

PARKS FORWARD

INTELLIGENCE SUMMARY

Attitudes and perceptions

Emerging audiences

Communication opportunities

High-propensity visitors

12 February 2014

CONFIDENTIAL

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Summary findings

- General lack of awareness – and regard – for the “ownership” of individual parks (i.e. national, state, county, city)
- Significant delta between stated demand activities (as indicated in the 2008 CORP) and actual visitor behaviors
- Attitude affinity challenges (i.e. “people like me”) borne of evolving demographics and social shifts
- Downward pricing bias attributable to standardization of product (i.e. the perception of ranging products as “common-ized”) and a lack of product/attribute differentiation
- Perceived communication disconnect largely attributable to a lack of presence and expertise on the market’s preferred platforms and channels
- Three features (camping, events, and historical/cultural context) indicate heightened engagement opportunities for all audience segments

Stated preferences vs. actual behaviors

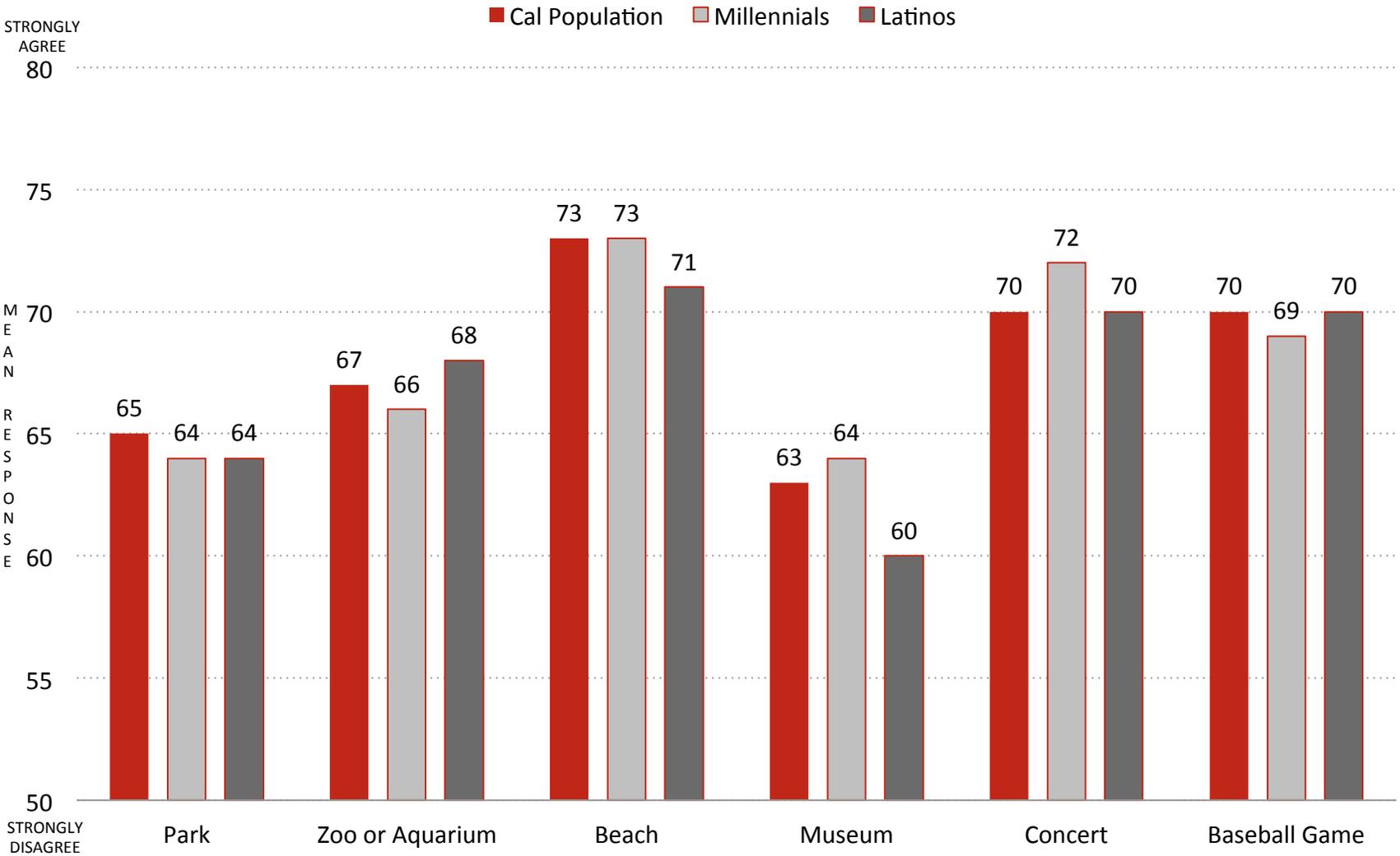
2008 CORP Stated Preferences

1. Walking for fitness or pleasure
2. Camping in developed sites
3. Bicycling on paved surfaces
4. Day hiking on trails
5. Picnicking in picnic areas
6. Beach activities
7. Visiting outdoor nature ZAMs
8. Visiting historical or cultural sites
9. Attending outdoor or cultural events
10. Off-highway vehicle use
11. Driving for pleasure, sightseeing
12. Swimming in a pool
13. Wildlife viewing, birdwatching
14. Outdoor photography
15. Swimming in freshwater lakes, rivers

Actual Behaviors

1. Walking for fitness or pleasure
2. Day hiking on trails
3. Outdoor photography
4. Driving for pleasure, sightseeing
5. Visiting historical or cultural sites
6. Wildlife viewing, birdwatching
7. Attending outdoor or cultural events
8. Bicycling on paved surfaces
9. Picnicking in picnic areas
10. Camping in developed sites

People like me enjoy going to a ...



Who are Millennials?

There are currently nearly 90 million Millennials (born 1980 – 1994)

- Gen X 1965 - 1979
- Boomers 1945 - 1964
- Traditionalists 1925 - 1944

Characterized as:

- Entrepreneurial
- Public service motivated
- Connected and protected
- Challenged by traditional hierarchy
- Tech-savvy
- Entitled and “over-educated”
- Community-oriented

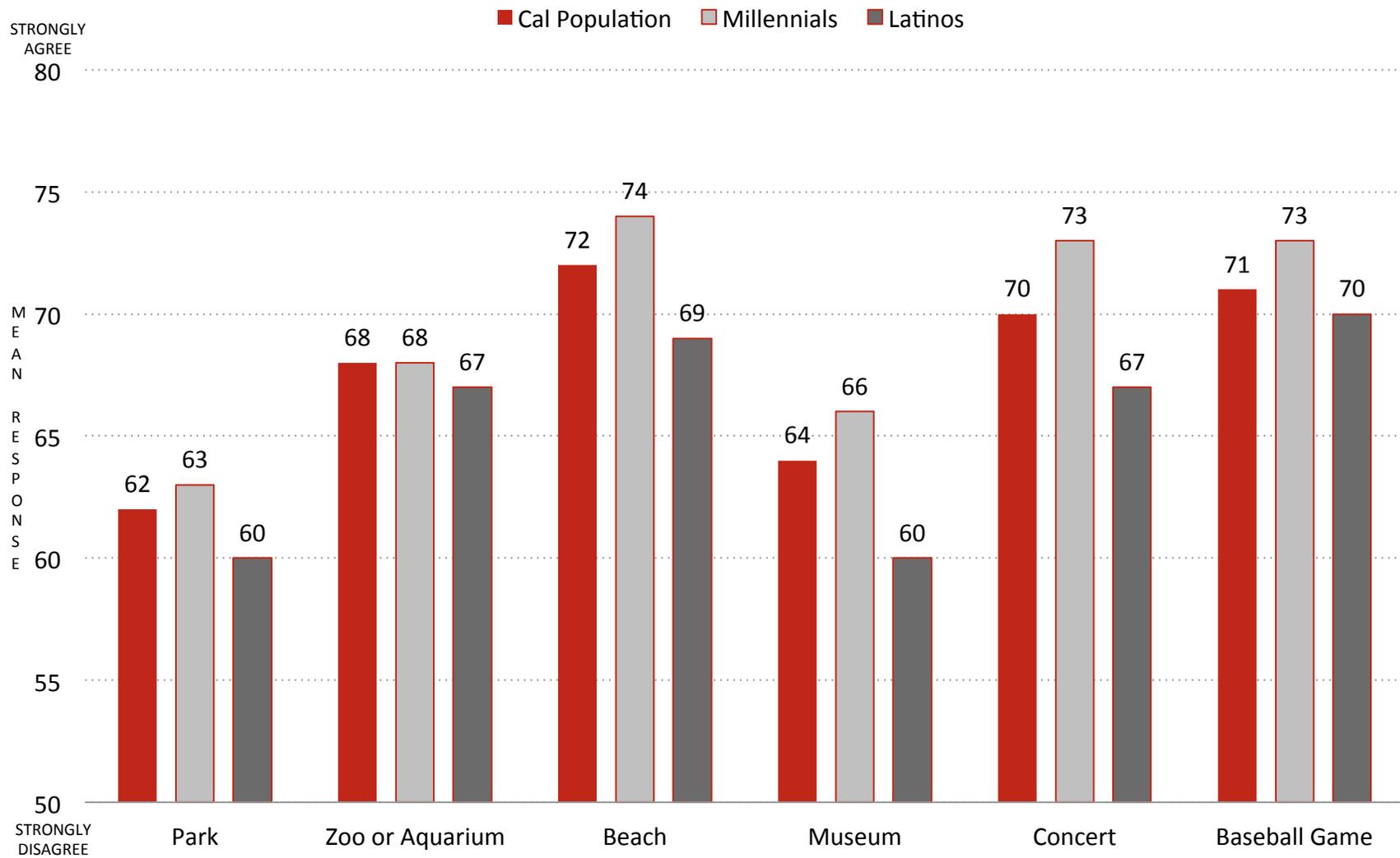
Compared to other generations, Millennials are the most:

