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A Social Values Segmentation of the Potential Ecotourism Market¹

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The use of social values in segmenting leisure and travel markets involving social goods is suggested as an alternative to the more common personal values approach. Results of a social values segmentation of the potential Australian ecotourism market indicate that the majority of potential ecotourists do not have particularly green values, and those with greener values tend to be least in favour of the use of park entrance fees. The latter appears to be a consequence of the high importance greens attach to equality, and the fact that shared responsibility through income taxes is perceived to be a more equitable source of funds for the management of natural areas.

Introduction

Numerous definitions of ecotourism have been offered in the literature. These vary in restrictiveness from Boo's (1990) simple 'nature-based' interpretation through to narrower definitions such as that of the Australian National Ecotourism Strategy (Commonwealth Department of Tourism, 1994), which requires ecotourism to be nature-based, educative, and culturally and environmentally 'sustainable' (see also Buckley, 1994). As attractive as these restrictive definitions might be, little is known about the profile of individuals who are either interested in such experiences, or currently driving this apparently lucrative market. In this paper we profile potential ecotourists in terms of their social values. Social values are enduring beliefs that individuals hold regarding appropriate modes of societal conduct, and desirable states of society. We know of no other study that has used social values as a basis for market segmentation. We argue that social values provide a particularly useful basis for segmentation when dealing with products, such as ecotourism, which have a social good component.

A key component of all marketing programmes is knowing the target group. Positioning, for example, must start with dividing the target adopter population into homogenous segments, each to be reached with a distinct marketing mix (Kotler & Roberto, 1989). Segmenting the target adopter population enables marketers to target specific groups and tailor products to these groups. A first step, however, is to define the population of target adopters. A common strategy is to define this potential market to include those members of society who have similar characteristics to existing consumers of the product in question. It is important that these characteristics distinguish the potential market from the total market. Another approach is to identify from a source other than existing clients, one or more individual characteristics that are expected to be correlated with adoption rates. This strategy is particularly useful when new and evolving markets are involved, since clients may not yet exist, or the profile of those that

do may reflect limitations of current marketing efforts, such as a lack of product awareness and/or availability. This strategy is employed here to define the latent or potential ecotourism market.

Our objective in this paper is to segment in terms of social values the population to which broad-based ecotourism marketing initiatives are commonly targeted. Target adopters are defined as those members of society who have an interest in spending some of their holidays in the next 12 months increasing their understanding and appreciation of nature. The product which ecotourism marketers seek to market to such individuals is the environmentally friendly ecotourism experience. In adopting this definition, we are deliberately casting our net wide. We believe that ecotourism is a relatively new and evolving market in most countries, and that considerable unexplored market potential is likely to exist. Whilst narrow, highly product-specific definitions of the potential market may have advantages in terms of expected adoption *rates*, the disadvantage is that important, and potentially profitable, segments of the market may be missed. In a climate in which the market is expected to grow, longer term potential should not be sacrificed for short term realities.

A further advantage of a broad initial definition of the potential ecotourism market stems from the fact that ecotourism represents both a 'market segment *and* a philosophy for planning, development and management' (Commonwealth Department of Tourism, 1994: 18). Thus, in addition to the traditional tourism marketing concerns of the sector, and individual operators within the sector, many ecotourism marketers are also concerned with broader questions of social change, and hence social marketing. Following Kotler & Roberto (1989: 24), social marketing involves a 'social-change management technology involving the design, implementation and control of programmes aimed at increasing the acceptability of a social idea or practice in one or more groups of target adopters'. In contrast to traditional marketing campaigns, which most commonly target those segments for which adoption is expected to be most likely, social marketing campaigns often target groups which are most in need of change, and which may not produce the most cost-effective return. Social marketers may seek to avoid preaching to the converted. An example of a public sector social marketing initiative is the use of the slogan 'Go Wild Wisely' in pamphlets distributed by the Ecotourism Section of the Australian Commonwealth Department of Tourism. The pamphlets do not specifically encourage individuals to purchase ecotourism products, as they would if they instead contained the slogan 'Take An Ecotour Today'.

The paper is structured as follows. Psychographic approaches to market segmentation are briefly reviewed in the second section, focusing on values segmentation and how this compares with other approaches such as motive-based segmentation. The survey instrument and value scales are then summarised. Results are presented next, beginning with a comparison of potential ecotourists and non-ecotourists, and moving on to an analysis of the underlying dimensions of social values in potential ecotourists, and a social values segmentation of the potential market.

