INSIGHTS INTO HOW REGIONAL TOURISM OPERATORS VIEW THEIR MARKETS

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ABSTRACT

Many researchers have considered segmentation in the tourism context and these efforts have enabled us to understand the bases that tourism destinations can use to segment markets and the bases that are more accurate predictors of future tourist behaviour. To date, all studies have used tourist data to profile the tourists travelling to a destination and most studies have used quantitative data. Addressing a key gap in the literature, this research sought to understand how tourist operators actually segment their market. Twelve tourism operators (activity operators, accommodation providers, destination marketing organisations and other stakeholders) were interviewed in one regional Australian tourism destination. Results indicated that different segmentation bases were used by different tourism operators. Activities sought, location, age, and trip purpose were the variables most frequently used by tourism operators to describe tourists. A tourist operator view is important because tourist operators can describe the tourists that are currently using their services. Given that different tourist operators attract different tourists, insights from these tourism operators can be compared with tourist data, thus enabling researchers to determine if they are adequately describing the tourists travelling to a destination.

Keywords: Segmentation; case study; tourism; destination

INTRODUCTION

Tourism is one of the world's largest industries and creators of jobs (Goeldner & Ritchie 2006). Research indicates that in 2006 tourism generated, directly and indirectly, 10.3 per cent of global GDP and nearly 235 million jobs in the world-wide economy (World Travel and Tourism Council 2006). Tourism is certainly an important part of the Australian economy. According to the Australian Bureau of Statistics (2006), tourism accounted for 3.9 per cent of total Australian GDP (or $37.6 billion) in 2005-06 and some Australian states are economically dependent on tourism. For example, tourism contributes significantly to the economic well being of Queensland and at present tourism is the third largest export earner for the state and employs 7.3 per cent of the state's workforce (Office of Economic and Statistical Research 2006; Queensland Department of Tourism, Fair Trading and Wine Industry Development 2006).

Tourism is an effective driver for the development of regional economies that can attract government investment. If planned and managed appropriately, tourism contributes to

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development which is economically, ecologically and socially sustainable. Tourism, like other forms of development, can cause negative impacts. However, the tourism industry has less impact on natural resources and the environment when compared with many other industrial alternatives. Tourism is based on enjoyment and appreciation of local culture, built heritage, and natural environment. Thus, tourism may provide an economic incentive to conserve natural environments and habitats which might otherwise be allocated to more environmentally damaging land uses, thereby helping to maintain biodiversity (Beaumont 2001). Taken together, this suggests that apart from its long term economic benefits, tourism is an industry that can provide a vehicle for investment in preserving culture and natural heritage.

Regions that recognise the importance of tourism and the potential that tourism offers for future economic development require strategies that are market driven if they are to attract tourists. It is commonly acknowledged that markets are heterogeneous, comprised of tourists with myriad motivations for travel and other key defining characteristics. Small business owners need to conserve limited financial resources (Perdue 1996). Segmentation offers small businesses a base to break large heterogeneous markets into smaller homogeneous segments to distinguish tourists based on different consumer needs, characteristics, or behaviour (Goldsmith & Litvin 1999). Segmentation offers a mechanism that may assist to frame management thinking (Aguas, Costa & Rita 2000).

The importance of segmentation as a basis for developing marketing strategy is widely acknowledged (e.g. Bieger & Laesser 2002; Kastenholz, Davis & Paul 1999; Cha, McCleary & Uysal 1995) and there has been a good deal of research into tourism destination segmentation using quantitative visitor/tourist data to profile tourist types (e.g. Bieger & Laesser 2002; Frochot 2005; Johns & Gyimothy 2002). Few studies (e.g. Laws, Scott & Parfitt 2002; Scott and Parfitt, 2004) have used qualitative methods. This research has assisted us to understand the ways that tourism destinations can effectively segment tourist markets with a range of different segmentation bases available to practising marketers. Researchers have not considered how tourism operators view their markets. Tourism operators interact with tourists and they are able to describe the tourists who use their services. Further, based on the findings of Laws et al. (2002) different tourist operators may attract different tourists.

This paper considers what is currently known about segmentation in the tourism context and then continues by taking an alternate view. This paper considers segmentation through a tourism operator lens for one regional destination.

LITERATURE REVIEW

As noted by Bieger and Laesser (2002) there are many studies in the tourism context using different descriptors and discriminating variables to segment a market. In reviewing the tourism marketing literature, demographic, psychographic, geographic and behavioural characteristics are the most frequently used segmentation bases. Researchers use these bases either singularly (e.g. Kim & Lee 2002; Reece 2004; Simpson & Bretherton 2004) or in combination (e.g. Baloglu & Shoemaker 2001; Bojanic & Warnick 1995; Court & Lupton 1997; Dolnicar & Fluker 2003; Etzel & Woodside 1982; Morrison, Hsieh & O'Leary 1994) to develop tourist profiles for chosen destinations.