- Educated
- Underemployed
- Optimistic
- “Plugged-in”
- Non-religious
- Democratic
- Diverse

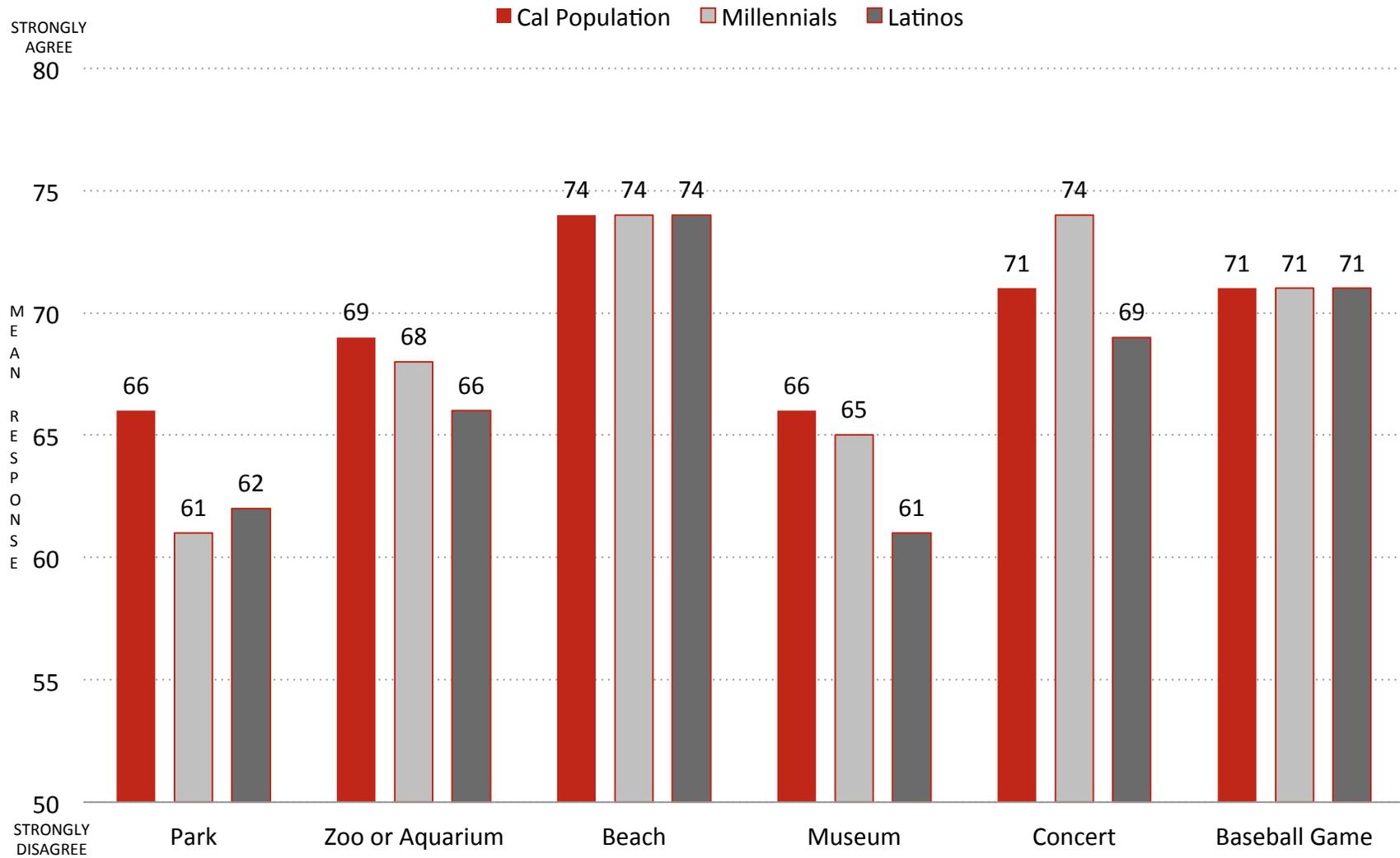
Why should we care?

- Millennials represent the single largest generation in human history
- There are more Millennials in the U.S than any other age group
- Millennials will have the largest buying power in the United States by 2017
- Millennials will significantly influence determine the outcomes of the next six presidential elections, and the public policy priorities that will shape and influence conservation and advocacy efforts

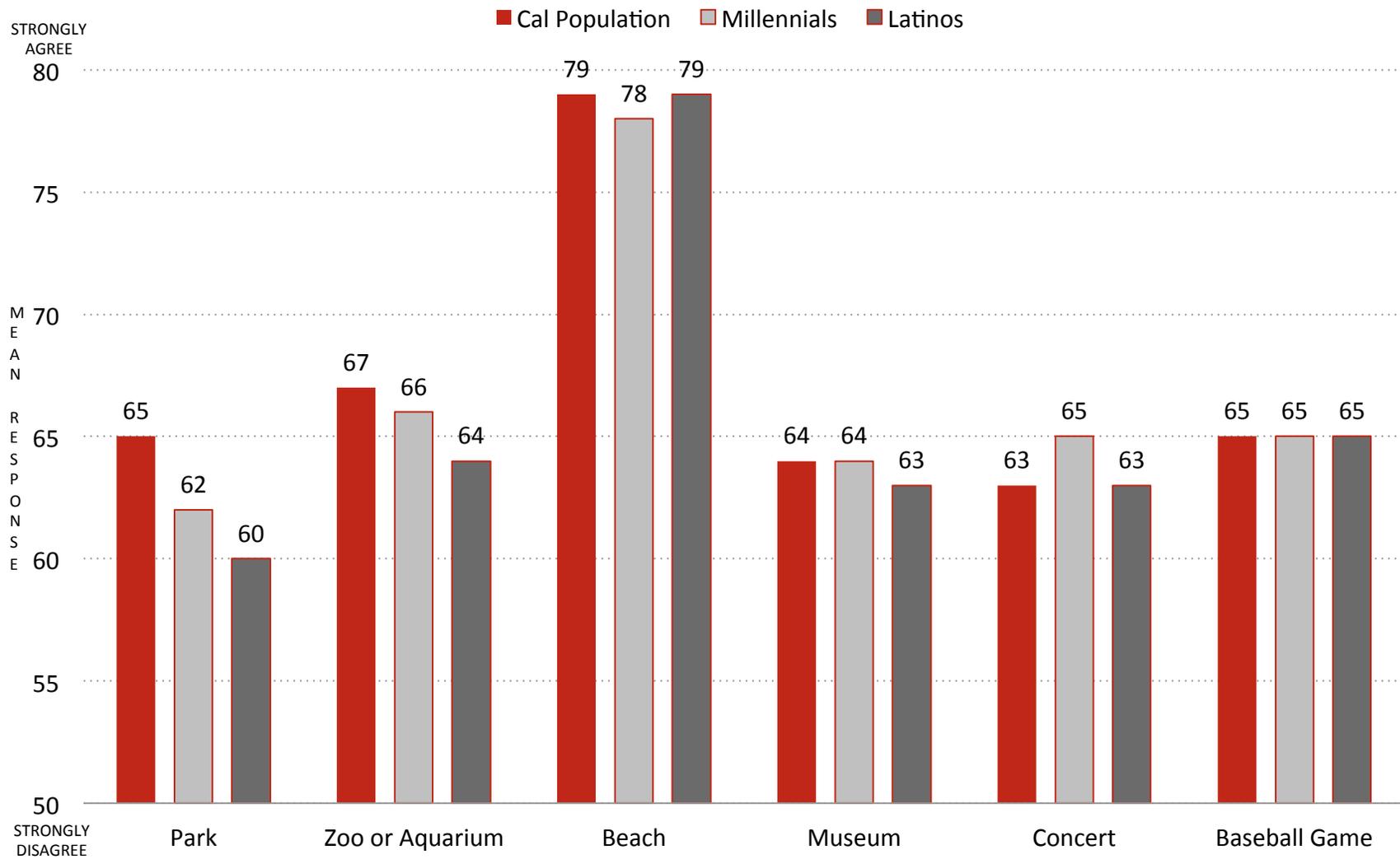
People like me are made to feel welcome when going to a



