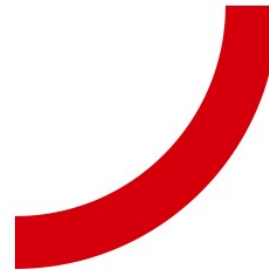




Tourist tribes on the coast: Segmentation by landscape experience



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SEMURU Symposium
28-29th October, 2019
Marine Institute

INTRODUCTION: Blue Growth, MSP and Coastal Change



RENEWABLE ENERGY

“Support the establishment of Ireland as **a world leader** of offshore renewable energy”
(NMPF 2019: p.119)



COASTAL & MARINE TOURISM

“Position Ireland as **a world class** sustainable coastal and marine tourism destination”
(NMPF 2019: p.68)



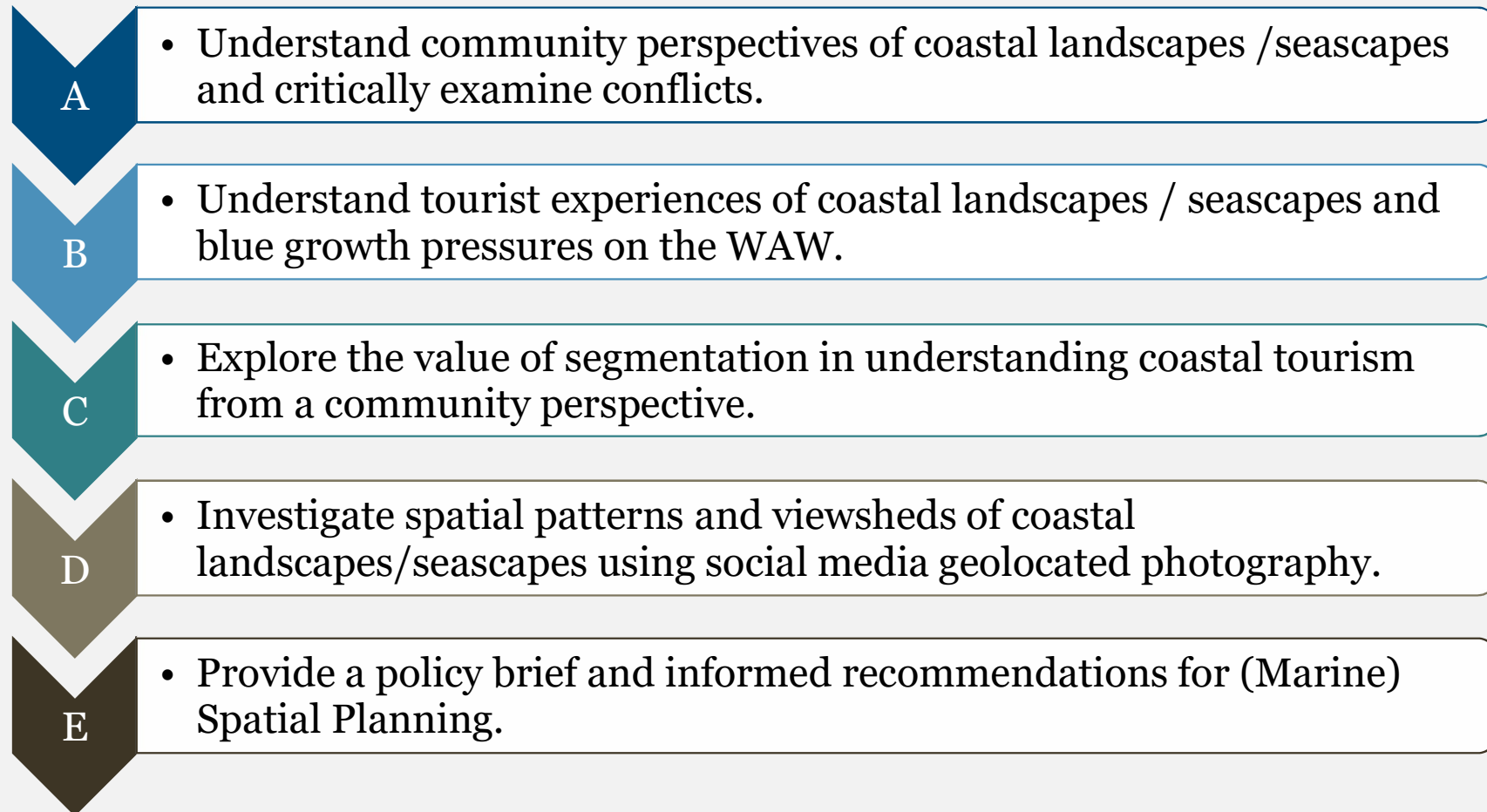
