

Title	Niche markets in Irish tourism: The case of North American coach tourists
Authors	Ryan, Marie;Deegan, Jim;Moloney, Richard;Sjostrom, William
Publication date	2014-01-01
Original Citation	Ryan, M., Deegan, J., Moloney, R. and Sjostrom, W. (2014) 'Niche markets in Irish tourism: The case of North American coach tourists', Irish Business Journal, 9(1), Article 7, pp. 94-114. Available at: <a href="https://sword.cit.ie/irishbusinessjournal/vol9/iss1/7">https://sword.cit.ie/irishbusinessjournal/vol9/iss1/7</a> [Accessed: 26 March 2024]
Type of publication	Article (peer-reviewed)
Link to publisher's version	<a href="https://sword.cit.ie/irishbusinessjournal/vol9/iss1/7">https://sword.cit.ie/irishbusinessjournal/vol9/iss1/7</a>
Rights	© 2014, the Authors. Published by the Irish Business Journal. This article is made available under the CC BY 4.0 license. - <a href="https://creativecommons.org/licenses/by/4.0/">https://creativecommons.org/licenses/by/4.0/</a>
Download date	2024-05-21 06:14:08
Item downloaded from	<a href="https://hdl.handle.net/10468/15700">https://hdl.handle.net/10468/15700</a>

1-1-2014

## Niche Markets in Irish Tourism: The Case of North American Coach Tourists

Dr. Marie Ryan

*Centre for Policy Studies, Unniversity College Cork*

Prof. Jim Deegan

*Department of Economics, University of Limerick; National Centre for Tourism Policy Studies (NCTPS)*

Dr. Richard Moloney

*Centre for Policy Studies, University College Cork*

Dr. William Sjostrom

*Cente for Policy Studies, University College Cork*

Follow this and additional works at: <https://sword.cit.ie/irishbusinessjournal>



Part of the [Tourism and Travel Commons](#)

### Recommended Citation

Ryan, Dr. Marie; Deegan, Prof. Jim; Moloney, Dr. Richard; and Sjostrom, Dr. William (2014) "Niche Markets in Irish Tourism: The Case of North American Coach Tourists," *Irish Business Journal*: Vol. 9 : No. 1 , Article 7.

Available at: <https://sword.cit.ie/irishbusinessjournal/vol9/iss1/7>

This Article is brought to you for free and open access by the Cork at SWORD - South West Open Research Deposit. It has been accepted for inclusion in Irish Business Journal by an authorized editor of SWORD - South West Open Research Deposit. For more information, please contact [sword@cit.ie](mailto:sword@cit.ie).

# Niche Markets in Irish Tourism: The Case of North American Coach Tourists

*Dr Marie Ryan, Professor Jim Deegan, Dr Richard Moloney, Dr William Sjostrom*

---

## Abstract

In 2010, 115,000 coach tourists came from North America to Ireland, averaging a length of stay of 9 nights. This paper applies factor analysis to a survey of North American coach tourists to Ireland (with 486 responses). It identifies the most significant factors that have common characteristics amongst the tourists. Factor analysis, although popular in tourism research, has never been applied to an inbound tourist market to Ireland, so this research fills an important gap in Irish segmentation research. The factor analysis of the survey identifies a number of important characteristics of this market. For example, the North American coach tourists are predominately under 65 years, are drawn to historical destinations, and active, with a strong preference for cycling and water sports. The findings in this paper suggest tourism policies can now be directed more precisely to cater for a specific type of coach tourist visiting Ireland rather than supplying a generic tourist product. Factor analysis shows that coach tour packages should be targeting a particular kind of tourist, not simply the generic tourist to Ireland.

**Keywords:** Coach tourists, segmentation analysis, factor analysis, niche markets, Irish tourism.

## Introduction

In an increasingly complex and highly competitive global marketplace, tourists' travel behaviours, travel activities, life-styles, and values have altered. Tourists travel to destinations for different reasons. There is increasingly a need for tourism providers to influence consumer decision-making, understanding who travels and why. By examining the North American coach tourist to Ireland, this paper establishes whether the North American coach tourists to Ireland are all the same or different. Do North American coach tourists to Ireland have diverse travel behaviours and activities? To answer this question, segmentation using factor analysis is used. Factor analysis can identify whether niche markets exist. Factor analysis reduces the data identifying the most significant factors that have common characteristics amongst the tourists. This technique, although popular within the tourism literature, has never been used to analyse an inbound tourist market to Ireland, so this research fills an important gap in Irish segmentation research.

Failing to develop a customer tailored marketing approach is likely to disadvantage destinations attempting to promote themselves in a competitive marketplace (Frochot 2005). Customer orientation is vital, and altering products to cater for differing niches, (i.e. customer orientation) is therefore crucial to future competitiveness. Because the North American tourist market is and will almost certainly remain a vital contributor to Irish tourist revenues and visitor numbers, a renewed focus is required. Irish tourism providers need to place increased emphasis on, and suitably target tourists (Fáilte Ireland 2007). Segmentation facilitates the promotion and targeting of specific markets in order to improve competitiveness and increase market size. Increasing the awareness of the North American tourists' motivations, activities, behaviours, attitudes, and character type improves the ability of tourism marketers to design

and implement policies likely to increase future North American visits. The segmentation findings in this research can therefore present a competitive advantage to the Irish tourism sector in this highly competitive market.

The paper responds to the challenges raised by New Horizons for Irish Tourism: An Agenda for Action (Tourism Policy Review Group 2003), by establishing the factors that encourage and discourage North American coach tourists to go on holiday as well as establish their personality traits. Section 2 examines the North American tourist in Ireland, section 3 describes the methodology, section 4 presents the findings, and section 5 concludes with a summary and policy implications.