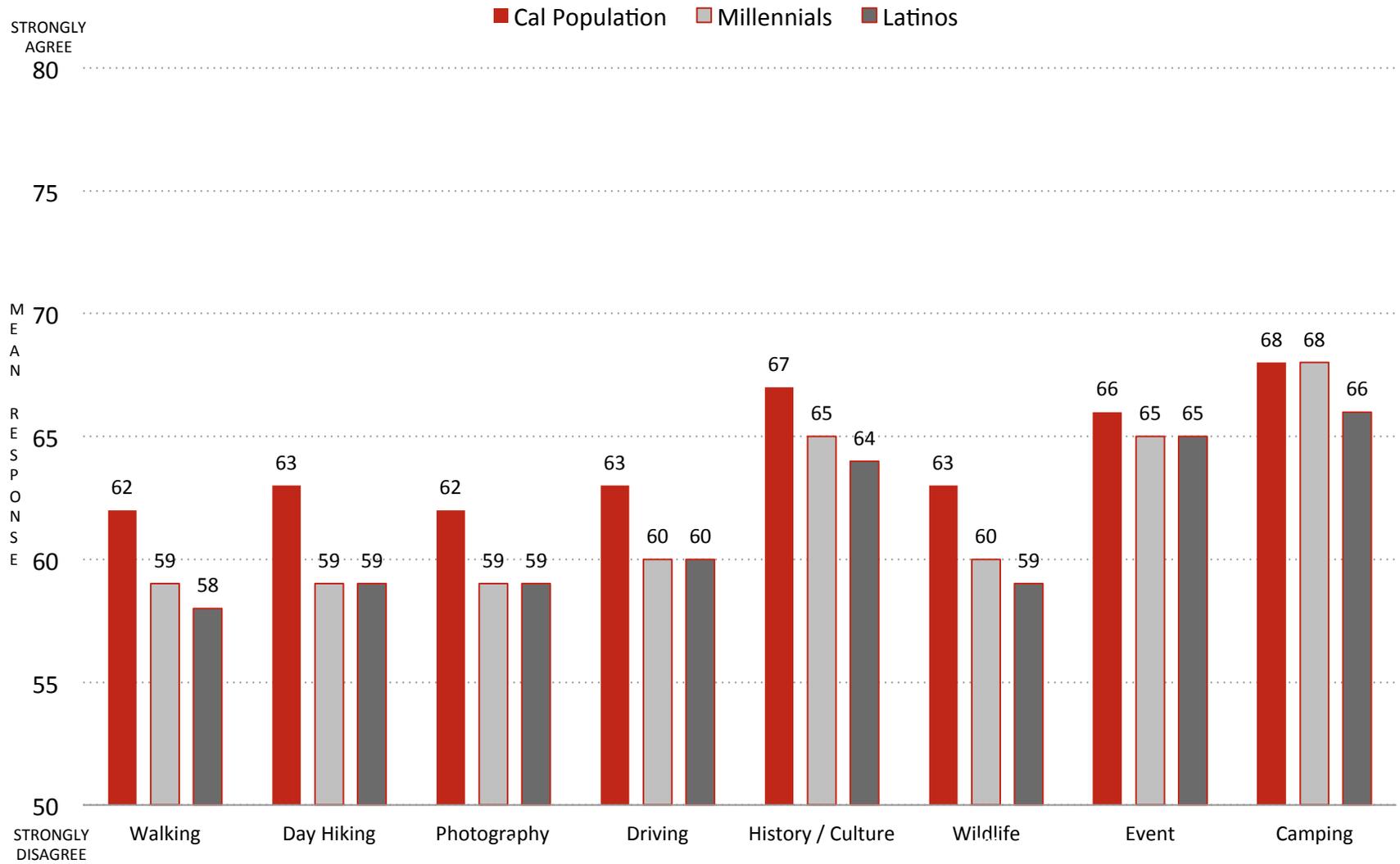
I would recommend going to a ... to a family member.



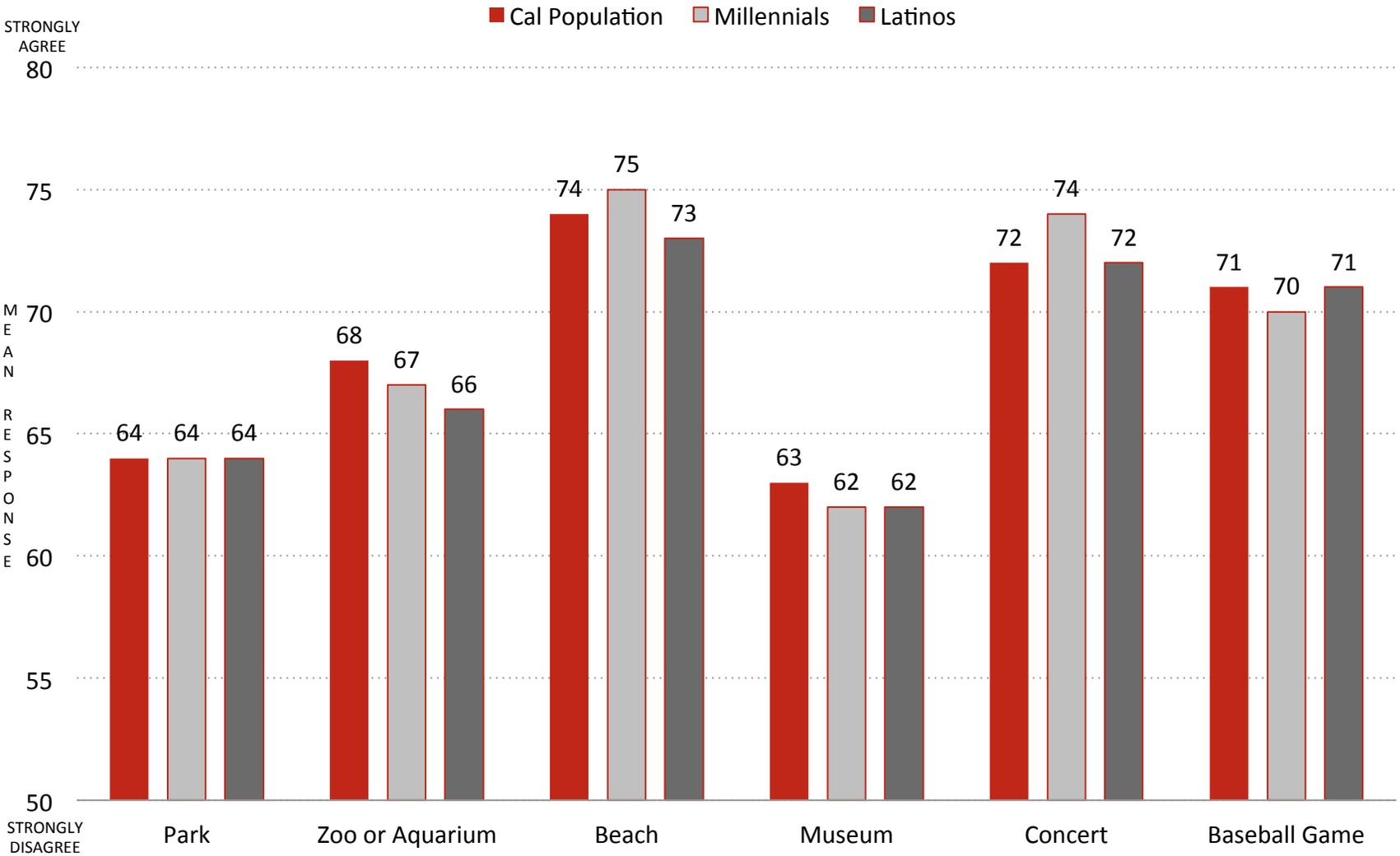
In terms of the cost of admission, ... represent a good value.