Demographic segmentation categorises tourists by variables such as age (Anderson & Langmeyer 1982), gender, family life cycle (Fodness 1992), income (Juaneda & Sastre 1999), occupation, education, religion, race, nationality (Bowen 1998) and socio-economic status (Gartner 1996, Morrison, Braunlich, Cai & O'Leary 1996). Demographic characteristics are easy to measure and are generally accessible (Brayley 1993). Psychographic segmentation has also received considerable attention as a segmentation base in the tourism literature. Psychographic segmentation involves assessing potential customers' psychological characteristics such as behaviour, interests, motivations and attitudes (Gartner 1996). Markets can also be segmented using geography as a base. Geographic segmentation involves segmenting tourists based on their place of residence (Gartner 1996). The assumption is that people living in similar areas share similar motivations and behavioural characteristics.

Whilst demographic and psychographic segmentation have been popularised as a basis for segmenting markets (Brayley 1993), there is evidence to suggest that demographic and geographic segmentation bases are poor predictors of tourist behaviour (e.g. Andereck & Caldwell 1994; Cha et al. 1995; Johns & Gyimothy 2002; Letho, O'Leary & Morrison 2002; Morrison et al. 1996; Prentice, Witt, & Hamer 1998). Logically, the most effective predictor of tourist behaviour should be the behaviour itself (Johns & Gyimothy 2002). Behavioural segmentation has evolved as yet another base that marketers can use. Behavioural variables include factors such as trip types, Internet use, travel arrangement, and travel expenditures (Hsu & Lee 2002).

Segmentation studies have been conducted in many different countries including America (Baloglu & Shoemaker 2001; Bojanic & Warnick 1995; Bonn, Furr & Susskind 1999; Fodness 1992; Morrison et al. 1996), Australia (Dolnicar & Fluker 2003), Britian (Juaneda & Sastre 1999; Letho et al. 2002), Germany (Baloglu & Uysal 1996), New Mexico (Court & Lupton 1997), New Zealand (Simpson & Bretherton 2004), Japan (Cha et al. 1995), Norway (Dalen 1989), Portugal (Aguas et al. 2000, Kastenholz et al. 1999), Singapore (Goldsmith & Litvin 1999; Keng & Cheng 1999), Switzerland (Bieger &Laesser 2002, Papadopolus 1989), Taiwan (Mok & Iverson 2000) and Turkey (Mudambi & Baum 1997). The focus of segmentation studies to date has been to develop tourist profiles for the destination under study using visitors' data. For example, Dolnicar and Fluker (2003) used a combined segmentation approach of psychographics and demographics to investigate the characteristics of surf tourists to Australian coastal destinations. They found a psychographic profile of five segments with characteristics including surfing experience and level of adventure. It was identified that the average age of surf tourists was 30 and the majority were male.

Kim, Wei and Ruys (2003) also combined psychographics and demographics to segment the senior tourists who travel to Western Australia. Four segments were identified with classifying characteristics including gender, travel party composition, income and motivations. As an example, the *active learner* was mainly female and usually travelled with other family members and friends. The active learner does not have a high yearly income, but is highly motivated in personal growth/learning and development, embracing new experiences and taking part in activities.

Whilst most segmentation studies have collected visitor data using quantitative data using questionnaire surveys (e.g. Baloglu & Shoemaker 2001, Dolnicar & Fluker 2003; Letho et al. 2002), there are a few cases where qualitative research has been utilised. Both Laws et al. (2002) and Scott and Parfitt (2005) used semi-structured interviews and focus groups with

Australian visitors to Tropical North Queensland in Australia. This research was used as a basis for formulating a structured questionnaire for subsequent psychographic segmentation research. Laws et al. (2002) identified four motivational groups classed as *Activity focused*, *Image focused*, *Other people focused* and *Self-focused*. The authors concluded that the *Activity focused* group goes on vacation and to particular destinations with clear objectives for undertaking particular activities. Studies have not considered how tourism operators view their tourists. Specifically, studies have not considered which variables tourism operators use to describe their markets.

