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Coastal tourism, market segmentation and contested landscapes

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ABSTRACT

Governments are increasingly adopting Blue Growth strategies as a means of promoting economic development. Although Blue Growth offers development opportunities, from a local perspective it is often concentrated in inaccessible sectors or has negative impacts on coastal communities and landscapes. We argue that to be of use to local communities, tourist experiences of coastal landscapes need to be understood from a community-led, rather than market-led, perspective. Tourist market segmentation can help reveal such experiences but has predominately been used in a narrow, econometric way by the tourism industry, market researchers and policymakers. These approaches often fail to capture the innate experiential nature of coastal tourism and often result in the production of coastal tourism that is unsympathetic to community landscape perspectives and values. To address this gap, this paper adopts an experiential tourist segmentation approach based on community experiences of coastal landscapes. Applied to data collected from a tourist survey on the west coast of Ireland, we identify five landscape experiences: *well-being experiences*; *conscientious travel experiences*; *nature experiences*; *coastal change experiences*; and *cultural experiences*. Based on these experiences, four alternative tourist segments were identified, with significant alignment to communities around sustainable, ethical and locally sensitised forms of tourism, as follows: *Blue Health Seekers*; *Nature Escapers*; *Pristine Seekers*; and *Heritage Explorers*. The paper concludes by arguing that adopting more experiential and dialogical approaches to market segmentation will identify tourist and communities' perspectives in ways that are compatible and will reveal opportunities for more inclusive and locally accessible forms of Blue Growth.

1. Introduction

The European Commission's (EC) *Blue Growth Strategy* [1,2] highlights economic opportunities that will arise from its implementation without fully considering the complex relationship between growth realisation, local communities and coastal land- and seascapes (henceforth referred to as landscapes). The *Blue Growth Strategy* aims to increase the value of the maritime economy by promoting the rapid development of five sectors: biotechnology; renewable energy; aquaculture; mineral resources; and coastal and marine tourism. We argue that although Blue Growth is framed as offering development opportunities for coastal communities [3], from a local perspective there is often an under-appreciation of the potential negative externalities of growth and the strategy's inherent contradictions regarding the development of coastal spaces [4–6].

Achieving the EC's Blue Growth ambitions will industrialise the coast, especially through the expansion of aquaculture and wind farms, and deepen competition for resources and space, while new opportunities will, predominately, remain inaccessible to communities. These increase the potential for stakeholder conflict [4,7,9]. The plans required by the Maritime Spatial Planning Directive [3,8] are currently being established across the EU and aim to reduce such conflicts. However, planning processes have often supressed local community counter-movements aimed at resisting the commodification of landscapes and resources for value extraction by the private sector [9,10,60]. With limited capital, skills-base, and asset ownership, most communities are unable to participate in technology savvy, capital intensive Blue Growth sectors, such as biotechnology, renewable energy or aquaculture [11,12]. In contrast, tourism appears to offer more accessible and sustainable forms of growth for communities in peripheral rural areas in which traditional sectors of the economy have declined [3,8]. The remoteness of many coastal areas and the nature of tourism relying on resources that are often embedded in local communities, make the sector one of the few Blue Growth opportunities available to coastal communities. However, the transformation of the coast from working spaces to spaces of visit and conversely, can create tensions [13,14]. For example,

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many tourists visit coasts to experience specific land- and seascapes and may be perturbed by industrial coastal vistas, which in turn, deprive coastal communities of potential revenue, job opportunities and access to important heritage assets. Therefore, there is a clear tension between Blue Growth tourism that seeks to capitalise on coastal landscapes, and forms of Blue Growth that will industrialise these landscapes (e.g. wind farm, fishing and port developments).

Navigating the complex relationships among tourism, landscapes, coastal industrialisation and communities is vital to realising the local potential of the *Blue Growth Strategy*. We argue that understanding tourists' landscape experiences is a central but often misinterpreted component of these relationships. Much of the research and policy in coastal tourism relies on market logics, that frame visitors as uncritical consumers, rather than on in-depth research on tourists' landscape interests. We argue that tourists are far more differentiated and critical than their framing as consumers with largely fixed gazes, especially in relationship to landscapes. Therefore, if coastal tourism is the Blue Growth agenda's main contribution to local communities, there is a need to understand the tourist experience from a community perspective and to consider how these experiences may positively and negatively be impacted by other activities.

We address this issue by undertaking an experiential tourist segmentation approach based on community experiences of landscapes. Segmentation of tourist markets to capture the complexity of their experience is common in research and policy. However, most segmentation approaches seek to understand tourists through market-based, consumer criteria (i.e. economic, behavioural, socio-demographic) and represent tourists as "buyers" with affective tastes [15], with the coast becoming an asset class in which tourism converts its scenic qualities into products, services and experiences to match assumed tastes [13]. This market logic frames tourists as passive consumers and elides community perspectives of landscapes in favour of misconstrued or narrow tourist identities based on buyer behaviours and price satisfaction [16,17]. The extension of market logics into tourism has intensified, especially given the loss of traditional labour markets, cooperative businesses and the industrialisation of key sectors, such as fishing [18]. For example, the landscape of the west coast of Ireland has been re-packaged as the *Wild Atlantic Way* (a touristic coastal route connecting the whole Atlantic coast) via slick marketing, comparatively limited infrastructure investment, but with spectacular success on visitor numbers, international recognition, and tourist expenditure [19,20]. The dominance of market logic in coastal tourism means that local community voices are often absent regarding how their locality is framed for tourism consumption [13,14]. Alternative views to dominant segmentations are regularly excluded, can lead to contestation around the way in which local landscapes are produced and consumed, and miss important alignments between producers, consumers, and communities in developing a sustainable tourist economy.

We argue that if segmentation studies are to enhance our understanding of the complexity of tourists' experiences, it should invest in producing knowledge about differentiated landscape experiences and pressures in a dialogical way with local communities. Undertaking tourist segmentation in this way can help inform planning around Blue Growth industries and mobilise community-led initiatives. In this context, this paper aims to: (a) critically explore the value of segmentation in understanding the coastal tourism sector from a community perspective; (b) elicit tourist segments from real landscape experiences of the *Wild Atlantic Way*, Ireland; and (c) to set out the implications for places faced with multiple Blue Growth pressures.