AQUACULTURE

“Support a diverse, compliant, **growing aquaculture** sector within Ireland”
(NMPF 2019: p.92)

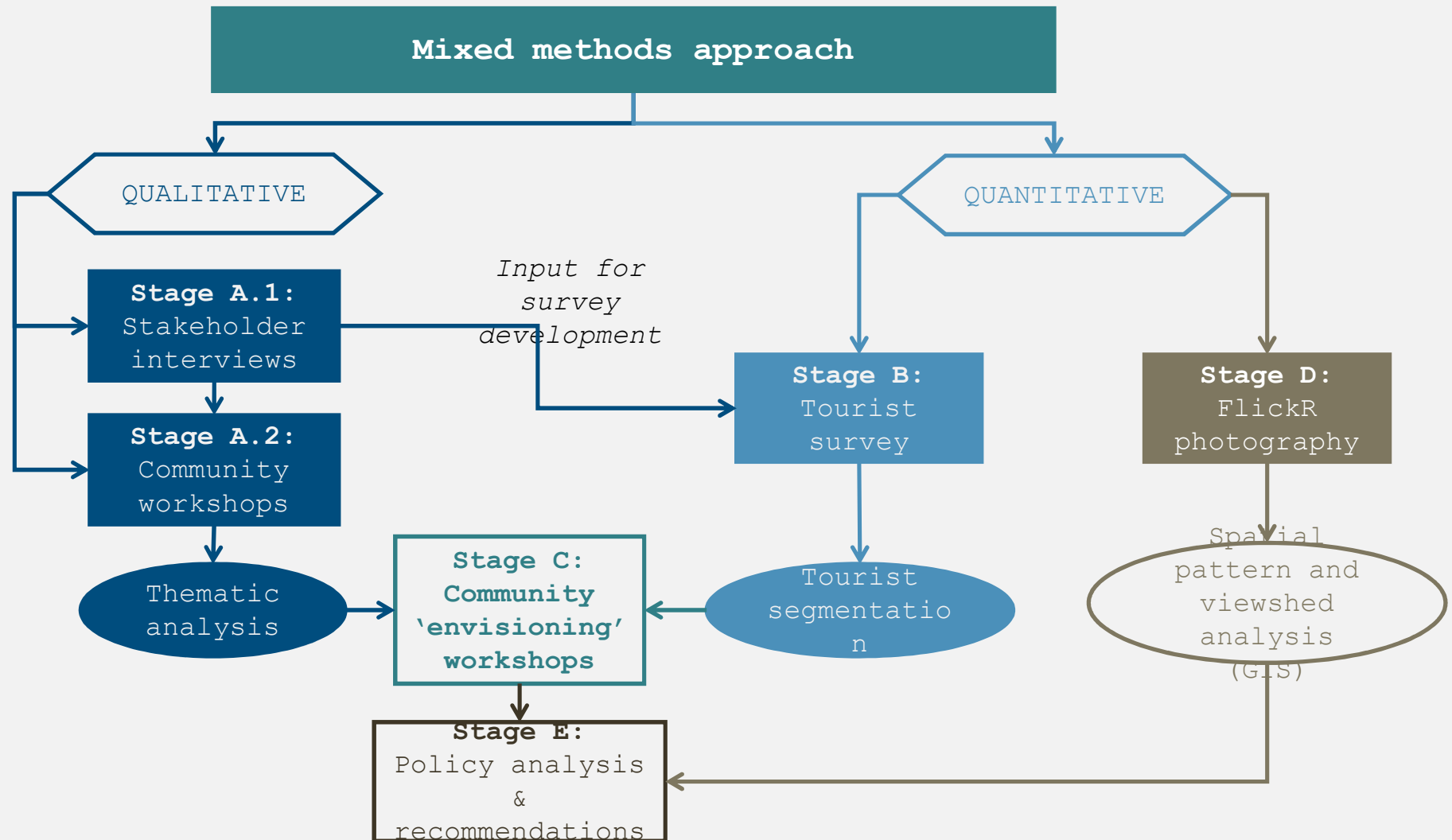
- Increasing BG brings fundamental changes on coastal and marine areas (Flannery et al. 2019)
- BG intensifies change on coastal landscapes/seascapes and heritage → Important assets of coastal tourism
- Coastal tourism a key sector of BG → A potential sector for community-led development (EC 2017)
- Need for a more nuanced understanding of landscape experience for sustainable planning solutions.

