

**Marketization:
Factors Affecting the Implementation of Reform in State Agencies**

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Abstract

We examine market segmentation as a strategy for responding to shifting demand quotients for public goods and services. We use data from state parks agencies in the fifty U.S. states to consider economic and normative explanations for the implementation of these reforms. Specifically, we construct an index to capture the extent to which state agencies attempt to target specific customer or client groups within the population as a way of responding to shifting demand quotients. We also develop and operationalize a two constructs that measures economic/political influences and normative influences that might be associated with strategies to target population segments. Economic/political influences are strongly associated with segmentation strategies but normative influences are not. We also find clear evidence of multiple market-related practices in place in the majority of states, and we find that our economic/political influences construct is strongly and positively associated with a state parks agency's capacity to generate revenues toward operating expenditure. These findings do not support the notion that competing drivers of reform account for segmentation strategies.

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Government organizations are increasingly tasked to examine and respond to citizen demands for services. Shifting demand quotients, which are anchored in demographic, economic, and social change, can alter citizens' perceived needs and expectations for public services, thereby complicating the process. A public agency may find that demand for its goods or services has declined and may no longer be sufficient for its current level of capacity. For agencies dependent on general fund allocations, decline in demand and client base may jeopardize the size of their budget regardless of cause. Greater competition in the production of goods and services, changing preferences and alternative options available to citizens, shifts in the use and availability of technology, and lifestyle changes are among a list of factors that can alter demand quotients for public services. These shifts in demand patterns for public goods and services mean that public officials are increasingly challenged by the fiscal priorities of meeting fixed operating costs and expanding the quality and quantity of goods and services they offer to remain economically viable in an increasingly competitive environment.

In response to these conditions, agencies might more aggressively attempt to attract members of their traditional base or change services to mimic those in competitor organizations. On the other hand, they might identify and focus on new population segments within an agency's market and persuade them of the value of the goods and services offered to create a new demand quotient. In a marketization framework, these efforts to respond to shifting demand quotients would be characterized as "market segmentation" strategies.

Public agencies may turn to marketization as a solution to the increasing threat of declining client bases and revenue shortfalls. Marketization may appear to be an attractive approach to public officials addressing fiscal shortfalls and related administrative challenges. Market segmentation is one of several arrows in the marketization quiver. The underlying assumption of marketization is that greater efficiency in the production and delivery of public goods and services is achieved through open competition and by borrowing market-based methods and solutions from the business sector (Moore 2002). Marketization entails competition, privatization, and other initiatives to make an agency more financially self-reliant and less dependent upon appropriations from legislative bodies or public trusts.

Marketization initiatives change the relationship between government and the people it serves by establishing multiple potential providers of goods and services, by casting the citizen as customer, and by expanding options for clients or customers. This bundle of market-based reforms is often referred to as New Public Management (NPM). These marketization strategies are controversial in the public sector and seen as a challenge to both democratic values and civil society because they transform citizens into self-interested actors (Box 1999; Box et al. 2001; Fountain 2001; Kettl 1997; Pagnato 1993; Lynn 1998; Mascarenhas 1993). As the emphasis on provision of public goods and services shifts to competition and efficiency, other values historically associated with democracy, such as the public good or social equity, may become less important to decision-makers. This can lead to a loss of "public value," even if the "bottom line" is improved (Bozeman 2002).

Scholars generally agree that there is no single and concrete definition of the NPM concept (Hood 1996; Pollitt 1990) and NPM-style reforms mutate as they travel from one place to another (Christensen, Lægheid, and Wise, 2000; Hood 1996). In the U.S. case, elements of marketization and economic competition were at the heart of the discussion in the reform wave that dominated the 1990s (Gore 1993; Hood 1996; Osborne & Gaebler 1993).

Research tends to assume that market-based reforms are anchored in public institutions and part of a consistent institutional logic, but more empirical studies need to be pursued to answer this question. If institutionally embedded, reforms are part of other organizational policies and processes like regulatory control. Specific parts of a reform package, however, may be selectively implemented while other elements are discarded. Reforms may be implemented on top of an existing framework without attempting to integrate them into other organizational systems, and many reforms may be only partially consistent with institutional

administrative logic (Modell and Wiesel 2008). Pay for performance, for example, might be put into place without making changes to other civil service pay policies, forcing administrators to resolve conflicting policy objectives. Similarly, organizations implementing user fees may fail to integrate fee policies with pricing mechanisms, demand structures, and competition strategies.

Some argue that it is easy to get the impression that economic reforms account for the great majority of change and innovation that has occurred in the public sector in recent years (Pollitt 2001; Wise 2002; Shultis 2005). Although reforms may be accompanied by substantial rhetoric and discussion of different options, actual implementation of a reform package may be far more limited than the amount of discourse about reform elements (Pollitt 2001). Indeed, seeking to make government more efficient is an almost unchallengeable proposition, particularly for political officials who need public approval, but the actual implementation of market-based reforms is often even more complex. Moreover, the tendency in recent years to see all reforms as rooted in economic values and the policies of NPM may give too much credit to one school of thought as an agent of change and bias understanding of the direction of change in public management practice (Wise 2002). Similar reforms may be advanced by both normative and economic drivers (Kaufman 1969; Wise 2002). Contemporary market-based reforms, for example, might be driven by a pragmatic and normative response to market failure or state failure (Hyde and Dixon 2002).

