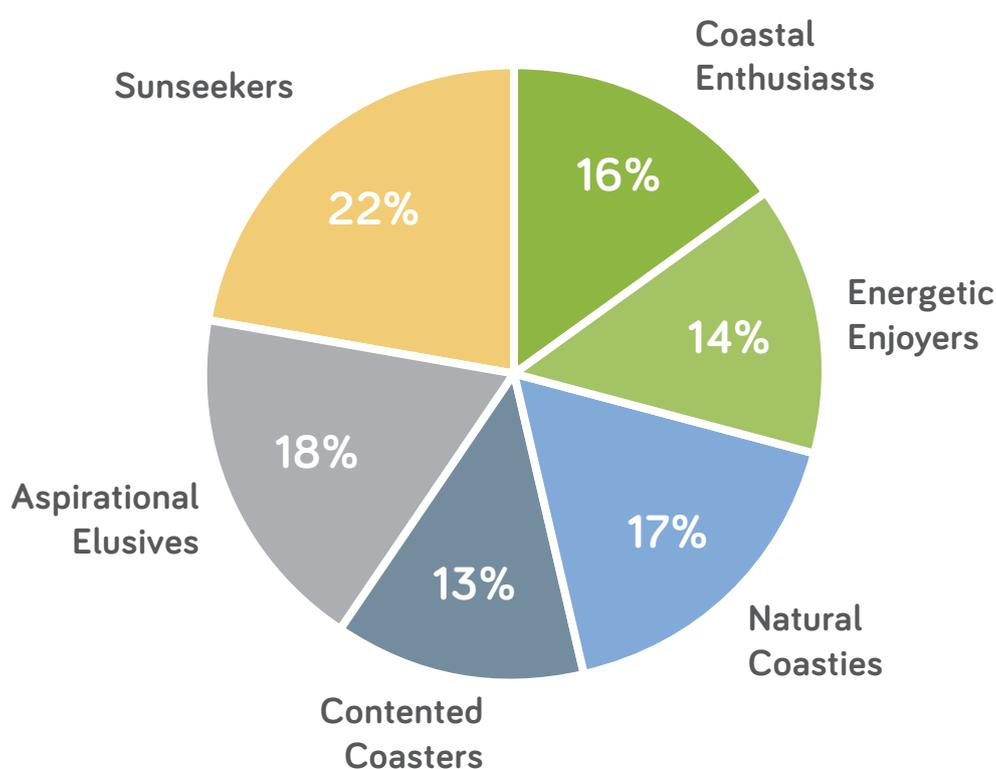
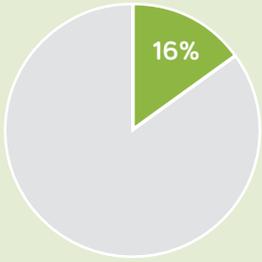


Empty Nesters: Market Segmentation



In spring 2016, the NCTA commissioned BDRC International to research the potential growth of the Empty Nesters market on the English coast - specifically in the off-peak period. Research focussed on 1800 people aged 55 - 74 all of whom would consider the English coast as a holiday destination and had taken at least one off-peak break in the past two years. Analysis of the travel behaviour, aspirations, lifestyle and perceptions of the English coast has led to the development of six distinct market segments.

