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Publication details

Hanlan, J, Fuller, D & Wilde, SJ 2006, 'Segmenting tourism markets: a critical review', in P Tremblay & A Boyle (eds), *Proceedings of To the city and beyond: Council for Australian University Tourism and Hospitality Education (CAUTHE) Conference*, Melbourne, Vic., Victoria University, Melbourne, Vic.

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SEGMENTING TOURISM MARKETS: A CRITICAL REVIEW

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ABSTRACT

Destination marketing practitioners and academics have viewed the practice of segmenting tourism markets as a vital step in the destination marketing process. The benefits have been seen to include an ability to gain a fuller understanding of a particular market, improved techniques to predict consumer behaviour, and an improved ability to identify and exploit new market opportunities. There has, however, been limited scrutiny of the techniques used to segment tourism markets and the associated difficulties of translating the results into effective marketing strategies. This paper argues that the market segmentation process must be driven by the strategic imperatives of the destination. Further, through adopting a creative combination of *post-hoc* and *a-priori* approaches to segmenting markets, destinations may identify emerging niche markets not yet targeted by competitor destinations.

Key words: Tourism, market segmentation, competitive advantage, marketing strategy

INTRODUCTION

Market segmentation aims to divide markets comprised of individuals into groups whose characteristics are relatively homogeneous within each set or segment and heterogeneous between segments, based on an identified set of variables (Kara & Kaynak, 1997). Marketing academics and practitioners have adopted the concept of market segmentation enthusiastically. The benefits have been seen to include an ability to gain a fuller understanding of a particular market, improved techniques to predict consumer behaviour, and an improved ability to identify and exploit new market opportunities for commercial benefit (Heok, Gendall & Esslemont, 1996). A capacity to divide tourism markets into distinct groups of travellers, or prospective travellers, who respond differently to changes in marketing mix variables is likely to prove particularly beneficial to those attempting to influence consumer demand for a particular destination or bundle of products and services offered within a destination.

Despite widespread acceptance of the concept of market segmentation in both practice and theory, there appears to be limited scrutiny of the techniques used to segment data sets and the associated problems of interpreting the solutions. In addition, while much has been written on the links between segmentation and marketing strategy there has been limited attention paid to the practicalities of integrating findings into operational marketing tactics, particularly relating to tourism destination decision-making. To be valuable to marketing practitioners the process of segmentation needs to be able to identify different groups of consumers who have uniform and stable responses to a particular set of marketing variables. Such consumers can then be targeted through available promotional media and distribution outlets (Elrod & Winer, 1982). This paper commences with a discussion of approaches to market segmentation. The following sections examine the application and effectiveness of market segmentation approaches within tourism destination marketing. Proposed means of designing and integrating segmentation models into management decision making to better aid effective destination marketing are then discussed. Finally, the implications of segmentation studies for destination marketing and as predictors of travel behaviour are examined.

DESIGNING THE SEGMENTATION MODEL TO AID EFFECTIVE DESTINATION MARKETING

As outlined by Kotler et. al. (2001), segmentation effectiveness depends on arriving at segments which are measurable, accessible, substantial, actionable and differentiable. Kotler refers to a measurable segment as one where the size of the segment and the related purchasing power can be quantified. For a segment to be accessible it must be able to be reached and served effectively by the marketing entity. Further, the segment must be substantial in that it is large and profitable enough to warrant the marketing entity to design marketing mix strategies that are differentiated from strategies that target other segments. The segment must also be actionable in that the marketing entity can design effective marketing strategies to attract and serve the segment and for the segments to be differentiable, they must respond differently to different marketing stimuli.

Hoek, Gendall and Esslemont (1996) have argued that at an intuitive level, market segmentation appears worthwhile in terms of increasing sales and revenue. For example, five star hotels and resorts would appear to increase their chances of making sales if they target consumers with high disposable incomes rather than a broad market that has not been segmented. However, market segmentation strategies go beyond such clearly rational judgements aiming to gain a competitive advantage by identifying and serving the needs of customers more effectively than competitors. Complex segmentation exercises use a wide number of consumer variables as the basis for segmenting markets and then adopt sophisticated statistical analysis to group customers together based on these variables. The dilemma facing such segmentation studies is how to actually segment the market from a myriad of possible approaches and how to choose the statistical technique likely to prove most suitable in providing the information required to aid market segmentation.