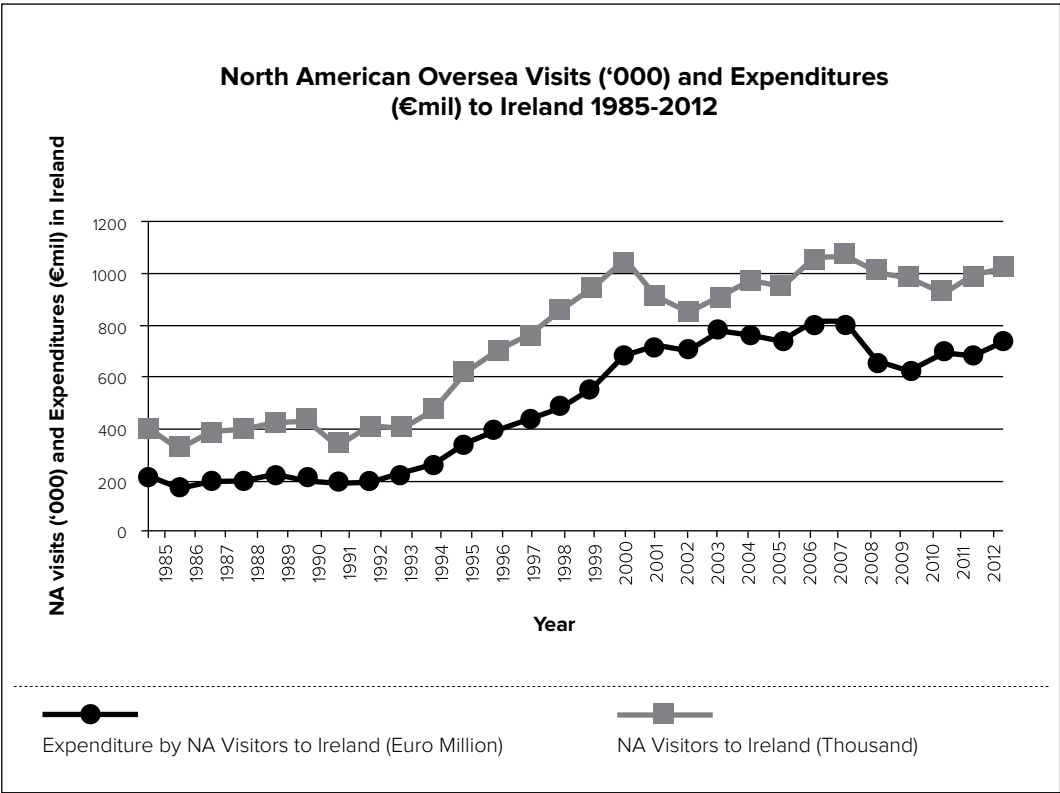
## **North American Tourists in Ireland**

Although the North American coach tourist market in Ireland has previously been analysed (Irish Tourist Industry Confederation, 2008; Fáilte Ireland 2012), no research has provided an in-depth segmentation analysis using factor analysis on an inbound market to Ireland. Economic benefits can consequently be raised if both potential and current North American coach tourists are targeted appropriately. Greater choice is important to the competitiveness of the Irish tourism industry (National Competitiveness Council 2011), and the analysis offered here helps to facilitate greater choice within the North American coach tourist market to Ireland.

Irish research detailing this market is sparse. In 2009, Tourism Ireland profiled Ireland's best prospects by categorising the North American tourists into two groups: the sightseers and culture seekers who have visited Europe in the past, and the better educated, better off urban and suburban tourists who enjoy the finer things in life (Nash, n.d.). Tourism Ireland (2006:8) further divided the sightseer and culture seeker tourist into three subsets: the luxury traveller, the Scots Irish, and the Group tourist. Tourism Ireland states the opportunity to "target an increasing share of affinity groups from the core target market of sightseers and culture seekers is a niche market with good prospects. Group tours increased by 56% between the years 2002 and 2006 (Irish Tourism Industry Confederation, 2008). Over the same period, coach tour programmes, with North America as its largest individual source, increased 160%, the fastest rate of any country (Fáilte Ireland, 2007). This paper examines the North American market with a focus on the coach tour market.

The North American tourists are among the primary drivers of tourism growth in Ireland. Since 2007, North American tourists constitute on average 15 per cent of the total overseas market to Ireland. Figure 1.1 illustrates the number and expenditures of North American visitors to Ireland between 1985 and 2012. North American tourists spend more than the average tourist (Tourism Ireland 2006). In 2006, with a total expenditure of over \$100 billion, North Americans were the second highest spenders on travel abroad globally with average spending per visitor increasing 8 per cent over the years 2002 to 2006 (Tourism Ireland 2006). Out of this, Ireland averaged €760 million per annum, and represented 18 per cent of Ireland's total foreign earnings. Despite a 45% increase in the real dollar cost of the euro from 2002 to 2007, North American tourists spent 60 per cent more than any other visitor (Tourism Ireland 2006). In 2007, North American visitor numbers and expenditures peaked, representing 14 per cent of total overseas tourists visited Ireland, and their spending constituted 16 per cent of total foreign earnings. Nevertheless, in line with total overseas visitors (see Figure 1.1) 2008 and 2009 saw a decline in North American visits and revenues. In these two years, North American visitors represented 13 per cent and 14 per cent of total overseas tourists, while expenditures fell to 13 per cent and 15 per cent of total foreign earnings (Fáilte Ireland 2011). Despite declining visitor numbers and revenues generated, the North American market