Project Objectives

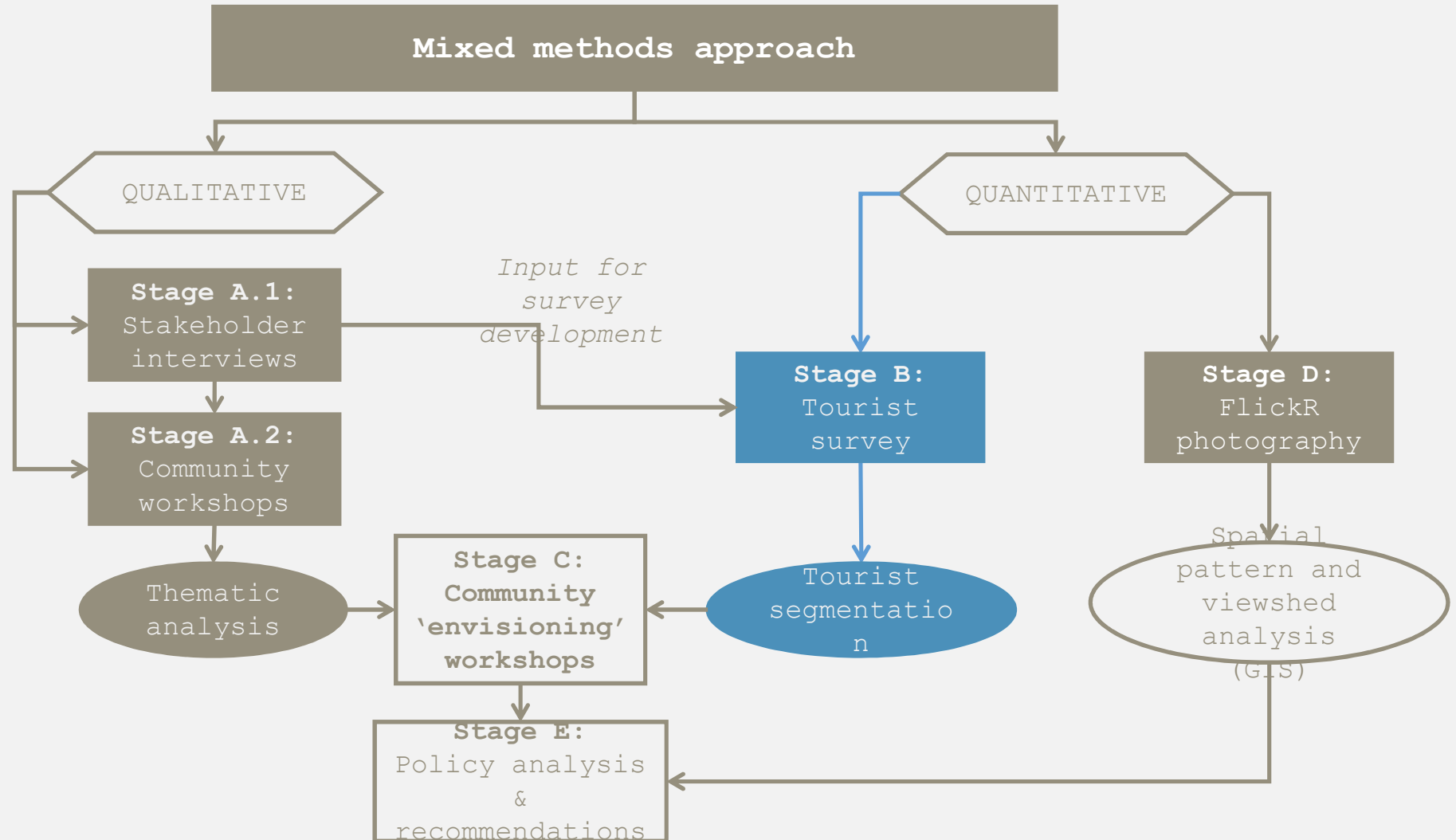
- **Research aim:** Investigate how local communities and tourists perceive coastal landscapes and changes driven by Blue Growth.