RESEARCH APPROACH

A case study with semi-structured interviews was used to identify how tourism operators describe their market. The case study approach has been widely used by researchers seeking to understand marketing phenomena (e.g. Agarwal 2002; Awaitefe 2004). This technique permits researchers to investigate complex issues in some depth (Yin 2003). Multiple case studies were chosen as they firstly provide a purposive sample and the potential for generalisability of findings (Miles & Huberman 1994). Tourism markets are complex involving a variety of stakeholders (Prideaux & Cooper 2002). Efforts were made to include participants from a wide cross section of the stakeholders in the tourism destination. Interviews were conducted with a range of accommodation providers from caravan parks to high quality resorts, activity providers—including whale watching and fishing operators—destination marketing organisations, and other tourism stakeholders.

Thirteen semi-structured interviews with twelve tourism operators were held. This provided a thorough overview of tourism at the regional destination under study. Each of these representatives was employed in tourism and was knowledgeable about how the destination is marketed to tourists. These representatives have also conducted marketing research using techniques such as interviews on their own tourists, so their judgements were useful. Due to human resource constraints, one interview was conducted at eleven of the twelve organisations. Case C, which was a larger organisation and not as constrained with human resources, allowed two interviews to take place with employees from their organisation. The interviews were conducted during March and April 2007. Respondents gave permission for their interview to be recorded after confidentiality of responses was assured. Interviews averaged 40 minutes and were recorded and transcribed for analysis. In total, 362 pages were analysed. Prior to analysis, responses to each question were entered into an Excel spreadsheet. The data analysis employed qualitative procedures aimed at identifying topics and sub-topics relating to the market segmentation of tourists by the interviewees. Statements were coded using, first, an open and, secondly, an axial coding scheme as recommended by Strauss and Corbin (1988). Each case was allocated an alphabetical label to ensure confidentiality.

The destination

Tourism Research Australia figures reveal that international visitors spent more than $3.5 billion across all of Queensland in 2006—up 10.3 per cent from the previous year (Fraser Coast South Burnett Weekly Update 2007)**.** The Fraser Coast was selected for this study because it was the best performing region[1] in Queensland in terms of percentage growth with international visitor spending increasing by 30 per cent to $68 million in 2006 (Fraser Coast South Burnett Weekly Update 2007).

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[1] Brisbane outperformed the Fraser Coast region in 2006.

According to Tourism Queensland (2007), in the year ended March 2007 1.2 million people visited the Fraser Coast spending more than $360 million. More than 1,800 hotel, motel, guest house and serviced apartment guest rooms are available on the Fraser Coast, but they achieve occupancy rates of only 55%. Taken together, these data suggest there is room for improvement in visitor numbers.

RESULTS
The thirteen respondents were asked to discuss the tourists who use their services. Prompts were used to elicit responses. Respondents were encouraged to consider tourists in terms of a number of variables that fit under the four main segmentation bases, namely *age, gender, travel party composition (TPC), income, education* (demographic), *location (place of residence)* (geographic), *trip purpose, motivations, lifestyle* (psychographic), and *expenditure, activities sought, purchasing behaviour* (behavioural). The results are summarised in Table 1.

All segmentation bases (e.g. demographic, geographic, psychographic and behavioural) were frequently used by tourism operators. Tourism operators used different segmentation variables to describe the tourists that use their services. Frequent variables used to describe tourists included *activities sought* (8 responses), *age* and *location* (7 responses each), *trip purpose* (6 responses) and *motivations* and *income* (5 responses each). Segmentation variables used less frequently included *expenditure, lifestyle, TPC, purchasing behaviour,* and *gender.*

Most tourism operators were able to describe their tourists using more than one segmentation base. Four of the cases (A, C1, C2 and E) utilised demographic, geographic, psychographic and behavioural segmentation variables. Case A was able to list the segmentation variables in descending order of importance. *Put those two* [age and location] *together for sure. Trip purpose and motivations would be the next one. Then activities and expenditure. Then group income in there.* Case C1 identified *location* as a dominant variable, but found it difficult to distinguish the level of importance between the other eight identified segmentation variables. Three tourism operators described their tourists using one segmentation base. Two of these respondents were small tourism operators who did not appear to target specific markets. The first, Case B, stated that they target using location. *We don't try to target them. But when we did we used the telephone and rang particular areas.* Case I focused on activities as the sole variable by claiming that *we'd be aiming to get people into here as an activity to experience life as it used to be. I wouldn't look at any other criteria.* Conversely, Case K, which was one of the larger organisations, argued that they focus on *price motivation* as the only relevant criterion. The respondent argued that *all people are price motivated where it comes to touring. And what product they are going to go* [to]. *It's just price motivation. They weigh up the pros and cons of a tour and it's price motivation.*

