

Market Segmentation of Nature-based Attractions: A Framework for Experience and Activity-oriented Segmentation

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ABSTRACT The outstanding natural resources and attractions of South Africa are considered to be the main assets of tourism industry in the highly competitive global tourism market. Typical examples of these attractions and businesses constitute those based on wildlife flora and fauna, including the National Parks, National Reserves and Game Reserves. These attractions are mainly public organisation and private enterprises offering a wildlife experience. One of the main issues and challenges that management of these organisations and businesses need to overcome is better understanding and knowledge of consumer behaviour. This study focuses on the marketing of nature-based attractions and more particularly explores the topic of market segmentation. Using as theoretical framework the strategic marketing, paper examines the main methods of market segmentation. The analysis of the nature-based attractions' offering is performed based on the concept of service experience and adopting two perspectives, that is, guest / visitors and business. The study's aim is to suggest an experience-activity oriented segmentation for wildlife visitor attractions, based on services marketing theory. It is estimated that such segmentation will contribute to improve guest experience and satisfaction, to render marketing communications more effective and, consequently, improve wildlife attractions performance in all fields (environmental, financial and social).

INTRODUCTION

Segmentation analysis is considered to be an approach supporting the decision-making process at strategic management level in tourism industry, destination or business level. Obviously the identification of market segments is necessary to organisations in creating product differentiation strategy to target them (Kim et al. 2011). The knowledge generated by segmentation process would be applied to an effective marketing plan, so that organisations can promote their offering effectively to the target market. In any industry, the marketing planning involves distinct actions that managers must understand and implement to create a successful marketing plan (Leung 2013; Middleton et al. 2009). The tourism industry does not constitute an exception to this rule and the nature-based attractions (NBAs) are a typical type of organisations that need to adopt the approach and tools of marketing planning (Kruger and Saayman 2010). The intensive use of segmentation analysis as a strategic tool is justified in travel

and tourism fields because of the diversity of products and consumers, and the increasingly competitive environment (Kim et al. 2011; Rid et al. 2014.). The focus of this paper is on the appropriate adoption and use of this strategic tool within the context of NBAs. All nature-based organisations can benefit from understanding marketing techniques and applying those tools to satisfy the identified needs of a target market. It is very important for NBAs to gain an understanding of the needs and motivations of their current guests and potential visitors in order to develop, to communicate and to market adequate experiences that meet these needs and the business objectives as well.

The review of literature indicates that there is a knowledge gap in the field of market segmentation for the nature-based tourism. This paper attempts to address this gap. Thus, the paper's aim is to suggest a framework of market segmentation for NBAs, mainly based on the concept of service experience. Its specific objectives are three, namely: (i) to analyse the component elements of tourism experience in wildlife attractions; (ii) to explore the consumer experience, its interrelation with the business offering and the resulting benefits and outcomes for both parties involved, in the context of NBAs; and (iii) to propose a segmentation framework based on the consumer's perception about

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natural environment and performed activities. It is estimated that such segmentation contributes to improve visitors' experience and satisfaction, to render marketing communications more effective and, consequently, improve wildlife attractions performance in environmental, financial and social fields.

Literature Review

Tourism and leisure businesses have an increasingly complex range of supply options at their disposal which they can use to meet specific needs of tourists. It is, therefore, vital that tourism managers and marketers are able to use all possible information sources and techniques in identifying new market potential, but also to understand their existing markets better and maximise the yield from their finite marketing budgets (Moutinho et al. 2011; Soteriades 2012). The main issues in the field of strategic marketing planning are three, namely: (i) the planning process, (ii) the consumer's decision-making process, and (iii) the ways of segmenting the market into homogenous groups of individuals. Literature indicates that strategic marketing is valuable to organisations for a number of reasons (Leung 2013; Moutinho et al. 2011). Eventually its main value is the fact that it makes managers think in structured and systematic ways about their tasks (Fodness 2005; Soteriades 2012). The strategic analyses enable managers to have a sound basis for establishing marketing objectives and strategies for organisation. Marketing planning involves distinct steps that managers must understand to create a successful marketing plan. In every stage of this process decisions need to be made. This study's focus is on the second stage of planning process, that is, the market segmentation. This tool constitutes one way of dealing with the complexity of the market. Most tourism-related enterprises do not - and cannot - appeal to everybody, so it is essential to identify those tourists segments whose needs most closely match their offering in terms of service experience. The process of identifying appropriate target markets is known as market segmentation (Brassington and Pettitt 2006; Kotler and Armstrong 2010). Segmentation analysis is considered to be a tool / approach supporting the decision-making process at a management or strategic level in tourism industry. This process uses