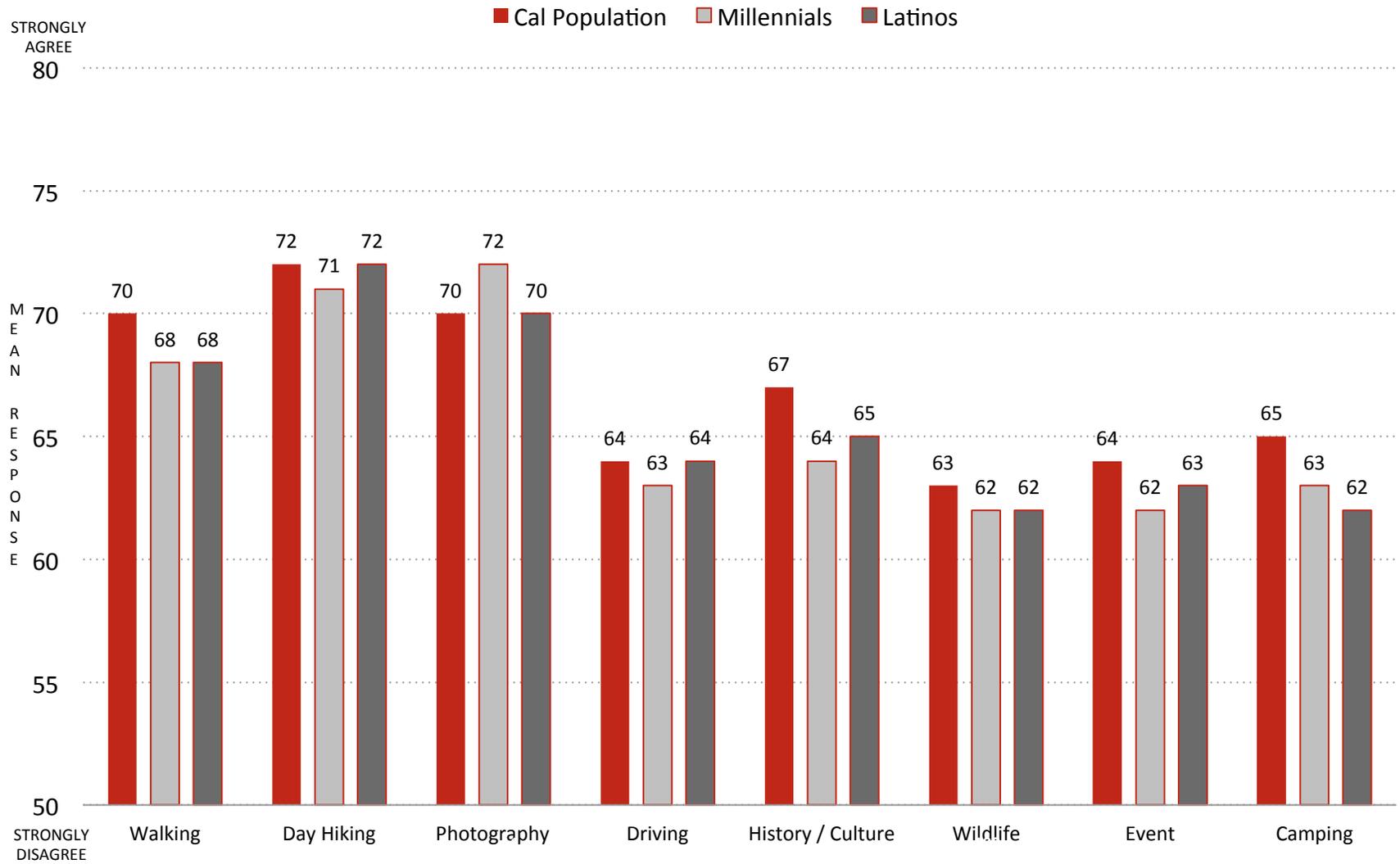
Cost for value perception by primary park behavior