One alternative driver of efforts to change demand quotients is to make public goods and services more attractive and useful to population groups, a notion that may be found in the diversity management movement. This approach involves an emphasis on being sensitive to clients and customers with diverse needs and value preferences – for efficiency-oriented organizations, this helps them to perform well, but for more normatively oriented organizations, this approach helps them to “value” differences as important and valid (Pitts 2006). The latter approach has been the predominant motivation in the U.S., with most programs in public agencies focusing on norms and values over the strategy and performance that is emphasized in the corporate world (Naff and Kellough 2004). Toward this end, organizational outputs may be grounded in humanitarian values with the objective of increasing social justice, equity or human dignity (Wise 2002).

From this point of view, efforts to identify and address the preferences and needs of diverse population groups are largely normative. Consequently, we use the more neutral term “targeting customers/clients” to describe the process rather than “market segmentation,” which pertains to a strategy grounded in economics, as we explore these patterns in the fifty states.

These competing explanations behind efforts to target organizational goods and services to members of specific demographic groups – economic competition and normative approaches – raise interesting questions about *if* and *why* organizations choose to engage in such practices. This study seeks to examine these questions. We first define and measure the extent to which a set of government agencies appear to target population segments as potential users of their goods, services, and facilities. Second, we examine whether initiatives targeting population segments are more likely to occur in conjunction with other marketization reforms and appropriately characterized as “market segmentation” or whether they tend to be found in association with normative influences. Our study thus makes several important contributions to public administration scholarship. It demonstrates how components of marketization can be measured, suggests a way to construct an index based on the implementation of different reform options, documents the extent to which NPM-style reforms have actually been implemented, and assesses whether drivers other than economic motives might account for their presence. Finally it looks for evidence to determine whether segmentation is more likely associated with normative or political/economic factors.

We use data from public parks agencies in all fifty U.S. states in order to construct a measure of market segmentation and test it against normative and economic influences. Our

data precede the current severe fiscal crisis in which budget cuts for state parks have made headline news (Sataline and Audi 2005).

In the following sections, we define market segmentation and introduce the public parks policy context. We then use our set of agencies to illustrate our measure of market segmentation and examine whether economic/political influences and normative influences seem to be important. We close with recommendations for future research and guidance for managers.

Market Segmentation

Market segmentation is a business marketing strategy that has evolved over time and precedes NPM (Yankelovich and Meer 2006). Better segmentation of the customer base is thought to enhance effectiveness by making production or service-related activities more specific and appropriate, by directing advertising initiatives more specifically, and by increasing customer or client satisfaction through delivery of goods and services that are more appropriate, more timely and more easily accessible to them. Segmentation means that the market or client group is organized into discrete subsets that share similar consumer behaviors, preferences or needs. The relative homogeneity within the segment increases the probability that group members will respond as expected to marketing strategies and promotions for good or services offered at a particular cost, and distributed in a particular way and time.

Markets can be segmented in a number of ways depending upon the product or service involved. The key point is to identify segments that will respond effectively to particular brands, products, or services. Indeed, from a marketing perspective, the ideal is to identify an underserved population, dissatisfied client group or potential first-time users. Segmentation strategies may focus on individual factors such as behaviors, values, psychographic profiles, or basic demographic characteristics such as gender, age, or ethnic group.

Normative drivers (e.g., concern for meeting the needs and preferences of population segments, inequities in the distribution of services) are equally relevant as economic ones, particularly in public agencies. Government agencies may be concerned that their services are being used by only one ethnic group, by only those of a certain income or education level, or by those in only part of their geographic region. Given that these services are likely funded by tax revenues drawn from across the population, this constitutes at a minimum “benefit hoarding” by some subsets of citizens (Bozeman 2002). For example, if state park services are used mainly by Whites, this demographic group can be seen as taking an inappropriate share of resources dedicated to maintaining and operating public park lands and park facilities. As minority groups grow in number relative to the total population in the United States, advocates for public land use are concerned about the fact that parks are serving only part of the public, reflecting an overall lack of diversity in park attendance. There is worry that this growing constituency may speak for different priorities and policies regarding public land use, recreational facilities, and budget expenditures (Hill 2005).

On the other hand, since national and state parks represent a public good, their preservation and availability to the public has intrinsic value in itself, which argues against the solution of reducing or eliminating park lands or park services in response to fiscal shortfalls or changing demand functions (Shultis 2005; US Congress 1997). Heads of state parks agencies are torn between their competing roles as stewards of a public good and executives of a public agency. In response to this tension, they have been innovators in garnering fiscal resources for operating and maintaining state parks.