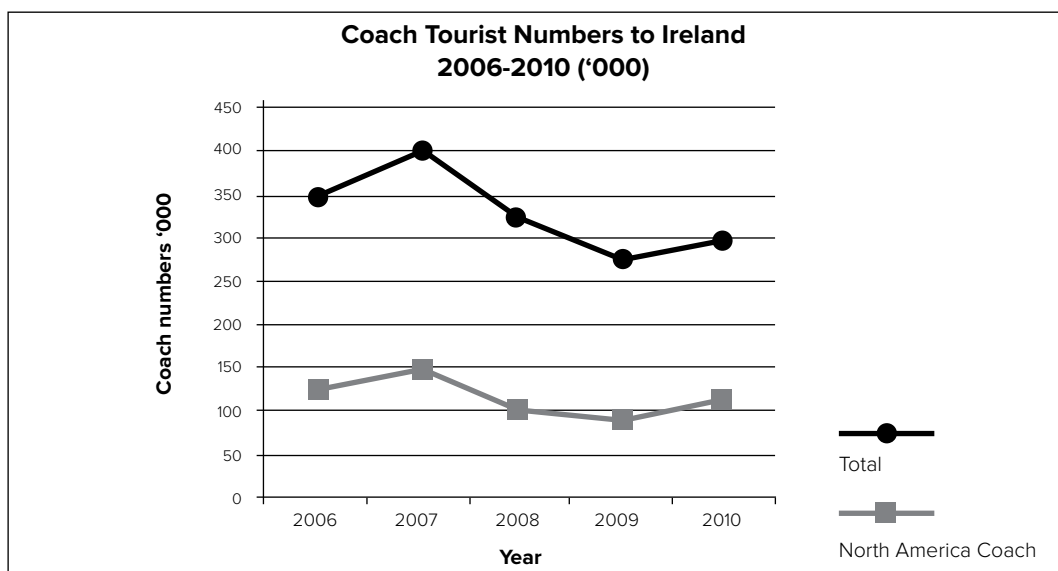
remained a significant contributor to Irish tourism. From the peak of 2007, visitors declined by just 1 per cent and revenues declined by 2 per cent. Despite challenging climates, North Americans have proven to be a reliable revenue and visitor generator in Ireland.



**Figure 1:** North American Oversea Visits ('000) and Expenditures (€mil) to Ireland 1985-2012

Since 2010, the North American market to Ireland has grown. After the drop from the peak in 2007, there was an increase in North American tourist numbers and expenditures from 2010 to 2012. The North American share of total foreign earnings increased from €695 million in 2010 to €742 million in 2012, rising from 19 per cent of the total to 20 per cent of the total. The number of visitors grew from 929,000 in 2010 to 1,017,000 in 2012, staying at 15 per cent of the total. The number of visitors from January 2013 to April 2013 grew 17 per cent compared to the same period in 2012, and revenues grew 4 per cent over the same period. The North American market is therefore overall a consistent, resilient, and significant contributor to the Irish tourism industry.

A key distinguishing factor of North American tourists in Ireland is the likelihood that they tour extensively around the island of Ireland (Tourism Ireland 2014). An important cohort within the North American market is consequently the coach tourist. Figure 2 shows the total coach market in Ireland and the North American coach market in Ireland between 2006 and 2010 (the most recent year available).



**Figure 2:** Coach Tourist Numbers to Ireland 2006-2010 ('000)

**Data Source:** Sea Carriers and Fáilte Ireland Survey of Overseas Travellers, 2010

In 2006, 124,000 North American coach tourists (35 per cent of the total coach market) visited Ireland. Figure 1.2 shows North American coach numbers represented 14 per cent of the total North American market visiting Ireland and 37 per cent of the total coach market. Most recently, in 2013, the year of The Gathering, the country's tourism marketing initiative to attract people to Ireland, CIÉ coach tours carried 50,000 passengers, including 43,000 from the United States (Carswell 2013). North American coach tourists are consequently a clearly identifiable and distinct sector.

## Methodology

One of the most common quantitative methods available to identify market niches (segments) is factor analysis. Specifically, factor analysis identifies relationships that exist within a set of variables and reduces this list with a minimum loss of information. Market segmentation therefore categorises customers and tourists into groups with similar preferences. Segmentation partitions heterogeneous markets into smaller more homogeneous market segments. Market segmentation means "dividing a market into smaller groups of buyers with distinct needs, characteristics or behaviours who might require separate products or marketing mixes" (Kotler and Armstrong 2009:184). Segments are distinguished by different consumer needs, characteristics, or behaviours (Kotler 1980). With offers satisfying specific needs, groups of similar tourists can be identified and targeted (Haley 1968). Segmentation is important because it enables destinations to attract tourists (Pike 2004). Segmentation can therefore facilitate the effective marketing of Irish tourism. Dolnicar (2007), Laesser *et al.*, (2006), Upchurch *et al.*, (2006), Inbakaran and Jackson (2005), and Kotler *et al.*, (2003) all provide evidence that segmentation can assist organisations to make better use of their financial resources.

According to the UN World Tourism Organization (2007), identifying and targeting segments to purchase a destination's tourism goods and services is critical to a national tourism organisation's effectiveness and competitiveness. This research is the first to apply factor to an inbound market in Ireland. The methodology can be widely used in many areas of Irish

marketing in the future and as an instrument for public policy formulation and evaluation, the unique segments devised, can ensure Irish tourism remains competitive.

This research develops and uses a unique in-depth questionnaire. Quantitative and qualitative data collection methods, including self-administered questionnaires and group interviews are carried out to assess the North American coach tourists' travel behaviours (trip type, activities sought) and psychographic (character type, life focus) behaviours. A self-administered questionnaire was distributed to North American coach tourists at the beginning of their coach tour and completed surveys were collected at the end of their stay. Coach tour duration was between seven to fifteen days. Tour length depended on the tour type chosen. To capture a representative sample of North American tourists, 741 questionnaires were distributed, providing 486 useable responses. Because it was a voluntary self-completion survey, the response rate of 66% was representative and well above the responses received by Andriotis *et al.*, (2007) and Bogari *et al.*, (2004).