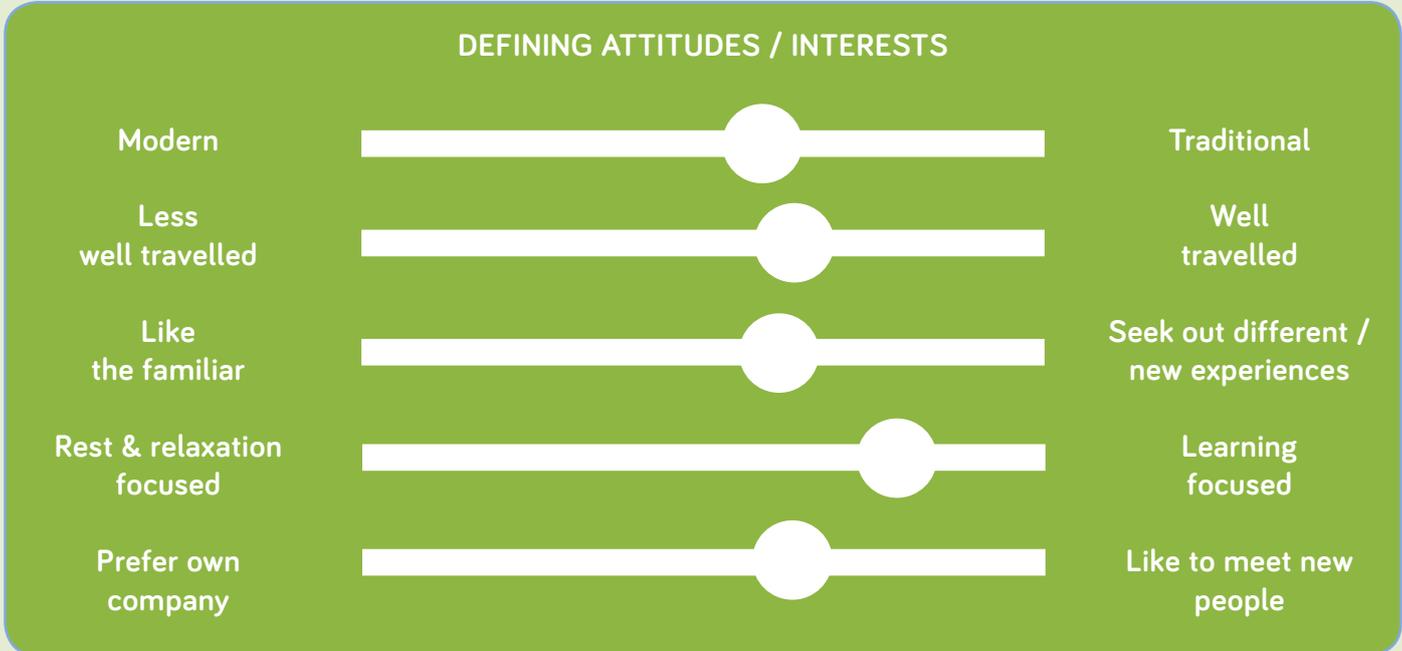
Based on the results of the research, the 'Pen Portraits' that follow describe who they are, how they behave on holiday, how they perceive the English coast and some tips for attracting each segment to the coast.



Coastal Enthusiasts

With a lower tendency to describe themselves as 'traditional', Coastal Enthusiasts are always on the look out for new things to do and places to see, and when doing so are always keen to make friends and be social.

DEFINING ATTITUDES / INTERESTS



CHARACTER & INTERESTS

They are slightly more affluent than the average (**71%** coming from social grade AB) and as such are willing to pay extra for the right product.

They do not necessarily mind crowds and will prefer to visit new places, though they will be attracted to more traditional places than cosmopolitan destinations. They have a particular interest in trying new and local cuisine.

OFF-PEAK VISITING BEHAVIOUR

In the past 2 years, Coastal Enthusiasts are most likely to have taken an off-peak holiday to visit somewhere new or go sightseeing.

However a noticeably higher than average proportion (**60%**) have taken an off-peak holiday to have fun and be social with friends/family. While they are most likely to be accompanied on holidays with their partner or their children, they are much more likely than average to travel with a group of friends (**18%**) or a friend (**14%**)

DISTINGUISHING VISITING MOTIVATIONS

Group Sightseeing and Socialising

History, Heritage & Culture

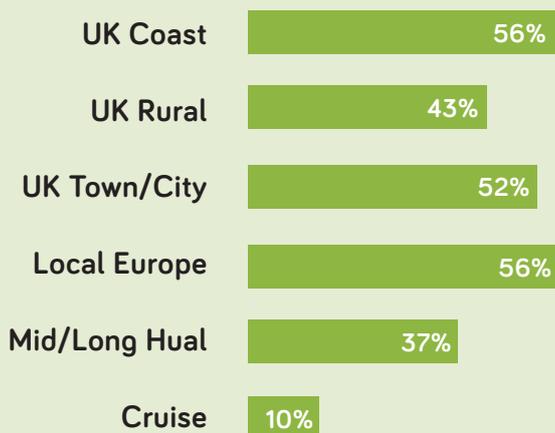
Sightseeing

Coastal Enthusiasts: General Holiday Behaviour

Coastal Enthusiasts are more widely travelled than the average, with the majority having gone on holiday within the UK or Europe in the past 2 years.