TABLE 1
The bases used by tourism operators to describe their tourists

Case	Demographic					Geographic	Psychographic			Behavioural			Total responses
	Age	Gender	TPC	Income	Education	Location	Trip Purpose	Motivations	Lifestyle	Activities Sought	Expenditure	Purchasing Behaviour	
A	√(*)			√		√(*)	√	√		√	√		**7**
B						√(*)							**1**
C1	√			√		√(*)	√	√	√	√	√	√	**9**
C2	√					√			√	√(*)			**4**
D	√(*)					√	√						**3**
E	√					√	√(*)			√			**4**
F	√	√		√(*)			√	√		√			**6**
G	√(*)		√(*)							√(*)	√(*)		**4**
H				√				√	√			√(*)	**4**
I										√(*)			**1**
J				√			√(*)			√(*)			**2**
K								√(*)					**1**
L	√(*)		√(*)			√ (*)							**3**
Total	**8**	**1**	**2**	**5**	**0**	**7**	**6**	**5**	**3**	**8**	**3**	**2**	

* Indicates most important variable/s

It was identified that whilst respondents may have listed similar distinguishing variables, each of the tourism operators tended to segment their tourists differently. Several examples are listed. Case E argued that *trip purpose, activities sought and nationality* (location) *all play a part. And age, that'd be about it*. Case L, conversely, stated that they *segmented the market by lifestyle stage* (a combination of age and travel party composition) *and demographics. That's how we currently do it*. The respondent later argued that the *visit market tends to reside in Brisbane and the South East Queensland*, indicating that location may be an additional measure of segmentation. Case F showcased the difference in their segmentation technique by indicating that they segment *first, well, definitely income, second would be age. You know about the 25 to 45 age group,* [third] *trip purpose, why they are coming here. Activities* [Activities Sought] *would be fourth, and then motivations*. Case D argued that they would *put age straight at number one, as we have the highest level of patronage over 55. We target the older market...And then we would probably want a second selection of nationality because we try to promote to the backpacker market...Trip purpose* [third]*—the idea of the trip purpose is we do a different tour*.

It was also noted that certain operators focused on segmentation variables that were important to them, but were deemed irrelevant by others. For example, Case H argued that they focus on *purchasing behaviour...because you want to know what time, how much*, whereas Case I suggested that *I wouldn't really be worried about purchasing behaviour*. Case E suggested that *we don't know anything whatsoever on that* [purchasing behaviour]. *Whether they've got 20 cents to their name or 20 million you know. It doesn't affect us here*. Case G suggested that *travel party composition* was very important, whereas Case C1 argued concerning this same variable that *I don't think that matters*. Case C1 considered location as the most important variable, arguing that *a lot of the target market is segmented by location*. Conversely, Case F suggested that location is *lowest on the list. I mean they come from all backgrounds*. Case I also suggested that *I wouldn't worry about nationality*.

DISCUSSION
The case study method employed in this study yielded insights into how tourism operators view their market. Different tourism operators within a single tourist destination attract different tourists and this finding is consistent with Laws, et al. (2002) who demonstrated tourist differences for two different hotels in one destination. The insights gained from this study suggest that tourism researchers need to consider segmentation at the tourism operator level rather than at the destination level. To date, the majority of tourist segmentation studies have used consumer data to describe segments for the destination as a whole. While such endeavours provide an overview of tourists frequenting a destination they are not likely to assist a tourism operator to distinguish between the customer types using their service.

This study extends our understanding with the key finding that different operators use different segmentation bases to describe the tourists that they attract. A tourism operator perspective is likely to benefit researchers because it provides a holistic view of a destination that accommodates the complexity of destination management. A stakeholder view is recommended to ensure that researchers familiarise themselves with destination stakeholders.

This study supports the tourism literature that a tourism market at a regional destination can be segmented, firstly, in different ways and, secondly, using singular or multiple segmentation forms. Whilst it was identified from the results that most of the operators utilised multiple segmentation forms, this study supports research that profiled tourists using

a single form of segmentation (e.g. Kim & Lee 2002; Simpson & Bretherton 2004). For example, Case K utilised only psychographic segmentation.