The literature discusses two principal approaches to segmentation. They are *a-priori* and *post-hoc* or *data driven* (Dolnicar, 2004; Kara & Kaynak, 1997, Wind, 1978). *A-priori* segmentation requires the researcher to first choose variables of interest and then classify buyers according to that designation (Wind, 1978). While an *a-priori* approach may guarantee within segment similarity by ensuring, for example, that all segment members come from similar geographic regions and income ranges, this does not necessarily mean that all segment members will respond in the same way to marketing stimuli (Hoek, Gendall & Esslemont, 1996).

For example, consumers with similar demographic characteristics may respond in a similar way to a change in pricing strategy but may have very different reactions to a promotional theme. Further, the selection of variables in an a-*priori* study, to some degree, reflect underlying assumptions concerning the market and about which variables are most likely to respond to marketing stimuli. Such assumptions are likely to influence the findings and marketing strategies that ensue.

The second approach is to segment markets on a *post-hoc* basis where the researcher chooses a range of interrelated variables and then clusters buyers into groups whose average within-group similarity is high and whose between group similarity is low (Wind, 1978). This approach may result in segments that are not necessarily internally consistent. Even if researchers can identify groups with similar attitudes or usage habits, members often posses different demographic characteristics making marketing decisions such as media buying, difficult to action (Hoek, Gendall & Esslemont, 1996). Indeed Young et. al. (1978), suggest that a common reason segmentation studies fail in the implementation stage is that marketing research is too preoccupied with the methods and techniques of segmentation, and fails to consider the competitive structure of the market and general marketing environment.

Further, Hoek, Gendall and Esslemont (1996) have argued that despite sophisticated approaches to market segmentation, one of the key difficulties in undertaking such studies is that the selection of variables involves significant subjective judgements. For example, researchers using consumption benefits as a segmentation basis, must determine which benefits to measure and select appropriate means of assessing their relative importance to respondents. It needs to be recognised that this process may have a significant impact on the research outcome. Everitt (1974, p. 48) argues that 'the initial choice of variables is itself a categorisation of the data which has no mathematical or statistical guidelines and which reflects the investigator's judgement of relevance for the purpose of the classification.' However, the subjective decisions and assumptions inherent in segmentation studies do not preclude the studies from being potentially useful to gaining an improved understanding of the key factors influencing the choice of a tourism destination. However, such assumptions need to be made explicit and transparent so that users of the models understand the limitations of any findings. While numerous segmentation studies have been undertaken within the realm of tourism destination marketing, few of these studies make clear the subjective elements of the research design.

Developing an appropriate segmentation model therefore requires the researcher to make this series of subjective judgements based on a sound knowledge of the destination's marketing environment (Young et. al, 1978). Despite the ongoing proliferation of new variables on which markets may be segmented, there are few guidelines as to which approach is the most appropriate in a given market context. It is generally recognised that there is no one best solution, as each approach has certain merits and limitations depending on the product(s) and market(s) being considered and the managerial objectives sought (Wind, 1978; Kara & Kaynak, 1997). Effective market segmentation is therefore context specific and allows for creative approaches that should be determined through correct analysis of the research problem. In order to assist researchers to define the parameters of such a study, Wind (1978) provides a suggested decision framework from which segmentation studies may ensue.

Table 1 details some of the major considerations involved in segmentation research studies. Wind argues that managerial objectives should drive the research process, where the basis for segmentation varies depending on the management issues in question. Developing an enhanced understanding of managerial marketing objectives requires improved information to evaluate the motivation and behaviour of both visitors and non-visitors to the region. It also requires an increased understanding of traveller characteristics with a view to developing marketing strategies able to influence the travel destination decisions of appropriate target markets. These objectives need to guide the process of selecting the appropriate basis on which the market may be segmented.

Table 1
Considerations in Segmentation Studies

1. *Problem definition*
    a. Managerial requirements
    b. Baseline vs ongoing segmentation
    c. The segmentation model
        1. Selecting the variables for the model
        2. Traditional a-priori and clustering-based designs vs the new flexible and componential segmentation designs.
2. *Research design*
    a. The unit of analysis
    b. Operational definitions
    c. Sample design
    d. Data reliability
    e. Segment stability
    f. Segment homogeneity
    g. Segmentability of the market
    h. Validation cost considerations
3. *Data collection*
    a. Primary vs secondary sources
    b. Conventional vs new procedures
4. *Data analysis*
    a. For determining the segments: classification
    b. For establishing the segments' profiles: discrimination
    c. For simultaneous classification and discrimination
5. *Data interpretation and implementation of results*
    a. Determining the number of segments and selection of target markets
    b. Translating segmentation findings into strategy

