Tourist tribes on the coast: Segmentation by landscape experience

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INTRODUCTION: Blue Growth, MSP and Coastal Change

• 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.

**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)
Project Objectives

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

- **A** Understand community perspectives of coastal landscapes /seascapes and critically examine conflicts.

- **B** Understand tourist experiences of coastal landscapes / seascapes and blue growth pressures on the WAW.

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

- **D** Investigate spatial patterns and viewsheds of coastal landscapes/seascapes using social media geolocated photography.

- **E** Provide a policy brief and informed recommendations for (Marine) Spatial Planning.
Methodology

Mixed methods approach

QUALITATIVE

Stage A.1: Stakeholder interviews

Stage A.2: Community workshops

Stage C: Community ‘envisioning’ workshops

THEMATIC analysis

Stage E: Policy analysis & recommendations

QUANTITATIVE

Stage B: Tourist survey

Tourist segmentation

Stage D: FlickR photography

Spatial pattern and viewshed analysis (GIS)

Input for survey development
Research design

**Mixed methods approach**

**QUALITATIVE**
- Stage A.1: Stakeholder interviews
- Stage A.2: Community workshops
- Thematic analysis

**QUANTITATIVE**
- Input for survey development
- Stage B: Tourist survey
- Tourist segmentation
- Stage E: Policy analysis & recommendations
- Spatial pattern and viewshed analysis (GIS)
- Stage D: FlickR photography

**Stage C:** Community 'envisioning' workshops
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)
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.
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

Landscape values and perceptions (Segmentation variables)

Socio-economic variables

Likert-type scale
Data Collection (Summer 2018)

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

Source: Fáilte Ireland, 2015
The Sample

Country of residence

Age

Job

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

**Whole Country Aggregates 2018**
- Britain: 36%
- Mainland Europe: 37%
- North America: 20%
- Rest of World: 7%

**West Region Aggregates 2018**
- Britain: 17%
- Mainland Europe: 41%
- North America: 34%
- Rest of World: 8%

**Sample 2018**
- Britain: 10%
- Mainland Europe: 49%
- North America: 29%
- Rest of World: 12%

*Error rate on (p) 20% : -/+ 3.9%
*Estimated for 95% confidence interval

Tourist Segmentation by Landscape Experience

- **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

- **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)

- **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)

- **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

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.

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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