Overall satisfaction by experience



Overall satisfaction by primary park behavior



VISITOR SUBSTITUTION

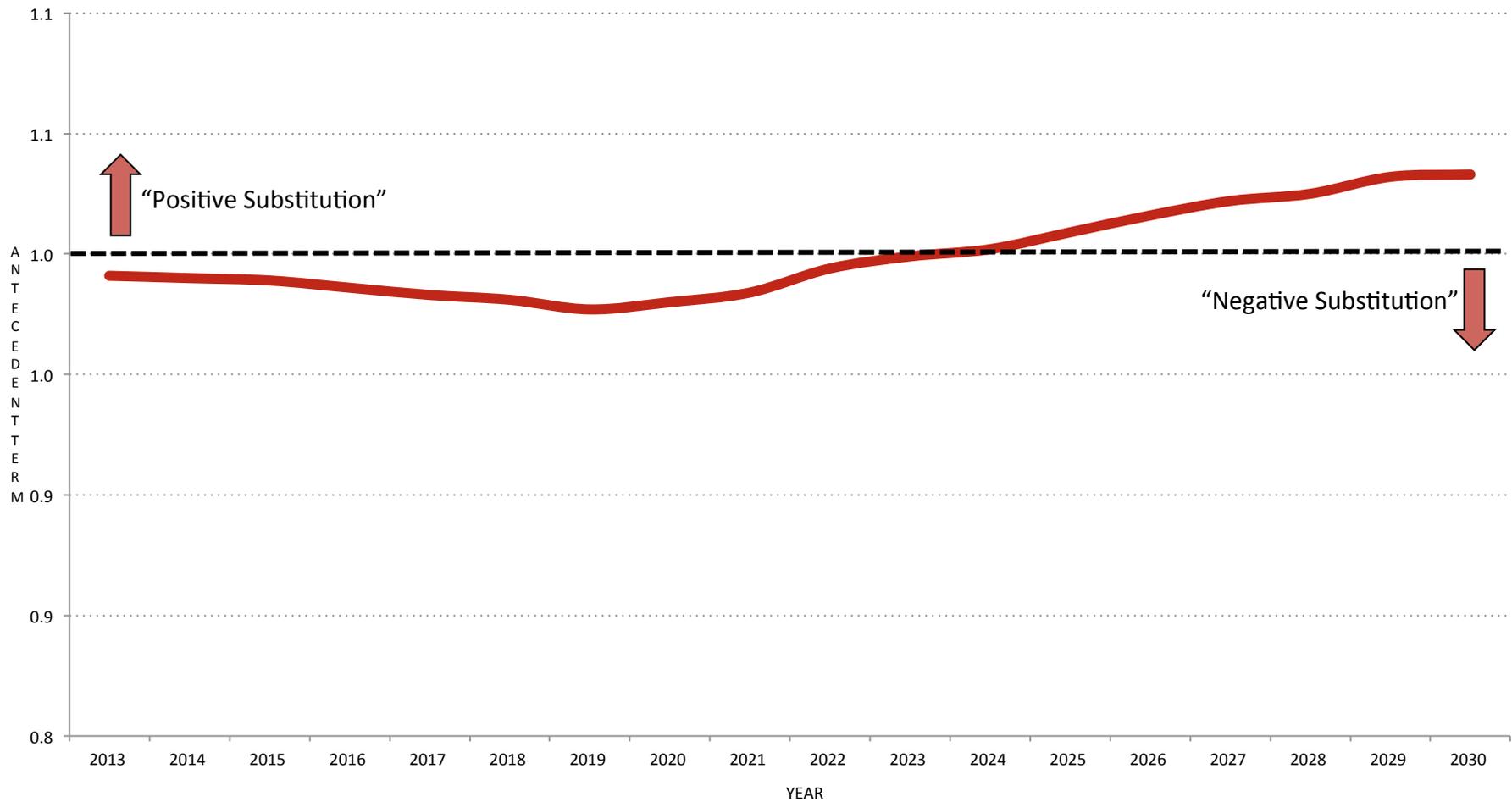
“Historic” visitors to State Parks



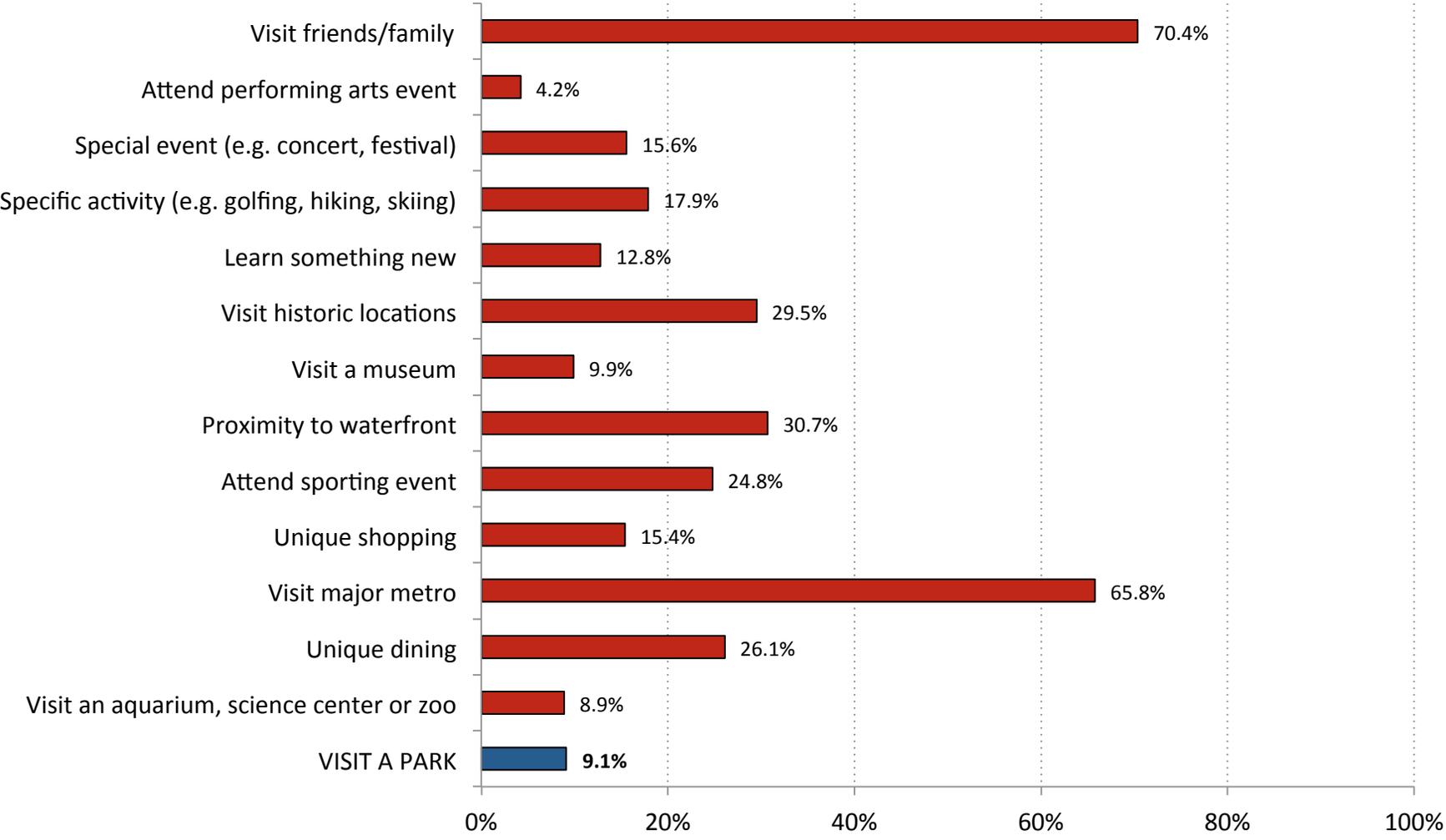
Less in + More out = Shrinking visitor base
(NEGATIVE SUBSTITUTION)

High-propensity park visitor substitution ratios over time

(projected through year 2030)