A premium/mid-tier hotel is the most common accommodation, while online publicity is their most common planning channel

DESTINATIONS TRAVELLED TO IN LAST 2 YEARS



MOST COMMON ACCOMMODATION

16%
Self catering

67%
Premium / mid
tier hotel

PLANNING CHANNELS PRE-HOLIDAY



MORE APPEALING ACTIVITIES

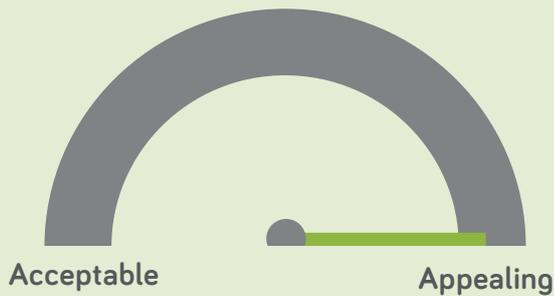
Organised
Sightseeing

Local
Life

PLANNING SOURCES ON HOLIDAYS

- 59% Leaflets
- 32% Chatting to local people/holiday makers
- 49% Tourist info. centre/ staff at attraction/ accommodation/ restaurant
- 27% Social media

Coastal Enthusiasts: Perceptions of the English Coast



56% of Coastal Enthusiasts have visited a UK coastal destination in the past 2 years and 44% strongly believe the English Coast is becoming a more appealing place to visit

GENERAL PERCEPTIONS OF THE ENGLISH COAST DURING OFF-PEAK SEASONS

A higher than average proportion (**47%**) would visit the English Coast off-peak as it won't be as crowded and close to 100% find a small coastal harbour town an appealing destination to visit for an off-peak holiday

% WHO FIND ENGLISH COASTAL DESTINATION APPEALING FOR OFF-PEAK TRIP

76%

Traditional seaside town / resort

92%

Rural Coast

98%

Small coastal harbour town

ACCOMMODATION

- **65%** do not think accommodation across the English Coast needs to be improved
- Highly unlikely to think they can afford to go somewhere better

WEATHER

- The majority (**56%**) are not deterred by the weather when visiting the English Coast off-peak

NATURE AND SCENERY

- **81%** strongly believe the English Coast is as wild and beautiful as other coastlines
- The majority (**76%**) think the natural scenery would be just as nice to look at during an off-peak holiday

ACTIVITIES AND ATTRACTIONS

- **63%** are very keen to explore places of historical or cultural significance along the English Coast
- **58%** strongly believe that there are large variations you can have along the coast
- The majority (**53%**) believe there will be enough for them to do during an off-peak holiday along the English Coast and only **7%** believe too much will be shut down

What appeals to Coastal Enthusiasts?

A coastal destination offering the ability to explore places of historical and cultural significance while at the same time allowing the ability to socialise and make new friends.

HOW TO ATTRACT

Marketing mediums: Coastal Enthusiasts have a particularly strong tendency to listen to recommendations from friends and family, but also turn to review sites and traditional hotel or tourist board websites.

Key messages: Plenty of opportunities to explore history and culture, and opportunities to socialise and meet new people

BARRIERS TO OVERCOME

Coastal Enthusiasts already have a strong affinity with the English Coast and as such there are not too many barriers when it comes to attracting them to the coast.

Destinations without organised group sightseeing activities may be at some disadvantage when it comes to attracting Coastal Enthusiasts.

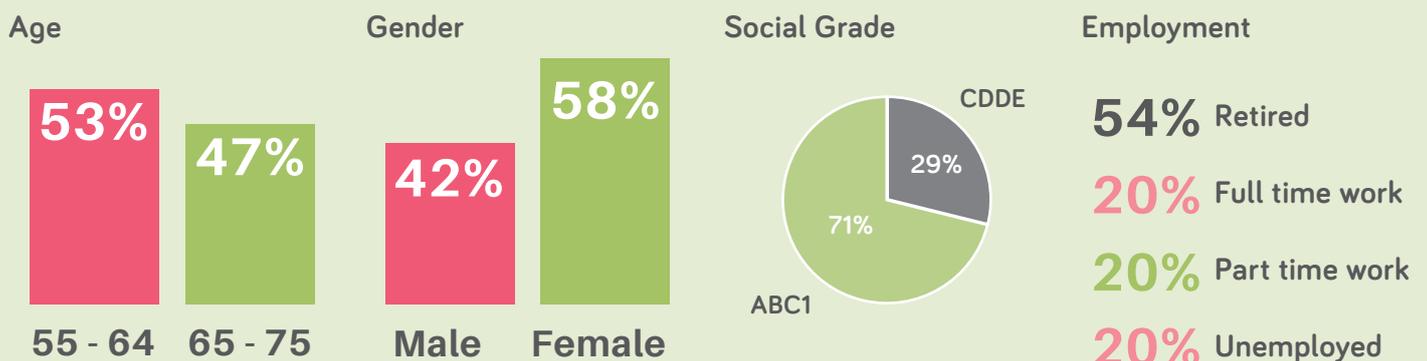
WHAT TO DELIVER / OFFER

Promote the unique sites of the destination - Coastal Enthusiasts want to learn about history and culture, and enjoy sightseeing. Pushing distinctive historical and cultural sites will draw this segment in.