Source: Wind, 1978

The range of *a priori* approaches used to segment markets has received significant attention within marketing literature (Sirgy, 1982; Blattberg et. al., 1976; Myers, 1976; Alpert, 1972). Early approaches to segmentation included the use of demographic, geographic and behavioural characteristics of consumers (Blattberg et. al., 1976). However, there is evidence of changing consumer behaviour within contemporary affluent societies, including an increased emphasis on the personalisation of consumer behaviour patterns, which are not well explained by socio-demographic and economic criteria (Gonzalez & Bello, 2002). There has therefore, been a growing emphasis in marketing on the human behavioural sciences which has led to segmentation approaches seeking to measure less tangible consumer characteristics such as lifestyle, personality, image and benefits (e.g. Sirgy, 1982; Myers, 1976; Alpert, 1972). Table 2 presents a summary of the main approaches to market segmentation within marketing and consumer behaviour literature.

Table 2
Basis for Segmenting Markets.

Basis	Description	Authors
Geographic	Dividing a market into different geographical units such as nation, states, regions, cities or neighbourhoods. For example tourism markets may be segmented into international and domestic visitors.	Kotler et. al., 2001 Kelly & Nankervis, 2001
Demographic	Dividing a market based on demographic variables such as age, gender, family size, family life-cycle, income, occupation, education, religion or nationality. For example luxury resorts may target high-income earners while caravan parks may target middle-income families.	Kotler et. al., 2001 Kelly & Nankervis, 2001 Blattberg et. al. 1976
Psychographic /lifestyle	Dividing markets based on consumer values, attitudes, interests, opinions. For example adventure tourism operators may target consumers who have a strong interest in outdoor pursuits while epicureans are the target market for food and wine trails and cooking schools.	Kropp et. al., 2005, Alpert, 1972 Frank et. al. 1972 Pessemier et. al, 1967 Lazer, 1963 Plummer, 1974 Yankelovich, 1964
Benefits	Dividing the market into groups according to the different benefits that consumers seek from the product or service. An example of benefit segmentation can be seen in the rise of spa resorts targeting consumers who seek rejuvenation and improved health and well being from their holiday experience.	Leisen, 2001 Haley 1968 Myers, 1976
Usage	Dividing markets based on usage patterns such as non-user, ex-user, potential user, first-time user, regular user, high volume user. For example destination-marketing programs may use one message strategy to communicate with repeat visitors and a different approach for people who have never visited.	Bowen, 1998 Twedt, 1964 Young et al. 1978

Loyalty	Dividing markets based on brand loyalty to a particular hotel chain or destination.	Yelkur, & DaCosta, 2001, Grover & Srinivasan, 1989
Image	Dividing markets based on the affective associations relating to brand image. For example the affective associations associated with the French Riviera are likely to be very different from affective associations with the Australian outback.	Leisen, 2001 Evans, 1959 Sirgy, 1982
Situation	Related to usage segmentation, situation segmentation divides markets on the basis of the consumption or purchase situation of consumers. For example travellers may find one destination suitable for a short break and a different style of holiday appropriate for a long holiday.	Gehrt & Shim, 2003 Dickson, 1982
Behavioural	Dividing markets based on consumer's knowledge of, attitude toward, uses for and responses to a product or service.	Kotler et.al., 2001

Source: Adapted from Hoek et. al. 1996

Wind (1978) argued that the selection of variables to form the basis of a segmentation model needs to relate to specific management objectives and be informed by the current state of knowledge concerning the relevance of marketing and consumer behaviour variables as bases for, and descriptors of, market segments. However, Wind's framework demonstrates a preference for what has become known as 'the benefit sought approach'. The benefit segmentation approach is based upon the belief that it is possible to measure consumer value systems in detail, together with consumer thoughts about various brands in the product category of interest (Haley, 1968). Grouping customers based on the benefits sought from consumption will lead to multiple segments each with a number of benefits sought. Some benefits will appear in multiple segments. It is however, the total configuration of benefits sought which differentiates one segment from another. Indeed Haley (1968) argues it is likely all segments will seek multiple benefits. It is the relative importance each segment assigns to a particular benefit that is likely to show differentiation between segments.

