


MARKET SEGMENTATION AND SUPPLY-SIDE DRIVERS: SOME THEORETICAL CONSIDERATIONS IN THE CONTEXT OF RELIGIOUS TOURISM

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Abstract

Purpose – The purpose of this research note is to add to the literature some new theoretical knowledge and to advance the conceptualisation of religious tourism by evaluating both the supply-side drivers and the demand-side expressed through market segmentation.

Methodology/Design/Approach – This research note is not based on empirical research but on theoretical argumentation. The research note uses a narrative review approach and summarises the academic literature related to market segmentation and supply drivers in religious tourism. The main methods used in this research are analysis, comparison, reflection and synthesis.

Findings – First, the findings advance the conceptualisation of religious tourism by expanding the debate on supply and demand. Second, the findings indicate that the religious tourism market is not stagnant, but growing and new micro-niches are emerging. Third, this research note attempted to build a conceptual framework within which to locate the supply of religious tourism based on market segmentation. Fourth, the debate on market segmentation in religious tourism can be an impetus for suppliers to develop strategies for segmentation, targeting and positioning.

Originality of the research – To the author's knowledge, this is the first literature review research that simultaneously investigates market segmentation and supply drivers in religious tourism and provides a different perspective.

Keywords religious tourism, market segments, supply-side drivers, micro-niches.

Research note

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INTRODUCTION

Religious tourism is considered one of the oldest forms of tourism (Rinschede, 1992). During the early stage of the development of the concept, the literature was mainly focused on pilgrimage. In fact, scholars debated pilgrimage and experience rather than religious tourism (Iliev, 2020). However, more recently, religious tourism has evolved and expanded into a large and segmented market such as pilgrimages, retreats, conferences, seminars, festivals (Stausberg, 2011), religious conferences/conventions, volunteer-oriented religious tourism, short-term mission travel (Ron, 2009), pilgrimage (site and journey), sacred travel, religious (place and faith based), missionary safaris and spiritual retreats (new age and traditional) (McKercher, 2016). Recently, Olsen (2022) divided the religious tourism market into four sub-markets: the religious tourism market, the pilgrimage or faith tourism market, the spiritual tourism market, and the New Age tourism market. Namely, scholars have begun to consider other forms of religious tourists, such as spiritual tourists (Stausberg, 2014; Willson et al., 2013), 'New Age' spiritual travellers (Attix, 2002; Ivakhiv, 2003), volunteers (Mustonen, 2006), cyberpilgrims (Digance, 2006), etc. Indeed, the market in religious tourism is highly segmented (Iliev, 2020).

There are case studies in the literature that investigate market segments in religious tourism, but there is still a lack of conceptual studies that simultaneously examine market segmentation and supply drivers and offer a conceptualisation of religious tourism. Hence, such research work is challenging. In this context, the author in this research follows Seyer and Müller's (2011) discussion of demand and supply in religious tourism, where twelve segments are identified: pilgrimages, missionary, volunteer vacations, leisure/getaways, destinations/attractions, retreats/guesthouses, cruises, religious conferences/conventions, Christian camps, student/youth, family/intergenerational and adventure/active. Namely, this research note aims to extend this work, offer a different perspective and advance the conceptualisation of religious tourism. This research note synthesises academic literature and intends to add to it some theoretical considerations and new knowledge about demand and supply in religious tourism.

The rest of this research note is structured as follows. The research note first discusses the research methodology and the procedure used to obtain and analyse the references. It continues by theorising and organising themes related to market segmentation and various resources and suppliers in religious tourism. The research note ends with concluding remarks, implications, limitations and research recommendations.

1. METHODOLOGY

The findings in this research note represent a synthesis of a narrative review of the literature related to market segmentation and supply-side drivers in religious tourism. Narrative reviews are an analysis of published literature and provide readers with new knowledge about a particular theme from the author's point of view (Rother, 2007) with little explicit structure for gathering and presenting evidence (Perkins et al., 2020). Namely, these are summaries aimed at theorising (Furunes, 2019). Narrative reviews '...may draw on qualitative and/or quantitative evidence and often include some form of *thematic analysis*' (Mays et al., 2005, p. 11). '*Thematic analysis* is the most common method adopted within narrative reviews... It seeks to identify and bring together the main, recurrent or most important issues or themes arising from a body of literature' (Mays et al., 2005, p. 12). Namely, narrative reviews are particularly useful for connecting different studies/themes (Baumeister & Leary, 1997). As this research note aims to combine knowledge from various studies related to market segmentation and supply-side drivers in religious tourism, a narrative review is a useful approach as it allows the author to summarise findings from previous literature.