After discussing our policy context in the next section, we define and operationalize market segmentation using our data set of agencies and test whether it seems to be associated with economic or normative forces.

The Case of Public Parks Agencies

In order to explore efforts to target customers and clients and test how competing influences affect them, we employ data from parks agencies in all fifty of the United States. Inventory in the U.S. state parks systems includes park areas, recreational areas (including lakes and reservoirs), and natural areas and wildernesses. In 2005-06, there were 2,045 state parks, which accounted for more than 8.8 million acres of land. Another 2.3 million acres is accounted for by recreation areas and natural areas. About 100 state parks were not in operation during this period (NASPD 2007). In addition to economic factors, parks and other public lands might have been closed for maintenance, renovation or on account of natural disasters such as flooding.

Parks are financed through a number of mechanisms and they differ in the 50 states. These include general funds, dedicated funds, federal funds, and other special funds. Some states earn revenues for parks through special automobile license plates or special taxes. Park-generated income is a substantial revenue source for operating expenses in most states and for capital expenditures in about half of the states. Of \$2.8 billion in operating expenses for 2005-06, just over \$800 million was generated by park revenues. In comparison, a total of \$812 million was derived from general funds. States vary in their allocation of general purpose funding to state parks. Alabama, New Hampshire and Vermont receive no general funds. Conversely, state parks in Rhode Island and Maine generate no revenues of their own and rely on other funds for operating expenses.

Decreased funding for parks has long been a significant factor in the management of state parks agencies. In 1980 general taxes supported 64 percent of state park budgets, but by 1997 that share was only 36 percent (Fretwell 2000). For FY 05-06 we calculate that share was 37 percent (computed from Table 5A NASPD 2007). Both aggregate and state-specific studies conclude that budgets for state parks have been declining since the early 1990s when measured as funding per capita (McLean et al. 2000: 9; Crompton and Culpepper 2006). Overall, state parks showed a decline in revenues in actual dollars from 1990 to 1999 (McLean et al 2000). McLean et al (2006: 12) observe that revenues generated by the parks themselves tended to be flat during this decade, which reflects a lack of increase in fees and other pricing mechanisms that may be politically motivated. California, for example, reduced state parks fees by 50% about ten years ago in response to an anticipated decline in budget size (McLean et al 2000: 12). State parks budgets are quick to feel the effects of state budget shortfalls (Ashley 2002). California state parks are currently facing a severe budget shortfall as a consequence of statewide budget crisis and considering the closing of more than 100 state parks despite a recent increase in user fees for parking and campsites (California Department of Parks and Recreation 2009; Rogers 9/14/09).

Public parks agencies are an exceptional example of a government function that has been affected by shifting demand quotients and competition for services. Declines in park attendance are a growing concern for both U.S. national and state government parks and attributed to many different factors (Crompton and Kim 2004; Munson et al. 2005). Chief among them are shifts in demographics. Interest in the wilderness and outdoors is much weaker among growing population segments than it has historically been in the White majority (Johnson et al., 2007; Hill 2005). Additionally, life style changes such as growing fascination with electronic media (Pergams and Zaradic 2006) and declining interest in the outdoors among young people (Louv 2005), are also key factors in lower attendance at state parks. Finally, economic constraints such as rising fuel costs and increased labor force activity work to reduce leisure time and may also account for decreased park visitation (Pergams and Zaradic 2006).

Johnson et al.'s (2007) review of this literature indicates that ethnicity and gender are related to recreational preferences and the rate of participation in the use of recreational facilities. According to a study conducted by the Outdoor Industry Foundation in 2005, participation in outdoor recreation is significantly related to ethnicity, with minorities under-represented in wilderness activities including camping, hiking, and canoeing. Although racial and ethnic minorities represented about 27 percent of the population surveyed, they represented only ten percent of those taking part in these outdoor activities. Steady growth in the overall rate of recreational visitors peaked in 1987 but then began to drop off and visitation rates for national parks steadily declined during the 21st century (National Parks Service; Nature Conservancy). Similarly, the total number of visitors is also declining in many state parks. Many states are also seeing a trade-off between the quality of the park visit experience and access to the park-seeking public due to a variety of factors including staffing shortfalls, inadequate resource conservation, and economic activities that compete with parklands (California State Parks Association, 2005; California, 2005).

According to the National Park Trust (2000) political pressure for state parks agencies to become more economically self sufficient dates back to 1991. States have responded to the ongoing fiscal crisis in many ways, including closures of all or part of their park lands and postponing capital projects and routine maintenance (Fretwell and Frost 2006; California 2005; Crompton 1998). Public parks were early users of fees for service and other market related mechanisms (Crompton 1998; Crompton and Lamb 1986). Almost all of the state parks charge fees for access to general park areas. These basic fees are usually implemented as admission charges for individuals or automobiles entering a park. A few states not employing general area fees for admission still apply fees to park an automobile, which also generate substantial income. In addition to general area fees, some state parks charge user fees for a subset of areas or facilities (e.g. lakes, campgrounds, cabins, boats, snowmobile/off-road vehicle areas) (NASPD, 2007). Fees may be regressive. Some research shows that low-income respondents indicate fee increases would likely reduce their visitation of state parks (More and Stevens 2000), but other studies argue that fees are relatively elastic and can be set at a point that would prevent a reduction in attendance (Crompton and Lamb 1986; McLean et al. 2000).

