

Market Analysis of the Trent University Nature Areas for Interpretive Planning

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Abstract

One important aspect of developing an interpretive plan for parks and protected areas is an analysis of the market for interpretive services. This component of the planning process provides information regarding who your visitors are and what they are expecting from their visit. Market analysis for interpretive programming is not always as thorough as it should be for all public use parks and protected areas in Canada. This is in part due to the lack of funding for such endeavours but it is also a direct result of the fact that a general use, low cost process for delineating potential visitors to a site is non-existent in interpretation literature. In many cases, interpretive planning is researched and set in motion without a market analysis - resulting in costly alterations to program and infrastructure in later years. This paper will present a strategy for implementing a low cost interpretive planning market analysis for the Trent University Nature Areas, Peterborough, Ontario and outline implications of the analysis process for other like parks and protected areas.

Introduction

Interpretation is an important and widely used method of presenting information in understandable terms to facilitate appreciation of meaning. It is utilized in parks and protected areas for a variety of purposes including education, increasing tourism, guiding visitor actions and nature appreciation. Given such weighty purposes, it is essential that an interpretive planning process be used for the development of interpretation programming. One important aspect of developing an interpretive plan for parks and protected areas is an analysis of the market for interpretive services. This component of the plan provides information regarding potential demand for services and visitor expectations. Lack of staff time and funding restrictions often make it difficult to complete a market analysis for a site before embarking on interpretive program implementation. However, a market analysis that results in information regarding visitor demand will prevent alterations in programming due to lack of interest in the near future and it will provide demonstrable support for continuation of interpretation. This paper will present a strategy for market analysis for interpretive planning as it pertains to the Trent University Nature Areas and other like protected areas.

This paper will overview various market analysis techniques for interpretive planning derived from a literature search and contact with various natural heritage agencies in Canada. This will be followed by an overview of the Trent University Nature Areas and the quantitative and qualitative market research that was carried out in early 1999. Finally, conclusions are reached regarding the market analysis process used at Trent University.

Market Analyses for Interpretive Planning

The market analysis component of interpretive planning has evolved considerably over the past two decades. Interpretive plans have been transformed from a product-oriented marketing approach to consumer-oriented. The product-oriented approach involves production of services based on resources and agency mandate; the public must then be persuaded to make use of these services (Knudson, Cable and Beck 1995). The consumer-oriented approach "first tries to determine what clients want, then provide services to meet those wants" (Knudson, Cable and Beck 1995: 103). Extensive research using social and behavioural sciences has been carried out by advocates of the consumer-oriented approach (Knudson, Cable and Beck 1995). Most recent interpretive planning efforts recognize that a balance between these two methods of market analysis creates services that protect the resources concerned but also appeal to the visitors.

The actual process of carrying out a market analysis for interpretive planning should focus on potential visitors to the site and audience opportunities for specific programs (Veverka 1994). In the past, quantitative surveying making use of demographic information has been the foremost method of gathering market information. Visitor demographics, related to site use patterns, can reveal information regarding selections made by varying age groups, different socioeconomic backgrounds and from a variety of locations. Visitor preference studies are also usually carried out in a survey format but focus on self-expression of interpretive service choices by the visitors (Knudson, Cable and Beck 1995). In recent years, sociologists have been applying marketing theory to recreational and travel-based studies with a technique called 'segmenting demand' (Knudson, Cable and Beck 1995). Knudson, Cable and Beck define segmented demand as involving segmentation of the visitor population based on demographic characteristics such that comparisons can be made between the actual clientele and the kinds of services being used. The theory is that groups not being served adequately can then be targeted for information regarding their interpretive preferences. If groups are homogenous enough, a "program can be developed according to the needs and interests of a specific audience" (Propst and Roggenbuck 1981). Market segmentation via demographic information is an asset to any site but depending on the approach taken, it might be less helpful to new sites without an existing clientele.

Any type of market analysis can be carried out in a qualitative or quantitative manner. Qualitative research refers to investigation based on meaning, character or nature while quantitative studies focus on measurement of amounts (Smith and Glass 1987). Generally, the results of qualitative research are derived from face-to-face interviews, observation or focus groups. Quantitative research relies primarily on surveying techniques for the generation of large quantities of responses for statistical calculation. Though some researchers and statisticians would argue that quantitative research is superior to qualitative, both can be of equal value depending on the goals of the research. Combination of the two methods can further strengthen the reliability of results.