The literature review implemented in this research note was conducted by keyword searching through the Google Scholar database. Google Scholar is recognised amongst scholars as the most renowned search engine for academic articles (Kim et al., 2019). The following keywords were selected to guide the search, including 'market segments in religious tourism' and 'supply-side drivers in religious tourism'. It should be emphasised here that the current research note does not aim to provide a comprehensive systematic review of the literature relating to supply and demand in religious tourism, but rather attempts to analyse the relevant literature that is directly and indirectly related to the twelve market segments identified by Seyer and Müller (2011), as well as with the newly emerging segments of the religious tourism market. The literature review focused on English-language peer-reviewed articles published in journals. Several book chapters and academic books related to religious tourism research are also included in the analysis. An electronic database search extracted peer-reviewed publications for the period 2000-2022. In total, 33 publications were selected as being relevant to the current research note and retrieved for analysis. Relevance was determined by reviewing the title, abstract, and in some cases the full text of the publication to identify whether the article discussed the context of market segmentation and/or supply-side drivers in religious tourism.

In the narrative approach to this review, findings from both the qualitative and quantitative literature are analysed thematically. Namely, findings relevant to the interest of this review were identified and coded, and similar codes were grouped into themes.

2. THEORETICAL ANALYSIS AND RESULTS

The pilgrimage is one of the oldest forms of human travel. Today, in addition to traditional forms of pilgrimage, new forms of pilgrimage related to ecological or environmental themes are also being developed (Ivakhiv, 2016). The concept of 'green pilgrimage' as a new form of global pilgrimage is of particular relevance here (Elgammal & Alhothali, 2021; Ivakhiv, 2016). Modern literature shows us that there is a difference between taking a pilgrimage and a route-based pilgrimage (Iliev, 2020). The modern practice of pilgrims walking on organic trails is a form of slow tourism. In this form of tourism, new market segments such as cultural tourists, heritage tourists and spiritual tourists are identified (Olsen et al., 2018). Traditionally, pilgrimage as a market segment has been served by small and medium-sized suppliers, but recently larger tour operators have become aware of this growing sector (Seyer & Müller, 2011). Also, some other organisations, such as the British Pilgrimage Trust, are focusing on the redevelopment of pilgrimage routes to advance pilgrimage as a form of cultural heritage that promotes holistic well-being, accessible to all.

The next theme on which the literature focused is missionary travel, that is, the phenomenon of short-term mission trips. The paths of these missionaries lead to exotic destinations, like the Dominican Republic (Occhipinti, 2016), and other developing countries. Short-term mission travellers are seeking new experiences and personal transformation. In communities around the world, participants in this journey provide medical care, serve the poor, teach children English, etc. They are a heterogeneous demographic (in terms of age) group, motivated by a desire to help others and seeking authentic experiences and spiritual benefits (Occhipinti, 2016). Short-term mission trips are a form of volunteer tourism (which has a long history in Western society). Numerous specialised missionary travel suppliers are present around the world, such as 'Mission Travel', 'Golden Rule Travel', 'PeliTravel Missionary Travel Agency', etc. The Americans are dominant participants in missionary trips and volunteer vacations (Wuthnow, 2009). Indeed, volunteer vacations are becoming a trend in the tourism industry, where millions of tourists travel to different parts of the world on volunteer missions, especially in the African context (Fang, 2020). According to Mustonen (2006, 172-173) '...volunteer tourism can actually be viewed as a continuation of the traditional pilgrimage. Volunteers might be the new pilgrims of contemporary world, who represent traditional pilgrims in postmodernity'. Recent studies have begun to discuss street-aid volunteer tourism as a micro-niche and, more specifically, faith-based volunteer tourism (Tomazos, 2022).