the concept of tourist's decision-making process as a guide and the knowledge generated would be applied into an effective marketing plan, rendering the marketing activities more efficient. Segmentation means splitting a population into subgroups or segments whose members show similar characteristics, needs and buying behaviour (Dolnicar 2002). The main methods used in segmenting the market are four, namely: geographic, demographic, psychographic, and behaviourist segmentation (Brassington and Pettitt 2006). Based on consumer research and adopting different approaches and using various techniques, scholars suggested segmentations based on benefits, expenditure, motivations, preferences, and constraints (see, for instance, Dolnicar and Grün 2008; Kim et al. 2011; Kim and Weiler 2013; Kline et al 2014; Palacio and McCool 1997; Shani et al. 2010; Tchetchik et al. 2009). Psychographic research into lifestyle dimensions might help target tourism products and services better, but the identified segments must reveal distinct differences to be useful. Literature indicates that psychographic market segmentation has some serious limitations for tourism business marketing; nevertheless, this type of segmentation offers a better understanding of the types of experiences and benefits that different 'lifestyle' groups seek from their tourism and leisure experience (Kline et al. 2014; Kotler and Armstrong 2010). Further, when considering the literature related to NBAs and the natural resources in conjunction with tourism and leisure activities, it seems that scholars have been interested in exploring this topic mainly from an environmental and social perspective (see for instance Aref and Redzuan 2009; Makamea and Boonb 2008; Muganda et al. 2013). Some other related studies were interested in natural resources planning, development and management (see for instance Gondo 2011; Muzvidziwa 2013; Neba 2009). Finally the same topic has been explored from a marketing perspective; at this regard three related studies could be mentioned, regarding branding (Chellan et al. 2013), travel motivation (Kruger and Saayman 2010), and recreational activities (Musamba et al. 2012). Apparently the issue of market segmentation of NBAs is under researched; there is a gap of knowledge. Furthermore, the above literature review indicates that there is a need for suggesting an approach / framework for more efficient market segmentation. This is the aim of the present study. The

reminder of the paper is structured as follows. The next section will be devoted to outline the offering of South Africa (SA) in wildlife attractions. This will be followed by an analysis of tourism consumers' experience and activities. This analysis leads then to present the framework for an experience/activity-based segmentation proposed by present study. Finally, the paper will be completed by discussing a set of recommendations, the study's limitations and suggestions for future research.

South Africa: Wildlife Attractions

SA is an emerging tourism destination with a plethora of visitor attractions. The country offers excellent facilities and a strong infrastructure combine to make the country an extremely popular destination for inbound and domestic tourists (SA Tourism 2012). The main elements of attractiveness of SA tourism industry include the following (SA Tourism 2010): superb opportunities for viewing wildlife; a warm temperate climate with the advantage of reverse seasons in the southern hemisphere; stunning scenery and a relaxed outdoor lifestyle; good infrastructure with excellent transport facilities; and an increase in tourism partly stimulated by the 2010 World Cup; the favourable exchange rate between the Rand and other major currencies; and the cost of living in SA is generally lower than in most countries in Western Europe (SA Department of Trade and Industry 2012).

SA offers unique interactions between nature and tourists. It has a global competitive advantage in ecotourism which is the biggest draw card for the country's main markets. The SA Department of Tourism emphasises that a continuous and consistent offering of value for money is necessary and marketing efforts should focused towards wildlife and adventure, while at the same time showcasing SA's lifestyle offering (SA Department of Tourism 2012: 2). Long haul visitors to SA mainly visit nature-based and wildlife attractions, such as Nature Reserves Game Reserves, and mountains (Stevens 2012). Nowadays SA is the most popular safari destination in the world. The concept of 'safari' conjures up images of *adventure, exciting wildlife and dramatic landscapes*. The magnificence of the SA wildlife attractions (Nature reserves, National parks and Game Reserves) offer any visitor a lifetime, unforgettable experience. These

NBAs are areas and locations set aside for conservation purposes. It worth pointing out they constitute more than just a piece of land or a place to keep wildlife. It is a place where ecosystems are protected and conservation is a key (Zijlma nd). Indigenous wildlife in its natural habitat makes for an ideal situation as this helps in providing an environment where growth in numbers at a natural rate can occur.