Respondents rated seven questions. The questions assessed motivations for travelling (why go and why not go on holiday), activities sought while on holiday, constraints that may prohibit travel, life focus over the next five to ten years and character traits of tourists. Responses were on a Likert scale, ranging from 1 = "Not at all important", 2 = "Mildly important", 3 = "Neither unimportant nor important", 4 = "Mildly important" and 5 = "Extremely important". A total of 101 variables were ranked by the coach tourists.

The data were analysed in two stages. First, to explore the overall sample profile, descriptive statistics analysis was applied to the data. Second, factor analysis was then applied to the data. Factor analysis groups variables into factors that have characteristics in common (Nunnally and Bernstein, 1994; Kim and Mueller, 1978; Pett *et al.*, 2003; Croux and Werker, 2004). Factor analysis is a data reduction method that has been widely used in tourism literature (Fuller and Matzler 2008, Cleaver *et al.*, 1999, Johns & Gyimothy 2002, Park and Yoon, 2009).

To measure the strength of the relationships between variables, the factorability of all 101 variables were examined. Two suitability tests, Bartlett's test of sphericity and Kaiser-Meyer-Olkin (KMO) tests, were carried out. Exploratory factor analysis, using Principal Component Analysis (PCA) with varimax rotation, identified and computed composite scores for the factors underlying 67 variables identified variables. PCA summarises the relationships that exist among a set of variables into a smaller set of uncorrelated principal components (Pett *et al.*, 2003; Tacq, 1997; Tabachnick and Fidell, 2001). The initial eigenvalue (eigenvalues assess the importance of each component in selecting the number of factors in each question was examined as eigenvalues represent the amount of variance accounted for by each factor (Pett *et al.*, 2003; Verbeek, 2008). Several well-recognised criteria for the factorability of a correlation were used. The criteria were as follows:

1. that factor loadings equal to or above 0.40<sup>1</sup> were retained (Pennington-Gray & Lane (2001) and Shoemaker (2000);
2. that eigenvalues equal to or above 1.0 (Kaiser-Guttman rule) were significant (Kaiser, 1974);
3. that at least 50 and 60 per cent of the total variance was explained (Pett *et al.*, 2003); and
4. an analysis of each variables' scree plot could extracted the factors (Tabachnick and Fidell, 2001).

---

<sup>1</sup> Varimax rotation maximises the factor loading of each variable on one of the extracted factors whilst minimising the loading on all other factors (Tabachnick and Fidell, 2001)

Decomposing a correlation matrix meant sixty-seven original variables were reduced to sixteen common categories, known as factors. These factors were saved and the most important factors in each of the six questions were retained and labelled according to a new dimension. All other variables were eliminated because they did not contribute significantly to the analysis. The six questions, which can be seen in detail in the appendix, relate to:

- push motivations to travel;
- pull motivations to travel;
- activities participated in while on vacation;
- constraints preventing travel;
- life focus of respondents over the next five to ten years; and
- level of agreement on various character types.

Results from the factor analyses of each of these six questions are presented in the following section.

## Findings

The general demographic information concerning the sample population was:

1. 32% of respondents were aged 65 and 74 years;
2. 28% were aged between 55-64 years, and 83 respondents;
3. 17% were aged between 45 and 54 years;
4. Thus, 77% respondents were aged 45+ years;
5. 45.3% were male; and
6. 53.9 per cent were female.

The 101 original variables were reduced to 22 more defined dimensions. These were then grouped into the six factor analysed questions. Each question is detailed in Table 1.

Table 2 summarises the push factors that influence, i.e. push, the North American coach tourist to go on a holiday, independent of destination.



<b>Variable Theme</b>	<b>Factors Extracted</b>
<b>Push Motivations</b>	Factor one – Educational Factor two – Rest/Relaxation
<b>Pull Motivations</b>	Factor one – Location Attributes Factor two – Physical Attributes
<b>Activities</b>	Factor one – Physical Activities Factor two – Indulging and Entertainment activities Factor three – Cultural Activities Factor four – Family Orientated Activities.
<b>Travel Constraints</b>	Factor one – Fear Constraints Factor two – Time Constraints
<b>Focus Over Next 5-10 years</b>	Factor one – Educating Spiritualist Factor two – Family Focused Factor three – Luxurious Wanderer
<b>Push Motivations</b>	Factor one – Trendy Liberalist Factor two – Independent Youth Factor three – Traditionalist

**Table 1:** Summary of Factors Extracted Per Variable Theme

<b>Item</b>	<b>Factor Component</b>	
	<b>Factor one loading</b>	<b>Factor two loading</b>
To learn new things	0.788	
Experience new culture	0.782	
For personal growth	0.774	
For adventure	0.634	
For rest and relaxation		0.714
Opportunity for romance		0.667
For nostalgia purposes		0.647
To escape		0.633
Quality time with family/spouse		0.597
<b>Extraction Method: Principal Component Analysis; Rotation Method: Varimax</b>		

**Table 2:** Push Motivations

Some coach tourists are active in their learning orientation in terms of culture and personal growth, while others like to relax, be romantic and reminisce. Knowing this allows for more accurate targeting of this sector of the market. A two factor rotated solution showed strong loadings on two factors with each of the nine items loading substantially on only one factor. Factor one consists of four items: ‘learn new things’, ‘experience new culture’, ‘personal growth’, and ‘adventure’. They represent the tourists’ desire to learn while on holiday and consequently factor one is labelled Educational. Factor two consists of five items: ‘rest and relax’, ‘opportunity for romance’, ‘for nostalgia purposes’, ‘to escape’, and ‘quality time with family/spouse’. They represent the tourists’ desire to take it easy and unwind while on holiday. Consequently, factor two is labelled rest/relaxation. Nine original variables were reduced to two crucial dimensions: Education and Rest/Relaxation.