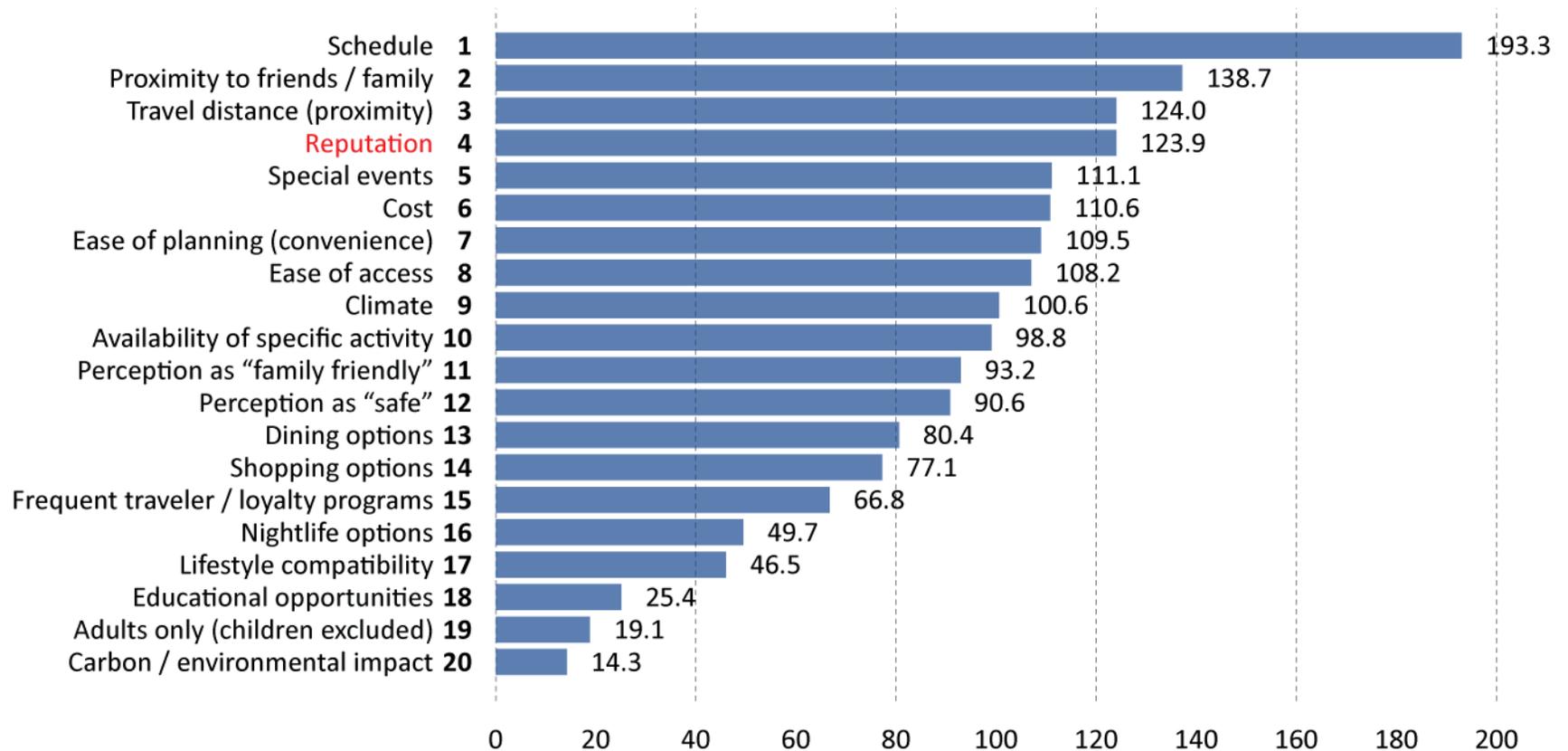


Leisure activity motivation



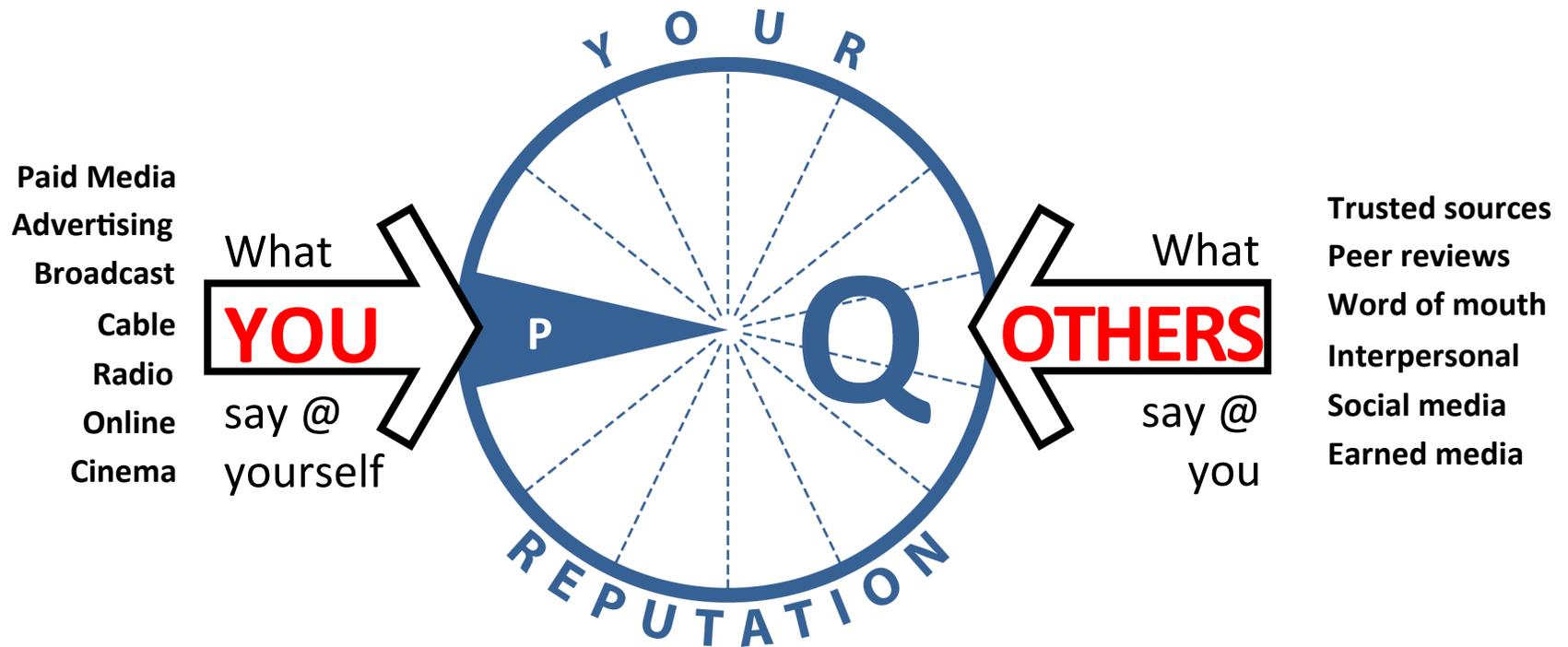
ATTITUDES INFLUENCE UTILITIES

What factors collectively contribute to the market's **leisure time decision making** processes?



THE ROLE OF REPUTATIONAL EQUITIES

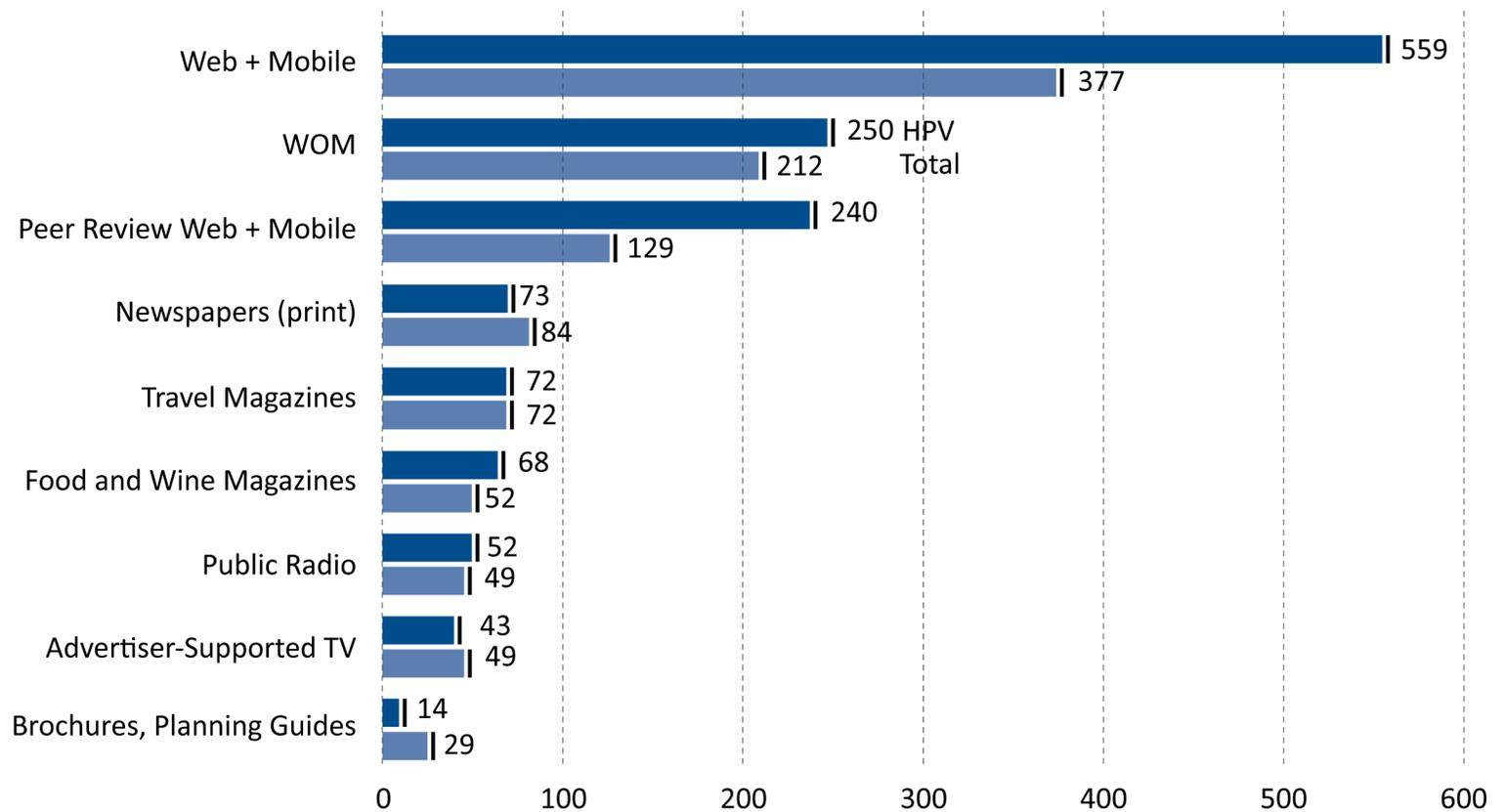
Reputation plays a role in driving success



Q (the coefficient of imitation) has a value 12.85x greater than that of **P** (the coefficient of innovation)
There is no amount of **self-proclamation (P)** that will overcome a deficiency of **others' voices (Q)**