This study supports the notion that multiple forms of segmentation can also be used to profile tourists at a regional destination. Whilst it has been concluded that utilising demographics and psychographics has been the most popular forms of segmentation for describing tourists (e.g. Brayley 1993), this study suggests that all four forms of segmentation identified in the literature are used by operators to profile their tourists. This supports the findings of Johns and Gyimothy (2002) who used all four forms of segmentation to predict tourists' behaviour in Bornhan, Denmark. Whilst authors have emphasised either geographic (Bonn, Joseph & Dai 2005; Moscardo, Pearce & Morrison 2001) demographic (e.g. Burnett & Baker 2001; Juaneda & Sastre 1999), psychographic (e.g. Baloglu & Uysal 1996; Cha et al. 1995) or behavioural (Bonn, Furr & Susskind 1999; Kastenholz et al. 1999) segmentation in their research, this study suggests that all four forms of segmentation are used to frame tourism operator thinking. Whilst authors such as Moscardo et al. (2001) have argued that geographic segmentation is rarely reported in published research, this study indicates that the variable of *location* is used by tourism operators to attract tourists. This supports Moscardo et al.'s (2001) claim that the use of geographic variables such as usual residence provides important descriptors to use in the development of marketing strategies and should be used in combination with psychographic or behavioural segmentation.

Whilst a majority of academics (e.g. Baloglu & Uysal 1996; Carmichael & Smith 2004; Oh et al. 1995) have utilised secondary data as a basis to define and analyse tourism segments, these studies would not include all possible segmentation variables relevant to the specific destination. Additionally, whilst studies have asked tourists to complete a questionnaire survey as a basis to define their market segments (e.g. Baloglu & Shoemaker 2001; Goldsmith & Litvin 1999; Mok & Iverson 2000), these studies have aimed to segment tourists based on the destination rather than tourism operator level. As this study has found that tourism operators differ in how they segment their tourists at the same regional destination, this provides justification for research to be conducted at the tourism operator level rather than the destination level. For example, as regional tourism providers such as a 5 star resort and a backpacker hostel will aim to attract tourists that require a place to stay, the way they may segment their tourists may differ as they will be attracting different tourists. Therefore, it is important to identify whether similarities or discrepancies exist at the tourism operator level. These results can then be compared to consumer data to determine whether the segments adequately describe the tourists visiting a destination.

CONCLUSION
To date the majority of market segmentation research has used a quantitative approach based on consumer data. By using a qualitative method based on the operators' perspective, this study contributes to the literature by extending our understanding of segmentation and identifying that different tourism operators attract different types of tourists, and that different tourism operators utilise different segmentation bases.

Implications for management
This paper has contributed to management practice by identifying how tourism operators at a regional destination currently segment their tourists. A managerial implication from this study is that tourism operators varied considerably in the way that they segment their tourists with variables such as *purchasing behaviour* being identified as significant by some respondents and irrelevant by others. This study did suggest that activities sought, location,

age and trip purpose were identified the most frequently and were considered the most important. Therefore, management should focus on targeting tourists that are searching for specific activities, and a trip purpose, that come from a particular location and are at a specific age as they appear prevalent at this destination.

Furthermore, this study suggests that the marketing approach used by tourism providers could be improved. Several of the tourism operators indicated that they did not segment using certain variables such as lifestyle, purchasing behaviour and expenditure. There has been an emphasis on psychographic and behavioural segmentation in the recent tourism literature (e.g. Frochot 2005; Simpson & Bretherton 2004) as these segmentation variables are more able to predict tourist behaviour (Johns & Gyimothy 2002). Focusing on these variables may help tourism providers to be able to determine which tourists are most likely to come to their destination. It is also noted that some of the tourism providers did not focus on segmenting their market, or if they did, they only utilised a few variables. It is recommended that all of the tourism providers segment their market, as segmentation provides a means to gain a competitive advantage. Segmentation can help tourism operators to efficiently allocate scarce resources (Kastenholz et al. 1999). Understanding tourists will help tourist operators to predict the type of tourist that will come to their organisation. Furthermore, if there is a tourism segment that the tourism operator requires and the destination marketers are not targeting, the operator may need to conduct their own marketing initiatives to ensure that they reach their target market.

Implications for researchers
From evaluating these research findings it is recommended that a dyadic approach be taken in aiming to segment a tourism market by academic researchers. As the first step, research could be conducted with tourism stakeholders prior to examining consumer data. A stakeholder view is important because different tourists use different tourist services. Researchers need to consider hotels, restaurants, tour operators, government bodies, and indeed any individual or firm that directly or indirectly supports tourism (Blain, Levy & Ritchie 2005). A second step would then involve examination of consumer data. A dyadic approach would enable researchers to determine if they are adequately describing all the types of tourists visiting a destination.

Further research is recommended to increase our understanding of how tourism operators view their tourists. It would be of value to consider where or why operators chose these segmentation schemes to further our understanding of segmentation from a tourist operator perspective. Future research considering how tourism operators view their tourists is also recommended for urban destinations, other regional locations and other countries. These endeavours would permit a more comprehensive understanding of how tourism operators view their tourists to emerge.

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