Beyond this general survey of market analysis concepts, a variety of Canadian sources were examined regarding the methodology used to determine potential visitor demand. A report entitled *Phoenix Rising?* produced for Parks Canada in

December, 1997 looked closely at the manner in which educational activities were related to visitor use patterns. The report suggested programming could be more productive with increased focus in this area. Specifically, the report lauded the efforts of the Bruce Peninsula National Park in development of a market communications strategy planning grid (*Phoenix Rising?* 1997). The chart lists specific market groups for Bruce Peninsula National Park, examines their client needs, potential strategies for reaching them and prioritizes the target markets (Bruce Peninsula National Park and Fathom Five National Marine Park). The process of development of the planning chart through staff teams and surveys will allow the park "to better focus their educational activities on target audiences and messages" (*Phoenix Rising?* 1997: Section 3.3). Recommendations from the *Phoenix Rising?* report are that each site should better define specific audiences, related programs and learning outcomes. In the past Client Survey Cards have been the main method of obtaining visitor data for Parks Canada but increased market research is recommended by the *Phoenix Rising?* report in the form of further efforts to reach the visitor through specific educational activities for target audiences.

Provincial Parks within Ontario also rely on general and interpretive visitor surveys to obtain information regarding visitor demographic and use patterns. Some parks carry out an interpretive visitor survey each year while others only implement it sporadically. The information provided from it is intended to "gather information on visitor participation in and knowledge of the park interpretive programs" (Ontario Parks 1996: 1). It is also possible that informal qualitative research is being carried out on a park-specific basis. Two Ontario non-governmental organizations—the Waterfront Regeneration Trust and the Rouge Park Alliance—relied partially on community partners and interested organizations to help define the potential market for their respective sites (Schollen and Company Inc. and LURA Consulting Group 1998; LORD Cultural Resources Planning and Management Inc. 1995). In a period when cooperative implementation of interpretive programming is increasingly a necessity, partnering with other organizations—either service users or service providers—in order to gain a better share of the market is often a wise business decision and certainly aids in understanding the potential market.

Case Study: Trent University Nature Areas

An interpretive market analysis strategy was carried out for the Trent University Nature Areas, Peterborough, Ontario as part of a pilot study of the interpretive planning process. The strategy was developed using some of the above-mentioned research and reflects the necessity for a low budget and low person hours approach.

The twelve nature areas of the Trent University Symons Campus total approximately 300 hectares in size, have been inventoried for significant natural features and some historical features and designated as protected by Trent University. Notably, little interpretive use of the Nature Areas has occurred and no overall interpretation plan has been developed. This makes the Trent Nature Areas an ideal pilot case for development of a process resulting in definition of interpretation opportunities.

The Trent Nature Areas are: the Wildlife Sanctuary; Canal Drumlin Nature Area; South Drumlin; Archaeological Centre Wetland Area; Otonabee College Wetland; Lady Eaton Drumlin Nature Area; Highway 28 Woods; Total Loss Farm Stream; Lock 22 Nature Area; Promise Rock Coniferous Woods; Wetland Complex and Ninth Line Nature Area (Figure 1).

Trent University Nature Areas Interpretive Market Analysis

The first step in any interpretive market analysis should be a general literature search regarding trends in potential visitor demand that would apply to the site in question and research on other local natural area interpretive opportunities. For the Trent University Nature Areas, information was drawn from Tourism Canada, Statistics Canada, the Canadian Tourism Commission, Ontario Parks, Peterborough Kawartha Tourism and Convention Bureau and a previous use survey com-