Methodology



Research design



NMPF & Tourism

Objectives

(NMPF 2019; page 168)

1. Position Ireland as a world class sustainable coastal and marine tourism destination.

2. Support **communities** in coastal areas through the increase in sustainable marine-based and coastal tourism activities.

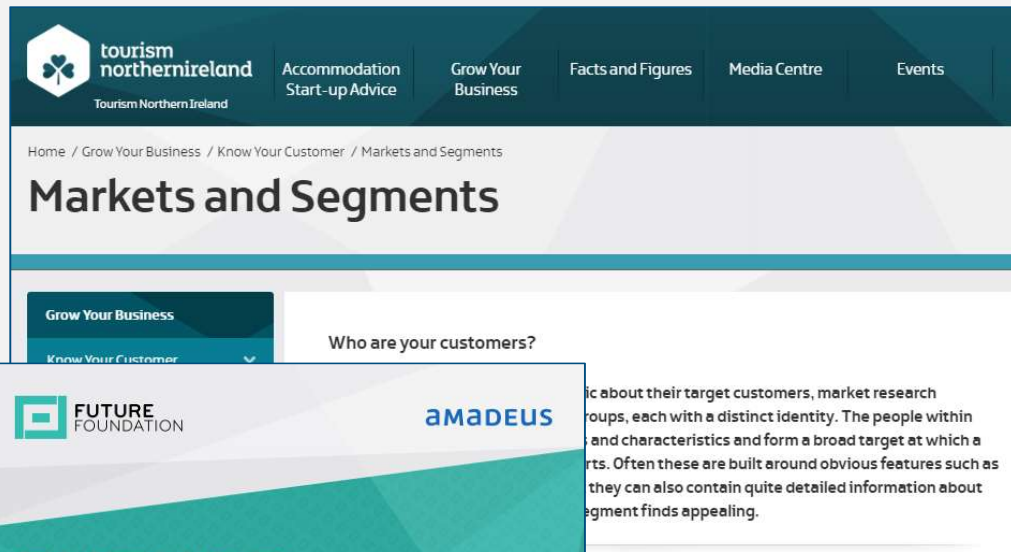
3. Maintenance of the natural marine and coastal areas which are a significant factor in bringing tourism and revenues to coastal **communities**.



Identify and develop the most promising tourist segments (p. 169)



Photos: Personal file



Tourist Segmentation

❑ Concurrent examination of multiple variables for the emergence of homogenous groups with common perspectives and behaviours

❑ Benefits:

- Expand tourism market with emergence of **niche markets**
- Identify **growth opportunities** for isolated areas
- Identify **policy gaps** and **align objectives** with environmental goals in protected landscapes (Rid *et al.*, 2014)

❑ Segmentation primarily based on market criteria:

- Expenditure, motivations, expected benefits
- Demographics

BUT

Tourists often framed exclusively as 'buyers' with fixed tastes when it comes to landscape

FUTURE
TRAVELLER
TRIBES 2030
UNDERSTANDING
TOMORROW'S TRAVELLER

Fáilte Ireland
National Tourism Development Authority

GROWING INTERNATIONAL SALES

Global Segmentation Toolkit
Using segmentation to win international sales



Our Approach

- ❑ Tourists are far more critical consumers with complex and multi-layered experiences of the coastal landscape
- ❑ Tourists and locals share more common perspectives about landscape and pressures than is sometimes supposed
- ❑ How can segmentation be used to:
 - A) Capture this complexity of landscape experiences at the coast and provide planning solutions to sustainably manage such experiences?
 - B) Mobilise community-led initiatives for coastal tourism?