Park, recreation and tourism scholars have produced a substantial body of work exploring customer/client preferences in public parks. The National Survey on Recreation and the Environment, an ongoing nationwide study dating back to 1960, identifies population segments and tracks recreation preferences over time. A substantial share of this work examines recreational preferences of potential park users based on attributes such as gender, age, and ethnicity. (see Ho et al. 2005 for a review of the findings from this work). Research has also looked at other factors such as lifestyle (Johnson et al. 2007) and perceived constraints for visiting parks (Crompton and Kim 2004), family acculturation, leisure involvement (Christenson et al 2006); heritage perception (Thomas and Wise 1999; Timothy and Boyd 2003; Poria et al. 2004; Biran, Poria, and Reichel 2006); gender (Ho et al 2005) and orientation toward eco- or green tourism (Ateljevic and Doorne, 2000). In the next section, we explain how we use our data set of parks agencies to better understand efforts to target population subgroups and look for evidence of market segmentation.

Data & Variables

In order to examine the extent to which parks agencies appear to pursue a market segmentation strategy, we conducted a comprehensive evaluation of official parks agency websites. Both state and national parks agencies use the Internet extensively to provide information to potential users and allow visitors to make park reservations. We contend that a state parks agency's website is a reliable reflection of that agency's goals and strategies regarding marketization. For example, a state parks agency's efforts to target members of

specific population groups as users of park services and facilities should be evident on its website. Moreover, using official parks websites enables us to compare agencies directly on a set of common features that reflects their efforts to expand their customer base and the number of visitors use park facilities.

Our data set includes websites for parks agencies in all fifty states. Data were collected directly from the websites over a six-month period during the 2006-2007 academic year. We do not believe that this “Distance” between the first and last data collection dates creates any significant threat to validity – data collected at the beginning and end of the period do not seem to be different in any systematic way, and there was no intervening event that should have created a change. Much of our analysis turns on interpretation and evaluation of webpage text and photographs. We used multiple coders for gathering the data and checked for consistency in coding and resolved differences through discussion and review of the website.

Segmentation

We begin our effort to understand segmentation by focusing specifically on the ways in which parks agencies target segments of potential customers. By segmentation we mean efforts to target specific population segments as potential clients or customers. We operationalize segmentation as consisting of seven components or dimensions (Table 1): race/ethnicity, sex, age, disability, language, type of family, and visitor purpose. These include traditional demographic characteristics frequently associated with park use, as well as specific “challenge” areas for parks, including people with disabilities, non-traditional families, and non-native speakers of English. We used a simple dichotomous indicator to record whether or not efforts to address a particular population subgroup were evident on each of these seven dimensions. Our segmentation index is a sum of the values on each of these dimensions.

Descriptive statistics for each of these dimensions appear in Table 3. For race and ethnicity, we considered whether people who seem to be of color appeared in photographs on the parks website¹. Organization attraction theory suggests that individuals prefer places where others appear to be like themselves, so a market segmentation strategy would likely involve ensuring that photographs and graphics were attractive to diverse subsets of the target population (Schneider et al. 1998; Thomas and Wise 1999). For sex, we considered whether women appeared in website photographs. Our measure of age involved four different variables: (1) where people beyond childrearing age appeared in website photographs, (2) whether children appeared in photographs, (3) whether the website included a special unit, or page, devoted to older visitors, and (4) whether the website included a special unit devoted to youth. All of these variables were dichotomously coded.

For disability, we used a two-part measure: (1) whether people with apparent physical disabilities appeared in photographs, and (2) whether there was a special unit in place for visitors with disabilities. Some disabilities would not be immediately obvious in a photograph, but this variable did permit us to test whether the parks were addressing the needs of those in wheelchairs or other aids for those with challenged mobility. Many of the special units that were in place for visitors with disabilities were legalistic statements about Americans with Disabilities Act accommodations. We coded these affirmatively, since prominent display of them on an agency’s website does indicate a commitment to ensuring that needs are met.

We used two measures for language segmentation: (1) whether a translation tool was available on the website, and (2) whether non-English links were available. For type of family, we examined website photographs to see whether non-traditional families were included. This is

¹ We realize this approach has limitations, but we assume photos were selected purposefully and based on the way the image would be perceived by viewers. States might also use photos of human figures whose sex or ethnic origins could not be discerned.

particularly relevant in the case of parks, since families with a mother, father, and biological children are a traditional market for public parks. As agencies include photographs of same-sex couples, couples without children, or single adults, it indicates a strategy on their part to address the needs of other groups. Finally, we used three measures for visitor purpose: (1) whether the main menu was organized by user type (hikers, boaters, hunters, campers, for example); (2) whether the main menu was organized by life events (group area use for weddings and parties, for example or opportunities to volunteer for retirees); (3) whether there was a special unit in place for individuals with different needs (for example, ramps or paved trails, campsites with paved access to washrooms; accessible facilities; Braille signage).