The paper begins with a review of the literature on tourism segmentation and how it has taken a producer-led rather than community-led approach, with little consideration to the importance of landscape in the tourist experience of the coast. This sets the framework for an analysis of contestation in an Irish context by focusing on tourism pressures, coastal commodification and specific impacts of the *Wild Atlantic Way*. The study site and our segmentation methodology are then outlined. This is followed by a presentation of our findings from the survey. The paper concludes by highlighting the complexity of tourism consumption in contested coastal landscapes and the implications for both indigenous development strategies and locally-based tourism production.

2. Segmentation and landscape experience

Market segmentation in tourism research is the process of dividing the tourism market into groups of tourists that demonstrate common perspectives and behaviours [21,22]. With the concurrent examination of several variables, market segmentation allows for the complexity of tourist experiences to emerge. For example, segmentation has been used by industry and policymakers to reveal consumer perspectives that are crucial to designing tourism policies, services, and marketing strategies [23,24]. Incorporating this knowledge into policy has considerable benefits, such as the identification of niche markets [24], anticipating infrastructure demands, such as access points, facilities, or museums [25] and enhancing branding strategies [26]. Segmentation can also be used to identify growth opportunities in isolated rural areas [22]; to highlight policy gaps [27]; and to align tourism and environmental management policies [21].

Although segmentation demonstrates several benefits, segmentation studies have primarily engaged with market logics and, implicitly, with how producers package the coast to maximize surplus through better knowledge of growth regimes. Although it is on-site experiences that predominantly affect tourist perceptions of landscapes, the majority of segmentation studies focus on analysing pre-visitation behaviour [28]. These studies typically focus on three constructs: purchasing behaviours combined with socio-demographic variables [29]; travel motivations [27]; and expected benefits from visitor experiences [24]. Subsequently, produced segments represent tourists primarily as "buyers" with *a priori* tastes and expectations that need to be matched in the supply of products, services, and experiences [15]. In terms of tourist landscape experiences, segmentation studies have distinguished typologies of tourists based on their intention to visit landscapes represented through a selection of images [30]. Therefore, tourist segmentation processes have largely neglected the experiential part of tourism and tend to disembed tourist from both landscapes and local communities.

Market-driven segmentation may overshadow local understandings of coastal areas, the history of places and unique features of community life [31]. There is a significant critical literature about the shallow renditions of coastal heritage, as often projected in state-sponsored marketing, and how they can minimise local understandings of landscape and community [16,17,32]. However, much of the criticism tends to frame tourists as passive receptors of narratives carefully crafted by tourism industry to maximize consumption [33]. These depictions invariably cause contestation and tensions between local communities and tourism narratives, branding imagery and packaged offers [13,31]. While tourist segmentation tends to result in the promotion of fossilised versions of picturesque and unspoilt coasts, community perspectives, although by no means homogenous, are significantly different and are primarily based on quotidian experiences of ordinary landscapes [14]. When segmentation reproduces tourists as buyers with fixed preferences, especially as regards real or imagined landscapes, it tends to privilege outsider conceptualisations of place. Segmentation, therefore, tends to neglect the complex socio-cultural rituals and traditions that set off counter-movements in the form of critical consumers who question hegemonic narratives imposed by tourism experts [34].

As Bruner ([16]; p. 11) argues, tourists' experiences are "not given *a priori*". Instead, they emerge in a dialogical interplay during interactions with locals and places. Although some approaches ,that adopt the questioning gaze, reframe the tourist as "a dialogical and questioning subject" ([35]; p. 27), they often only focus on social encounters between tourists and locals, with landscape only featuring as a background to such interactions. There is a need to delve into people-landscape

interactions to inform a deeper understanding of the complexities of tourism segmentation. Here, community values are important, as they elucidate and delve into lived experiences, with an emphasis on multi-sensory perceptions, corporeality, emotion and contestation [25,36].

Place attachment, identity, sense of community, sense of history and an enhanced sense of well-being are intricate experiential values commonly expressed by locals when it comes to the coast [37,38]. Such values have received critical attention in the literature of community planning, as they explain the way coastal landscape is valued and contested [39,40]. However, empirical studies in tourism have ignored experiential values in favour of normative, behavioural, semiotic interactions. As a result, although produced segments might be pragmatic, they are separated from local experiences of coastal landscapes. As such, they hold limited value for communities and local planning. This study addresses this gap by segmenting tourists based on a set of values, emotions, and attitudes that local communities have identified for the landscapes of the west coast of Ireland.

3. Methodology

3.1. Study site

Ireland has adopted several Blue Growth policies, with the west coast of Ireland being a particular focus for coastal tourism intensification strategies [41–43]. The west coast is viewed as the premier asset of Irish tourism and features as the "cornerstone of international tourism campaigns" ([44]; p. 3). Recently, the west coast has been reinvented as "wild" and "unspoilt", along the *Wild Atlantic Way*. Conceived as Ireland's first long-drive touristic coastal route stretching along the west coast, the *Wild Atlantic Way* project was launched in 2014 as an €8 m investment to rejuvenate Irish tourism [19]. Relying exclusively on existing road networks with comparatively limited investment on new infrastructure, the *Wild Atlantic Way* project focuses on marketing coastal landscapes and communities. The marketing campaign strategically targeted groups of tourists through a producer-led segmentation model which identified two main sectors: the *Culturally Curious*, who tend to be slightly older, independent travellers interested in places and landscapes of historic and cultural value; and the *Great Escapers*, who are travelling to "get away from it all", renew family bonds, and spend time in beautiful places [45]. Having identified the tourist segments, Fáilte Ireland (the National Tourism Development Authority of Ireland), represented coastal landscapes and communities along the *Wild Atlantic Way*, marked through a provision of viewing points, activities and relevant businesses [19], as unique spectacles and experiences that matched the presumed desires of these segments.

The success of the *Wild Atlantic Way* intensifies has intensified local resource pressures. Concurrently, the country's commitment to Blue Growth has framed the west coast as a site for development of the aquaculture and offshore renewable sectors [46–48]. These policies potentially contradict the *Wild Atlantic Way* portrayal of the west coast as a wild and unspoilt space and may lead to conflict between Blue Growth developers and coastal communities reliant on tourism.

