

Market Research

California State Parks



- Survey on Public Opinions and Attitudes on Outdoor Recreation in California (SPOA)
- State Park Visitor Survey
- Ruf Strategic Solutions
- Alternative Camping Survey
- Social media analytics



SPOA*

- Popular activities:
 - Walking for fitness or pleasure
 - Picnicking in picnic areas
 - Driving for pleasure
 - Sightseeing
 - Beach activities
- Companions were family (56%) or family and friends(31%)
- Californians think it worthwhile to pay higher fees to participate in activities that require the use of equipment, skills or fuel



*Random phone sample (2,800) and mail-back survey(1,200).
April – August 2008.

SPOA, cont:

- Growing acceptance of private businesses within parks providing:
 - Recreation equipment rental
 - Ready to eat food/beverages
 - Sponsoring special events
 - General maintenance
- Do not support:
 - Privatization of law enforcement
 - Privatization of total operation and management of areas



SPOA, cont:

- When enjoying the outdoors, adults want to :
 - Have fun
 - Be with family and friends
 - Relax
 - View scenic beauty
- Top activities adults want to do more often:
 - Walking for fitness or pleasure
 - Camping in developed areas
 - Bicycling on paved surfaces
 - Day hiking on trails



SPOA - Hispanic Opinions and Attitudes*

- Hispanics spent *more days* than non-Hispanics visiting highly developed parks and recreation areas
- More Hispanics (66%) than non-Hispanics (52%) visited parks with just family
- Hispanics went to parks with companions including more people under 18 than non-Hispanics

*700 respondents



SPOA – Hispanic cont.

- Hispanics were *less likely* than non-Hispanics to:
 - Use beach and water recreation areas or scenic observation/wildlife viewing areas
 - Participate in hiking and fishing
 - Visit historic or cultural areas



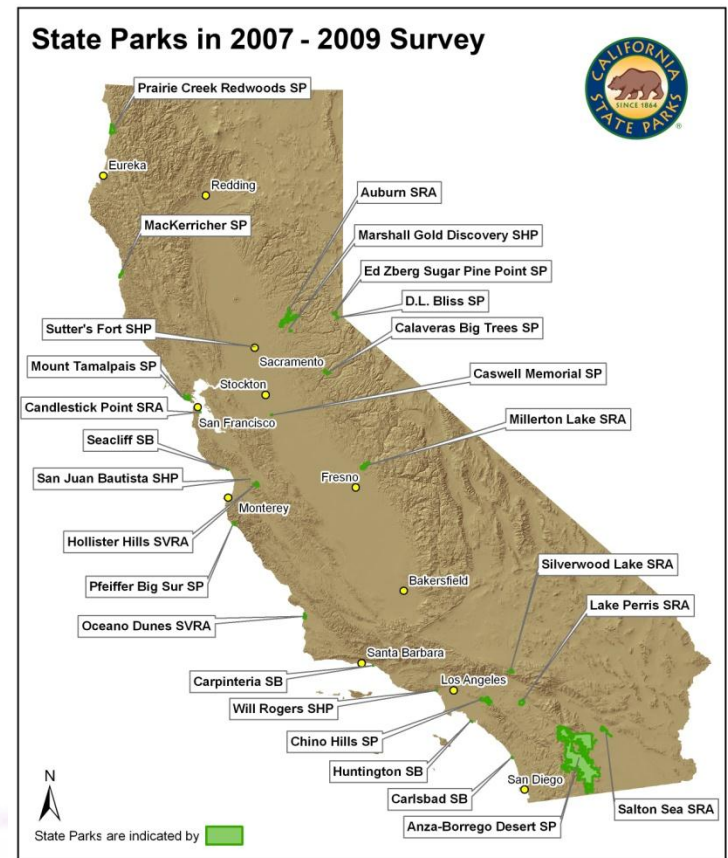
SPOA – Hispanic cont.

- Hispanics were more likely than non-Hispanics to participate in:
 - walking
 - playing (Frisbee, catch, playing with children)
 - jogging/running
 - sports
- Hispanics were more likely to strongly agree that open space lands were needed where they live.



State Park Visitor Survey

- In-person survey of visitors at 26 parks
- 279 parks in the system
- 9,600 visitors over 18 months.
- Uniqueness of each park makes comparisons and generalities difficult



Visitor Survey, cont.

- Of the visitors surveyed:
 - 43% were 35-54 years old
 - Most came with family (62%) and friends (34%)
 - 23% of visitors surveyed had children between 1 and 9 years old in their group
 - 65% identified themselves as white/Caucasian, 11% Hispanic/Latino, 7% other/multi-racial, and 3% Asian



Visitor Survey, cont.

- 88% of visitors to the state parks surveyed were from California
- Visitors travel shorter distances to parks that are in urban areas (SBs)
- Iconic destinations draw more international and out of state visitors (redwoods, Lake Tahoe, desert)
- Visitors to parks needing specialized recreation equipment are willing to travel farther (SVRAs, SRAs)



Visitor Survey, cont.

- Of the visitors surveyed, the primary activities were:
 - Hiking
 - Relaxing in the outdoors
 - Camping
 - Walking for pleasure
 - Fishing
- Most common ways visitors learned of the park were from a recommendation or because they had grown up or lived nearby.



Visitor Survey, cont.

- What visitors want
 - More contact with park staff
 - Improved facilities
 - Improved or better maintained access to parks
- What visitors like & feel is important
 - Feeling of safety & security
 - Preservation of resources
 - Condition of facilities



Ruf Strategic Solutions

- Demographic data on individuals reserving state park campsites through ReserveAmerica in 2008 and 2009.
- 629,000 recorded addresses were matched to the US Consumer Database



Ruf Strategic, cont.

- Residence of campers:
 - 36% from Los Angeles DMA
 - 19% from SF-Oakland-San Jose DMA
 - 11% from Sacramento-Stockton-Modesto DMA
- Age and household income similar to those in the SPVS
- Presence of children in household helps confirm family based travel



Alternative Camping

Definition:

Tent cabins, cottages,
floating campsites or
cabins



Alternative Camping Survey*

- 76% chose park for location
- 64% chose park because of alternative accommodations
- Top reasons for alternative camping instead of traditional:
 - Better protection from the weather
 - More convenient than an RV or tent
 - Cleaner than a tent



*3,400 online surveys, July 2009-August 2010

Alternative Camping, cont.

- Age of respondent:
 - 30%, 34-44 years old
 - 34%, 45-54 years old
- Household income:
 - 20%, \$75-99,999
 - 28%, \$100-149,999
- Ethnicity:
 - 83% White/Caucasian
 - 5%, Hispanic or Latino
 - 5%, Asian
 - 4%, other/multi-racial



Social Media Analytics

- Facebook – department main page has 3,200 friends. Analytics on the page show:
 - Age ranges
 - Gender
 - Residence
 - Peak ‘viewing’ times



What are we doing with this market research?

- Recreation Opportunity Bulletins
 - Group Camping and Picnicking
 - Here Come the Millennials
- Working to add more alternative camping areas
- Using our more urban parks to familiarize Hispanic and other non-traditional visitors with State Parks



What we are doing with research -

- Fam Camp to build new audiences
- Developing a partnership with NPS along the Anza Trail to build knowledge of State Park operated historic sites tied to California's Hispanic heritage
- Social media expansion
 - Tracking 'readership' responses
 - Posting at highest viewing times



Thank you!

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