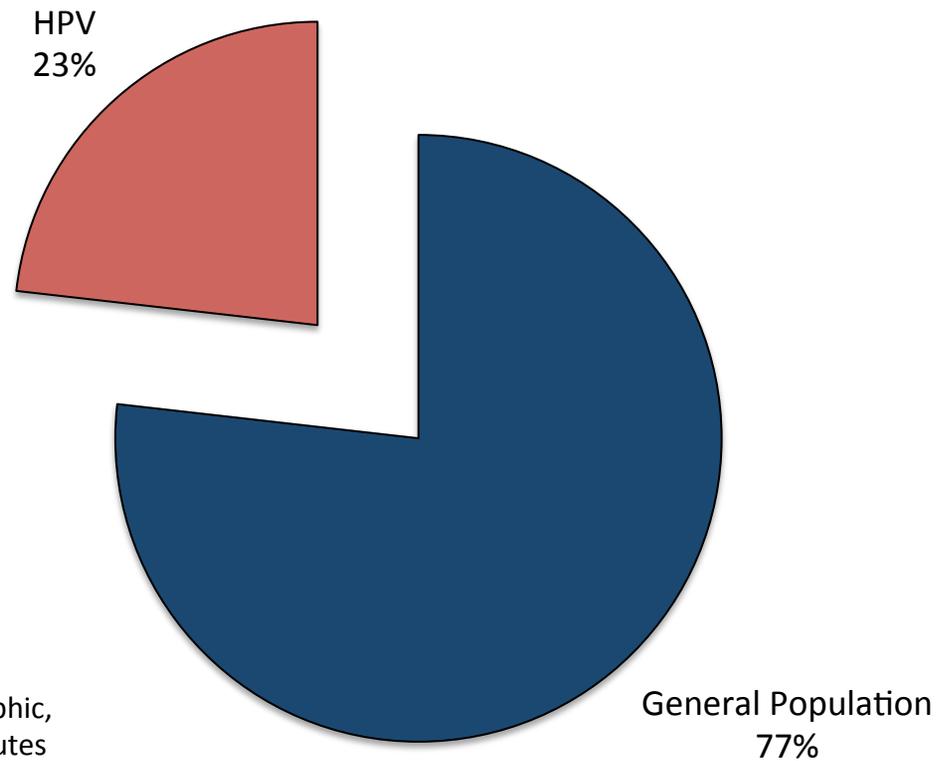
ATTITUDES

Accessing information about leisure activities



USES

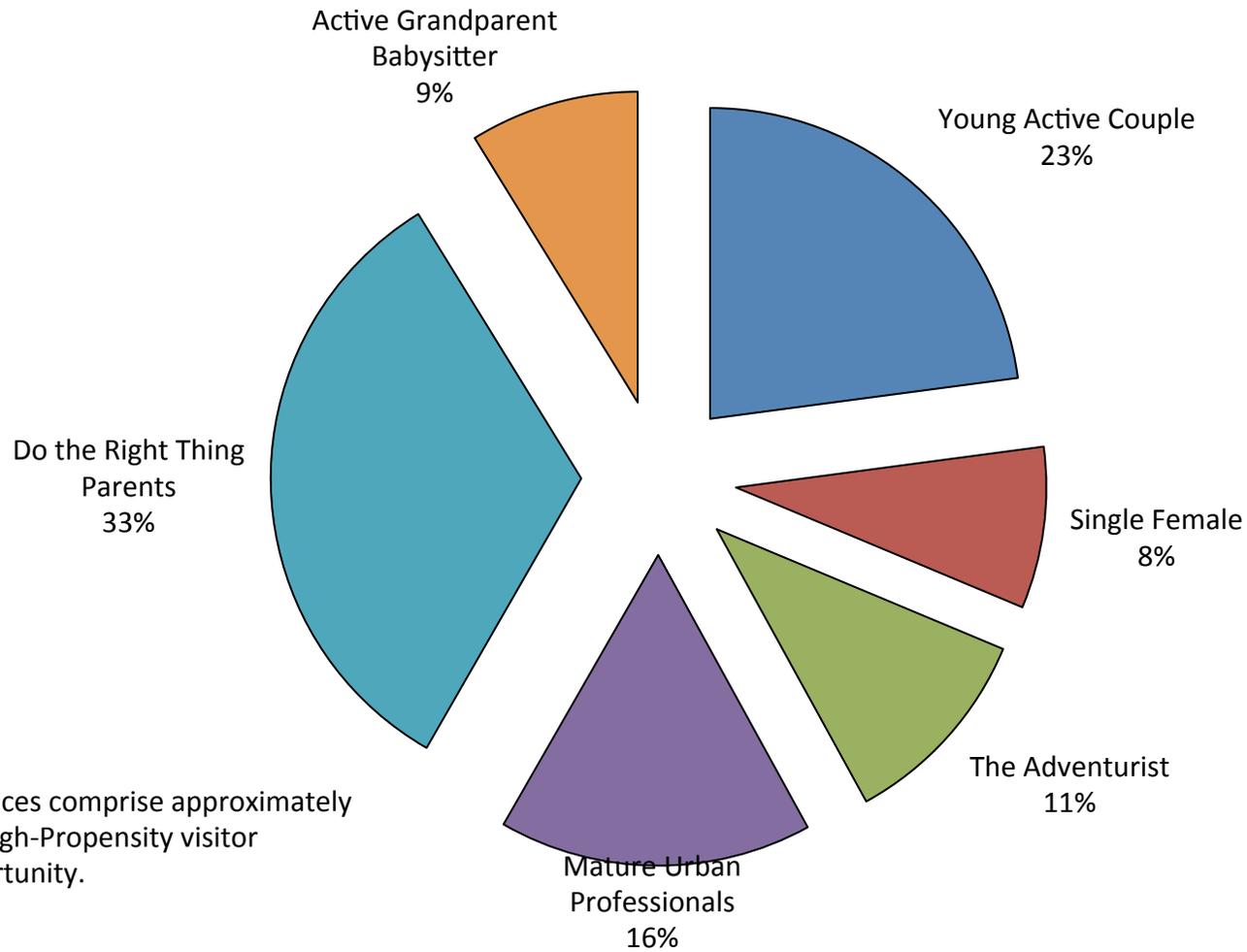
High-Propensity State Residents



There are approximately 9 million residents who possess the demographic, psychographic and behavioral attributes that tend to indicate an increased likelihood of visiting a state park.

USES

High-Propensity State Residents by Profile



Latino audiences comprise approximately 40% of the High-Propensity visitor market opportunity.



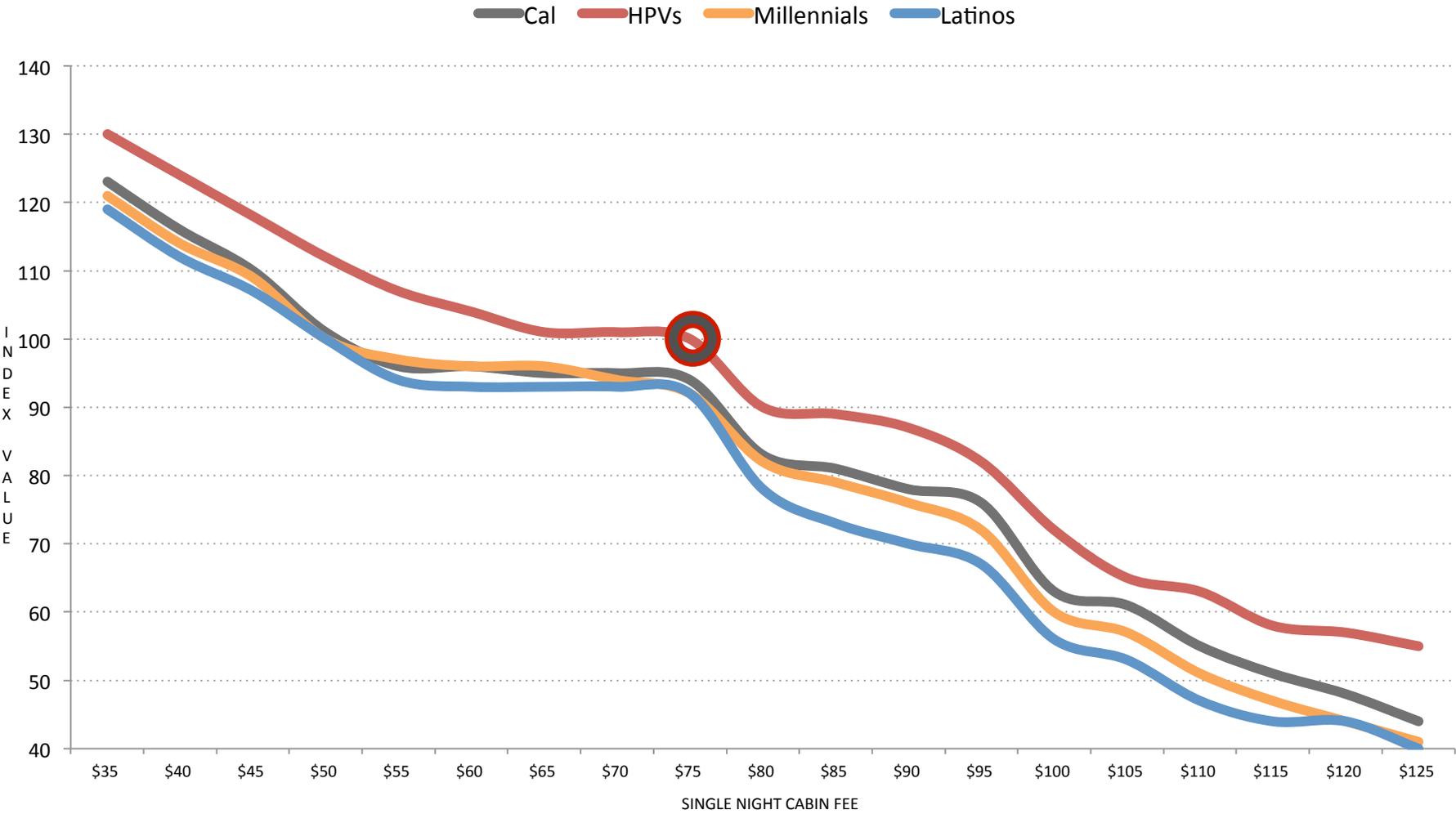
Agua Caliente County Park
County of San Diego