Table 3 shows the pull (choice of destination) motivations that North American coach tourists take into account when choosing a holiday destination. The table shows the eight items listed in this question.

Item	Factor Component	
	Factor one loading	Factor two loading
Nice weather	0.758	
Good value for money	0.728	
A safe and secure location	0.634	
Ease of getting there	0.635	
Availability of high quality accommodation	0.606	
Interesting history		0.845
Quality of scenery		0.685
Recommendation from friends		0.643
Extraction Method: Principal Component Analysis; Rotation Method: Varimax		

**Table 3:** Pull Motivations

A two factor rotated solution showed a number of strong loadings on two factors with all eight items loading substantially on only one factor. Factor one consisted of five items. Given the various related items factor one was labelled Location Attributes.

For similar reasons factor two was labelled Physical Attributes.

Table 4 illustrates how certain travel constraints curtailed tourism behaviour. Nine common constraints are listed in this question. Two significant factors are identified from the original list of nine: **Fear Constraints** and **Time Constraints**. Fear of terrorism and general lack of time are found to be key constraint variables.

A two factor rotated solution showed a number of strong loadings on both factors with all nine items loading substantially on only one factor. Factor one consisted of seven items. The seven items represent a tourist’s sense of fear due to the very significant factor loadings on

items such as ‘fear of terrorism’, ‘health problems’, and ‘lack of interest’. The second factor consisted of two items relating to time, with significant factor loadings on ‘commitments to work’ and ‘lack of time’.

Item	Factor Component	
	Factor one	Factor two
Fear of terrorism	0.719	
Health problems	0.686	
Lack of interest	0.682	
Pets to look after	0.651	
Lack of a travel companion	0.592	
Family commitments	0.509	
Lack of money	0.446	
Commitments to work		0.841
Lack of time		0.835
Extraction Method: Principal Component Analysis; Rotation Method: Varimax		

Table 4: Holiday Constraint Factors

Holiday activities were the next question factor analysed. Table 5 below shows the North American coach tourists’ preferred holiday activities. Eighteen common activities were listed with respondents rating each activity on a scale of one to five for their importance while on holiday. Factor analysis reduced eighteen common holiday activities into four critical dimensions. In rank order of importance these are **Physical Activities, Indulging/Entertainment Activities, Cultural Activities,** and **Family Orientated Activities**. These findings indicate that coach tourists visiting Ireland are (and perhaps surprisingly) very active individuals.

Item	Factor Component			
	Factor one	Factor two	Factor three	Factor four
Cycling	0.854			
Water-sports	0.826			
Equestrian	0.817			
Golf	0.731			
(Hill)walking/hiking	0.708			
Spa treatments/massage	0.633			
Spiritual activities	0.583			
Artistic and literary activities	0.563			
Fine dining		0.822		
Music/Food		0.752		
Shopping		0.708		
Theatre act/stage show		0.561		
Historical activities			0.794	
Museum/art gallery			0.739	
Nature activities			0.545	
Guided tours/excursions			0.529	
VFR				0.790
Tracing roots/Genealogy				0.589
<b>Extraction Method: Principal Component Analysis; Rotation Method: Varimax</b>				

**Table 5:** Activity Factors

A four factor rotated solution showed a number of strong loadings on four factors with all eighteen items loading substantially on only one factor. Factor one consisted of eight items. Factor two attained four items with factor loadings ranging from 0.561 to 0.822. Factor three also retained four items while factor four retained two items. These results allow for a more precise analysis of the spectrum of activities.

Factor analysis was also carried out on respondents' focus in life over the next five to ten years. Table 6 highlights the core life focus factors of the coach tourists. Eleven life ambitions are listed in this life focus question.

Item	Factor Component		
	Factor one	Factor two	Factor three
Sharing my beliefs with others	0.835		
Working in my dream occupation	0.728		
Strengthening my spiritual faith	0.723		
Developing new skills	0.716		
Technology/gadgets/internet	0.703		
Caring for the environment	0.598		
Family		0.791	
Grandchildren		0.762	
Looking after my health		0.560	
Travelling more			0.784
Enjoying more of life's luxuries			0.597
<b>Extraction Method: Principal Component Analysis; Rotation Method: Varimax</b>			

**Table 6:** Life Focus Factors

From the original eleven variables, three were representative: **Educating Spiritualist**, **Family Focused** and the **Luxurious Wanderer**. In order of importance, the key focus for North American coach tourists over the next five to ten years were sharing beliefs with others, strengthening spiritual faith, and family and grandchildren. This offers a more accurate understanding of future coach tourists.

The final question factor analysed measures tourists' level of agreement regarding their character type. Table 7 indicates three factors were identified. From twelve variables, the three factors are labelled: **Trendy Liberalists**, **Independent Youths** and **Traditionalists**. These findings indicate to tourism suppliers that coach tourists are risk takers. They want to keep up with new trends. They enjoy being on their own while also look forward to retiring.

Item	Factor Component		
	Factor one	Factor two	Factor three
I am a risk taker	0.677		
I always keep up with new trends	0.671		
I consider myself liberal	0.646		
Modern technology challenges me	0.580		
Financial enrichment is important to me	0.525		
I enjoy being on my own		0.778	
Associate with younger people		0.563	
Cultural enrichment is very important		0.500	
I live a physically active life		0.484	
Traditional values are very important			0.742
I look forward to retiring			0.557
Routine suits me			
<b>Extraction Method: Principal Component Analysis; Rotation Method: Varimax</b>			

**Table 7:** Character Type Factors

## Policy Implications

The factor analysis indicates that there are twenty-two critical dimensions within the North American coach market. The paper provides an enhanced understanding of the coach market to the industry suppliers. This is important because the Tourism Renewal Group (2009) indicated tourism businesses with strong track records and viable futures need to be protected and supported. The paper highlights the issues raised in the *New Horizons for Irish Tourism: An Agenda for Action* (Tourism Policy Review Group, 2003) by establishing the factors that encourage and discourage North American coach tourists to go on holiday in Ireland. Issues such as important travel constraints, motivation, activities, accommodation attributes, life focus and personality traits epitomizing the North American coach tourists are highlighted. The findings reveal potential niche markets within the broad coach tourism market.

