# 'The New Ball Game? Changing social attitudes to leisure and recreation and the implications for show cave tourism.'

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## Abstract

The past decade has seen a series of events, from 9/11 to SARS to the Global Financial Crisis, which have presented serious challenges for the tourism industry. At the same time the retail sector and DIY business have also emerged as direct competitors to tourism as they have become identified socially as alternate recreational pursuits. At the start of the second decade of the 21st century, patterns are emerging suggesting links between some of these factors previously considered independent, patterns that suggest we may be experiencing a broader social shift in attitudes towards leisure time and the traditional conception of the place of tourism within the broader recreational framework that was established following the Second World War. These changes present a serious challenge to the tourism industry. All operators of show caves, amongst the best examples of nature based tourist attractions, must confront this challenge. Future successful show cave tourism will necessarily involve continuous product development, embracing digital media and the delivery of memorable on-site experiences that continually challenge conventional cave tour paradigms.

## Introduction

The need to at least cover operational costs – or better, whilst protecting the resource is an underlying principle of the commercial operations at Jenolan Caves. Such a commercial imperative is entirely compatible with the necessity for sound environmental stewardship, if the approach is appropriate. Indeed, the operation of a successful commercial show-cave operation is of great benefit to broader cave conservation efforts as a means of widely promoting conservation values and educating the general public. The economic environment in which commercial cave tours operate is becoming increasingly challenging and difficult. It is tempting to think simplistically of competition in terms of –

- Alternate destinations
- Other attractions

However, the reality is that it is necessary to think of competition in quite different terms. Today, competition includes all of those pursuits and endeavours that people spend their discretionary expenditure on. Our perception of competition should be expanded to include-

- Other forms of entertainment
- Shopping – not just the act of purchasing but increasingly the whole experience of shopping
- Staying at home could be considered as competition as people engage in digital communication and entertainment, big screen TV's, cocoon themselves at home ('holiday at home') and move again towards renovation and do it yourself
- The tendency to save
- Paying down mortgages

The future of tourism in caves, or anywhere for that matter, lies in the ability to provide compelling and sustainable experiences. Understanding the potential market improves the ability not only to compete through promotion but also to develop product that suits the needs of the market and is therefore more appealing.

It is perhaps easy to be dismissive of marketing research as 'mumbo jumbo' but our experience is that it is important in orienting marketing communication, product and promotion to appropriate markets. Increasingly, contemporary market research is helping inform Jenolan's managers about product development and to have more confidence in making decisions about products that are proposed. It is equally becoming evident that certain aspects of market research that could once have been considered more of academic than practical interest to operational managers are now very much an ongoing practical concern.

The, perhaps simplistic, missive of 'orient your marketing towards your market' is easy to say and conceptually appreciate but this becomes more difficult to achieve when you look at who comes to Jenolan – our clients are not a homogenous group, each of our visitors or potential visitors has individual needs, preferences and behaviours.

By grouping potential clients into segments with distinguishing variables and likeminded behaviours we come up with a range of market segments. At Jenolan we have multiple markets. Some forms of segmentation include-

- Geographic i.e. where they live
- Demographic i.e. age, sex and some more sophisticated derivatives include 'Gen X, Gen Y and Gen Z and maybe lifecycle segments are in fact an extension of a demographic approach to segmentation i.e. 'Baby Boomers', Family & DINKS (Double Income No Kids)

Another form of segmentation, mindset segmentation, is a particularly valuable tool for us at Jenolan Caves. The See Australia segmentation was developed by Colmar Brunton and subsequently refined by Roy Morgan Research for Tourism Australia (Undated) and Tourism NSW(2004). This form of segmentation could be described as a mix of both state of mind and demographic approaches.

| **See Australia Terms** | **Tourism Australia Terms** |
|---|---|
| Pampadors | Luxury Travellers |
| Compatriots | Family Travellers |
| True Travellers | Adventure Travellers |
| Wanderers | Touring Travellers |
| Groupies | Peer Group Travellers |

Mindset segmentation is technically a form of psychographic segmentation which gave us a totally new way of analysing our markets.

Returning to the proposition of 'orienting your marketing toward your markets', we could arrive at the conclusion that each market needs its own suite of communication material oriented to that particular market and all of your marketing issues would be resolved. It sounds simple but the reality is that this would be totally impractical and hugely expensive.

Tourism Australia may well have had a similar problem – how to market to multiple markets across a number of markets with a limited budget and in addition in recent years they have been given a role in domestic marketing.