The coast of Connemara (Co. Galway) on the west of Ireland was selected as our study site because images of its landscape are central to coastal tourism marketing (Fig. 1). With the largest *Gaeltacht* (Irish

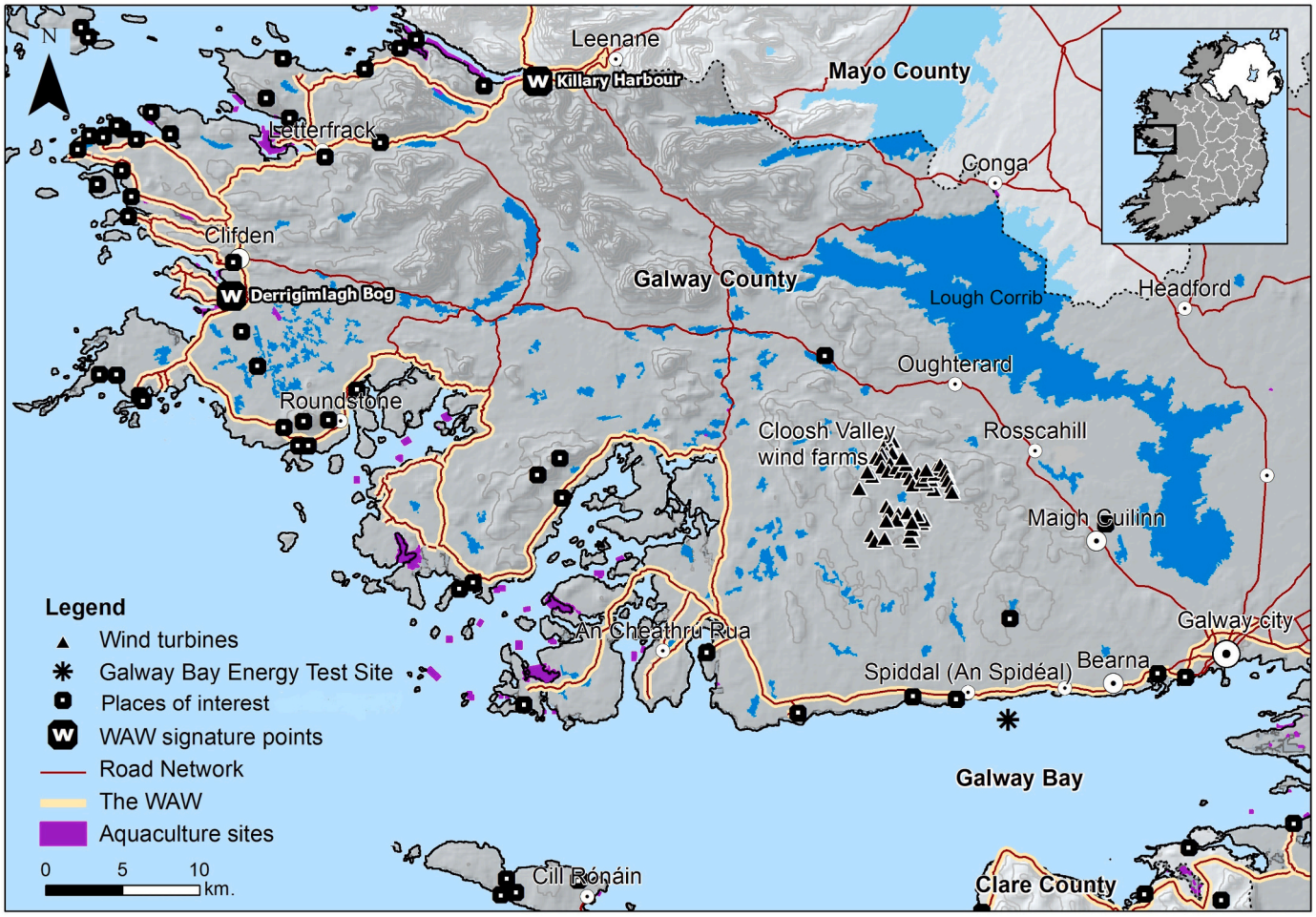

Fig. 1. Coast of Connemara. Data sources: [52,53]

language speaking community) on the island, Connemara is a geographic region that has historically featured as a wild landscape with a distinctive history and culture and strong links to the Irish diaspora. The coast of Connemara is also experiencing increasing pressures from Blue Growth, such as proposed aquaculture and energy developments. Tourism intensification, Blue Growth developments, and a strong sense of local identity, has resulted in inter-sectoral competition and community-industry contestation. Two coastal settlements were considered as appropriate case studies due to their contested nature: An Spidéal (Spiddal, in English), on the coast of Galway Bay in south Connemara; and Leenane, on the coast of Killary Harbour in north Connemara. Both are located on the *Wild Atlantic Way* and are connected with other Blue Growth developments, especially fishing and aquaculture [49]. An Spidéal is the proposed location for the deployment of a sub–sea ocean renewables test site in Galway Bay in 2015 [50], which was opposed by local communities. Leenane is a prominent location for seafood production, with extensive mussel farms and salmon aquaculture [51].

3.2. Data collection

Our study was conducted during the summer 2018. We adopted a sequential mixed methods approach. The first stage consisted of semi-structured scoping interviews with members of the two communities. We recruited the participants through a combination of convenience and snowball sampling and asked them two questions which then instigated an open discussion: "What do you value most about your local place?" and "Are there any issues that create concerns to you?". We recorded interviews via written notes and made an effort to capture phrases verbatim. We then coded the data manually and used it for the development of the tourist survey. For example, participants from both communities identified the restorative benefits of the sea as being especially important. Accordingly, a variable was developed to reflect this value, phrased as "Being close to the ocean makes me feel healthier". Similarly, participants from both communities expressed a general belief that it is necessary to protect coastal landscapes from what were perceived as unsustainable changes, including: uncontrolled urbanisation; intensive types of tourism; the proliferation of wind farms; and extensive aquaculture. Accordingly, five variables were developed to capture these perspectives and two variables were also developed to reflect the notion of preservation (see survey in supplementary materials).