Psychographics and Social Values

In a bid to improve prediction of tourist behaviour beyond that which is possible with demographic variables only, attention has turned to psychographic variables. Defined broadly as lifestyle patterns (Beane & Ennis, 1984), psychographics is an umbrella term for a host of psychological concepts such as beliefs, values, attitudes, motives, needs, desires, commitments and so on. At this stage, the relative importance of these concepts is far from established, and as Pizam & Calantone (1987) and others have noted, their measurement can also be problematic.

One approach has been 'to develop a general measure of psychographics that could describe successfully consumer lifestyles in various areas, and be applicable across different products and services' (Pizam & Calantone, 1987: 177). The search for these general models has tended to follow two paths. One has focused on needs, and the states of arousal, or motives, that lead to the satisfying of these needs. The other has focused on human values.

Much of the early literature on tourist needs and motivations focused on 'escape'. Mayo (1975) found that psychographic measures pertaining to the need to escape from other people were, among other measures, significantly correlated with attractiveness ratings for National Parks. Dann (1977) argued that escape is the main basis for tourist motivation, manifesting itself in two forms. First, it is claimed 'that a possible push factor for travel lies in the desire to transcend the feeling of isolation obtained in everyday life, where the tourist simply wishes "to get away from it all"' (p. 187). Second, some individuals, typically of lower socioeconomic status, tend to emphasise the status and significance of their holiday. More generally, Dann (1977) argues that travel decisions involve two factors: push factors which make you want to travel, and pull factors which affect where and how you travel. Crompton (1979) and Iso-Ahola (1980, 1982) also identify escape as an important aspect of tourist motivation.

Plog has developed a unidimensional model of travel 'motivation' in which individuals are seen to fall along an allocentric-psychocentric continuum. The term psychocentric is used to refer to a person 'whose centre of attention is focused on self-doubts and anxieties, rather than using this energy to venture out into the world to explore it' (Plog, 1994: 214). Pearce and colleagues have developed a framework for the analysis of travel motivation based on Maslow's (1954) hierarchy of needs. It is argued that 'people have a career in their travel behaviour. Like a career at work, people may start at different levels {of the hierarchy}, they are likely to change levels during their life-cycle and they can be prevented from moving by money, health and other people. They may also retire from their travel career or not take holidays at all and therefore not be part of the system' (Pearce, 1991: 125). Plog's approach appears to relate most to personality characteristics, with Pearce's focusing more on the nature of travel motivations for a given experience. Thus, the travel career ladder is likely to be most useful in explaining different tourist behaviour at different points in time. A personality type approach is likely to be more useful if the purpose is to generalise across time, and/or predict tourism-related forms of behaviour.

Values differ from needs in that they represent socially desirable standards of behaviour. In some ways, values can be thought of as the socially acceptable

manifestation of human needs. Pizam & Calantone (1987) have been the main proponents of a values-based approach to understanding tourist behaviour, using well-known measures such as Rokeach's (1968) Value Survey, Scott's (1965) Personal Values Scales and Bales and Couch's (1969) Value Profile.

A value can be defined as 'an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state of existence' (Rokeach, 1973: 5). Values tend to be general rather than specific, and as such, have been referred to as 'abstractions concerning general classes of objects' (Katz & Stotland, 1959: 432), and as 'generalised attitudes' (Bem, 1970). Rokeach, however, has argued that values represent different kinds of belief than attitudes. A value is a single prescriptive belief whereas attitudes are clusters of beliefs that can be prescriptive, cognitive, affective or behavioural. A further difference is that values transcend specific objects or situations, whereas attitudes focus on specific objects and values. As a consequence of their definitional properties, values are limited in number and have wide generalisability. They are also widely regarded as the core beliefs that guide actions and behaviour (Braithwaite & Scott, 1991: 663–4). Thus, their relevance across different situations and their limited numbers make them economical measures when one considers the breadth of the psychographic field.

Because values are relatively enduring, the results of segmentation studies based on values can be linked to the results of previous segmentation studies employing the same values measure (and values structure). This means, for example, that once the preferred television programmes and newspaper and magazine reading habits of different value segments have been established, they can be assumed in other studies without the need for further measurement. Motives, being less enduring and more situational than values, will tend to have less explanatory and predictive ability with respect to such forms of behaviour. Motives are particularly useful, however, in identifying what it is that attracts tourists to a given area, and hence establishing what the content of marketing campaigns should be.