This approach is supported in the literature particularly in relation to tourism studies (eg, Botschen, Thelen & Peiters, 1999; Johar & Sirgy, 1995). The primary advantage of the benefit-sought approach is the causal rather than descriptive nature of the data, making this approach a more effective tool for developing marketing strategy (Young et al., 1978; Haley, 1968). Haley (1968) for example, argues that true market segments are based on the causal relationship between the benefits sought from consumption and future purchasing behaviour. Forms of segmentation including geographic, demographic and psychographic tools provide only descriptive data based on 'after the fact' characteristics of consumers. Such approaches are therefore not necessarily seen to be successful predictors of consumer choice (Wind, 1978; Botchsen, Thelen & Peiters, 1999).

A key advantage of using benefit segmentation is seen to arise from the fact that outcomes can then be acted upon, producing segments which will react differently to altered marketing mix variables. Botschen, Thelen, & Pieters (1999) argue that benefit segmentation has become the preferred technique for successful product positioning, new product introduction, pricing, and advertising. It should be noted that benefit segmentation is seen as the first stage in the segmentation process. Characteristics such as age, income, lifestyle and media habits are then included in the process to enable marketers to develop strategies to reach and communicate effectively with each segment.

Botschen, Thelen and Pieters (1999) describe the typical benefit segmentation study as adopting a common approach, commencing with the analysis of secondary data and/or conducting in-depth interviews and focus groups to identify relevant attributes and benefits sought. From this initial data a measure of the importance of attributes /benefits is developed and pre-tested prior to the data collection. Generally, responses are given on a scale representing low to high importance and/or variability. The data is then analysed using factor and cluster analysis to identify benefit segments. However, while Botschen, Thelen and Pieters (1999) acknowledge that benefit segmentation is a powerful tool for predicting consumer preference and behaviour, they argue that many of the empirical studies undertaken in this area have not adequately differentiated between product attributes and the benefits sought by consumers. They argue that the means-end chain theory of cognitive structures holds that consumer behaviour is driven by the true benefits sought which in turn drives the desire or preference for certain attributes. If the focus of a segmentation study is on the level of preferred attributes the underlying benefits sought by customers will not be clearly identified (Botschen, Thelen and Pieters 1999).

Means-end theory holds that a product, service or behaviour is stored in memory as a chain of hierarchically related elements. The chain commences with the product or service attribute and establishes a sequence of links with personal values through the perceived consequences or benefits produced by certain attributes of the product (Botschen, Thelen and Pieters 1999). Botschen, Thelen and Pieters (1999) describe the means-end chain as a four-step process:

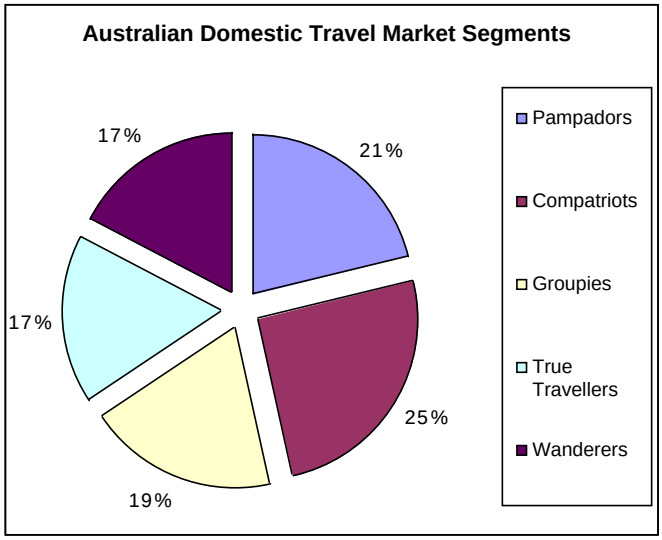
Step 1: product specific attributes (great climate) leads to
Step 2: functional benefit (likely to be sunny when we visit) leads to
Step 3: practical benefit (the children will spend all their time at the beach) leads to
Step 4: emotional pay-off (the parents will have a relaxing and stress free holiday)

Product attributes are the means by which consumers satisfy the desired consequences of consumption. The premise of this argument, that consumers purchase goods and services to provide satisfaction to the consumer at both a functional and emotional level, is the basic premise of marketing (Kotler, et. al, 2001). Therefore, market segmentation strategies which group customers together based on the benefits they seek from consumption provides a powerful diagnostic tool whereby manipulation of elements of the marketing mix can influence consumer behaviour by better matching the market offering with the desired consumption outcome (Botschen, Thelen and Pieters 1999).