We created a summative index of all seven segmentation dimensions by taking the mean score of each component and adding them together. The mean score for each component ranged from 0 to 1. In the case of components like race and ethnicity, where only a single measure was used, the score options would be only 0 or 1. The scale for the segmentation index ranges from 0 to 7, but for our data set, the actual score ranged from .92 to 4.75. The mean index score for our data was 2.5, with a standard deviation of .95.

Table 1: Components of Segmentation

Dimension	Operationalization
Race and ethnicity	Are people who appear to be of color shown in website photographs?
Sex	Do women appear in website photographs?
Age	Do people beyond childrearing age appear in photographs?
	Do children appear in photographs?
	Does the website include special units or pages aimed at older visitors?
	Does the website include special units or pages aimed at youth?
Ability	Do people with disabilities appear in website photographs?
	Does the website include special units or pages aimed at people with disabilities?
Language	Is a translation tool available on the website?
	Are non-English links available?
Family type	Do non-traditional families appear in website photographs?
Visitor purpose	Is the main menu organized by the type of user/visitor?
	Is the main menu organized by life event?
	Does the website include special units or pages aimed at visitors with alternative needs?

The frequency distributions for the segmentation index are shown in Table 2. No state had a score of zero, but 18% percent of the states have relatively low level of activity in segmentation with scores below 1.5. In 30% of the states the segmentation index was equal to or greater than 3.0.

Table 2. Frequency Distribution of Segmentation Index Score by State

Range 0-5	N of States	Percentage
.92 to less than 1.0	1	2
1.0-Less than 1.5	8	16
1.5 to Less than 2.	6	12
2.0 to Less than 2.5	13	26
2.5 to Less than 3.0	7	14
3.0 to Less than 3.5	5	10
3.5 to Less than 4.0	7	14
4.0 or Higher	3	6
Totals	50	100

Economic & Political Drivers of Segmentation

Our second purpose is to determine the extent to which segmentation is associated with economic or normative factors. That is, are efforts by state park agencies to target specific populations more likely to be found where other forms of marketization are apparent, do they appear to be found in states where demands for responsiveness to diverse groups would be expected to be higher than in other states, or do both categories of influences appear to be present?

We created an index using four factors that reflect economic influences and one political factor, measured as the governor's political party. Current research argues that partisanship remains an important factor for understanding the implementation of reforms (Allan and Scruggs 2004), and we expect states with Republican governors to be more inclined toward market-related initiatives. Our economic factors include whether or not an agency charges a fee to users of primitive campsites; whether the state parks issue permits to private providers for concessions providing park-related services; the use of lease permits (for skiing; lakes; and agriculture, for example); merchandising of park-related products such as publication and souvenirs. All of these are dichotomous variables with one indicating the practice is in place in a particular state. The data are drawn for the 2005-2006 fiscal year.

Imposition of user fees is a clear indicator of marketization strategies where the customer or user bears part of the cost for operation. Revenues from user fees for admission or the use of facilities and other park-generated fees (for example, licenses for boats or hunting) are primarily applied to operating costs. We obtained information on user fees and share of park-generated revenue for operating expenses (NASPD 2007). Since almost all states apply general area admission fees or parking fees and only a few states employ hunting fees (for example), we looked at secondary area fee structures. We chose primitive campsite fees since these facilities are accessed by a large number of park visitors and potentially accessible to many park users. The standard deviation for this indicator was 0.43. There is similar variation among the states in the use of merchandizing (standard deviation = 0.43); concessions and licensing (standard deviation = 0.49); and issuing of lease permits (standard deviation = 0.50). The mean score for partisanship was 0.56 (Republican = 1) with a standard deviation of 0.50.

The combined means produced an economic/political influences index which ranges from 1 to 5 with a mean state score of 3.3 and standard deviation of 1.28 as shown in Table 3.

Normative Drivers of Segmentation

Our competing explanation is that these state agencies are not targeting population segments on account of economic motives, but rather because they are trying to respond to the preferences and needs of diverse citizens in their target population. In this case, the driver behind apparent efforts to expand the park visitor base is normative, not economic. In order to measure the potential strength of social diversity as a force driving change in the ways parks promote their services and facilities, we consider five different demographic indicators. Four of these indicators are drawn from the 2000 U.S. Census. These include the percentage of the state population that is nonwhite; the percentage of the population not speaking English at home; the percent of the population with disabilities; and the percent of households with children. Additionally, we consider whether or not the state parks agency head is female (Book of the States), since some research suggests that diversity in key policy positions may be associated with a valuing diversity orientation. Table 3 shows the combined mean is 75.91.