The second phase consisted of the pilot and execution the questionnaire survey. The survey included two types of variables: *non-segmentation* variables, which included demographic and socio-economic variables, pre-visitation motivations and awareness of the *Wild Atlantic Way* brand; and *segmentation* variables developed from the scoping interviews and phrased as values, emotions and attitudes which reflect experiences of coastal landscape. Segmentation variables were measured on a five point Likert-scale (strongly disagree to strongly agree). An open-ended question was also included to capture additional positive and negative perceptions. The survey was piloted with a group of researchers (both native and non-native English speakers) and with tourists in several locations within the study site.

Segmenting by landscape experience requires collecting data on-site to capture the real-time corporeal and emotional responses. The survey was, therefore, distributed in two ways. The first involved recruiting the participants on-site applying convenience sampling [21,27,29] at three locations and on one bus tour route along the coast. In this instance, participants were invited to self-complete and return the survey to the researchers. The second involved leaving the survey at multiple outlets along the coast (i.e. Galway City Museum, and various businesses from the tourism sector in An Spidéal and Leenane) and collecting them the end of the summer period (Table 1). In total, 505 valid surveys were retained, with an average response rate of 33% for on-site recruiting and 26% for surveys collected from coastal outlets. As it was decided not to impute missing values, only 457 surveys with zero missing values were eventually used for segmentation, while variables with high percentage of missing values were also removed.

Table 1
Response rates per location.

	Recruited on site			Total
	Galway city (Spanish Arch)	**Connemara (several places of interest)**	**Connemara Bus Tours**	
Tourists sampled	753	84	312	1,149
Valid surveys	227	22	126	375
Surveys used in analysis (zero missing values)	221	20	110	351
Response rate	30%	26%	40%	**33%**
	Collected from outlet			
	Galway city (Galway Museum)	Connemara (An Spidéal & Leenane)		
Surveys distributed	250	250		500
Valid surveys	112	18		130
Surveys used in analysis (zero missing values)	94	12		106
Response rate	45%	7%		**26%**

3.3. Segmentation methodology

A two-step segmentation methodology was adopted, which comprises both factor and cluster analysis. This is an established methodology for tourism segmentation studies [21,24,29]. Segmentation variables were factor analysed (Principal Component Analysis with Varimax rotation) to identify the underlying dimensions of tourist coastal landscape experiences. Five components were retained, which concurrently satisfied three criteria: (1) eigenvalue of at least 1 [54]; (2) factor loadings above 0.50 [24]; and (3) high internal consistency (Composite Reliability > 0.7 and Average Variance Extraction > 0.5) [55]. These five components were then grouped into a set of clusters (K-means with Euclidean distance) to identify typologies of coastal tourists based on their landscape experiences. Having repeatedly tested three, four and five-cluster solutions, four clusters were retained, as this was the most stable (based on iteration history) and interpretable solution [54]. Finally, Pearson Chi-square tests were run to identify significant differences between tourist segments using the non-segmentation variables of the survey (i.e. frequency of visitation, importance of the *Wild Atlantic Way* on decision to visit, demographics, etc.). All the statistical analysis was performed in SPSS software.

4. Findings

Respondents were all over 18 years old, with a median in the age class of 25–34 years old. Data regarding country of residence revealed that: 38.7% of respondents came from European countries; 23.9% from North America; 16.4% from Ireland; 8.3% from Great Britain; and 4.4% from Northern Ireland. The remaining 8.9% came from the rest of the world. These ratios resonate with official statistics for tourism on the west coast [56].

4.1. Identifying experiences of coastal landscape

Findings from the Principal Component Analysis (PCA) suggest that tourist experiences of the west coast are best represented by five components (Table 2). These include: *well-being experiences*; *conscientious travel experiences*; *nature experiences*; *coastal change experiences*; and

cultural experiences. Each component is briefly described below. The statements which loaded in each component are referenced within the text in parenthesis (i.e. v1, v2 etc.). Quotes from the open survey question are used to give context to the experiences. Quotes were taken from respondents with a high contribution (factor score >0.70) to the relevant component.

4.1.1. Well-being experiences

The component which accounted for the highest variance (22%), was interpreted as representing therapeutic coastal experiences and was labelled *well-being experiences*. *Well-being experiences* emphasizes intrinsic values and deeper psychological connections with the coast and sea, captured through statements that associate with specific states of mind and positive emotions. The distinguishing feature of *well-being experiences* is the quest for well-being and the therapeutic qualities of coastal landscapes. The presence of water is central in this construct, as the proximity to the ocean enables participants to "feel healthier" (v4). The statements that best express this perspective stand for spiritual values, such as freedom and eternity (v1), a sense of tranquillity (v3) and emotional attachment (v2). These variables loading together align with the notion of tranquillity, which is synonymous with feelings of calmness, quietness, peace, solitude and a sense of escape from stressful everyday life. The sea also triggers a sense of peace and well-being, as illustrated in quotes which relate to the *well-being experiences* experience:

> *"The best part was the coast facing the Atlantic Ocean"* (Male, 18–24 years old, student, Europe).

> *"the coast and the peace"* (Female, 35–44 years old, teacher, Ireland).

> *"the power of the sea, peace and wildness together"* (Male, 18–24 years old, researcher, Canada).

Well-being experiences seems to be underpinned by a general belief that the coast and the sea are intrinsically valuable. This belief mobilizes a nostalgic concern and a sense of emotional loss over environmental degradation of waterways and the sea. The sentiment is expressed in statements around pollution:

> *"sad for the level of pollution of the river and the sea"* (Female, 55–64 years old, education, Europe).

> *"The pollution of the waterways takes away from the experience"* (Female, 35–44 years, currently unemployed, Ireland).

Coastal change resulting from urban sprawl (v13), wind turbines (v12), aquaculture (v11) or tourism (v5, v6) were less relevant to this experience, as evidenced by the comparatively weak loadings on these statements.