“The tourist experience is not given in advance. Instead, it is shaped during interactions with the landscape and the locals”
(Bruner, 2005)

Tourist Survey Objectives

A

- Elicit tourist segments on the WAW based on landscape experience

B

- Understand how tourists perceive landscape pressures and discuss planning solutions

C

- Explore the value of segmentation in understanding coastal tourism from a community perspective

The Survey Design

Motivation, visit frequency and the WAW

Likert-type scale

**Landscape values
and perceptions**
(Segmentation
variables)

Socio-economic variables

[illegible]

DATA COLLECTION

The Wild Atlantic Way

NORTHERN HEADLANDS

SURF COAST

BAY COAST

CLIFF COAST

SOUTHERN PENINSULAS

HAVEN COAST

Source: Fáilte Ireland, 2015

● Data collection (Summer 2018)

- Self – administered questionnaires
- 3 locations and 1 route (onboard Connemara bus tours)
- 504 respondents (of which 404 overseas tourists)

Galway City Museum



Nancy's point

Leenane

Spanish Arch, Galway



Spiddal

Spanish Arch

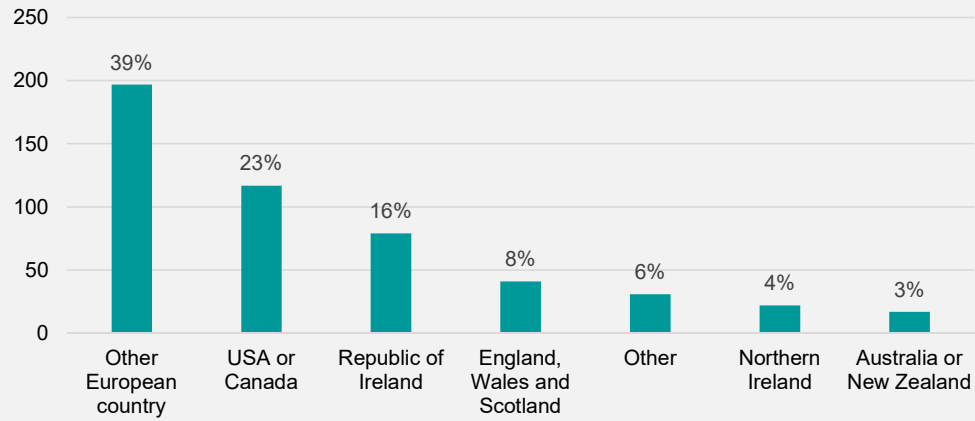
Museum

Crafts village

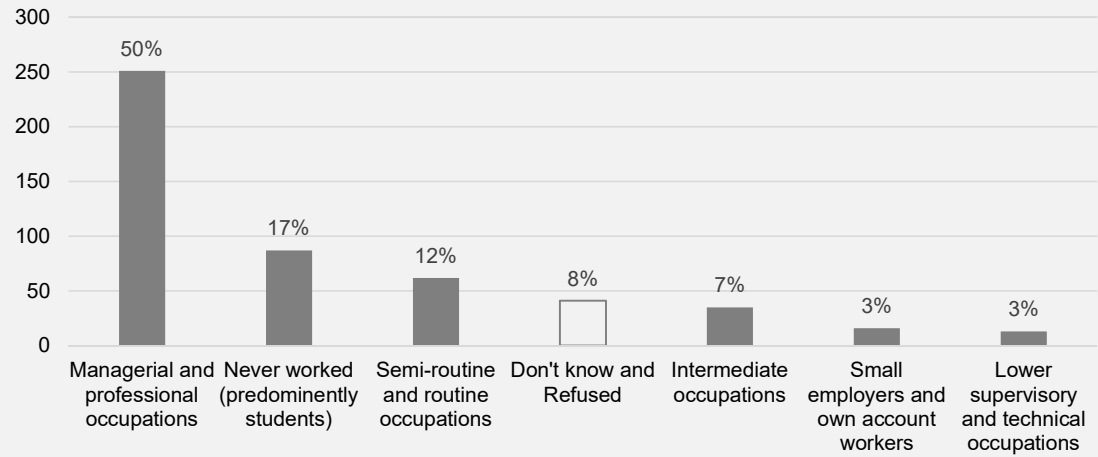
OpenStreetMap®

The Sample

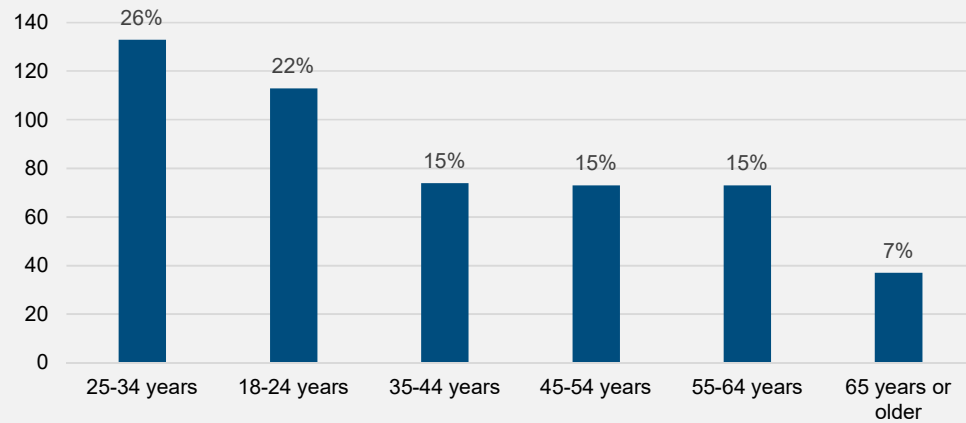
Country of residence



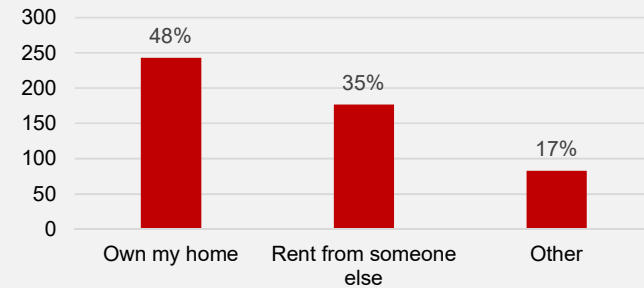
Job



Age

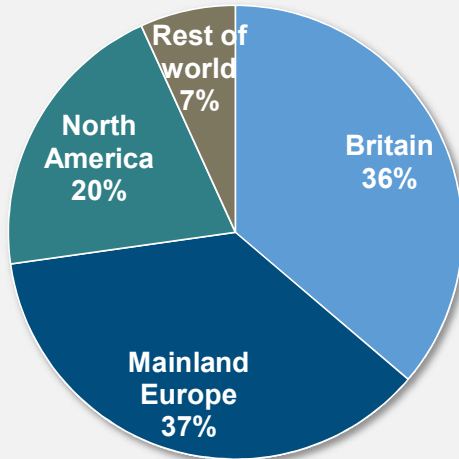


Home ownership

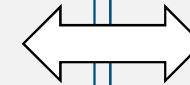
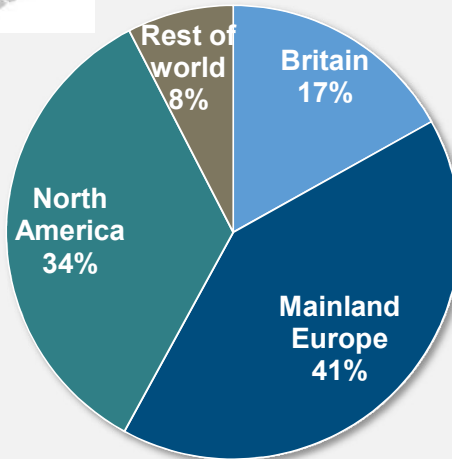