Although a number of studies have used personal values as a basis for market segmentation (see for example, Pitts & Woodside, 1984, Kamakura & Mazzon, 1991) and a few have applied values to the tourism sphere (Pizam & Calantone, 1987; Luk *et al.*, 1993; Madrigal & Kahle, 1994; Shih, 1986), little interest has been shown in social values. Whereas personal values refer to the ideals one has about one's own private life, social values refer to the ideals one has about how the world, one's country and one's community should be.

We know of no other tourism segmentation study that has used social values. The use of social values as a basis for segmentation is expected to be particularly useful when the product of interest is a social good. Because the environment is typically of a public good nature, one might expect that social values would provide a useful segmentation variable in studies of ecotourism, sustainable tourism, alternative tourism and the like.

Previous studies have shown that both personal and social values are related to environmental behaviour. Dunlap *et al.* (1983), for example, found that recyclers rank values reflecting higher-order needs (such as exciting life, inner

harmony and a world of beauty) significantly higher than a national sample, and rank lower order needs (such as national security, a world at peace and salvation) significantly lower. In another study employing the Rokeach Value Survey, Neuman (1986) found that a number of values were weakly but positively related to both energy conservation behaviour and beliefs about the efficacy and necessity of conservation. Neuman (1986: 61–2) notes that the observed association between conservation and personal growth values ‘reflects the recent social movement toward voluntary simplicity, ... in which material consumption is de-emphasised in favour of more inward forms of fulfilment and satisfaction’. This is seen to be consistent with Maslow’s (1954) hierarchy of needs.

The Rokeach Value Survey contains only five social values, but a more comprehensive coverage of this domain is provided by Braithwaite & Law’s (1985) Social Values Inventory. The instrument was developed from interviews with a random sample of Australians after they had completed the Rokeach Value Survey. Respondents were asked what values had been left out, which ones covered too much ground and so on. The instrument has been used widely in Australia and has established reliability and validity (Heaven, 1990, 1991; Braithwaite, 1982, 1994; Thannhauser & Caird, 1990).

A second measure of social values included in the survey conducted for this study corresponds to Inglehart’s (1977) theory of postmaterialist values. According to this theory, the ‘unprecedented affluence of Western societies in the postwar years and the establishment of social welfare programmes has satisfied the material needs of these populations. Those who have grown up in this period have therefore been concerned less with the material concerns such as economic security and physical safety than with non-material or postmaterialist concerns such as social equality, the protection of the natural environment, and the overall quality of life’ (McAllister, 1990: 15). The materialist–postmaterialist distinction has been shown to be an important determinant of individuals’ social attitudes, and subsequent electoral behaviour (Inglehart, 1990; McAllister, 1990). Individuals with postmaterialist value types are more likely to favour environmental protection, and to become involved in pro-environment forms of behaviour, such as voting in favour of environmental protection, joining conservation groups and so on. Inglehart’s theory of postmaterialism has its origins in Maslow’s (1954) theory of motivation. One would expect ecotourism experiences to typically involve needs toward the top of Maslow’s hierarchy, which coincides with postmaterialist values. Note that in contrast to Pearce’s travel career ladder, which is concerned with identifying the level(s) a tourist is operating in at a certain point in time, the theory of postmaterialist values is concerned with the identification of an individual’s *generalised* orientation with respect to Maslow’s hierarchy. Blamey (1995) summarises the different psychographic approaches in more detail along with their relevance to ecotourism.

Methods

A questionnaire was mailed to a random sample of 3500 adult Australians registered on the electoral roll. Two weeks after the initial mailing a reminder card was sent to all non-respondents, and a further two weeks later another copy of the questionnaire was mailed to individuals not responding to the earlier

prompts. 1680 valid responses were obtained, constituting an acceptable response rate of 48%. A comparison of respondents' demographic characteristics with the known characteristics of the Australian population revealed that the sample had higher education levels than the population, but a similar age and income profile (i.e. statistically not significant t-statistic, on sample and population proportions).

Potential ecotourists were those responding yes to the question 'Would you like to spend some of your holidays in the next twelve months increasing your understanding and appreciation of nature?'. The question clearly emphasises the educative/experiential dimension of the ecotourism definition, which is arguably the primary motivator for ecotourism experiences. As with all self-report measures of social attitudes, intentions and behaviour, responses to the question will be subject to some degree of social desirability bias, and differing respondent interpretations.

The Social Values Inventory requires respondents to read through a list of societal goals and to judge each as a standard that they might use to make judgments about world and community events and to guide their actions. Responses are given on a seven point asymmetrical rating scale where (1) = I reject this, (2) = I am inclined to reject this, (3) = I neither reject nor accept this, (4) = I am inclined to accept this, (5) = I accept this as important, (6) = I accept this as very important, (7) = I accept this as of the utmost importance. Of the 18 original items of the Value Survey, 17 appear to be valid contemporary indicators of Australian values (see Blamey & Braithwaite, 1996) and have been used in this study.