Tourism Australia is very much committed to the mindset approach to segmentation and conducted research into how to gain optimum economic value. The research identified that even across the mindset segments there is a core group of people with a greater propensity to travel. The attributes of this group drive the need for these people to travel to seek out experiences

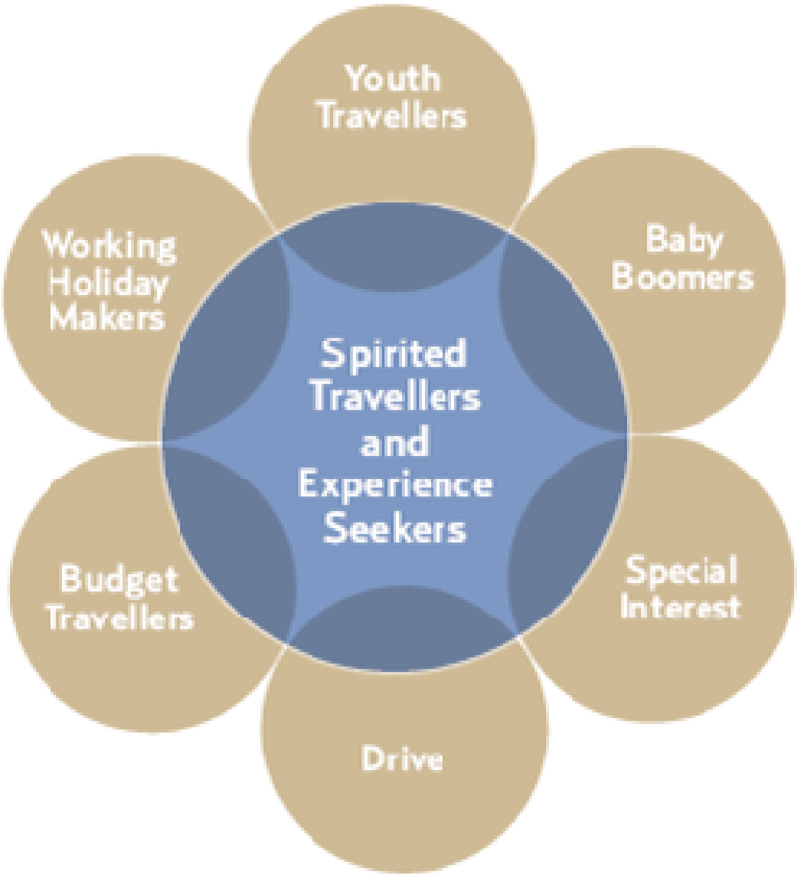


**Figure 1 Experience Seekers cross into 'conventional' market segments (Tourism NT, (2008) p6)**

The experience seekers are the perfect target (Tourism Australia, Undated). They –

- are experienced travellers
- seek out information about holidays and experiences
- spend more on holidays and experiences than typical consumers
- seek more engagement
- are opinion leaders but at the same time seek opinions and ideas
- use technology, particularly to gain information
- see themselves as individuals and seek out activities and experiences that enhance them as individuals
- are likely to be tertiary educated
- don't appreciate a typical sales oriented approach

It is important to be aware that most of us report that word of mouth is our best form of promotion and therefore this group is of particular importance because they have a great propensity to influence the behaviour of others.

In a marketing sense this means that by producing marketing communications that are relevant to this group, the same communications are relevant across a spectrum of segments. By extension from a product development perspective it becomes logical to develop products that meet the needs of experience seekers as these products will also meet the needs of the wider segments.

At Jenolan we overlay this approach with information about the changing nature of tourism and more contemporary approaches to interpretation and we feel we have some very powerful tools to guide us.

Nothing stays the same and the market is constantly changing. Research on experience seekers suggests that increasingly visitors will demand (Tourism NT, 2008 - See Figure 1)-

- special interest experiences
- interactive learning experiences
- authentic experiences
- physical and /or psychological challenges
- ecologically sustainable experiences
- customisation and flexibility value for money.