THE APPLICATION OF MARKET SEGMENTATION APPROACHES WITHIN TOURISM DESTINATION MARKETING

Despite the subjectivity involved in selecting the variables to include in a segmentation model and the consequent limitations of market segmentation techniques outline above, it is important for those associated with the planning, management and marketing of tourism destinations that they attempt to gain an improved understanding of the origin of their visitors, their travel patterns and travel motivations. Based on such understandings, destination-marketing organisations (DMO) can aim to alter marketing mix variables to influence decision-making. Within the Australian context, market segmentation studies have been undertaken, primarily under the auspices of State and Federal tourism bodies along with industry representatives. One such study was commissioned by Partnerships Australia Domestic Ltd, (PADL), and conducted by Colmar Brunton Research with the aim of developing a 'practical and robust segmentation methodology tailored specifically to the domestic tourism market that incorporates travel motivation (eg benefits sought) and barriers to travel (eg lifestyle, disposable income, time)' (Colmar Brunton, 2000). It should be noted the focus of this study was Australian domestic leisure travellers, excluding business and special purpose travel such as sport tourism. The study identified five main segments as shown in Figure 1.

Figure 1
Domestic Travel Market Segments as Percentage of Population



Source: Colmar Brunton, 2000

Figure 1 shows the market segments identified from this study along with the percentage of the Australian population who were identified with each category. Key features of the segments are presented in Table 3.

Table 3
Summary of Australian Domestic Market Segments

	Age (yrs)	Travel group	Daily expenditure	Key Motivation	DYI/DFY*
Pampadour	45-61	Couples	$172.20	Pampering /rejuvenation	DFY
Compatriots	25-44	Families	$110.73	Relax and unwind/ children their priority	Desire DFY/ Limited by resources
Wanderers	54-75	Couples	$132.13	Observational	DIY
True Travellers	Under 45	No children, may travel alone	$125.88	Adventure/ cultural immersion	DIY
Groupies	15-24 Males	Groups	$122.82	Fun, parties, surf	DIY

Source: Adapted from Colmar Brunton, 2000

** DIY Do it yourself, DFY Done for you*

Table 3 shows the key characteristics of the market segments drawn from the segmentation profile. The study has primarily examined the demographic characteristics of the population based upon the family life-cycle, age and family composition along with the motivation or benefits sought from the travel experience. This description of Australian domestic tourism market segments has since been disseminated by Australian government tourism organisations and has been the basis of a number of Australian tourist destinations marketing programs. However, with multiple destinations relying on the same segmentation model, destinations risk the possibility of head-to-head competition as destinations with similar attributes may be targeting identical market segments.

Dolnicar (2004) argues that destinations may identify new and emerging market opportunities by developing segmentation studies that are unique to the destination and driven by the destination's strategic imperatives. In support of this argument Dolnicar (2004) offers a review of tourism segmentation studies published in the Journal of Tourism Research over the last fifteen years and groups them into four main conceptual approaches. Dolnicar estimates that 53% of these studies have adopted an *a-priori* approach, 36% were a combination of *a-priori* sub-groups divided into data driven or *post-hoc* segments, 11% were a combination of more than one *a-priori* segment and 5% of the studies were *post-hoc*.

Dolnicar argues that creative combinations of *a-priori* and *post-hoc* segmentation will lead to more original approaches to segmenting travel markets, producing solutions not yet exploited by competitor destinations. By considering a wider variety of possible approaches to market segmentation, DMOs can gain deeper insight to the market from a variety of perspectives. Figure 2 presents Dolnicar's schematic of approaches to market segmentation based on possible combinations of *a-priori* and *post-hoc* segmentation. The schematic aims to provide a blueprint for deriving segments which have not previously been described.

