good links with transport infrastructure.</p>	<p>Natural setting (backcountry walk-in or remote) with basic facilities. Access is largely on foot except where air or boat access is permitted. Foot access is on tramping tracks or routes.</p>	<p>Natural setting (remote or wilderness). Contains few or no facilities. Access is largely on foot except where air or boat access is permitted. Foot access to the edge of remote / wilderness areas is usually by tramping track or route.</p>	<p>Sites with a mostly natural backdrop, often with a dramatic element to them. The setting is often spectacular. The sites are found right across the recreation opportunity spectrum. They are highly accessible using a range of transport (including aircraft).</p>
Nature of Visit and Activities Undertaken	<p>Visits of a short duration of up to one hour's length or associated with lunch / cup of tea break / toilet stop / stretch of the legs or a visit to a natural attraction. Seeking activities of a passive to mildly active nature such as picnicking, photography, sightseeing, nature appreciation and short walks.</p>	<p>Tracks used by this group are of a standard that enable use by relatively inexperienced visitors with a low level of skill. Visits are often associated with a family or group outing or a specific recreational activity. Two distinct types of activities may occur at these sites: a) those activities such as picnicking and swimming; b) activities such as walking along easy day tracks. Water is often a focus for the visit, be it at the coast, lakes or rivers.</p>	<p>The duration of the visit may be from one night to one or more weeks. These locations are often used as summer holiday spots year after year. Camping is the predominant activity. At both campsites and overnight accommodation this group often undertakes a range of activities using the site as a base, including easy day walks, guided nature programmes, water-skiing, fishing, swimming etc.</p>	<p>The major activity undertaken is tramping on the major tracks, with most trips taking 2 to 5 days.</p>	<p>Visits generally range from 2 to 7 days (sometimes longer), but also include some day visits. Backcountry adventurers undertaking day visits can range further into the backcountry but do not require the standard of facilities sought by the day visitor group. Activities include tramping, hunting, fishing, mountaineering, cross-country skiing, rafting, kayaking and mountain biking; activities with a high degree of self-reliance.</p>	<p>Visits range from 3 to 7 days (or longer). The main activities are tramping, hunting, mountaineering, crosscountry skiing, rafting, all require the highest degree of self reliance.</p>	<p>The visit is up to a day's duration and involves exciting activities such as downhill skiing, parapenting, rafting, bungee jumping and snow-boarding. There is also an element of thrill seeking in some overnight backcountry activities such as cross-country skiing and long distance rafting, and such visitors should be considered as Backcountry Adventurers or Remoteness Seekers.</p>
Experience Sought and Degree of Risk	<p>Seeking an "instant immersion" in nature experience, associated with a high degree of scenic value or historical interest. Low risk experience associated with safe facilities.</p>	<p>Seeking experiences in a natural (or rural) setting with a sense of space and freedom. This group seeks an outdoor experience with a low level of risk, and safe facilities.</p>	<p>This group seeks an overnight experience in a predominantly natural setting. They expect both the camping / overnight experience, and the associated activities they undertake, to be generally low risk ones. Includes the traditional New Zealand family holiday experience.</p>	<p>Seeking an outdoor experience in a backcountry environment that has low risk due to the provision of safe, comfortable facilities. To ensure a safe and comfortable experience this group sometimes uses guided or concessionaire operations. For many this may be their first introduction to the New Zealand backcountry.</p>	<p>The traditional New Zealand backcountry experience. This group has a higher level of backcountry skills and experience than backcountry comfort seekers. They seek an experience that has challenge and a sense of freedom and they accept a degree of risk and discomfort.</p>	<p>Seeking a wilderness experience with limited interaction with other parties. Seek the challenge and complete sense of freedom that comes from prolonged contact with wild nature. Because of their high skill level and experience, this group accepts the higher level of risk associated with travelling through remote wilderness areas.</p>	<p>Seeking controlled risk activities as part of an exciting experience.</p>