4.1.2. Conscientious travel experiences

Conscientious travel experiences, which accounted for 12% of the variance, was interpreted as the experience of relating with the west coast in a conscious, responsible manner. This is characterized by an increased awareness of tourism's impact on the coast, as illustrated by the two statements that received the highest loadings (v5, v6). The degradation caused at the coast by tourist facilities is central in this perspective, while the negative experience from the increasing numbers of tourists has also been captured in quotes:

> "[Travelling to] *learn about my ancestry* [but there are] *hordes of tourists everywhere"* (Female, 35–44 years old, university professor, USA).

Other quotes relevant to this experience, revealed a level of cynicism about *"the over-commercialization of the coastal areas, especially Galway" (Female, 55–64 years old, bookseller, England)*, portrayed as the *"areas with a lot of tourists and chain stores" (Male, 25 – 34 years old, railways engineer, Australia)*. The way the tourism industry has reinvented specific representations of Irishness were also highly critiqued:

> *"Some cliché touristy "Irish" stuff aimed at Americans"* (Male, 55–64 years old, commercial director, Great Britain).

> *"The caricature of Irishness or how we represent ourselves with increasing stereotypes"* (Female, 25–34 years old, mental health helpline administrator, Ireland).

This component is the one that most strongly advocates for preservation (v7), drawing on a belief that the coast is fragile, and increased human activity causes serious damage. This belief is captured in comments related to increased rubbish and waste produced by tourists and the perceived insensitivity of the 'other' as regards the coastal environment:

> *"I can't stand the number of tourists who don't have appreciation for the earth and litter the waterways and the land"* (Female, 18–24 years old, student, USA).

4.1.3. Nature experiences

The component accounting for 9% of the variance was interpreted as representing the experience of engaging with nature. The key strand of this experience emphasizes the importance of the outdoors recreational opportunities that the west coast provides (v8) and the pleasure of being both close to nature and the environment and learning from it (v9). Nature experiences also places value on the natural resources of the west coast (v10).

Frequent phrases and words used in the open question and which are associated with the nature experiences include: "countryside"; "clean air"; "wind", "biodiversity" and the "sounds and the smells of the sea". This shows their appreciation of nature goes beyond visual or scenic amenities to include the quality of and threat to coastal ecosystems. Related quotes include the importance of "the coastal walkways", "mountain walks" and "hiking paths in the countryside", suggesting that physical encounters with nature are embodied in attitudes about its use and social value. The therapeutic value of the coast (v4) and the need for preservation (v7) were also relevant, as indicated by the relatively lower, yet significant, loadings observed in these statements.

4.1.4. Coastal change experiences

The component accounting for 7% of the variance in the data, was interpreted as the experience of specifically and distinctly focusing on the contestation from urban sprawl and Blue Growth on the west coast, which labelled was labelled *coastal change experiences*. The experience elicited by this component emphasizes pressures from the scattered developments along the coast (v13), wind farms (v12) and aquaculture sites (v11), as demonstrated by the high loadings of the relevant statements.

The experience of observing coastal change perhaps contradicts the wild scenery (v15) and the identity of the coast (v16), as indicated by the negative loadings in these statements. This is also illustrated in negative comments about aquaculture on the basis of environmental impact because of the *"bacteria and pollution"* and the *"visual impact and the smell; especially the smell"* (Male, 55–64 years old, author, USA). Others focused on *"the overdevelopment along the coast"* (Male, 45–54 years old, freelancer, Ireland) and vigorously opposed this type of urbanization:

> *"no more buildings!!!"* (Female, 25–34 years old, research assistant, Europe).

4.1.5. Cultural experiences

The component accounting for 6% of the variance was interpreted as the experience of seeking immersion in a different culture. This experience was labelled *cultural experiences* and involves searching for

Table 2
Coastal landscape experiences.

Vi	% Variance explained	Principal Components[ab]					Composite Reliability/ Average Variance Extracted
		Well-being experiences	Conscientious travel experiences	Nature experiences	Coastal change experiences	Cultural experiences	
		22%	12%	9%	7%	6%	
s1	The ocean gives me a sense of freedom and eternity.	**0.79**	0.06	0.13	−0.04	0.07	CR: 0.90 AVE: 0.78
s2	I feel somehow attached to this place.	**0.73**	−0.08	0.03	0.11	0.14	
s3	This place is peaceful and tranquil.	**0.70**	−0.04	0.10	0.06	0.13	
s4	Being close to the ocean makes me feel healthier.	**0.55**	−0.01	0.41	0.01	−0.01	
s5	Touristic facilities alter the character of the landscape.	0.00	**0.82**	−0.18	0.10	0.06	CR: 0.89 AVE: 0.80
s6	The increasing number of tourists has a negative impact on the landscape.	−0.17	**0.75**	−0.07	0.20	0.09	
s7	We need to preserve these coastal landscapes even if this means that we need to restrict some activities.	0.10	**0.61**	0.38	−0.06	0.00	
s8	I like this place because it provides outdoor recreation opportunities.	0.09	−0.12	**0.70**	0.05	0.13	CR: 0.82 AVE: 0.75
s9	Here, I can learn about the environment and nature.	0.12	−0.03	**0.63**	0.12	0.28	
s10	I appreciate this place because of its natural resources	0.26	0.13	**0.53**	0.08	0.20	
s11	Wind turbines would not be compatible with the landscape of this area.	0.14	−0.08	−0.05	**0.71**	0.01	CR: 0.86 AVE: 0.77
s12	Offshore fish farms have a negative impact on the view of the sea and the horizon.	0.16	0.26	0.13	**0.66**	−0.11	
s13	Scattered developments along the coast have a negative impact on the landscape.	−0.14	0.16	0.17	**0.66**	−0.11	
s14	Here, I can learn more about the Irish history, culture and heritage.	0.09	0.02	0.12	0.04	**0.76**	CR: 0.85 AVE: 0.77
s15	I enjoy the dramatic and wild scenery.	0.02	−0.01	0.17	−0.10	**0.66**	
s16	There is a distinctive Irish identity embedded in this landscape.	0.31	0.13	0.11	−0.13	**0.59**	

[a] Sample base: 457 respondents.
[b] Extraction method: Principal Component Analysis. Rotation method: Varimax with Kaiser Normalisation. Rotation converged in 8 iterations.

authentic experiences, which appear to be embodied in the west coast and the unique sense of Irishness it engenders. The connection to landscape and identity is central in this experience (v16), while cultural experiences also demonstrate a stronger tendency towards consumption in comparison to the other experiences. For example, the consumption of local food and drink, the pub culture and Irish music are considered integral part of the cultural experiences on the west coast of Ireland:

"Friendly people, historical buildings, Irish music, pub culture"

(Male, 18–24, student, Europe).