Any tourist destination or attraction that fails to satisfy the above criteria will find it difficult to effectively compete for what is a diminishing market. Indeed the tourism industry as a whole faces an entirely uncertain future. Although it is dangerous to make broad predictive statements, the current experience at Jenolan Caves strongly suggests that tourism is currently undergoing a fundamental shift. The industry has always been characterised by dynamism and reflections of broader changing social and technological norms. However, the current change may reflect a deeper shift in the social conceptualisation of "leisure" and "recreation", twin concepts that underlie tourism.

| 1960s | 1970s | 1980s | 1990s | 2000s |
|---|---|---|---|---|
| STAGE 1 | STAGE 2 | STAGE 3 | STAGE 4 | STAGE 5 |
| Products and Activities, Places and Things | Service Differentiation, Niche Indulgences | Products and Emotions, Exhilaration and Adventures | Experiences: Learning, Authenticity and Sustainability | Experiences: Meaning and Purpose |
| ➢ Pre-packaged holiday rewards for hard work<br>➢ Hand-written paper Tickets<br>➢ Bookings via travel agents | ➢ Holiday as reward/ opportunity for indulging passions and fulfilling interests and pursuits<br>➢ Typed tickets<br>➢ Telex bookings | ➢ Holiday as an escapist active adventure with high intensity emotions<br>➢ Introduction of Global Distribution Systems<br>➢ Facsimile bookings | ➢ Holiday as an opportunity to learn and be engaged. Tap into local knowledge/ culture<br>➢ Emerging sustainability considerations<br>➢ Tailoring of holiday packages through travel agents<br>➢ Beginning of Internet for bookings<br>➢ Introduction of e- ticketing<br>➢ Loyalty Programs | ➢ Increased demand for special interest needs and rarity.<br>➢ Seeking authenticity and highly sceptical of over marketing<br>➢ Emerging environmental and social consciousness<br>➢ Dynamic packaging and tailored packaging online<br>➢ Consumer direct bookings over the Internet<br>➢ Disintegration of traditional distribution channels<br>➢ E-ticketing and e-check-ins |

**Figure 2: The decadal changes in Tourism. We have entered into a new stage in this process (Tourism NT, 2008 p8).**

Tourism has historically been one area, a highly important one, within the spectrum of activities that constituted how one "recreated", with "recreation" being strongly associated (in some ways almost interchangeable) with "leisure". It is easy to become befuddled with the academic approaches to these terms – there are over 200 definitions of "leisure" in the academic literature for example (Veal, 1992). However, a sufficient summary of conventional theory would be that leisure represents the available <u>time</u> available to pursue recreation – generally defined as the activities undertaken within this leisure time.

The problem with these definitions today lies in the perception of what constitutes "recreation", and in the availability of leisure time. Traditional boundaries between 'work time' and 'leisure time' are being increasingly eroded, partly as a consequence of technology but equally by social and economic necessity. One outcome of this is a reduction in the defined blocks of time available for recreational pursuits. Work itself is increasingly viewed as a possible form of 'recreation' as the concept of job satisfaction and defining oneself through your career can fill the same emotional and social requirements once considered exclusively associated with non-work ('leisure') time.

"Recreation", if considered as the voluntary activities one elects to pursue within available leisure time, has changed even more dramatically as a concept. As we have noted, such activities as home renovations and even online shopping are now legitimate parts of the recreational activity spectrum. The consequence of this is to reduce the percentage of this spectrum once allocated to tourism. When we argue that tourism faces increased competition from non-traditional competitors, we are arguing at a fundamental level.

For our on the ground operations, these changing social patterns are now beginning to manifest themselves in measurable ways. One example has been the steady decline of off-peak visitation (including weekends outside of school holiday periods) while peak periods remain steady or even demonstrate growth. At Jenolan Caves this has emerged as a clear trend over the past 12 months, and appears to reflect a new social pattern: people are still travelling and taking holidays during defined holiday periods, however they are increasingly concentrating all travel within these periods. The once strong tradition of the weekend away is declining.

So what are the future implications of this trend? Such crystal ball gazing is far from an exact science, however what is clear is that operators of tourist attractions such as show caves need to understand that the playing field has changed, and that concepts that were purely academic less than a decade ago are now important considerations at an operational level. Understanding the importance of creating the experiences sought by the "Experience Seekers" dictates a consistent revision of core products. We must be prepared to adapt, change, then adapt and change yet again. The economic implications to a tourism business of an accentuated pattern of peaks and troughs in visitor numbers are significant when considering fixed costs to a business and staffing levels. Collaboration between businesses and the sharing of knowledge and resources may prove to be a critical element in creating growth in key areas such as environmentally based tourism.

There are opportunities within this challenge. 'Ecotourism' remains a strong concept, and 'Geotourism' appears to be a potentially strong subset of this. There is still a strong popular concern with environmental issues that can translate to an increase in the popularity of nature based tourism (though this popular concern may be experiencing a period of decline currently). But underlying these opportunities remains the concern that 'good' is not 'good enough' any more, and that we must work increasingly hard to exceed the increasing demands of our experience seeking visitors.

## References

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