Figure 2
Systematics of Segmentation

Which group is described first?	
A subgroup of the total tourist population determined by an *a-priori* criterion.	A subgroup of the total tourist population determined by *post-hoc* segmentation on a multivariate basis
CONCEPT 1 *=a-prior segmentation*	CONCEPT 2 *=post-hoc segmentation*

Which groups are explored next?			
A subgroup of the total tourist population determined by an *a-priori* criterion		A subgroup of the total tourist population determined by *post-hoc* segmentation on multivariate basis	
CONCEPT 3 *=a-prior/a-priori* segmentation	CONCEPT 4 *=post-hoc/a-prior* segmentation	CONCEPT 5 *=a-prior/post-hoc* segmentation	CONCEPT 6 *=post-hoc/post-hoc* segmentation

Source: Dolnicar, 2004

Dolnicar concludes that creative approaches to market segmentation, in combination with a thorough analysis of the marketing environment allows destinations to gain a strategic competitive advantage depending on the ability of the destination to match their capabilities and potential with the needs and desires of particular market segments. To enable destinations to operationalise the findings of such segmentation studies the entire process must be driven by an overall strategic plan for the destination. A destination strategic plan is the process of developing and maintaining a strategic fit between the destination's goals and capabilities and its changing marketing opportunities (Kotler et. al., 2001). The strategic plan relies on developing a clear mission, supporting objectives and coordinated functional strategies so that the destination may take advantage of emerging opportunities in a dynamic environment.

The formulation of overall destination management objectives and strategies assists the development and refinement of more specific marketing objectives. The marketing process then becomes the means of achieving these marketing objectives. The marketing process involves analysing marketing opportunities, selecting target markets, developing an appropriate marketing mix and managing the marketing effort. Market segmentation may be utilised and an important step in the process of identifying target markets.

Once homogenous groups within a heterogenous market are identified, the marketing entity needs to evaluate each segment's attractiveness and select one or more segments towards which marketing resources will be directed (Kara & Kaynak, 1997). Within each of these chosen segment(s) a market position needs to be formulated. Market positioning aims to place a destination in a clear, unambiguous, distinctive and desirable position in the minds of target consumers. Such positioning strategies must be devised with consideration given to competing destinations, thereby formulating an enhanced competitive position for a destination (Kotler et. al, 2001).

CONCLUSION AND IMPLICATIONS

Market segmentation has emerged as a key marketing imperative for both marketing practitioners and academics. It is recognised that markets and those individuals who make up such markets are not homogenous and therefore no single market offering will satisfy all individuals (Alderson, 1983; Assael & Roscoe, 1976). Therefore, leisure travel destinations need to group customers together into meaningful market segments so as to better match marketing variables with the characteristics of various market segments. One of the key decisions to be made within any segmentation study is the selection of the criteria on which the market will be segmented. A number of approaches have been discussed in this paper, with benefit segmentation emerging from the literature as a preferred approach, particularly in relation to tourism studies (Botschen,Thelen & Peiters, 1999; Johar & Sirgy, 1995, Young et. al. 1978; Haley, 1968). This is primarily due to the causal rather than descriptive nature of the data. Grouping travellers based on the benefits sought from the travel experience, supplemented by more traditional segmentation criteria such as geographic and demographic profiles has been found in this paper as more likely to yield segments that are valuable predictors of travel behaviour and destination choice (Botschen,Thelen & Peiters, 1999; Wind, 1978; Haley, 1968).

The merits and limitations of two key approaches to market segmentation, *a-priori* and *post-hoc* methods highlight the subjective decision making inherent in many segmentation studies. Such subjective decisions need to be made clear and transparent in any research findings. Further, it has been argued that if destinations wish to identify emerging niche markets which have not yet been targeted by competitor destinations, creative approaches to segmentation are required (Dolnicar, 2004). Such approaches to segmenting markets are only of value if the ensuing marketing strategies are able to influence the destination choice of prospective visitors. Such marketing strategies need to be developed based on a thorough knowledge of the external marketing environment with particular emphasis on the desired market position particularly in relation to competitor destinations. A detailed analysis of consumer purchase behaviour is also essential to success. It has therefore been argued that market segmentation approaches must be driven by the strategic goals and imperatives of the destination. It is only at this strategic level that destinations can develop a sustainable competitive advantage within identified target markets. The process of matching the resources and capabilities of the destination with the needs of identified market segments should be the basis upon which marketing strategies are formulated.

This paper has presented a critical review of the market segmentation process within the domain of tourism destination marketing. There is a need for future empirically studies to evaluate the way in which DMOs currently use data generated from existing segmentation studies and the ability of these marketing entities to develop effective marketing strategies capable of influencing destination choice within a given segment. Additional research is also required to evaluate the potential to identify new untapped niche markets using a creative combination of *post—hoc* and *a-priori* approaches to segmenting potential markets.

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