There are potential niches in different types of coach tours. Four possibilities suggested by our findings include activity tours (e.g., cycling breaks), spa tours, spiritual tours (e.g., Knock), and historical tours. There are also clear niches in the particular way tourists travel. The three identified are the health conscious tourist, tourists who prefer an adults-only tour and tourists who prefer a tour with families.

Coach tourists are largely active individuals with a desire for cycling. Physically active tours are a potential niche. Tourists seek attractive location attributes and are interested in physical features such as historical relics. Coach tours specialising in history are a potential niche. Fear and time are two travel constraints. Although not a new phenomenon, promoting a peaceful island of Ireland is found to be still a forefront issue with coach tourists. Push motivations defined as educational or restful/relaxing indicate coach tourists are active in their learning

prowess albeit in terms of culture and personal growth, while others like to relax, be romantic and reminisce. Offering specialised coach tours such as spa retreat tours or a spiritual tour would target these coach tourists. Assessing the five to ten year life focus of the coach tourist indicates a future niche for targeting family tours. Findings highlight the importance of not only child and parent holiday facilities but also child and grandparent tours.

Findings in this paper demonstrate that North American coach tourists to Ireland are diverse. The North American coach tourists visiting Ireland have differing travel behaviours and pursue diverse activities when on holiday. There is a supply gap: the latent demands of coach tourists highlighted in this paper show an appetite for facilities that are not currently being provided. Tourism providers can target more precisely the coach tourist of the future if they choose to work in tandem with the best form and adoption of, new innovations and product developments. Interactive websites and advertising offers ample scope to develop niche markets for the active tourist. Merging technology with suppliers' products would cater for several types of coach tourists visiting Ireland. The generic tourist product is a thing of the past. The future for the industry is positive. If suppliers listen to their customers, the long-tail segmentation of the coach market will offer more choice, increase satisfaction, and attract more tourists to Ireland.

## Appendix

1. Which of the following influence your CHOICE of destination?

Please (✓) where 1 is LEAST important, 5 is MOST important. (PULL MOTIVATION)

	1	2	3	4	5
A safe and secure location					
Ease of getting there					
Interesting history					
Quality of scenery					
Recommendation from friends					
Availability of high quality accommodation					
Good value for money					
Nice weather					

2. How important are the following for YOU to go on a LEISURE vacation?

Please (✓) where 1 is LEAST important, 5 is MOST important. (PULL MOTIVATION)

	1	2	3	4	5
To escape					
Experience new culture					
For personal growth					
For adventure					
To learn new things					
Opportunity for romance					
Quality time with family/Spouse					
For rest and relaxation					
For nostalgia purposes					

3. Which of the following have STOPPED you from going on vacation?

(Please (✓)) (CONSTRAINTS)

Lack of money	
Lack of travel companion	
Family commitments	
Lack of time	
Commitments to work	
Health problems	
Lack of interest	
Fear of terrorism	



4. How important are the following ACTIVITIES to YOU while on any vacation?

Please (✓) 1 is LEAST important, 5 is MOST important

	1	2	3	4	5
Visiting relatives and friends					
Tracing roots/Genealogy					
Historical activities					
Museum/art gallery activities					
Nature activities					
Guided tours/excursions					
Spiritual activities					
Artistic and literary activities					
Water-sports					
Equestrian					
Golf					
Cycling					
Walking/Hill walking/Hiking					
Theatre act/stage show					
Fine dining					
Music/Food					
Shopping					
Spa treatments / massage					

5. How IMPORTANT will the following be in your life, over the next 5 to 10 years?

Please (✓) where 1 is LEAST important and 5 is MOST important.

	1	2	3	4	5
Grandchildren					
Family					
Travelling more					
Looking after my health					
Strengthening my faith (spiritual)					
Developing new skills					
Caring for the environment					
Enjoying more of life's luxuries					
Technology/Gadgets/Internet					
Sharing my beliefs with others					
Working in my dream occupation					

6. For the following, please tick (✓) YOUR level of agreement. 1 is LEAST agree and 5 is MOST agree.

	1	2	3	4	5
I choose to associate with younger people					
Traditional values are very important to me					
I enjoy being on my own					
Cultural enrichment is very important to me					
I look forward to retiring					
Financial enrichment is important to me					
I always keep up with new trends					
Routine suits me					
Modern technology challenges me					
I live a physically active life					
I consider myself liberal					
I am a risk taker					