Postmaterialism was measured using the scale developed by Inglehart (1977), whereby respondents are presented with two lists of 'important matters facing society', and asked to indicate those in each list which they see as most important. One list has four items to choose from, and the other has eight items. Depending on the proportion of postmaterialist and materialist items selected, individuals are classified as either pure postmaterialist, mixed postmaterialist, mixed materialist or pure materialist.

Results

Determinants of interest in increasing understanding and appreciation of nature

A logistic regression was run in order to investigate the influence of selected variables on the dichotomous question used to identify potential ecotourists, described above. Variables used in this regression were defined as follows:

- shop = dichotomous variable taking on a value of (1) if respondent indicates that environmentally friendly products usually purchased; (0) otherwise.
- knowl = 5-point scale indicating lack of knowledge in issues involved in deciding how Australia's forests should be managed in the future ((1) = very knowledgeable, (5) = not at all knowledgeable).
- proenv = dichotomous variable taking on a value of (1) if respondent more

frequently favours preservation when controversial environmental issues arise; (0) otherwise.

prodev = dichotomous variable taking on a value of (1) if respondent more frequently favours development when controversial environmental issues arise; (0) otherwise.

educate = a dichotomous variable taking on a value (1) if respondent has a tertiary degree, or higher; (0) otherwise.

The regression results are as follows:

$$\log (P_i / (1-P_i)) = 0.529 + 0.716shop - 0.212knowl + 0.911proenv - 0.762prodev + 0.371educate$$

(0.210) (0.115) (0.058) (0.125) (0.203) (0.170)

where P_i represents the probability that the i th respondent indicated an interest in increasing her understanding and appreciation of nature {% correct predictions = 70; model -2LogL = 1845.9; initial -2LogL = 2044.9}. Standard errors are presented in brackets.

A first observation is that each of the parameter estimates is statistically significant at the 95% significance level. As has been suggested in the literature, individuals with an interest in learning about and appreciating nature are more likely to purchase environmentally friendly products on a regular basis, more likely to favour preservation when controversial environmental issues arise, and more likely to have a tertiary education. Although these general results are consistent with claims that ecotourists are environmentally conscious, seeking out authentic and environmentally sensitive tourism experiences, different segments of the market may differ in the degree to which they concern themselves with such matters. The cluster analysis reported in the next section addresses this question.

It is interesting to observe the sign of the estimated knowledge parameter in the above regression. It appears that those interested in increasing their understanding and appreciation of nature are those who are already most knowledgeable. To some degree, ecotourism will be preaching to the converted. Education and subsequent attitude change may be most needed among those who do not currently undertake nature-based experiences in an environmentally friendly way.

Evidence pertaining to the relationship between interest in ecotourism, postmaterialist value type, and age is shown in Table 1.

These results confirm that postmaterialists have a significantly higher propensity to participate in ecotourism than materialists. From the first entry in each cell, 88% of pure postmaterialists aged 30 or less satisfied the definition of potential ecotourist adopted in this study, compared with 47% of pure materialists, and 67% of those with mixed-value orientations. When the focus changes to where potential ecotourists are most likely to be found, a different story emerges. Aggregating over all age categories, only 18% of all potential ecotourists have pure postmaterialist values, compared with 23.4% for pure materialists. The largest values segment is the mixed materialist, accounting for 35% of all potential ecotourists. This finding holds for particular age groups as well.

Table 1 Target adopters by age and values¹

	Age 30 or less	Age 31-39	Age 40-49	Age 50-61	Age 62+	Total
Materialist	47% (2.7%)	66% (4.5%)	61% (4.4%)	60% (5.7%)	54% (6.1%)	58% (23.4%)
Mixed Materialist	67% (7.6%)	66% (7.6%)	66% (7.1%)	69% (7.5%)	51% (5.0%)	64% (35.0%)
Mixed Postmaterialist	67% (4.5%)	80% (6.5%)	71% (5.8%)	68% (4.0%)	67% (2.7%)	71% (23.5%)
Postmaterialist	88% (5.8%)	75% (1.7%)	95% (1.7%)	84% (1.3%)	81% (1.6%)	85% (18.1%)
Total	67%	71%	70%	67%	58%	67%

1. The first result in each cell refers to the percentage of the cell sample that may be considered to be potential ecotourists. Results in brackets represent the percentage of all potential ecotourists falling in a particular cell.