Landscape is appreciated for its wild and dramatic character (v15) and is mainly viewed as a "nice view" or "beautiful scenery", as indicated by the frequent use of these phrases in the open questions. The west coast is also portrayed as the Celtic Ireland, which is then perceived to be "the real" Ireland and in this sense part of the *cultural experiences* could be said to represent unique *Celtic experiences*:

"It's beautiful, feels like the real Ireland, people are friendly and helpful"
(Female, 65 years or older, retired social worker, USA).

Unlike *coastal change experiences*, *cultural experiences* do not seem to identify signs of contestation on the coast, as indicated by negative loadings in the relevant statements (v12, v13). This might be instigated by a romantic perception that this type of tourism is in balance and harmony with nature, and by extension coastal landscapes. It could also be motivated by the most iconic representations of the west of Ireland, where dispersed developments dot the coast and hence, they are perceived as the equivalent to a "rural" and by extension "authentic" way of life. Their indifferent attitude to dispersed settlement patterns and how they reflect community choices and traditions is a case in point:

"Maybe, but they [developments] *make the Irish countryside special"*
(Female, 35–44 years old, teacher, USA).

Whilst others opined:

"Not if they [developments] *are done in a sensitive eco-friendly manner"*
(Male, 44–55 years old, artist, Great Britain).

4.2. Identifying coastal tourists

Findings from the cluster analysis suggests that tourists on the west coast are best represented by four clusters: *Blue Health Seekers*; *Nature Escapers*; *Pristine Seekers*; and *Heritage Explorers* (Table 3). The findings from Pearson's Chi-square show that there are significant differences between the clusters in variables and in particular: country of residence; type of visit; influence of the *Wild Atlantic Way* on decision to visit; and occupation (Table 4). This suggests that the tourist clusters are perhaps useful for developing or revisiting market segments of coastal tourism in a more marketized way. Each cluster is briefly described below, while the relationship between landscape experiences (components) and coastal tourists (clusters) has been visualised in Fig. 2.

4.2.1. Blue Health Seekers

The cluster which grouped 153 respondents (33% of the sample) is characterised by the quest for enhanced health and well-being, as evidenced by the high mean score at the *well-being experiences* experience (mean = 0.58). *Blue Health Seekers* are mainly European (33%) and North American (30%). As an island nation, the connection to the sea is

Table 3
Coastal tourist segments.

Coastal Tourists	Coastal Landscape Experiences					Number of cases per cluster
	Well-being experiences	Conscientious travel experiences	Nature experiences	Coastal change experiences	Cultural experiences	
Blue Health Seekers	**0.58**	−0.18	−0.12	−0.70	0.35	153
Nature Escapers	−0.03	**0.76**	**0.70**	**0.45**	0.24	125
Pristine Seekers	0.10	−0.18	−0.50	**0.46**	−1.21	104
Heritage Explorers	−1.27	−0.64	−0.21	0.04	**0.55**	75
F-test[a]	92.409	48.543	38.935	55.925	118.897	

[a] Significant at the 0.00 level for all clusters.

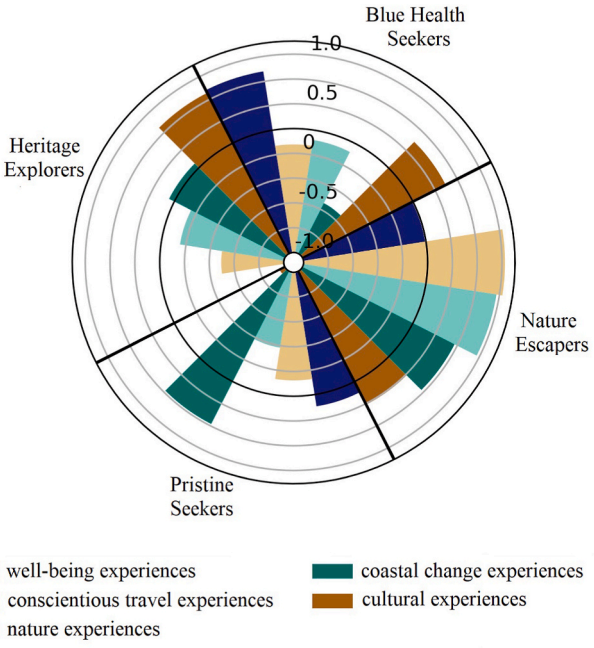

Fig. 2. Coastal tourists and coastal landscape experiences.

inherently strong for many local visitors and this is reflected on the significant concentration of Irish nationals in this cluster (20%) in comparison to the other three. While for other segments holidaymaking is the predominant reason for travelling, for *Blue Health Seekers* the reasons for travelling are slightly more varied, with 13% of *Blue Health Seekers* travelling to the coast to visit friends or relatives.

Blue Health Seekers want to connect with the marine environment and experience its therapeutic qualities. Therefore, blue assets that facilitate this engagement with the sea, such as coastal promenades, beaches, piers, harbours, cliffs, rocks and seaweed, might be of high importance to this cluster. *Blue Health Seekers* are also interested in *cultural experiences* (mean = 0.35). This suggests that the maritime cultural heritage of the west coast, such as traditional boatbuilding, fishing heritage, lighthouses, shipwrecks and coastal memorials of emigration and Famine, might also be of special interest to this cluster.

4.2.2. Nature escapers

The cluster which grouped 125 participants (27% of the sample) emphasizes all experiences concurrently. However, the key strand that characterises this cluster is the *nature experiences* (mean = 0.70). The appeal of nature is also key for the *Great Escapers*, which is one of the two segments identified by the tourism industry for the *Wild Atlantic Way* [45]. For this reason, this cluster was labelled *Nature Escapers*. *Nature Escapers* are young (47% below 34 years old), predominantly European (41%) and their main purpose for travelling to the west coast is for holidays (87%).