In recent years, religious tourism has changed the tourism scene by combining leisure and religion. Scholars suggest a link between leisure and spirituality (Livengood, 2009), Christianity and contemporary meanings of leisure (Schulz & Auld, 2009), Taoism and leisure (Wang & Stringer, 2000). Also, the concept of leisure has relevance in an Islamic context (Martin & Mason, 2004). More and more people are using their leisure to visit different religious destinations and attractions. According to Alliance of Religions and Conservation (ARC), annually, more than 200 million people participate in pilgrimage, and the main pilgrimage sites are: for Christians (Our Lady of Guadalupe, Mexico; Basilica of the National Shrine of Our Lady of Aparecida, Brazil; Western Wall, Jerusalem; Jasna Gora monastery, Czestochowa, Poland; Fátima, Portugal; Lourdes, France; El Rocio, Cadiz, Spain; Church of

the Holy Sepulchre, Jerusalem), for Muslims (Arba'een, Karbala, Iraq; Hajj, Mecca, Saudi Arabia; Kadhmayn, Baghdad, Iraq), for Hindus (Ayyappan Saranam, Tirupati, Kumbh Mela, Vrindavan, Dwarka, and Varanasi, India), for Buddhists (Nanputuo Temple, Xiamen, China), for Sikhs (Amritsar, Holla Mohalla Anandapur Sahib, India), for Shinto (Ise, Japan), for Daoists (Wutai Shan), etc. Spiritual retreat objects and guesthouses are also significant tourist attractions. From the literature review it can be seen that New Zealand (Bone, 2013), Australia (Gill et al., 2018), and Thailand (Ashton, 2018) are important destinations for spiritual retreat tourism. According to Fang (2020), today millions of religious believers travel to different parts of the world to retreat.

The growth of religious tourism is also evident in the faith-based cruise segment. In essence, it is a journey to sacred sites by Christians and other religious groups. The centre of pilgrimage cruises is the Mediterranean Sea region (Kizielewicz, 2013). The phenomenon of pilgrimage in the Mediterranean Sea has been proven since ancient times by maritime journeys (Trono & Imperiale, 2018). There are many countries in this region offering rich religious sites and objects, such as Italy, Greece, Spain, etc. (Kizielewicz, 2013). The proposed maritime pilgrimage routes to Jerusalem in recent literature are particularly important potential vectors for the lasting future development of the Mediterranean (see Trono & Imperiale, 2018). Among other regions in the world, the example of America is interesting, where today the most popular types of religious cruises are Christian cruises (Fang, 2020). Pilgrimage cruises include some of the well-known suppliers, such as 'Windstar', 'Louis Cruises', 'Fred Olsen Cruise Lines', etc. (Kizielewicz, 2013).

The literature has shown us that religious conferences and conventions are also an important market segment. Christian leadership conferences are the most popular ones in the last two decades, which have grown into large conferences with over 10,000 participants, such as Alpha (United Kingdom) and Willow Creek (America). They are held annually and involve people of different cultural backgrounds and all ages people (Tkaczynski & Arli, 2018). Suppliers recognised the benefits of holding such conferences. In this regard, the Religious Conference Management Association (RCMA) is particularly important. The association includes key leading hotel representatives, convention bureaus, conference centres, airlines, and service companies.

Christian camps are no less important. North America is a major destination for this type of vacation. The student/youth market is the most prevalent segment in Christian camps. Likewise, the focus of the student/youth segment is on other events, such as the event World Youth Day (Mróz, 2016). According to the Alliance of Religions and Conservation (ARC), one million young Catholics participate in this event. Youth and students are also significant participants in the pilgrimage routes. For example, along the Way of St. James, the Via Francigena route, the St. Olav's Way and many others (see Mróz, 2016). Another important market niche is the 'family/intergenerational' segment. Many pilgrimage centres, Christian camps, faith-based cruising, etc., are the main resources in which this market segment is involved. These journeys encourage spiritual growth and give an opportunity for the family to grow together in faith. Suppliers around the world offer different packages for family religious trips.

Lastly, the 'adventure/active' market niche is a potential segment for possible growth in religious tourism. Swarbrooke et al. (2003) emphasise that spiritual tourism has its own infrastructure or suppliers, for example, spiritual adventures – monasteries and religious retreat communities. Mountains are tourist resources, but they are also considered sacred places for some folks. Hiking on the mountain trails (e.g., Himalaya tour) in order to reach the holy place can be considered as a kind of adventure activity. Also, according to Fang (2020), Muslims using camels during religious journeys in Saudi Arabia is considered an adventure activity.