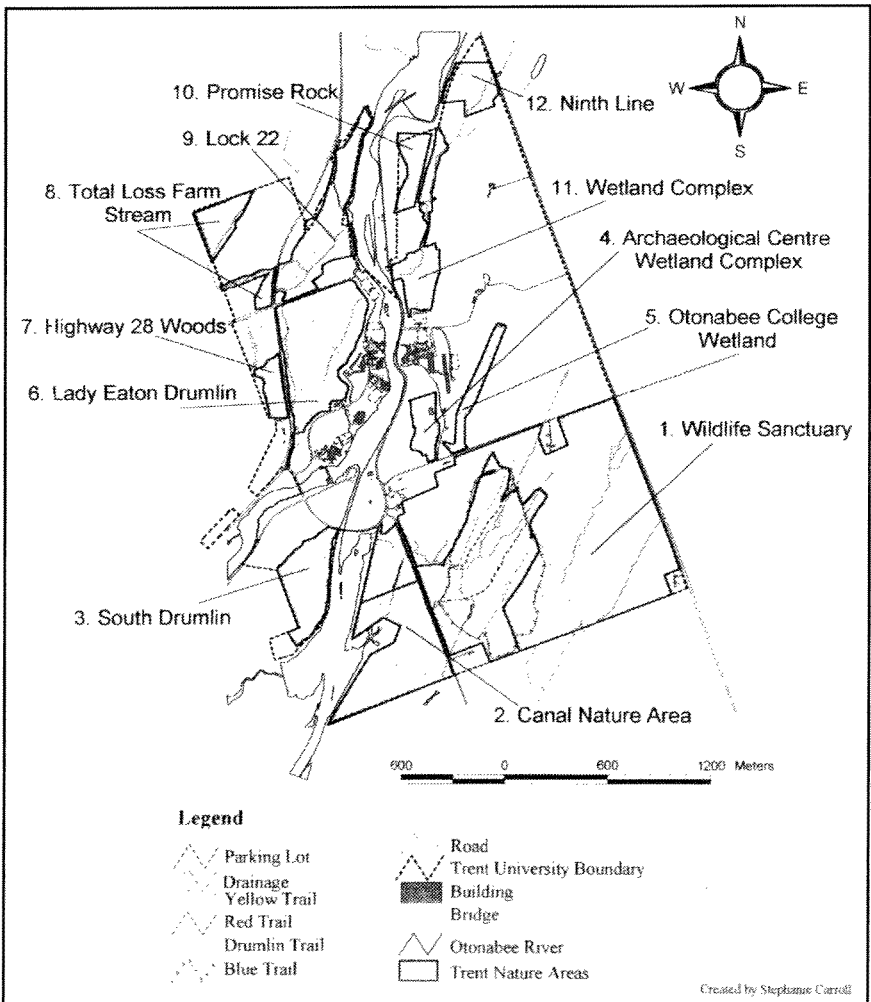


Figure1: Trent University Nature Areas

pleted by Trent Nature Areas users in 1995. The sources of information researched will differ depending on the site in question and the amount of previous interpretive market research done in the area.

In order to obtain reliable results, it was decided to combine the quantitative and qualitative methods of examining potential visitor demand for interpretation programs. The quantitative phase involved surveying the users of the Trent Nature Areas regarding their current use of the areas and interest in possible future interpretation programs. In the second phase of the research, potential user groups were interviewed about their current and potential uses of the nature areas as well as future partnership opportunities. Each of the phases of the market analysis is described in more detail below. The entire market analysis process as it is outlined here relates to the consumer-based approach to interpretive planning. However, this information will be integrated with other site information in the final interpretive plan.

Quantitative

This section of the market analysis focuses on the preferences for interpretive programming expressed by the current users of the Trent University Nature Areas. A survey was carried out in the Wildlife Sanctuary from Friday, February 5th, 1999 to Sunday, February 7th, 1999. This survey expands upon the above-mentioned user survey of 1995 and delves more into interpretive opportunities. The survey was implemented during the winter season due to the fact that this was known to be one of the highest use periods for the nature areas (Kivari and Shillinglaw 1995). It will also be implemented in the summer season.

Surveying occurred for a total of 16 hours, eight hours on the weekday and eight hours on the weekend. This surveying time frame was used in order to get a glimpse of the level of use and opinions of both weekday and weekend users. The total number of visitors to the nature areas during the survey period was 94, 79 adults and 15 children. Due to Trent University regulations, only the adults were surveyed giving a surveyable number of 79. However, of that number, six visitors were repeat users or had been previously interviewed so the resulting surveyable population was 73. Of this population, 62 surveys were granted and this rate of return falls within the 95% confidence interval. In other words, for the user group being examined on this average winter season weekday and weekend, the results are accurate to within +/-2.5% or 19 times out of 20. This is within a reasonable margin of error level for most quantitative statistical research.

The summer survey will also be carried out for a total of 16 hours, eight hours on a weekday and eight hours on a weekend. It is hoped the results will be equally as significant and result in quantitative information regarding the interpretive preferences of summer users. This information can be compared to the winter survey results but it can also be combined with those results to look at the overall preference patterns.

This quantitative surveying was carried out in a face to face manner for the following reasons: necessity for open-ended questions; need to research attitudes of visitors; only a small sample of people was required; and, specific responses were essential. Face to face surveying is deemed to be the best manner in which to

respond to these concerns (Abbey-Livingston and Abbey 1982). Telephone and mail surveys may be equally acceptable in other situations.

The relative cost of this portion of the market analysis was 109 person hours and approximately \$50 for photocopying and printing. The person hours can be broken down into 10 preparation hours, one pre-testing hour, two training hours, 48 interviewing hours and 48 compilation of results hours. The budget allocation to this project, both in terms of money and person hours, is relatively low compared to the larger quantitative surveys often carried out in order to gather market demand information. Larger visitor populations require a larger survey sample size in order to gather statistically accurate information. However, the use of smaller sample sizes in large populations will still derive visitor preferences of those sampled and this information can be used as a starting point for the development of some interpretive programming opportunities.