The strong connection *Nature Escapers* feel for nature, makes them particularly sensitive to *coastal change experiences* (mean = 0.45). Furthermore, *Nature Escapers* are highly conscious of their own impact to the host communities, as suggested by the high score at the *conscientious travel experiences* component (mean = 0.76). This suggests that increasing numbers of tourists at hotspots on the *Wild Atlantic Way* might potentially become a discouraging factor for *Nature Escapers*. On the other hand, the connection to the sea does not seem to be a key feature for this cluster. This suggests that *Nature Escapers* are perhaps more focused on rural spaces in general rather than spaces by the sea in particular. In other words, *Nature Escapers* are drawn to places of high environmental quality that offer outdoor recreational opportunities regardless of whether they are blue or green. The outdoor recreational orientation of this cluster perhaps makes it a seasonal market segment.

4.2.3. Pristine Seekers

The cluster which grouped 116 respondents (23% of the sample), highlights the *coastal change experiences* (mean = 0.46). Participants represented by this cluster demonstrate a change-averse attitude that perhaps underlies a quest for unspoilt, pristine landscapes. Therefore, this cluster was named *Pristine Seekers*. *Pristine Seekers* are mainly represented by Europeans (41%), while the highest concentration of visitors from Northern Ireland (8%) is also observed in this cluster.

Pristine Seekers are similar to *Nature Escapers* with regards to *coastal change*. They are also similar to *Blue Health Seekers*, as suggested by the positive mean score at the *well-being experiences* experience. In this context, it could be inferred that *Pristine Seekers* show characteristics of a niche market in the boundaries between *Blue Health Seekers* and *Nature Escapers*. What differentiates *Pristine Seekers* from these two clusters, is the type of visit, which is more varied for the former. For example, 12% of *Pristine Seekers* combined business with holidays, while 8% stated "Other" as their main reason for being at the coast. This type of response includes visitors who have moved to Ireland for a short period of time, typically less than a year, for work or study. As such, *Pristine Seekers* frequently visit the west coast for daytrips. The *frequency of visit* variable (Table 4) also suggests that *Pristine Seekers* are more regular to the west coast than the rest of the clusters. This suggests that *Pristine Seekers* might be a prominent market segment for developing year-round tourism. However, this observation needs to be taken with caution, as the relevant variable does not present statistically significant differences between clusters.

4.2.4. Heritage explorers

The cluster which grouped 75 participants (16% of the sample) emphasizes *cultural experiences* (mean = 0.55). As such, it was labelled *Heritage Explorers*. *Heritage Explorers* tend to be older than the rest of the clusters (31% above 55 years old). They are mainly from North America and Europe (33%). There is also a relatively higher concentration of visitors from Great Britain in this cluster (15%) in comparison to the rest of the clusters. *Heritage Explorers* are distinct holidaymakers (91%) holding managerial or professional occupations (70%) and owning their

Table 4
Socio-demographic differences between clusters.

Survey variable		Blue Health Seekers 33% (n = 153)	Nature Escapers 27% (n = 125)	Pristine Seekers 23% (n = 104)	Heritage Explorers 16% (n = 75)
Frequency of visit	First time	61%	65%	59%	65%
	Once every few years	18%	22%	19%	19%
	More than once a year	11%	8%	10%	13%
	More than once a month	10%	6%	12%	3%
Type of visit[a]	On holiday	76%	87%	69%	91%
	Visiting friends/ relatives	13%	5%	11%	8%
	On business	1%	4%	12%	1%
	Other	9%	4%	8%	0%
Importance of WAW on decision to visit[a]	A lot	27%	35%	41%	43%
	A little	27%	22%	25%	27%
	None at all	46%	42%	34%	31%
Age	18–24 years	26%	24%	19%	15%
	25–34 years	26%	23%	27%	25%
	35–44 years	11%	13%	21%	20%
	45–54 years	13%	19%	16%	9%
	55–64 years	17%	13%	14%	16%
	65 years or older	7%	9%	2%	15%
Country of residence[b]	Republic of Ireland	20%	14%	19%	9%
	Northern Ireland	3%	5%	8%	3%
	England, Wales or Scotland	8%	9%	4%	15%
	Other European country	33%	41%	49%	33%
	USA or Canada	30%	22%	10%	33%
	Australia/New Zealand	3%	2%	3%	5%
	Other	5%	6%	8%	1%
Home ownership	Own my home	46%	54%	39%	62%
	Rent from someone else	38%	34%	38%	27%
	Other	16%	12%	22%	11%
Occupation[a]	Managerial/ professional	56%	52%	49%	70%
	Intermediate/ Small employers/ Own account workers	7%	12%	17%	8%
	Lower supervisory/ Technical	2%	3%	4%	1%
	Semi-routine/ Routine	16%	11%	12%	8%
	Students/ Long-term unemployed	19%	23%	17%	11%
Landscapes should be changed to support human activities, even if this means … [b]	Strongly disagree	52%	60%	63%	25%
	Mostly disagree	30%	22%	14%	32%
	Neither	13%	14%	15%	29%
	Mostly agree	4%	2%	4%	11%
	Strongly agree	1%	2%	3%	3%

[a] Differences among clusters are significant at the 0.05 level.
[b] Differences among clusters are significant at the 0.01 level.

homes (62%). This suggests that the high majority of *Heritage Explorers* are upper-middle class. Among all the clusters, *Heritage Explorers* appear to be the most influenced by tourism branding of the west coast, as evidenced by the high percent (43%) that responded "a lot" in the question about the importance of the *Wild Atlantic Way* in their decision to visit. This shows that Fáilte Ireland has successfully identified and targeted the *Culturally Curious* as a prominent segment for the *Wild Atlantic Way* [45].