Table 3: Descriptive Statistics

Variable	Range	Mean	Standard Deviation
<i>Segmentation Index</i>	<i>0.92 – 4.75</i>	<i>2.50</i>	<i>0.95</i>
Race and ethnicity	0 – 1	0.56	0.44
Sex	0 – 1	0.59	0.40
Age	0 – 1	0.30	0.26
Disability	0 – 1	0.14	0.25
Language	0 – 1	1.0	0.25
Family type	0 – 1	0.38	0.49
Park visitor’s purpose	0 – 1	0.44	0.43
<i>Economic & Political Influences Index</i>	<i>1 – 5</i>	<i>3.3</i>	<i>1.28</i>
Agency collects user fees for campsites	0 – 1	0.86	0.43
Agency issues concessionaire permits	0 – 1	0.60	0.49
Agency issues lease permits	0 – 1	0.52	0.50
Agency merchandizes publications and souvenirs	0 – 1	0.76	0.43
Republican Governor	0 – 1	0.56	0.50
<i>Diversity Influences Index</i>	<i>47.4 – 143.10</i>	<i>75.91</i>	<i>20.21</i>
Percent Non-White Population	3.4 – 75.1	21.07	13.1
% Population not speaking English at home	2.7 – 39.5	12.57	9.00
% of Population with Disabilities	5.7 – 12.2	7.88	1.58
% of households with Children	29.5 – 43.6	34.24	2.82
State Parks Agency Head Female (1=female)	0 – 1	0.15	0.35

Approach

We analyze the data by examining descriptive trends across key indicators and measures of association between population segmentation and economic/political influences and normative influences. Several factors prevent us from using more advanced quantitative methods. We have data on all fifty states, but the data are cross-sectional and drawn at only one point in time. This yields a relatively small data set and one that is incapable of demonstrating causal trends across time. Moreover, we anticipate substantial endogeneity among our primary variables of interest. Just as economic and normative influences are likely to drive a parks agency to employ segmentation strategies, segmentation is also likely to influence some of the economic and normative factors that we include in our analysis. We are unable to identify a suitable instrument in our data, making it impossible for us to successfully address the endogeneity issue. As a result, we consider our findings to be exploratory and *suggestive* of the factors that may be at play in agencies' decisions to adopt segmentation strategies. In the next section, we discuss the results from our analysis of these concepts in our data set of parks agencies.

Findings and Discussion

Our question is to determine whether or not states appear to adopt a customer segmentation strategy in response to shifting demand quotients and if so, are these strategies more likely to be associated with economic/political influences or with normative influences. We begin by examining the extent to which economic (user fees, concessionaire permits and licenses; lease permits, merchandizing) and political (state governor's party affiliation) influences are associated with segmentation strategies. Republican governors were present in 28 or 56% of the states during the period of our study. In 70% of the states, three or more of the economic and political influences were present.

If we look just at the presence of economic influences, we gain insight into the climate of marketization in the states. Table 4 shows the frequency distribution for economic and political influences by state. In 36% of the states, only one or two economic factors were present, while in 64% of the states three or four of the factors we included were present. We selected out market initiatives which were initiated by all states and lacked variance. These distributions indicate that market-oriented reforms are more likely to be present in bundles rather than as single initiatives.

Table 4: Frequency Distribution of Economic and Political Influences by State

N of Influences	N of States with Economic Influences Present (1-4)	Percent	N of States with Both Economic & Political Influences Present (1-5)	% of States with Both Economic & Political Influences Present
1	10	20	10	10
2	8	16	10	20
3	17	34	10	20
4	15	30	15	30
5	na	na	10	20
total	50	100%	50	100%

We next examine the extent to which these economic and political influences appear to be associated with market segmentation, specifically in order to compare whether the relationship is stronger or weaker than what we find for normative influences. The Pearson's r correlation coefficients for these indices (and their component parts) appear in Table 5. Our findings indicate that economic and political factors are more strongly associated with the use of segmentation in the states than normative factors. For the economic and political influences, all signs are positive and the index has a positive and statistically significant correlation with segmentation ($r=0.336$). The strongest individual correlation coefficient of 0.369 pertains to the practice of letting concessions, permits and licenses to private vendors. It is also statistically significant. The correlation coefficients for two other privatization indicators, merchandising and charging user fees, are weak, while the coefficient for letting lease permits is negligible but in the same direction. Partisanship of the chief executive of the state produces a somewhat stronger correlation coefficient of 0.243, which is marginally significant at the 0.10 level (two-tailed test) and in the expected direction. These findings jointly indicate that as the presence of these market-related political and economic factors increase, the extent to which park agencies adopt a segmentation strategy also increases. This suggests that the pattern of customer targeting we observed on agency websites is appropriately characterized as "market segmentation" and placed in the bundle of market-related reforms.