**Acknowledgement:** This paper was funded by the Irish Hotels Federation.

## References

- Andriotis, K, Agiomirgianakis, G and Mihotis, A (2007). 'Tourist Vacation Preferences: The case Of Mass Tourists to Crete', *Tourism Analysis*, 12(1/2), 51-63.
- Bogari, NB, Crowther, G and Marr, N. (2004). 'Motivation for Domestic Tourism: A Case Study of the Kingdom Of Saudi Arabia', *Tourism Analysis*, 8(2-4), 37-41.
- Carswell, Simon (2014). "US Tourists Answering Ireland's Clarion Call" *Irish Times* [online], 31 January, available: <http://www.irishtimes.com/business/sectors/transport-and-tourism/us-tourists-answering-ireland-s-clarion-call-1.1673640> [accessed 23 May 2014]
- Cleaver, M., Muller, T., Ruys, H., and Wei, S. (1999). 'Tourism product development for the senior market, based on travel-motive research', *Tourism Recreation Research* 24(1), 45–65.
- Croux, C. and Werker, B. (2004). 'Dynamic Factor Models', *Journal of Econometrics*, 119(2), 223-230.
- Dolnicar, S. (2007). 'Market Segmentation in Tourism', in Woodside, A. and Martin, D., eds., *Tourism Management: Analysis, Behaviour and Strategy*, Oxfordshire: CABI.
- Fáilte Ireland (2007). *Tourism Facts 2006* [online] available: [http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3\\_Research\\_Insights/3\\_General\\_SurveysReports/TourismFacts2006.pdf?ext=.pdf](http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/3_General_SurveysReports/TourismFacts2006.pdf?ext=.pdf) [accessed 9 June 2014]
- Fáilte Ireland (2011). *Coach Tourism in Ireland: 2010 Sectoral Study* [online] available: [http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3\\_Research\\_Insights/1\\_Sectoral\\_SurveysReports/Coach\\_tourism\\_in\\_Ireland\\_2011\\_.pdf](http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/1_Sectoral_SurveysReports/Coach_tourism_in_Ireland_2011_.pdf) [accessed 9 June 2014]
- Fáilte Ireland (2012). *Coach Tourism in Ireland: 2011 Sectoral Study* [online] available: [http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3\\_Research\\_Insights/1\\_Sectoral\\_SurveysReports/Coach-Tourism-Sectoral-Study.pdf?ext=.pdf](http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/3_Research_Insights/1_Sectoral_SurveysReports/Coach-Tourism-Sectoral-Study.pdf?ext=.pdf) [accessed 9 June 2014]
- Fruchot, I. (2005). 'A benefit segmentation of tourists in rural areas: A Scottish perspective', *Tourism Management*, 26(3), 335-346.
- Fuller, J and Matzler, K. (2008). 'Customer delight and market segmentation: An application of the three-factor theory of customer satisfaction on life style groups', *Tourism Management*, 29(1), 116-26.
- Haley, R.J. (1968). 'Benefit Segmentation: A Decision-Oriented Research Tool', *Journal of Marketing*, 32(3), 30-35.
- Inbakaran, R.J and Jackson, M. (2005). 'Understanding Resort Visitors through Segmentation', *Tourism and Hospitality Research*, 6(1), 53-71.
- Irish Tourist Industry Confederation (2008). *Review of Ireland's Coach Tourism Sector & Future Recruitment Challenges*, CHL Consulting Company Limited on behalf of ITIC, Dublin. [online] available: <http://www.yumpu.com/en/document/view/6947438/review-of-irelands-coach-tourism-sector-future-itic>
- Johns, N and Gyimothy, S. (2002). 'Market Segmentation and the Prediction of Tourist Behaviour: The Case of Bornholm, Denmark', *Journal of Travel Research*, 40(3), 316-327.

- Kaiser, H. F. (1974). 'An Index of Factorial Simplicity', *Psychometrika*, 39(1), 31-36.
- Kim, J. and Mueller, C.W. (1978). *Factor Analysis: Statistical Methods and Practical Issues*. Newbury Park, California: Sage.
- Kotler, P. (1980). *Principles of Marketing*. Englewood Cliffs, New Jersey: Prentice-Hall.
- Kotler, P and Armstrong, G. (2009). *Marketing: An Introduction*, 9th ed., Upper Saddle River, New Jersey: Prentice-Hall.
- Kotler, P., Bowen, J.T. and Makens, J.C. (2003). *Marketing for Hospitality and Tourism*, 3rd ed., Upper Saddle River, New Jersey: Prentice-Hall.
- Laesser, C, Crouch, G.I. and Beritelli, P. (2006). 'Market segmentation by reasons and influences to visit a destination: the case of international visitors to Australia', *Tourism Analysis*, 11 (4), 241-249.
- Nash, Peter. (n.d.) "The North American consumer – what they're looking for", [online] Tourism Ireland, available: <http://www.tourismireland.com/CMSPages/GetFile.aspx?guid=dd5f8b71-746f-49ad-8b58-d2776d360ffa>
- National Competitiveness Council (2011). *Ireland's Competitiveness Challenge 2011* [online], available: [http://www.competitiveness.ie/media/11012012-Irelands\\_Competitiveness\\_Challenge\\_2011-Publication.pdf](http://www.competitiveness.ie/media/11012012-Irelands_Competitiveness_Challenge_2011-Publication.pdf)
- Nunnally, J.C. and Bernstein, I.H. (1994). *Psychometric Theory*. New York: McGraw-Hill.
- Park, D. B. and Yoon, Y-S. (2009). 'Segmentation by motivation in rural tourism: A Korean case study', *Tourism Management*, 30 (1), 99-108.
- Pett, M., Lackey, N.R., and Sullivan, J.J. (2003). *Making Sense of Factor Analysis: The Use of Factor Analysis for Instrument Development in Health Care Research*, Thousand Oaks, California: Sage Publications.
- Pennington-Gray, L. and Lane, C.W. (2001). 'Profiling the Silent Generation: Preferences for Travel', *Journal of Hospitality & Leisure Marketing*, 9 (1/2), 73-95.
- Pike, S. (2004). *Destination marketing organisations*, Oxford: Elsevier.
- Shoemaker, S. (2000). 'Segmenting the Mature Market: Ten Years Later'. *Journal of Travel Research*, 39 (1), 11-27.
- Tabachnick, B.G. and Fidell, N.M. (2001). *Using Multivariate Statistics*, 4th ed., Boston: Allyn and Bacon.
- Tacq, J. (1997). *Multivariate Analysis Techniques in Social Science Research*, London: Sage.
- Tourism Ireland (2006) *North America: Land of Opportunity* [online], available: [http://www.itic.ie/fileadmin/docs/North\\_American\\_Market\\_Reviewed\\_24-10-06.pdf](http://www.itic.ie/fileadmin/docs/North_American_Market_Reviewed_24-10-06.pdf) [accessed 9 June 2014]
- Tourism Ireland (2014). *Wicklow County Council Visits Tourism Ireland in New York* [press release] 23 March, available: <http://www.tourismireland.com/Home!/About-Us/Press-Releases/2014/Wicklow-County-Council-Visits-Tourism-Ireland-in-N.aspx> [accessed 9 June 2014]
- Tourism Policy Review Group (2003). *New Horizons for Irish Tourism: An Agenda for Action*,