William Heise County Park
County of San Diego

Cabin fee price analysis

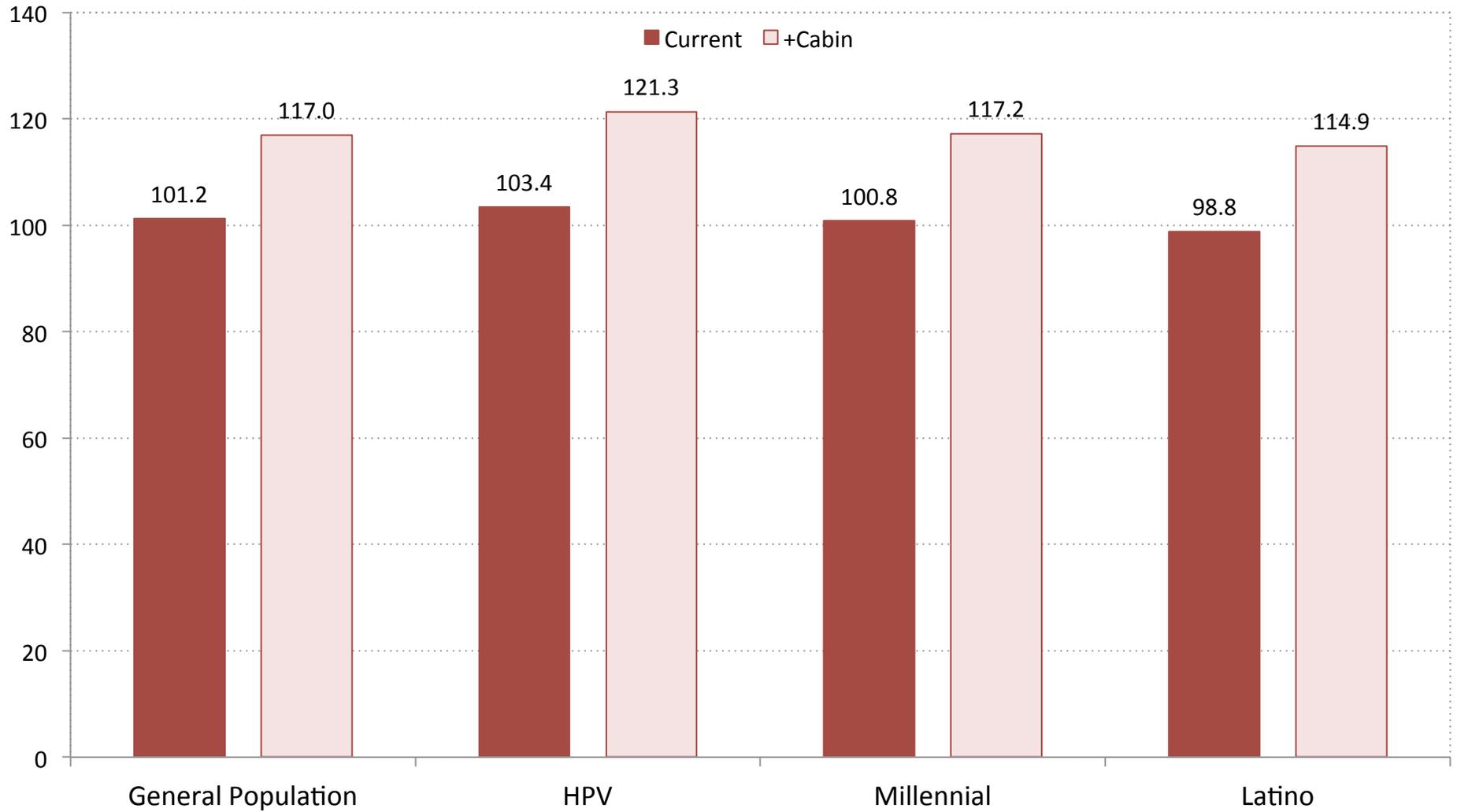
Perceived value for nightly cost by consumer category



* Nightly costs includes all reservation fees, etc.

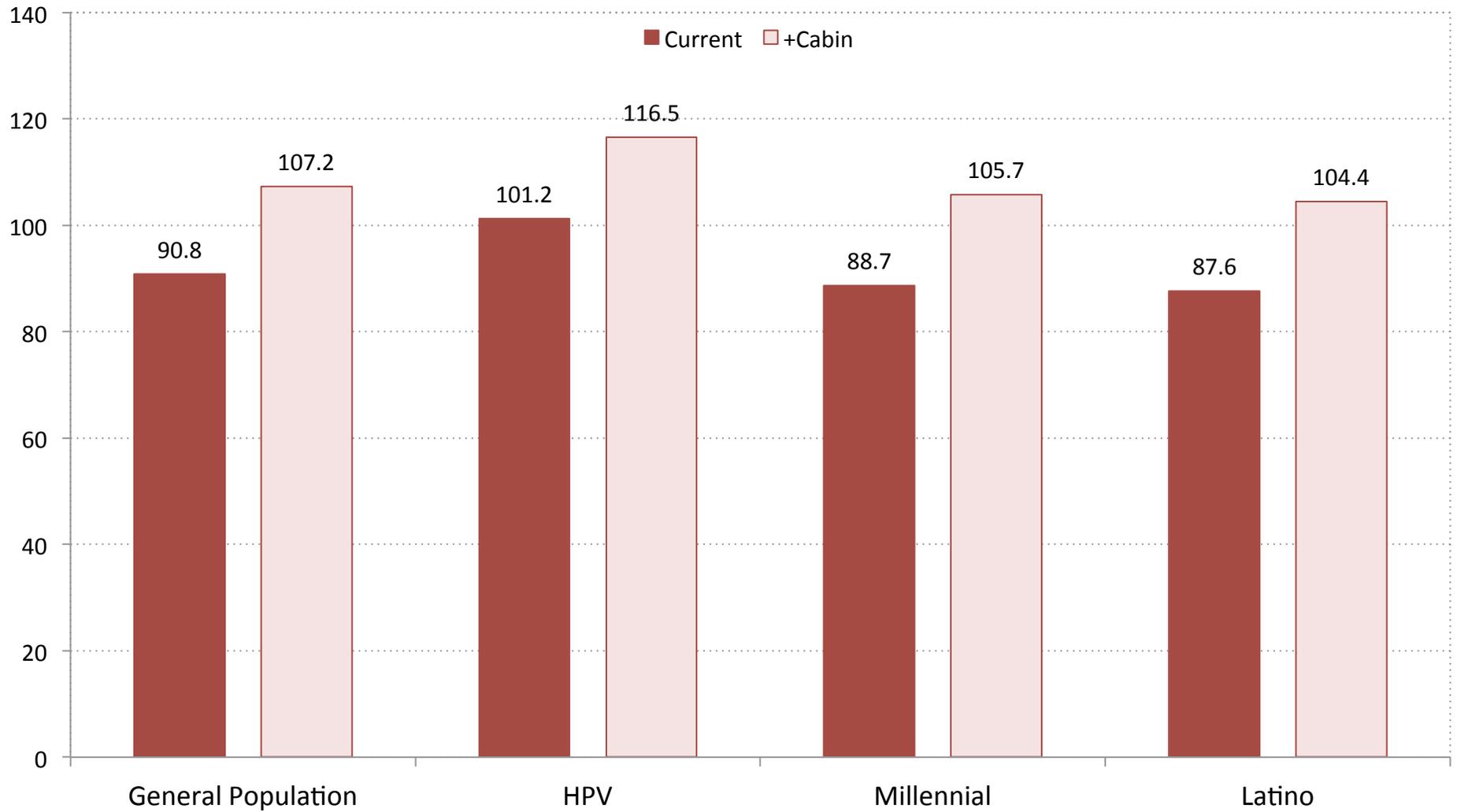
Perceptual assessment

Parks relative favorability



Perceptual assessment

Parks relative actionability



Recommendations and next steps

- The data indicates extremely limited awareness and concern for the “state park brand” – such a lack of awareness perhaps suggests a marketing and communications strategy that emphasizes the content, features, amenities and services of the parks more than a brand-building effort
- Prioritization of the three features (camping, events, and cultural/historical context) indicate the greatest opportunity to optimize engagement for both current constituencies and emerging audiences
- Alternative lodging options will likely increase the reputational equities and appeal of the parks – for both campers and day visitors alike
- Social media diagnostic “audit” would likely reveal low-cost, immediately implementable engagement opportunities and serve as a key component of an integrated marketing and communications strategy

INQUIRIES OR REQUESTS?

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