Qualitative

The qualitative section of the market analysis focused on contact with individuals, groups or agencies that might have an interest in future interpretation and education options in the Trent University Nature Areas. These stakeholders were interviewed in person or over the telephone during January, February and March of 1999. Current use of the nature areas was discussed with each interviewee, as well as opportunities for collaboration in the future. A set of questions particular to each individual, group or agency formed the basis for the interviews but the conversation style used frequently resulted in discussion that led off in many other pertinent directions.

This phase of the interpretive market analysis encompasses the concept of market segmentation as well as the notion that linked community organizations should take part in the process of examining site demand potential. The list of organizations interviewed was generated based on identification of known or potential specific user groups. Research by Tatham and Dornoff (1971) suggests that this segmentation of the market into identifiable homogeneous groups is necessary to identify demand patterns. It is certain that some agencies or individuals pertinent to the interpretation planning process for the Trent University Nature Areas have been forgotten in the qualitative research interviewing that was carried out. However, this will always be the case with any site and the main issue of importance is that as many current or potential market segments were included in the study as possible. In the case of the Trent University Nature Areas, a representative of each of the following organizations was interviewed: Sir Sandford Fleming College Recreation and Leisure Services Program; Kawartha Pineridge District School Board; Peterborough, Victoria, Northumberland and Clarington Separate School Board; Lakefield College School; Peterborough Kawartha Tourism and Convention Bureau; Trent University Student Associations; Trent University Faculty; Trent University Education Programme; Trent University Students; Trent University Conference Centre; Scouts Canada—Peterborough, Murray Street Cub Pack; Peterborough Field Naturalists; and, Activity Haven Seniors' Centre.

Though these organizations are market segments, they also could be collaborating partners for developing and offering a variety of interpretation programs or just assenting to specific use agreements. This type of cooperation in order to offer

interpretive services is best exemplified by the Rouge Park Alliance in the *Rouge Park Integrated Interpretive Plan* of 1998. Non-governmental parks and protected areas such as the Rouge Park and the Trent University Nature Areas will probably have to depend on community collaboration in the future in order to offer any interpretation. This may also be true for government run national and provincial parks unless substantial funding is forthcoming. 'Friends' organizations are a good way of developing community support for a parks or protected areas and this is a long-standing suggestion for the Trent University Nature Areas.

Though the results of all the qualitative interviews carried out to ascertain potential market segments and cooperative opportunities for the Trent University Nature Areas cannot be outlined here, mention must be made of the positive results. Some of the options discussed with the varying organizations interviewed were: a use agreement with the public school board; a financial and volunteer partnership with the local field naturalists; interns to offer interpretive programming from Sir Sandford Fleming College and Trent University's Education Programme; and expansion of Trent University's Conference Services to include activities in the nature areas. Most of the information gathered from these interviews will be of great value for recommending future interpretation services to offer in the Trent University Nature Areas and shows some overlap with quantitative research results.

The relative cost of this portion of the market analysis was 62 person hours and approximately \$50 for travel and telephone costs. The person hours can be broken down into 2.5 interview set-up hours, 7.5 preparation hours, 26 interviewing hours and 26 compilation of results hours. The budget allocation to this project, both in terms of money and person hours, is relatively low and it is feasible for only one staff member to carry out the whole assignment.

Conclusion

In conclusion, the interpretive market process used for the Trent Nature Areas, as it was developed from research and contact with various natural heritage agencies in Canada, seems to have effectively gathered information regarding potential site demand for interpretation. By employing both qualitative and quantitative methods of analysis, the strength of the results is increased and it also allows for cross-checking of outcomes. Certainly both the qualitative and quantitative portions of this research could have been more in-depth, with increased person hours and monetary costs. This research has examined a market analysis as it stems from existing markets—this is a jumping off point which could be expanded later with continued research. Further research regarding general public interpretation interests could but carried out but it is extremely costly and often has low return rates. This interpretive market analysis strategy was developed in order to balance the market demand information required with the output costs. The total cost of the analysis was 171 person hours and approximately \$100. Combined with other components of the interpretive planning research such as resource inventory, safety hazards, funding, agency mandate and management conflicts, the market information gathered is adequate for determination of potential interpretation opportunities for the Trent University Nature Areas. However, the true value of this interpretive market analysis strategy cannot be tested until the interpretive services are in place and use patterns and learning levels have been evaluated.

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