5. Conclusions

The production and consumption of the coast has intensified with the advent of Blue Growth policies. This both pressurises and provides opportunities for local communities. However, these opportunities may go unrealised unless the complex relationship between growth activities, coastal tourism and local communities is addressed in future policies and marine and coastal plans. We argue that tourists' landscape experiences are at the heart of these complexities and that market segmentation can be used to deepen our understanding of such experiences in ways that advantage communities rather than producers. However, segmentation has primarily adopted market-driven approaches that often fail to revel the complexity of landscape experiences of coastal tourists and has created shallow and often unrecognisable versions of place to local people. We do not seek to deny the value or validity of market segmentation but, rather, wish to reframe it so that communities can understand tourism preferences in ways that reflect their own landscape values and that may reveal their options to resist, respond or open alternatives for locally-centred Blue Growth.

The Irish Government has committed to boosting such alternatives for locally-centred coastal tourism by endorsing the need to "support communities in coastal areas through the increase in sustainable marine-based and coastal tourism activities" ([57]; 168). Furthermore, the realisation that the relationship among coastal tourism, communities and landscapes is impermeable, is also reflected in the acknowledgment that the development of the most "promising tourism segments" needs to be done in tandem with "maintaining and enhancing the quality of the coastal places and landscapes that visitors experience during their stay" ([57]; 87). Within this context, our study has elucidated another dimension that policy-makers could consider in the decision-making process. Adopting a more experiential and dialogical approach to market segmentation has identified perspectives that are important to both tourists and communities in ways that are often compatible, but which also open opportunities for inclusive forms of local development. Our analysis reveals a more complex tourist than the narrow "buyer" framed by industry methodologies. While *Heritage Explorers* and *Nature Escapers* are similar to segments that have already been identified by the tourism industry on the *Wild Atlantic Way*, known as the *Culturally Curious* and the *Great Escapers* respectively, our analysis has highlighted that these segments are highly (self-)critical, acknowledge the contradictory nature of their practice as tourists and seek to behave in more ethical and sustainable ways. Our analysis has also introduced alternative segments representing very differentiated experiences. For example, *Blue Health Seekers* emerged as the largest segment in our analysis, but industry-driven methodologies have failed to recognise this coastal experience. This is probably because *Blue Health Seekers* look for well-being experiences that are not exclusively economic, but are focused on physical and mental health, enhanced well-being and restoration, emotional and existential connections with community and place. Tourists represented by this segment are likely to be interested in conserving and valuing the same type of assets, resources, indigenous knowledge, development models and even ideas about place as local communities. Furthermore, *Pristine Seekers* are reflective and environmentally conscious tourists who understand and even empathise with the development pressures faced by host communities. *Pristine Seekers* is another potential segment which the tourism industry has perhaps missed while focusing on international and high-spending, yet seasonal,

market segments.

The segments we have identified also align with community perspectives, values and concerns, opening up the possibility for less conflictual forms of landscape valorisation within the tourism industry. The challenge is to convert such alignments into practical projects that extract value for communities, protect and enhance their identity, and better manage the structural economic forces that have marginalised their sense of place. This will open opportunities for communities affected by tourism and other Blue Growth pressures to think about their own assets, collective effort, and solidarity business models that better capture spill-over effects. Recycling value in such sectors taps into visitor ethics and of course, raises related ethical issues about the development options open to communities. Small communities on the *Wild Atlantic Way* are not going to stop economic development models that support high value tourism sectors. But they can redefine value, what it means to local people and prioritise more ethical and sustainable forms of 'growth'.

Although there is no indigenous wholesome model of tourism, there are approaches that resist narrow forms of profitability in favour of more inclusive and embedded community development. For example, there have been successful co-operatives and social enterprise models, including working barns providing shelter for walkers, hostels, heritage museums and fishing tours, that tap into this direct exchange. However, most of them are generally small scale, undercapitalized and cannot compete with corporate providers. Policy can help by supporting: (a) the regulatory environment that preferences cooperative models; (b) community access to land and property assets; (c) social finance at competitive market rates; and (d) skills development that moves beyond traditional community development models to support business planning, financial analysis and project management. These suggestions speak to a range of national policies which already exist in Ireland. For example, The Department of Rural and Community Development has recently developed a *National Social Enterprise Policy for Ireland 2019–2022* [58]. Here, priorities should perhaps focus on effective integration across marine policy, spatial planning and social enterprise, rather than creating new policies. Similarly, emphasis should be given in vertically integrating EU policy and investment with national and regional planning and local development programmes for delivering better outcomes for coastal communities.

Developing a systematic understanding of the tourist market that reflects community preferences and needs is a tactical challenge that is valuable to local communities. Lay knowledge and anthropological narratives are useful but normative constructs that give communities a sense of the complexity of markets are also tactically important as Blue Growth will intensify the multiple pressures they face in the future. This study has identified some of these issues in a way which we hope will add value for coastal communities. However, the study presents conceptual and methodological limitations. Experiencing the landscape is a multi-layered and nuanced interplay of physical, cognitive and emotional processes. As such, it remains largely elusive in quantitative methodologies. Triangulating tourist experiences with qualitative data from the local communities can be helpful for strengthening the conceptual value of the segments. However, triangulation goes beyond the purpose of this paper and it is addressed in other publications. The segmentation methodology adopted in this paper also poses limitations. While factor analysis (PCA) gleaned the underlying categories in which the coast is broadly experienced by tourists reflecting local values, there is an inevitable loss of information when variables are transformed into components. This limitation is acceptable in segmentation studies, yet findings need to be interpreted with caution. Furthermore, cluster analysis is an exploratory tool and as such, the outcome is one out of several possible solutions. Validating the clusters has no indicated solution in the literature. In this study, significant differences among the clusters in terms of socio-demographic variables support the assumption that the clusters represent a valid split into potential market segments. However, the decision about the number of segments was subjective and based on repeated trials and interpretation. This suggests that many solutions are valid, if they are useful for coastal communities, coastal tourism and marine policy. Further research and experimentation is needed to convert these clusters into market segments and the use of market intelligence to develop services, products and facilities that build strong indigenous economies, that protect landscapes, heritage, intangible assets and memories of coastal communities.

Author statement

Maria Pafi, Conceptualization, data collection, data Formal analysis, Writing - original draft preparation. Wesley Flannery, Conceptualization, Supervision, writing – reviewing and editing. Brendan Murtagh, Conceptualization, data Formal analysis, Supervision, writing – reviewing and editing.

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Appendix A. Supplementary data

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