One of the main challenges that NBAs must address is their marketing, and at this regard, the understanding of their visitors' behaviour is of crucial importance. The factor that determines whether or not a NBA is successful is how the market responds to its offering. It is therefore vital that NBA managers understand their current and potential clientele. This issue, and more particularly the market segmentation, is increasingly important in designing the appropriate service experience to meet visitors' needs and business objectives. This is the topic of the following section dealing with the segmentation framework suggested by present paper.

Analysing Visitors' Experience and Activities

The NBAs offer an experience to their guests, regardless the duration of their visit, varying from few hours to some days. Whatever the duration is, there is a need for planning and designing the service experience. Before moving on, it seems necessary to present an outline of services marketing theory, since this is the academic field within this paper is situated. The tourism service aspect is very important in terms of management and marketing (Middleton et al. 2009; Wang and Pizam 2011). This requires an appreciation of the characteristics of services as they influence the way in which services should be marketed. Gronroos (2000) identified three basic characteristics for most services, namely inseparability, intangibility and variability: (i) Services are at least to some extent produced and consumed simultaneously (inseparability); (ii) Services are processes consisting of activities or a series of activities rather than things (compared to physical products); and (iii) The consumer participates in the service production process at least to some extent (Gronroos 2000: 47). These characteristics of tourism services, along with the market trends involve a series of challenges to be faced by tourism marketers. Obviously the tourism marketing man-

agement should be examined in the context of services marketing (Wang and Pizam 2011). Within services marketing, Booms and Bitner (1981) added to the classic four Ps of the marketing mix – product, promotion (communication), price, and place (distribution) – an additional three: process, physical evidence and participants. Literature (see, for instance, Lovelock and Wirtz 2011; Zeithaml and Bitner 2000) suggests that these marketing variables mean: (i) Process, or the service delivery process through which the service product is actually experienced. It includes reservations, queuing, flow paths, service recovery from service failure, complaint management systems, etc. (ii) Physical evidence, or methods used to render tangible the service to the consumer, at the point of sale, during consumption (the servicescape), and remotely (website, telephone, invoice, etc.). It includes uniforms or dress codes, signage, equipment, colour, lighting, textures, use of sound – essentially any appeals to the senses. Some authors regarded them as the equivalent of ‘packaging’ for physical goods. (iii) Participants: include the consumer, the frontline and the backstage employee, any intermediaries or third parties, and elements such as participant’s recruitment, appraisal and motivation. All three elements involve a greater necessity for working closely with human resources and operations departments.

Literature suggests that nature-based tourism is seen as essentially those tourist activities that involve the direct use of a destination’s natural resources as either a setting or an attraction. Valentine (1992, cited by Lawton and Weaver 2001) refined this perception by suggesting that the interaction between the activity and the natural environment might occur in three ways, namely: (i) Some activities are dependent upon nature for the attraction and/or setting, (ii) Some activities are enhanced by nature, and (iii) The natural environment or nature is incidental to the activity. Hence, nature-based tourism might be defined as “incorporating forms of tourism that maintain a dependent, enhance or incidental relationship with the natural environment, or some aspect thereof, in terms of their utilised attractions and/or settings” (Lawton and Weaver 2001: 35). It is therefore very useful to understand the multidimensional and variable nature of the tourism environment and related experience. Apparently, any tourism environment may be perceived and consumed in different ways

by different tourists (Cong et al. 2014). As Holden (2000) summarized, tourists are likely to perceive and interact with destination environment in a multitude of different ways, depending upon their attitudes, motivations and expectations. In other words, “the attitudes of the tourist to the environment will be reflected in their behaviour” (Holden 2000: 48). Thus, at one extreme, tourists may have a complete disregard for the environment, placing the satisfaction of personal needs above environmental concerns; at the other extreme, they may feel a strong attachment to the destination environment and will attempt to integrate themselves into it. This suggests that tourists’ experience of the environment can be placed upon a continuum of perception and behaviour, as follows: (i) Environment is regarded as setting for action, therefore it has a functional role (that is, it supports specific activities, a place for hedonism, relaxation, etc.) and tourist has conscious or unconscious disregard for environment. (ii) Environment is perceived as a social system; thus it has an interactive role (that is, a place for social interaction) and tourist focuses on social interaction, meaning that the environment is irrelevant to experience. (iii) Environment is considered as being an emotional territory; hence, it plays an emotional role, evokes feelings of well-being, pride, peace, wonderment. Tourist involves him/herself more actively in the environment, performing activities such as gazing, painting, writing, etc. (iv) The natural environment is perceived as self, it plays an identity role; in other words it becomes part of the self. In such a case tourist integrates with place and adapts his/her behaviour to blend with environment (Holden 2000: 49-50).