[online], available: [www.transport.ie/tourism/pdfs/TourismReviewReport03.pdf](http://www.transport.ie/tourism/pdfs/TourismReviewReport03.pdf) [accessed 9 June 2014]

Tourism Renewal Group (2009). *Survival, Recovery and Growth – A Strategy for Renewing Irish Tourism, 2009-2013*, September, [online], available: <http://www.dttas.ie/sites/default/files/publications/tourism/english/%E2%80%9Csurvival-recovery-and-growth-strategy-renewing-irish-tourism-2009-2013%E2%80%9D-%E2%80%93-report-tourism-renewal/finaltrg-reportweb-version.pdf> [accessed 9 June 2014]

Upchurch, R., Rompf, P. and Severt, D. (2006). 'Segmentation and satisfaction preferences of specific looking glass cohorts' profiles: A case study of the timeshare industry', *Journal of Retail and Leisure Property*, 5 (3), 173 – 184.

Verbeek, M. (2008). *A Guide to Modern Econometrics*, 3rd ed., Chichester: John Wiley.

World Tourism Organisation. 2007. *Handbook on tourism market segmentation: maximising marketing effectiveness*. Madrid: World Tourism Organisation.

## Contributors

*Professor Antonie Bauer* is a professor in the Tourism Management Department of Munich University of Applied Sciences, where she teaches a wide range of subjects from adventure and sports in tourism to intercultural competence and destination management. Her main research interests are currently in the field of adventure tourism and service quality measurement.

*Dr Áine Conaghan* is a recent PhD graduate of the Institute of Technology Sligo and has a keen interest in sustainable management of tourism destinations and associated policy formation and implementation. Key areas of expertise are in sustainable tourism certification and planning.

*Professor Jim Deegan* is Head of the Department of Economics, Director of the National Centre for Tourism Policy Studies (NCTPS), and Professor of Tourism in University of Limerick. His research interests lie in tourism economics, tourism policy, and the services industry.

*Gráinne Dwyer* is an independent Researcher who previously completed a Master degree by Research in the Geography Department, Mary Immaculate College. Areas of interest include nature-based tourism, community collaboration and rural development. She currently works as tourism officer for a Chamber of Commerce in West Cork, where she assists with local tourism projects and co-ordinated marketing.

*Dr James Hanrahan* is a Lecturer in Sustainable Management of Tourism at the Institute of Technology Sligo, graduate of University of Manchester, and University of Surrey. He has supervised a vast array of PhD and Master students in the area of sustainable management of tourism destinations and has worked as a lecturer and private tourism consultant in New Zealand, Eastern Europe and Hawaii.

*Dr Felicity Kelliher* is a Senior Lecturer in Management Studies and Founder-Senior Researcher at the RIKON research group ([www.rikon.ie](http://www.rikon.ie)) at Waterford Institute of Technology. Research interests include cooperative network activity, management capability development, and individual learning in the small and micro-firm environment.

*Dr Margaret Linehan* is Head of the School of Humanities, Cork Institute of Technology. She is the current chair of the Irish Academy of Management. She has supervised numerous Master and PhD students. Her research interests include women in international management, food tourism, learning and higher education.

*Dr Richard Moloney* is a retired economics Lecturer at the Centre for Policy Studies, University College Cork. His research focus is on industrial structure, tourism, rural development, forestry, input output analysis, environmental economics, and marine research.

*Deirdre O'Donovan* is a Lecturer in Human Resource Management and PhD researcher in Cork Institute of Technology, where she also obtained her MBus. Her research interests include Human Resource Management, particularly Diversity, Performance and Performance Management, Industrial/Organisational Psychology, particularly Inclusion and Organisational Citizenship Behaviours, and National Culture.

*Lisa O'Riordan* is a PhD student at the Department of Tourism and Hospitality at Cork Institute of Technology. The main focus of her PhD is on food tourism and sustaining culture in regions in the South and Southwest of Ireland.

*Dr Leana Reinl* is Learning Network Coordinator on the INTERREG funded Green Innovation and Future Technology (GIFT) project and a postdoctoral researcher with the RIKON research group at Waterford Institute of Technology. Research interests include learning in small and micro-firm networks and evolving learning community environments.

*Dr Marie Ryan* is an economics Lecturer at the Centre for Policy Studies, University College, Cork. Her interests lie in the areas of social policy, health economics, tourism, and education policy.

*Dr Irene Sheridan* completed a Doctorate on Change Management in Higher Education with the University of Middlesex in 2012. Since 2007, she has managed two collaborative projects aimed at engagement between higher education and enterprise (Education in Employment and Roadmap for Employment-Academic Partnership). Both projects were funded by the Higher Education Authority under the Strategic Innovation Fund. She is currently Head of the Extended Campus at Cork Institute of Technology.

*Dr William Sjostrom* is Director and Senior Lecturer in Economics at the Centre for Policy Studies, University College Cork. His research interest is primarily in industrial economics, with particular focus on the maritime industry.

*Dr Aisling Ward* is a Lecturer in Tourism in the Cork Institute of Technology. Her research interests include Market Segmentation, Tourism Motivations, Senior Tourism, and Culture and Behaviour in Tourism.