The fact that the majority of potential ecotourists do not have either pure or mixed postmaterialist values suggests that overall, ecotourists may not be as environmentally aware and socially conscious as often thought. Although actual ecotourists may clearly differ to potential ecotourists, few a priori reasons exist to explain why current marketing efforts and consumer constraints would favour ecotourism experiences among the more postmaterialist segments of society.

Social values segmentation

Dimensions of social value

For the purpose of identifying orthogonal values dimensions among potential ecotourists, the 17 SVI items were subjected to a principal components factor analysis, with varimax rotation. A three-factor solution appeared to produce the most sensible solution for which eigenvalues were in excess of one.

The first factor (Table 2) is labelled *Development and Control* because it is defined by values that favour economic development, domination of nature, national greatness, national security, the rule of law and reward for individual effort. The theme is competition, the desire for power and the exertion of power. These values may be thought of as those that are most often advocated by the political right.

The second factor is labelled *Equality and Harmony* with strong loadings for social reform, international cooperation, equality, rule by the people, and a good life for others. These values are often associated with the political left.

The third factor is a *Rights* factor in that it supports the wellbeing of the individual and of nature. The right to live in freedom and peace with dignity is the essence of this dimension.

Identifying the segments or clusters

A non-hierarchical cluster analysis, K-MEANS Cluster (SPSS, 1993), was used to cluster respondents into a small number of relatively homogenous groups. The input variables were the three factor score variables corresponding to each of the social values dimensions. Several cluster solutions were run, ranging from three to six clusters. A four-cluster solution appeared to offer the most sensible

Table 2 Social value dimensions (and item loadings)

<i>SVI Statement</i>	<i>Factor 1</i>	<i>Factor 2</i>	<i>Factor 3</i>
National Economic Development: having greater economic progress and prosperity for the nation	0.78		
National Greatness: being a united, strong, independent, and powerful nation	0.75		
National Security: protection of your nation from enemies	0.74		
The Rule of Law: punishing the guilty and protecting the innocent	0.71		
Reward for Individual Effort: letting individuals prosper through gains made by initiative and hard work	0.61		
Domination of Nature: controlling nature and making use of the forces of nature	0.49		
Social Progress and Social Reform: readiness to change our way of life for the better		0.75	
A Good Life for Others: improving the welfare of all people in need		0.68	
International Cooperation: having all nations working together to help each other		0.63	
Rule by the People: involvement by all citizens in making decisions that affect their community		0.58	
Greater Economic Equality: lessening the gap between the rich and the poor		0.50	
Freedom: being able to live as you choose whilst respecting the freedom of others			0.66
Equal Opportunity for All: giving everyone an equal chance in life			0.63
Human Dignity: allowing each individual to be treated as someone of worth			0.55
A World of Beauty: having the beauty of nature and the arts			0.49
A World at Peace: being free from war and conflict			0.49
Preserving the Natural Environment: preventing the destruction of nature's beauty and resources			0.48
Eigenvalue	5.5	2.1	1.2
Cronbach's Alpha	0.78	0.76	0.78
Total Variance Explained	51.2%		

interpretation, and provided an acceptable distribution of cases across the four clusters. Table 3 presents the final cluster centres.

The first cluster was the smallest ($n = 176$) and brought together those who supported both Equality and Harmony and Rights but were relatively non-supportive of Development and Control. This group was hypothesised as representing *Ideological Greens*.

The second group ($n = 217$) were not particularly supportive of values of any kind. This response style was identified by Scott (1965) in his study of student values. The group is given Scott's label of *Moral Relativists*, meaning that for these people, it was difficult to endorse any value as a guiding principle across all situations.

Members of the third group were in the majority ($n = 334$) and were of the

Table 3 Final cluster centres (mean values for factor score variables for each cluster)

	<i>Cluster A</i>	<i>B</i>	<i>C</i>	<i>D</i>
Development and Control	-1.38	-0.40	0.73	0.31
Equality and Harmony	0.53	-0.42	0.80	-0.97
Rights	0.58	-1.29	0.02	0.62

view that both Development and Control and Equality and Harmony were important. This group represented *Dualists* wanting social policies that brought together the best of right and left politics.

The fourth group ($n = 275$) was distinguished by having little regard for Equality and Harmony values and high regard for Rights. The group appears to have a strong *Libertarian* flavour emphasising freedom for all individuals to prosper without the constraints imposed by social engineering.

Attitudinal and demographic comparison of clusters

Tables 4a, 4b and 4c indicate how the clusters differ with respect to selected attitudinal and demographic variables contained within the questionnaire.