The NBAs offer an experience to their guests/visitors, like any other tourism and leisure business. This experience is based on natural environment, the SA wildlife, fauna and flora. Drawn on the theory of services marketing, paper’s approach to construct a segmentation framework is based on two main pillars / components of business offering: the service experience and the activities. Literature suggests that tourists do not buy products, or even services; they purchase the total experience that the product or service provides (Cong et al. 2014; Morgan et al. 2010). Business environment has moved beyond simply products or services into engaging or immersing customers in experiences, and a typical example of this development is tourism

and leisure industries (Mehmetoglu and Engen 2011). That is the reason why organisations devote their energy and resources to offering their consumers unforgettable experiences through their goods and services (Pine and Gilmore 1998). Experience management is seen as the way to remain competitive in markets where globalisation and technology have turned products and services into commodities (Morgan et al. 2010). This approach is applicable to a tourism service such as a visitor attraction (Cong et al. 2014; Mehmetoglu and Engen 2011; Vitterso et al. 2000). Undoubtedly NBAs offer service experience. This service is an experience that begins in advance of the actual consumption and in some ways continues after the consumption: the anticipation of the visit; activities performed and services enjoyed on-site; and post-consumption, memories and souvenirs (Middleton et al. 2009). Additionally Lovelock and Wirtz (2011) suggest that service experience also contains three elements, namely: (i) the core service and benefits that the visitor experiences – for example, viewing wildlife, attending a traditional show/dance, having fun, and enjoying a relaxing stay; (ii) supplementary features/augmented services that differentiate a NBA from its competitors – for example, its wildlife opportunities, accommodation, service quality, type of guests, and (iii) the delivery process – for example, the role of staff in the experience. An important characteristic of the marketing of tourism services is that people are also part of the product. In other words, much of guests' satisfaction comes from their interactions with other people experiencing the same visit, game drive, or other recreational activity. This feature means that business management and marketing need to ensure that market segments within their clientele are compatible, and that there is an ease of interaction among people on-site. Apparently the nature of the visitor's total experience is tangible and intangible, and the service experience encompasses two main parties involved.

Suggesting a Segmentation Framework: Experience and Activity-oriented Segmentation

Based on the above analysis, the approach to market segmentation should be considered in two perspectives, namely consumer and business. The consumer's perspective is the *visitor experience* which includes mainly intangible at-

tributes and elements. Literature suggests that the main elements of visitor experience are four: (i) Motives / Motivators: is about why guests do what they do; are those factors which make people want to visit attractions, (ii) Previous experiences, knowledge and perceptions; (iii) Ambience and atmosphere: the interactions with other guests within a setting / atmosphere; and (iv) Experiential qualities/characteristics, senses and feelings (Agapito et al. 2013, 2014; Lin et al. 2014; Vitterso et al. 2000). What are the needs and motives of nature-based tourists? Literature (see, for instance, Kruger and Saayman 2010; Lin et al. 2014; Mehmetoglu and Engen 2011) indicates that these include all the basic human needs (physical, social, and psychological): escaping and social benefits (group activities, people-watching, and interactions); lifestyle and interest in authentic local experiences; and interactions with nature (wild, physical exercise, and sports). Obviously, nowadays more experienced visitors are increasingly demanding ever higher standards of service and facilities. A study performed by Ince and Bowen (2011) focuses on consumer satisfaction in services within the context of tourism, and the dive tourism industry in particular. This paper proposes a framework explaining the formation of diver satisfaction and argues the crucial role of emotion above other satisfaction antecedents.

The second perspective to be considered is the *business offering* also encompassing tangible and intangible elements. However, it is worth pointing out that the former are prevailing over the latter ones. The business offering perspective includes four components, namely: (i) Place: the location with all geographic features; (ii) Physical setting: its design, amenities, facilities and equipment; (iii) Processes used to deliver and experience the services; and least but not last, (iv) Human resources / staff having the necessary skills and capabilities to adequately perform processes and supporting services (Fowler and Bridges 2012; Hosany and Prayag 2013; Lin et al. 2014; Mehmetoglu and Engen 2011). A very high quality service can be attained only when all four elements are managed in effective and efficient ways (Soteriades 2011). The visitors' satisfaction and delighting would be derived from a high standard service delivery creating a memorable experience. The quality of experience largely depends on staff's skills and capabilities, expertise and know-how. Staff must

be dedicated, competent, highly trained, and customer caring. Quality of services is defined as “the relationship between planned services (objective); services provided (outcome) and the customers’ perceived performance based on their expectations” (Soteriades 2011: 8). Therefore the business offering of experiences will be assessed and evaluated by guests based on elements of attractiveness / initial motives, mainly perceived quality and atmosphere.