Overseas Tourists by Country of Residence: Fáilte Ireland stats vs. Sample

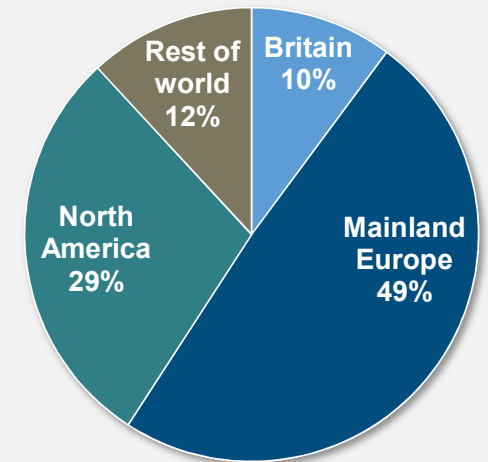
**Whole Country
Aggregates
2018**



**West Region
Aggregates
2018**



**Sample
2018**



Source: Fáilte Ireland (2019) "TOURISM FACTS 2018 Preliminary". Available at:
<http://www.failteireland.ie/Failteireland/media/WebsiteStructure/Documents/Publications/Preliminary-Tourism-Facts-2018.pdf?ext=.pdf>

*Error rate on (p) 20% : $\pm 3.9\%$

*Estimated for 95% confidence interval

Tourist Segmentation by Landscape Experience

- ❑ PCA was used on 17 items to elicit the segments
- ❑ Findings suggest that tourist perspectives are best represented by six segments which cumulatively explain **63% of the variance** within the data.

Blue Health Seekers (15%)

- **Restorative value** of blue environment important
- The sea/coast as a way to experience **calmness, tranquillity, peace**
- **Intrinsic and emotional experiences**
- Irish and European young professionals

Preservation Travellers (10%)

- **Sense of community** important
- Identify signs of **pressures from blue growth** and **extensive urbanisation**
- Perceived **loss of landscape identity**
- **Concerns** for environmental sustainability

Responsible Visitors (12%)

- **Critical** of tourism industry
- **Conscious** of their own impact on the coast
- **Concerns** for over-development and exploitation
- Travelling to **visit friends/family** OR **connect with 'roots'**
- Mainly Irish and North Americans

Heritage Explorers (8%)

- Interested in exploring **landscapes, history**, tasting **local food** and meeting **locals**
- Mainly young Europeans and older North Americans
- “Culturally Curious” (Fáilte Ireland, 2015)

Nature Escapers (11%)

- Attracted by **blue/green environment** and **outdoor recreational** opportunities
- Engage in **physical activity**
- Tend to be younger than other segments
- “Great Escapers” (Fáilte Ireland, 2015)

Environmental Vacationers (7%)

- Attracted by **scenic views** and **wilderness**
- **Critical** of blue growth and landscape pressures (esp. aquaculture, tourism etc.)
- **BUT sympathetic to wind energy**

Source: Pafi, Flannery and Murtagh 2019 (under submission)

How do tourist segments resonate at the community level?

SIMILAR PERSPECTIVE TO: *Blue Health Seekers*

Quote from community workshop:

*“That’s just my favourite place in the world. It’s just a sense of, it’s **a sense of space** but it’s also **a sense of security**. I feel like I’m closed in on the bay but I’ve got all this space within it, yeah. No, definitely **my favourite place to go if I’m happy or sad or whatever, it’s the pier.**”*

Participant #4, Spiddal



How do tourist segments resonate at the community level?

SIMILAR PERSPECTIVE TO: *Blue Health Seekers*

Quote from personal interview:

“I took this [photo] to show you the place I was going to when I was feeling very sick and I was doing a lot of walking to recover. So, I would walk on like a kind of a loop at the beach and back to my house [...]and I wanted to show you this place ...”

Participant #5, Spiddal



Conclusions and Next Steps

- We argued that tourist market segmentation has narrowly focused on socio-economic aspects failing to account for tourists' landscape experiences.
- Increasing pressures from BG and mass tourism are being perceived and increasingly questioned by visitors (and communities)
- There is a potential negative relationship between increasing BG and tourism on the WAW → Need to further investigate how the NMPF responds to this.
- Responses of Blue Health Seekers, Responsible visitors and Preservation travellers are very common to those expressed by local communities → Gap in policy about **blue health**
- Recognising these alternative market segments opens opportunities for inclusive forms of local development and landscape management.

Further research:

- **Community “envisioning” workshops** are currently being organised to investigate how communities can develop a **blue health** agenda and create **new forms of distribution from blue growth** and sustainable use of local landscapes, assets and values.

Thank You

Any questions?

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