Identifying the ways in which these groups define their relationship with nature

The first group, Ideological Greens, were expected to have a special regard for nature, seeing it as good in its own right and attributing to it religious or spiritual significance. The first six items in Table 4a measure the significance of nature to the individual. Scores represent level of agreement with the statement on a five-point scale where 3 represents neither agree nor disagree, a score less than 3 indicates agreement and a score greater than 3 indicates disagreement.

From the mean scores in Table 4a, it is evident that, on average, all four value groups — Ideological Greens, Moral Relativists, Dualists and Libertarians — acknowledge the spiritual side of nature and its right to exist independently of human use of it. The means for the first five items endorse the rights and spirituality of nature (all are less than 3) while the mean for the sixth item indicates disagreement with the sentiment that wilderness only has value in so far as it can benefit humans.

Even so, significant differences were observed between the groups in the direction anticipated. One way ANOVA's and LSD tests were used to compare the group means for each item. Significant differences in mean values among the groups are indicated by capital letters in Tables 4a and 4b. The Ideological Greens were significantly stronger in their support of the environment than any other group on five of the six items.

Differences also emerged between Dualists, Libertarians and Moral Relativists. Least supportive of the spiritual significance of nature and its rights to exist were Moral Relativists. For four of the six items, Moral Relativists were significantly less supportive of nature than any other group. In between Ideological Greens and Moral Relativists were Dualists who were the second most supportive on average and Libertarians who were third most supportive on average.

Table 4a Mean scores for attitudinal statements across clusters

<i>Attitudinal Statement Variable</i>	<i>Cluster A (Greens)</i>	<i>Cluster B (Relative)</i>	<i>Cluster C (Dualists)</i>	<i>Cluster D (Libertarians)</i>
<i>Significance of nature:</i>				
It is very important to have places where plants and animals are preserved, even if my family or I never go there to actually see them (L)	1.16 B, D	1.52	1.22 B, D	1.40 B
Species should be preserved for their own sake and not ours (L)	1.44 B, C, D	2.09	1.70 B, D	1.88 B
I look upon nature as if it were there in itself, and for itself, and not simply as a resource for human use (L)	1.52 B, C, D	2.29	1.90 B, D	2.07 B
Wildlife has the right to be protected irrespective of what this costs society (L)	1.86 B, C, D	2.51	2.13 B	2.26 B
Nature is spiritual or sacred (L)	1.94 B, C, D	2.82	2.21 B, D	2.65
Wilderness has value only in so far as it can ultimately benefit humans (L)	4.10 B, C, D	3.41	3.47	3.45
<i>Forest Management Issues:</i>				
Protecting areas for bushwalking/camping (I)	1.86 B	2.05	1.79 B, D	1.91 B
Attracting tourists to the area (I)	2.14	2.17	1.83 A, B, D	2.05
Protecting Aboriginal values (I)	1.62 B, C, D	2.30	1.86 B, D	2.29
Protecting wildlife and plants (I)	1.05 B, D	1.28	1.10 B, D	1.26
Those who visit wilderness areas should pay for the management of such areas through entrance fees (L)	2.55	2.44	2.34 A	2.36
The cost of managing wilderness areas should be shared amongst all taxpayers (L)	1.73 B, D	2.25	1.87 B, D	2.06 B
<i>Educational Issues:</i>				
Knowledgeable about issues involved in forest management (K)	2.40 B, C, D	2.86	2.76	2.79
Interest in how forests are managed in this country (L)	1.92 B, D	2.47	2.02 B, D	2.34
<i>Other:</i>				
Obligation to recycle papers, plastic and glass (G)	1.24 B, D	1.31	1.49 B, D	1.60 B
Obligation to purchase environmentally friendly products (G)	1.45 B, D	1.79	1.54 B, D	1.72
Obligation to donate to environmental groups when approached (G)	2.02 B, C, D	2.52	2.38 D	2.58
In general, industry can be relied on to not seriously damage the environment (L)	4.45 B, C, D	3.74	3.84	3.82
There should be less government regulation of business (L)	3.22 B, C, D	2.90 D	2.84	2.71
Spending on social security should, if anything, be increased (L)	2.91 B, D	3.38 C, D	3.02 D	3.60
More money should be spent on reducing poverty	2.04 B, C, D	2.41 C	1.86, D	2.49
Economic growth is essential, and we just have to accept that some environmental impacts cannot be avoided (L)	3.59 B, C, D	2.88	2.72	2.76
Deeply concerned about the way western societies in general are heading (L)	1.85 B, D	2.40	1.96 B, D	2.33