Counter to our findings for economic and political factors, normative influences appear to have very little relationship with segmentation. In fact, four of five normative factors and the combined normative index carry negative signs, indicating that demographic diversity is inversely associated with efforts to target population subgroups in the states. We observe weak positive associations for two factors: the percent of households with children ($r=0.135$) and the gender of the state agency head ($r=0.125$). The more politically salient diversity factors (race/ethnicity; non-English speaking; disabilities) are those that have negative signs. The strongest coefficient ($r=-0.213$) pertains to the percent of the population not speaking English at home, but even this coefficient fails to reach statistical significance. The positive sign for agency head gender is consistent with previous research (Dolan 2000), but it is weak and not significant.

Table 5: Associations between Economic & Political Influences, Normative Influences, and Segmentation

Factor	Pearson's <i>r</i>
<i>Economic and Political Influences Index</i>	0.336**
Privatization of Concessions, Permits, Licenses	0.369**
Merchandising of Park-Related Products	0.127
Primitive Camp fees	0.134
Lease Permits	0.048
State Governor Partisanship (1=Republican)	0.243+
<i>Normative Influences Index</i>	-0.120
% of Pop Not Speaking English at Home	-0.213
% of Pop Foreign Born	-0.203
% of Pop with Disabilities	-0.028
% of Pop Non White	-0.075
Gender of State Parks Director	0.125
% of Households with children	0.135

Statistical significance: ** $p < 0.01$ * $p < 0.05$ + $p < 0.10$, two-tailed test

To further understand the influence of marketization we examine the relationship between the number of economic and political factors present and the extent to which state agencies generate a share of their operating expenses. Economic self sufficiency is a key aspect of market-oriented reforms, and we find that there is a relatively strong and statistically significant correlation ($r=0.456$, $p < 0.01$) between the two. We do not include self-generated revenues applied to capital expenditures here since this practice is less common among the fifty states but the amount of money earned is not insignificant. As the data presented in Table 6 demonstrate, states that earn the highest percentages of their budgets are affected by three or more economic and political influences. For example, seven states with three, four, or five marketization factors generate 70% or more of their operating budgets. By contrast, none of the states with only one or two market influences generate more than 60 percent of their operating budget. Not surprisingly, the percent of operating expenditures is negatively and significantly correlated ($r=-0.250$, $p < 0.01$) with our normative influences index.

Table 6: States Earning the Highest Percentage of Operating Expenditures

State	% Budget Earned	N of Economic/Political Influences
Alabama	100	3
New Hampshire	100	4
Vermont	91	5
Mississippi	84	5
Michigan	75	3
Indiana	75	4
Nebraska	70	5

In order to better understand the variation in segmentation among the fifty states we look more closely at state agencies at the top and bottom of our list based on their segmentation index score as shown in Table 7. In the case of Indiana, the agency with the highest score on our segmentation measure (4.75), we find the state's economic and political influences score equals 4, which is substantially above the mean state score of 3.3. On the other hand, the states at the lower end of our measure do not seem to focus on targeting potential customers or visitors much at all. Arizona and New Mexico have very low scores on the economic and political influences index (1). Iowa is an outlier in this set with an economic and political index score of 4, which is well above the group mean of 2.4.

If we compare the set of high scoring states on segmentation with the set of low scoring states, we see that the average economic and political influences index shown in Table 6 is clearly lower in the states showing low levels of segmentation (2.4) than it is in the states with higher levels of segmentation (4.2).

Table 8 provides the information pertaining to the normative influences for the same twenty low and high-scoring states. Recall that the mean score for all states on this index is 75.91. The average normative influences index score for the states scoring low on segmentation is somewhat higher (88.57) than the average for states scoring high on segmentation (74.18). In terms of the segmentation, Texas's relatively high score (106) is the exception. The other top ten states have low or moderate scores on the normative influences index. States in this group with high normative influences index scores – Hawaii (highest of all states at 143), California (125), and New Mexico (111) – have low segmentation index scores ranging from 1.33, 1.42 and 1.25 respectively. That is, states with high levels of population diversity do not appear to target members of the same population groups who are included in our segmentation index.

Table 7: Economic and Political Influences for Top/Bottom 10 States by Segmentation

State	Segmentation	Economic & Political Influences
Top Ten		
Indiana	4.75	4
Maryland	4.58	4
Georgia	4.08	5
Kentucky	3.83	4
Missouri	3.83	5
Texas	3.83	5
Delaware	3.67	4
Ohio	3.67	4
Wisconsin	3.67	3
Montana	3.5	4
Average	3.9	4.2
Bottom Ten		
Arizona	1.5	1
California	1.42	3
Alaska	1.33	2
Florida	1.33	3
Hawaii	1.33	2
Michigan	1.33	3
Tennessee	1.33	3
New Mexico	1.25	1
Iowa	1.08	4
West Virginia	0.92	2
Average	1.28	2.4