The common ground, the field in which the two perspectives (visitor experience and business offering) are met and converged is the service experience, including all services and activities provided: accommodation, dining, wildlife activities, entertainment services and education-

al opportunities (events and shows). Therefore, the interrelation and interaction of the two perspectives form up the whole experience and produce outcomes for both parties involved. Figure 1 illustrates the two perspectives and main constituent elements briefly discussed above.

The outcomes of the service experience for both parties are also interrelated. An experience must be valuable for visitors and successful for organisations as well; so both parties would be satisfied. Visitors will benefit from relaxation, fun, recreation, social interaction and mainly by experiencing wildlife, that is, enjoy responsibly natural environment, discover and have interactions of the wild nature. For organizations the resulting outcomes are related to business ob-

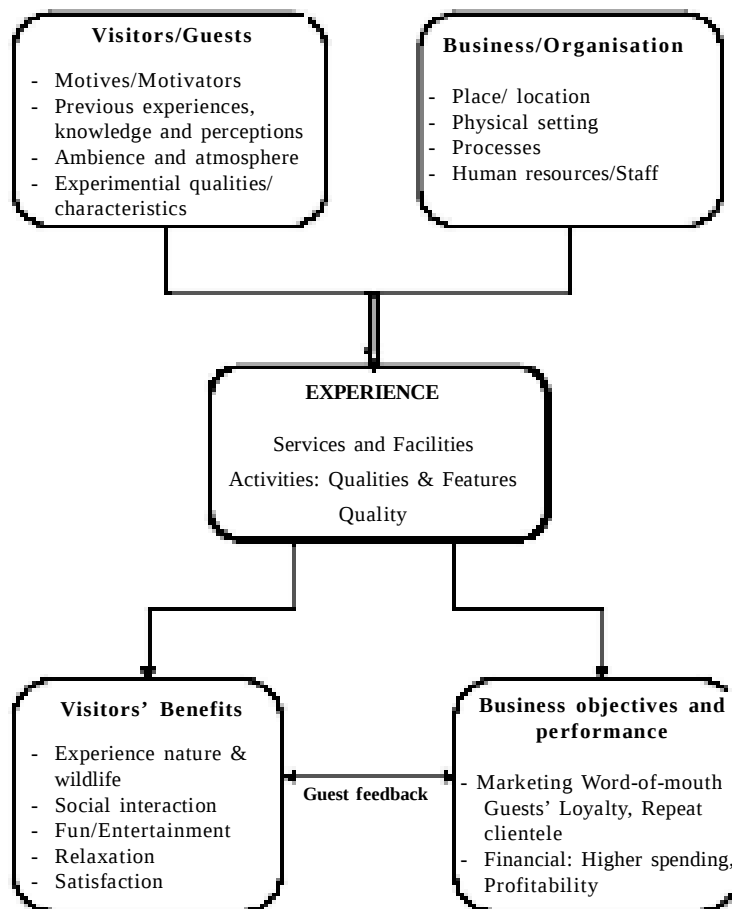


Fig. 1. Service experience in NBAs: two perspectives approach

jectives and performance, mainly in two fields: (i) Marketing: loyalty, recommendations and word-of-mouth, and repeat clientele; and (ii) Financial: higher spending by visitors resulting in improved profitability. Finally, the suggested framework involves the use of market research and feedback from visitors with the appropriate techniques and methods. This is the only way to evaluate guests' satisfaction and to assess business performance.

The above two perspectives approach of NBAs experience allows suggesting market segmentation drawn and based on the concept of experience, that is, visitors' activities and level of participation. As noticed earlier, the various activities are services provided by NBAs business and constitute opportunities offered to guests. They could be classified into the following categories / types (see Table 1).

Table 1: Categories of visitors' activities provided by NBAs

<i>Categories</i>	<i>Activities</i>
Wildlife viewing	Morning and evening open off road drives, Horse, Eco adventure trails, Hot air balloon
Guided walks and hikes	Guided bush walks, walking trails, hikes
Entertainment and recreation	Shows and events (music and dance performances), Animals' feeding and demonstrations
Leisure games and sports	Paint ball, Board and Video games, Archery, Table tennis, Volley ball, Swimming, Tennis
Other / miscellaneous	Team building activities, Wellness and Spa treatments

Visitors during their stay/visit may adopt different behaviour in terms of participation and involvement in the activities provided, depend-

ing on their motives and interests. Hence, it seems reasonable to suggest the following segments based on the activities performed during their stay (see Table 2).