Table 4b Mean age, income and postmaterialism value type by cluster

	Cluster A (Ideological Greens)	Cluster B (Moral Relativists)	Cluster C (Dualists)	Cluster D (Libertarians)
Age	39 C, D	41 C, D	48	46
Personal Income	24,500	27,400 C	21,400 D	27,800
Postmaterialism	3.2 B, C, D	2.3	2.2	2.1

Table 4c Breakdown of respondents in each cluster by specified socioeconomic characteristics (column percentages)

	Cluster A (Ideological Greens)	Cluster B (Moral Relativists)	Cluster C (Dualists)	Cluster D (Libertarians)
Have tertiary qualifications	32.4%	20.3	15.0	14.5
Age 25-34	29.2	29.7	19.4	19.4
Age 35-44	32.8	29.2	22.7	25.1
Age 45-54	16.8	21.6	22.1	22.3
Age 55-64	13.1	11.4	14.7	19.4
Age 65+	8.0	8.1	21.1	13.8
Have children	58.1	70.0	79.2	78.1
Have tried but do not generally purchase green products	13.1	31.8	27.2	34.2
Usually purchase green products	86.4	66.4	71.0	64.7
Pure postmaterialists	51.1	9.3	13.4	10.9
Mixed postmaterialist	23.6	27.8	23.4	20.7
Mixed materialist	20.7	41.7	34.0	38.2
Pure materialist	4.6	21.3	29.2	30.2

Note to tables 4a–4c: Variables measured as follows: L = 5-point likert scale indicating strength of disagreement; G = 4-point scale ranging from (1) = a great deal of personal obligation to (4) not at all obligated; K = 5-point self-report scale ranging from (1) very knowledgeable through (3) slightly knowledgeable to (5) not at all knowledgeable; I = 4-point scale ranging from (1) very important as a forest management issue to (4) not at all important. Letters in cells indicate which other mean values in the row are significantly different to the mean value in that cell, using ANOVA's with *post hoc* Least Significant Differences tests (Montgomery, 1991).

Management objectives

The groups were compared in terms of the importance they attached to what the Australian Government's management objectives should be in relation to Australian forests. The four objectives that were compared in overall descending order of importance were: protecting wildlife and plants, protecting areas for bushwalking and camping, attracting tourists, and protecting aboriginal values. Again, all groups considered these objectives important or very important. Differences emerged, however, in how important.

Protecting wildlife and plants and aboriginal values were more highly prized by Ideological Greens and least by Moral Relativists and Libertarians. Ideological Greens and Dualists were equally committed to protecting areas for bushwalking

and camping and significantly more so than Moral Relativists. In relation to attracting tourists, this management issue was most strongly supported by Dualists.

Who should pay for forest management

Two issues were canvassed regarding payment of forest management: payment of entrance fees where practicable and payment by all taxpayers regardless of individual use. Dualists endorsed both proposals. Ideological Greens were least enthusiastic about entrance fees and most enthusiastic about sharing the costs among all tax payers. While all groups again fell on average into the 'agree' or 'strongly agree' categories, Moral Relativists continued in their tradition of being relatively unenthusiastic about both options.

The most interesting finding here is that the Greens are the least in favour of entrance fees, despite being most committed to environmental protection. It appears that although the Greens may strongly support initiatives to ensure that local communities benefit from nature-based tourism, they have the greatest tendency to reject the use of entrance fees for this purpose. Such a practice conflicts with their commitment to equality, and providing support for those less well-off financially. This is an example of how segmentation based on social values can be useful in the ecotourism context.

Educational issues

Two questions tapped current knowledge about the issues involved in forest management and interest in forest management. The means in Table 4a are all less than three, indicating some knowledge and interest in these issues from all groups. In terms of knowledge, the Ideological Greens saw themselves as being more knowledgeable than the other groups. In terms of interest, Ideological Greens and Dualists were significantly ahead of Libertarians and Moral Relativists.

Personal obligation in relation to the environment

Two questions asked respondents about their obligation to buy environmentally friendly products and to donate to environmental groups. The questions were designed to tap the degree to which individuals seriously accepted their citizenship role in relation to environmental issues. All groups scored on average between 'a great deal' (1) and 'a fair amount' (2) on purchasing environmentally friendly products. They were less personally committed to making donations with mean scores between 'a fair amount' (2) and 'not much' (3). The differences that emerged between groups separated Ideological Greens and Dualists from Moral Relativists and Libertarians who were less committed to the purchasing of environmentally friendly products. In relation to donations, Ideological Greens were more supportive than the other groups.