Table 8: Normative Influences for Top/Bottom 10 States by Segmentation

	Segmentation	Normative Influences Index
Top Ten		
Indiana	4.75	61.8
Maryland	4.58	93
Georgia	4.08	74.6
Kentucky	3.83	74
Missouri	3.83	79.5
Texas	3.83	106.4
Delaware	3.67	77.6
Ohio	3.67	63.5
Wisconsin	3.67	58.2
Montana	3.5	53.2
Average	3.941	74.18
Bottom Ten		
Arizona	1.5	92.4
California	1.42	125.7
Alaska	1.33	91.2
Florida	1.33	77.5
Hawaii	1.33	143.1
Michigan	1.33	74.6
Tennessee	1.33	70.1
New Mexico	1.25	110.8
Iowa	1.08	50.6
West Virginia	0.92	49.7
Average	1.282	88.57

Conclusion

In this paper, we examined segmentation – the construct of targeting customer or client subgroups – both as part of a marketization strategy and as a normative approach—as a response to shifting demand quotients for public goods and services. We constructed an index to capture the extent to which state agencies attempt to target specific customer or client groups within the population as a way of responding to declining demand quotients. We observed substantial dispersion on this index. For forty percent of states the segmentation scores were midrange ranging from 2.0 to less than 3.0 Thirty percent of the states had moderately high scores of 3.0 or greater as an indicator of the extent to which customer segmentation efforts were evident. Only one state had a score below one (.92) on the segmentation index. We developed and operationalized a construct to measure marketization influences based on five factors, four of which were economic and one political. In applying that indicator to state parks agencies, we found clear evidence of market-related practices in place in the great majority of states. We found our marketization construct was strongly and positively associated with a state parks agency's capacity to generate revenue toward operating expenditures budgets.

We observe that market-based reforms tend to occur in bundles rather than as single initiatives. The great majority of states employed three or more of these market related practices. We found the components and summary index of economic/political factors to be consistently positively associated with a state's efforts to target customer subgroups. This suggests that the process we observed reflects a “market segmentation” strategy, a consistent part of a market-based administrative policy. We acknowledge, as Hyde and Dixon (2002) point out, organizations may implement market-based reforms as pragmatic rather than ideological solution to market or public policy failures.

We investigated the possibility that normative influences were related to efforts to target population segments which would be consistent with the competing drivers of reform framework. But we did not find any support for this argument. Efforts to target population subgroups to make services accessible and attractive diverse subsets of their target populations are not apparent. In fact, the larger the amount of diversity in a state's population, the less likely it is to attempt to target specific subgroups as potential visitors to state parks.

Several caveats warrant acknowledgement. Although there are a number of benefits to using data from public parks agencies in the U.S. context, the ability to conduct sophisticated quantitative analysis is not high among them. We assume a linkage between agency strategy and our measure of population targeting. We assume institutional embeddedness of reform elements enhances the success of reform efforts but we need substantially more research on the institutional context in which reforms occur that might be obtained through case analysis. With only fifty cases and a complex behavioral variable like market segmentation, it becomes difficult to use multivariate regression or other more advanced means of understanding relationships. We have illustrated with some clarity that the relationship between economic competition and market segmentation is positive and much stronger than that between diversity and customer targeting which is negative. We do not have a formal means of testing that difference using a single model and rely on simple correlation coefficients. Much of our analysis is also subjective, and while we have been careful to validate our coding with multiple coders where feasible, it is still possible that others would have a different view of these agency websites.

Despite these caveats, we believe that our analysis provides a comprehensive overview of efforts to target population subgroups as customers for agency goods and services. Although the pattern of market segmentation we observed is consistent with market-driven administrative policy, states that pursue a value-based approach to administrative practice might consider targeting population subgroups as a strategy for responding to diverse citizen needs. We cannot

say that these findings support the argument that competing influences account for reform implementation. It may be that the long history of declining visitation or user rates that characterize parks administration create a unique context for selecting among policy choices and drive administrators toward pragmatic solutions.

Our data are drawn from public parks agencies, but they might be useful for others interested in developing measures to capture marketization trends in government agencies. The insights regarding evidence of market-based reforms including market segmentation, and the relationship between this reform bundle and economic self-sufficiency might be interesting to practitioners in other areas of government. Any agency could employ a market segmentation strategy on its website as a way of attracting more users or clients. Other public agencies might want to consider implementing market-related strategies which have the potential for increasing their economic self sufficiency but the policy context should be taken into consideration to avoid unexpected negative consequences—such as reductions in future general fund allocations or conflicting in institutional logic.

State parks administrators organized as the National Association of State Park Directors have been meeting annually since 1962. Their unique and highly professional network promotes sharing of norms and information about current practices that no doubt contributes to the amount of innovation practiced in state parks administration. Visitation rates have long been an indicator of performance for state parks and thus changes in visitation or demand would capture the attention of state parks administrators.

Research would also benefit from an examination of specific initiatives to respond to shifting demand quotients for public goods and services. For example, states parks might change facilities or services they offer in response to shifting demand (e.g. trails for off-road vehicles; water parks; geocaching). Finally, understanding how market segmentation affects actual use of public services is a vital next step in assessing these initiatives. Research aimed to test market segmentation against changes in utilization would add an important dimension to this stream of research.

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