The above discussion highlights the increasingly fragmented nature of the religious tourism market. Different market segments appear as a result of different destinations, places, attractions, but also as a consequence of the wide range of suppliers. The growing interest in these market segments is visible in the creation of tourism organisations that are focused on the promotion and branding of the religious tourism sector, such as the Faith Travel Association. Additionally, in the past two decades, tourism operators, marketers, promoters and religious organisations have increasingly developed the religious tourism market (Olsen, 2022). Finally, demand and supply in religious tourism are interrelated as demand appears to be supply-driven and attraction-based.

CONCLUSION

This research note used a narrative review approach and summarises the academic literature related to market segmentation and supply drivers in religious tourism. In terms of theoretical implications, the research note advances the theoretical knowledge of market segmentation and supply-side drivers in religious tourism by extending Seyer and Müller's (2011) conceptual framework of demand and supply. The findings of this research note show us that the religious tourism market is not stagnant, but growing and new micro-niches are emerging, such as: green pilgrimages, slow pilgrims, street-aid volunteer tourists, etc. Hence, this research note confirms the recent claim of Iliev (2020) that religious tourism is undergoing transformation and expanding into a large and segmented market. Some early studies attempted to identify and classify supply in religious tourism (Mazumdar & Mazumdar, 2004; Shackley, 2001). In contrast to these studies, this research note offers a different perspective and attempts to build a conceptual framework within which to locate the supply of religious tourism based on market segmentation. It is evident that there is a diverse and fragmented supply set of destinations, sites, attractions and suppliers, which affects demand in religious tourism. Namely, just as a diverse and fragmented set of resources and suppliers of religious tourism exists, so the motives of tourists who visit and consume these products are equally diverse. This research note attempted to conceptualise the coherence between market segmentation and supply in religious tourism, emphasising that religious tourism cannot be perceived only as an expression of tourism supply, but should be considered in conjunction with tourism demand and market segmentation. This finding is in accordance with the conclusion of Iliev (2020) that no analysis of the supply of religious

tourism is complete if demand is not considered. To the author's knowledge, this is the first literature review research that simultaneously investigates market segmentation and supply in religious tourism and provides a different perspective. Most of the existing religious tourism studies that examine market segments are site-specific, making it difficult to generalise findings to broader areas. In contrast, this research note offers generalisations and provides scholars with insightful information about the diversity of market segments, attractions, and supply-side drivers in religious tourism in broader geographical contexts, and therefore has implications for international literature beyond a specific site. However, further research is needed to confirm the connection between market segmentation and supply. There are still gaps in the literature that need to be filled. From a review of the narrative literature, it can be determined that there is a lack of empirical research (case studies) examining the relationship between market segmentation and the supply side of religious tourism. Future researchers might address this obvious gap in the literature by undertaking in-depth examinations. Indeed, empirical studies are needed because, without these studies, we do not have a strong conceptualisation. Future research could also focus on some market segments that researchers have so far neglected, such as religious conferences, faith-based cruises, Christian camps, children's and family segments.

Religious tourism is growing globally (Iliev, 2020). According to estimates by the United Nations World Tourism Organisation, approximately 600 million people a year travel domestically and internationally for religious purposes. As such, the religious tourism niche market is a multi-billion USD industry (Olsen, 2022, p. 282). Here, the clash of desires and interests is more likely as a result of the differences between market segments and, therefore, the need for differentiation of the supply of religious tourism based on market segmentation and its appropriate promotion is imposed. In this context, this research note offers practical implications and may be useful for destination management organisations, marketers, tour operators and policymakers. Indeed, most practitioners and suppliers are aware of the existence of popular religious destinations and attractions, but they often need clarification and broader insight into religious tourism market segments. So, by reading this research note, they will be able to get a generalised and deeper insight into the religious tourism market segments. The debate on market segmentation in religious tourism can be an impetus for suppliers to develop strategies for segmentation, targeting and positioning.

This research note has several limitations. First, this research uses a narrative literature review approach, so the literature used may not be exhaustive, as there are limitations associated with using a single Google Scholar database and possible researcher bias related to the decision-making processes used to determine whether publications should be included or excluded in the analysis. Therefore, in some future studies, it is recommended that researchers use additional relevant databases and a systematic literature review approach to extend the research. Second, the inclusion criterion of publications exclusively in English also limits the literature. Therefore, in future research, the inclusion of other academic publications in different languages could provide different perspectives and deepen existing knowledge. Third, research notes, editorial articles, book reviews, conference papers, dissertations, trend reports, etc. were excluded from the sample. Such materials could be considered in some future research, as they could also expand our knowledge.

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