Political attitudes, environmental trade-offs and industry trust

Ideological Greens were significantly more in support of government regulation, and the need for social security and poverty reduction, and more concerned about the direction in which the world is heading. Libertarians and Relativists were least in favour of regulation, social security and poverty reduction, and least concerned about the way Western societies are heading.

No group trusted industry on average, with Ideological Greens significantly less trusting than other groups.

Conclusions

The search for psychographic bases for tourism market segmentation has tended to focus on needs and motives. As Pizam & Calantone (1987) have observed, however, the measurement of these concepts has often proved problematic, suggesting that further attention should be given to exploring the usefulness of values as a basis for segmentation. We suggest that the use of social values as a basis for segmenting leisure and travel markets involving social goods provides a worthwhile alternative to the more common personal values approach. Measures that allow for multiple social value dimensions (such as the Social Value Inventory) can be expected to offer greater insights and predictive benefits than those that reduce all values to a single dimension (such as postmaterialism–materialism). Because values are relatively enduring, and multidimensional, they will often have greater predictive power with respect to other forms of behaviour of interest to marketers, such as newspapers and magazines read, than less generalised measures of needs and motives.

Past research has linked environmental concern with ecotourism. Results of the social value segmentation of the potential Australian ecotourism market, however, indicate that the majority of target adopters do not have particularly green values. There is significant heterogeneity in the value orientations of this population. Using Inglehart's (1977, 1990) value classification system, target adopters were present not only among the environmentally conscious post-materialists, but also among materialists. Indeed, they were most likely to be mixed materialists. Using Braithwaite's (1982, 1994) social value orientations, four types of target adopters, or potential ecotourists, were empirically identified. While committed Greens were represented, they were the smallest group. Their commitment to the environment was not reduced by considerations of economic development. They placed their faith in government for wilderness management, they believed that all citizens should own these areas and pay for their maintenance. Their commitment to ecotourism was embedded in a political ideology of environmental protection, social cooperation, and equality. This was most evident in this group's greater opposition to user pays principles for access to wilderness areas, when compared to the largest segment, Dualists.

Dualists were cognisant of both environmental protection needs and economic development demands and appeared open to debates that sought new ways of resolving the tension between the two. Although their sympathies lay with the environment, they were more trusting of industry to do the right thing than Greens, and had less confidence in government regulation as the solution. Moral Relativists were the least likely to take an absolutist stance regarding the protection of nature, and were less supportive of government regulation than Greens, but more so than Libertarians, the second largest segment. Of the four segments, Libertarians felt the lowest level of obligation to recycle papers, plastics and glass, were the least supportive of government regulation, although not significantly less so than Dualists, and were the least supportive of social welfare spending.

If ecotourism is to expand and flourish as an industry, the findings of this study herald a number of warnings for those engaged in the management of this industry. First, it is important to recognise that the potential ecotourism market is not restricted to those who are particularly committed or sensitive to environmental issues. A significant component of the latent market involves those who have conservative values, many of whom may be unlikely to undertake self-reliant forms of ecotourism, but who may appreciate the opportunity to learn about and appreciate nature in the safe and comforting environment of guided ecotours. Second, this potential market, while unsophisticated in some ways, expresses a willingness to learn about the environment and is open to the adoption of new rules of ecological etiquette. Third, given the size and diversity of the potential ecotourism market, institutionalised means of protecting the environment are necessary. These data suggest that this proposition will not meet with opposition from the market. The fourth point, however, is that how environmental protection is managed is problematic and has potential for causing frictions within the ecotourism industry. This study demonstrates that management issues are political issues. Payment of entrance fees to wilderness areas illustrates this assertion well. Ideological Greens who are the most likely to oppose the user pays principle may be a minority group whose interests can be sacrificed to those of the majority. The alienation of such a group might, however, mean the loss of environmental commitment, knowledge and expertise which are the seeds for the development of a new enlightened environmental culture and the emergence of a new environmental etiquette. A philosophy of 'going wild wisely' cannot be legislated for: it must be nurtured at the grass roots level by individuals who can teach by example.

There is a need for studies of how the factors that currently limit the ecotourism market operate differentially across the various value segments. Ultimately, the successful operator, sectoral and social marketing of ecotourism products will require segmentation studies to be conducted among many different groups, each varying in terms of the specificity and/or objects of their interests, behavioural intentions, and/or behaviour. Individual operators will clearly need to complement the results of broad-based segmentation studies, such as that presented in this paper, with studies that are more specific to the particular experiences they offer.

Note

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