MARKETING OF PROTECTED AREAS AS A TOOL TO INFLUENCE VISITORS' PRE-VISIT DECISIONS

Segments	Short-Stop Travellers	Day Visitors	Over Nighters	Back Country Comfort Seekers	Back Country Adventurers	Remoteness Seekers	Thrill Seekers
Facilities and Services Sought	Seeking a high standard of facilities and services, including car parks, toilets, easy tracks of short duration that cater for all ages and most abilities, picnic facilities and orientation / interpretation signs about the location.	Seeking a high standard of facilities and services, including carparks, wharves, boat ramps, toilets, tracks, picnic facilities, onsite orientation / interpretation signs and also pre visit information about activities that are possible and features of the site.	Seeking basic facilities and services, at least pit toilets and a water supply. Like day visitors, overnighers generally prefer a high standard of facilities (e.g. tracks, onsite orientation / interpretation signs) for activities where the site is used as a base. A few seek facilities such as cabins and sites, with electricity found at a small number of serviced campgrounds. Seek pre-visit information on booking arrangements, planning where to go, and on activities that can be undertaken in the area or on unique natural or historic features.	Seeking a low risk comfortable experience in the backcountry. This is facilitated by the provision of well constructed tracks, bridges and quality huts (some with hut wardens) and backcountry campsites with associated facilities. Seek pre-visit information to help plan their trips and daily track condition information from hut wardens.	Require only basic facilities maintained to appropriate standards (for example, huts, tracks, tent sites, essential bridges, routemarkers, limited signs). Seek pre-visit information to help plan their trips, including maps, information on snow / weather conditions, hut tickets and route guides. They are particularly interested in information about transport options and access restrictions.	Seek no facilities once in remote country. Seek pre-visit information to help plan their trips, including maps, snow / weather conditions and route guides.	Seek specialised facilities-such as ski fields, bungee jumping platforms and pre-visit information to encourage undertaking or help planning for an activity.
Visitor Types and Numbers	Represented by both domestic and international visitors including free and independent visitors. Sites used by short stop travellers receive high use compared with sites used by the other visitor groups.	Sites used by day visitors receive medium to high use compared with sites used by the other visitor groups. This group uses two major types of sites: · sites that are used predominantly by non-locals, both domestic and international visitors · sites used largely by visitors from local communities, many of whom make repeat visits.	Visitors staying for one week or more tend to be mainly New Zealand family groups. Many overnight campers are school groups. Most international visitors stay for only one night and can include those in campervans and other free independent travellers. During the peak summer period, use at most sites is high compared with low use for much of the year.	Overall there is an equal proportion of New Zealanders and international visitors on the major tracks. New Zealanders in this group are relatively inexperienced with a wide age range. The majority of international visitors are aged 20 to 40.	Backcountry adventurers are generally young, male New Zealanders. It is difficult to estimate the numbers in this diverse and widely dispersed backcountry adventurer group.	This group is made up of fit, experienced, predominantly male New Zealanders. Compared with other visitor groups, remoteness seekers numbers are very low.	High numbers of international Visitors are represented in this group (except for downhill skiers who tend to be New Zealanders), comprising largely the young and well off. Currently high visitor numbers relative to other groups.
Projected Use	Because of the expected large increase in international visitors there will be a corresponding increasing demand for this type of facility / service in this setting, particularly along main tourism highways.	International visitor numbers are expected to increase greatly whereas domestic visitor numbers will increase more slowly.	Because this group is made up mostly of New Zealanders, total use is expected to increase only slowly with the exception of areas close to Auckland. But as these are increasingly 'found' by international visitors, use will increase.	This group is projected to experience a large increase in international visitors, with the domestic visitors remaining static or even dropping (if no limits on numbers are set), based on 'tramp flight' to lower use areas to avoid increasing numbers.	Because this group is made up mostly of New Zealanders, numbers are expected to increase only slowly. Potential growth in some areas may occur from international visitors and New Zealanders seeking alternatives to higher use tracks.	Numbers are expected to increase slowly. Although remote experience has international appeal, it is difficult to assess the growth of overseas visitors seeking remoteness.	This group is projected to experience a rapid growth based on the large international component and the way these experiences are marketed to this group.

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The STCRC has grown to be the largest, dedicated tourism research organisation in the world, with \$187 million invested in tourism research programs, commercialisation and education since 1997.

The STCRC was established in July 2003 under the Commonwealth Government's CRC program and is an extension of the previous Tourism CRC, which operated from 1997 to 2003.

Role and responsibilities

The Commonwealth CRC program aims to turn research outcomes into successful new products, services and technologies. This enables Australian industries to be more efficient, productive and competitive.

The program emphasises collaboration between businesses and researchers to maximise the benefits of research through utilisation, commercialisation and technology transfer.

An education component focuses on producing graduates with skills relevant to industry needs.

STCRC's objectives are to enhance:

- the contribution of long-term scientific and technological research and innovation to Australia's sustainable economic and social development;
- the transfer of research outputs into outcomes of economic, environmental or social benefit to Australia;
- the value of graduate researchers to Australia;
- collaboration among researchers, between researchers and industry or other users; and efficiency in the use of intellectual and other research outcomes.