The main criteria of this segmentation are the various activities performed and the level of participation of guests. It is worth stressing that the above suggested segmentation, designed as Experience/Activity-Oriented Segmentation (EAOS), must be viewed as an initial approach, a framework based on the two adopted criteria.

CONCLUSION

Marketing is a structured and consistent way of thinking about managing a tourism / leisure organisation to achieve objectives related to market, clientele, satisfaction and profitability. The core of NBAs marketing is the focus on existing guests and potential visitors. Successful marketing flows from a complete understanding of these tourism and leisure consumers, who they are and what needs and requirements they seek to satisfy. From this knowledge, NBAs organisations can develop strategies that span the whole service experience.

The main aim of this paper was to suggest a framework for segmenting the NBAs' market. The study's approach has been based on the concept of experience and the related activities. The consumer research it is not just about understanding tourists from the outside, but also about getting a real feeling for what it is like to lead their lives. Only then the tourism and leisure operators will be in position to create, design and deliver emotional experiences that go beyond mere visitor satisfaction. This is equally, and eventually most importantly, true for NBAs. It is estimated that the proposed segmentation

Table 2: Suggested Experience and Activity-Oriented Segmentation (EAOS)

<i>Segment's name</i>	<i>Level of participation</i>	<i>Profile (in terms of activities)</i>
<i>Passive Guests (PG)</i>	Inexistent	Hedonists, persons looking for relaxation, spend time without participating in any activity, just chilling out.
<i>Light Guests (LG)</i>	Low / Very limited	They are merely interested in fun and sports not requiring high physical effort / condition.
<i>Semi-active Guests (SG)</i>	Medium	More interested in wildlife, although they seek a balance between recreation opportunities and environmental/wildlife activities
<i>Active Guests (AG)</i>	High	High curiosity and much focused on wildlife. Participating in all types of environmental / wildlife activities

– Experience and Activity-Oriented Segmentation (EAOS) – could contribute to this direction and with a degree of flexibility. It allows gain a deeper understanding of tourism behaviour, in the sense that it enhances to determine changing needs and desires of visitors and guests of NBAs.

RECOMMENDATIONS

The above analysis, drawn within the theory of services marketing and based on the concept of service experience, indicates that marketing manager needs to work closely with other managers, departments and functions to ensure that guests' needs and expectations are fully met. All business plans have one function, to achieve the organisation's objectives by focusing on the needs of its target market. Therefore, it is important to create a synergy between marketing, human resource and operations management aiming at offering to guests the adequate service experiences.

It is believed that visitors and guests want their real experiences reflected and connected to their very specific and personal needs. Tourism and leisure operators must become truly consumer centric, they must adopt research that listens to the consumers' voice, and only then, they will be able to deliver experiences that tourists really appreciate. Furthermore, in a particularly volatile and fashion led market, NBAs have to focus upon particular market segments rather than trying to appeal to everyone.

STUDY'S LIMITATIONS AND SUGGESTIONS FOR FUTURE RESEARCH

It is worth pointing out that the proposed segmentation is merely a conceptual framework. The latter must be regarded as an initial approach, a framework based on two criteria, that is the various activities performed and the level of participation of guests. It must be tested in order to be validated and finalised by means of an empirical study using a qualitative method. It is estimated that the most appropriate methodology at this end is a focus group that is in depth interviews from NBAs Managers and an Experts Panel. The final outcome of this empirical investigation would be a more precise and accurate segmentation in operational terms for NBAs or-

ganisations. Only then the segmentation EAOS would be operational and useful to NBAs managers and marketers. This will be the second stage of research project, as already planned. Another interesting idea for future research could be to perform similar studies in other countries offering nature-based attractions and to carry out a comparative analysis aiming at identifying similarities and differences.

The main aim of the future research and empirical studies should be the evaluation and the assessment of the proposed segmentation in terms of feasibility factors and characteristics of effectiveness, as suggested by related literature. The feasibility of market segmentation is mainly determined by five factors, namely: identification, measurability and size, accessibility (segments must be accessible to marketing activities), appropriateness (substantial and actionable), and responsiveness to marketing communications and activities.

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