Offer opportunities to socialise - Going away with friends, making new friends while on holidays and joining group sightseeing tours mark a Coastal Enthusiast holiday distinctively. Targeted Empty Nester social activities will therefore appeal greatly to this segment. Such activities could include group taste testing (as this segment also likes to try new cuisine), organised sight seeing tours or activities associated with particular hobbies such as photography or arts and crafts.

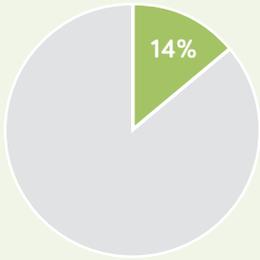
Offer something new to the revisitor - Coastal Enthusiasts do like to revisit a place, but each revisit must include a new experience. To ensure Coastal Enthusiasts come back, destinations need to ensure there is always something new to offer for each revisit.

DEMOGRAPHICS



Pink is lower than average
Green is higher than average

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Energetic Enjoyers

Energetic Enjoyers have a lively, playful nature and are likely to be seeking an active life of novelty and challenge.

DEFINING ATTITUDES / INTERESTS

Modern



Traditional

Less well travelled



Well travelled

Like the familiar



Seek out different / new experiences

Rest & relaxation focused



Learning focused

Prefer own company



Like to meet new people

CHARACTER & INTERESTS

Energetic Enjoyers are very social, with the majority using social media in their every day life. Making friends is a key part of any holiday.

The majority of Energetic Enjoyers still work and so are able to pay extra for the right product. However, being younger than average they are more likely to have family commitments, so do tend to plan leisure time around family more than the average

OFF-PEAK VISITING BEHAVIOUR

To escape/relax is the most common motivation for having been on an off-peak holiday in the past 2 years, though a higher than average proportion have gone on a holiday to take part in a sport or activity.

Energetic Enjoyers are most likely to be accompanied on holidays with their partner (81%) or their children (17%) and are more likely than average to have gone on a short break of 3 nights or less

DISTINGUISHING VISITING MOTIVATIONS

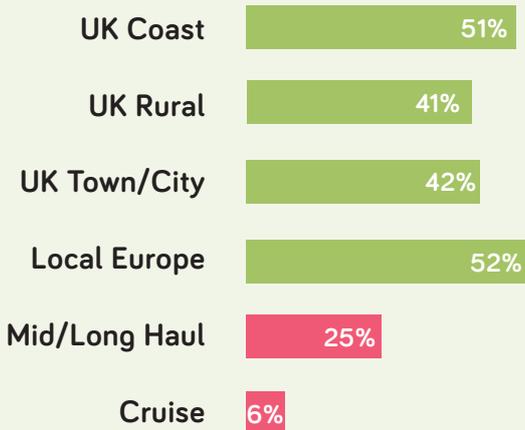
Take part in activity / sport

Attend event / festival

Energetic Enjoyers: General Holiday Behaviour

Energetic Enjoyers are open to either travelling abroad or within the UK. A premium/mid-tier hotel is their preferred accommodation and are keen shoppers when on holidays. They also enjoy the theatre, theme parks and amusement arcades. Given they are more sociable, they are more likely than average to chat and engage with locals and other holiday makers.

DESTINATIONS TRAVELLED TO IN LAST 2 YEARS



MOST COMMON ACCOMMODATION

13%
Self catering

59%
Premium tier
hotel

12%
Holiday
park

PLANNING CHANNELS PRE-HOLIDAY



Online publicity
& advertising

54%



Recommendation

36%



Brochures
& Guidebooks

34%



Traditional publicity
& advertising

23%

MOST APPEALING ACTIVITIES

Theme parks

Shopping

Theatre / ballet /
opera

PLANNING SOURCES ON HOLIDAYS

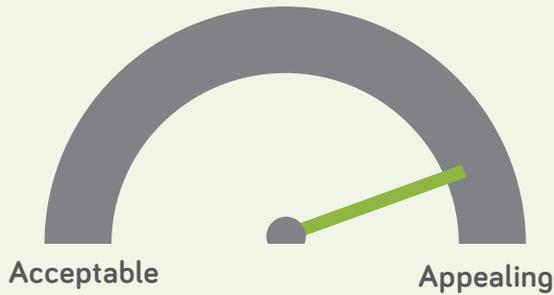
57% Leaflets

36% Chatting to local people/holiday
makers

49% Tourist info. centre/ staff at attraction/
accommodation/ restaurant

34% Social media

Energetic Enjoyers: Perceptions of the English Coast



51% of Energetic Enjoyers have visited a UK coastal destination in the past 2 years. In general, Energetic Enjoyers are positive about the English Coast with **one in three** believing it is becoming a more appealing place to visit.

GENERAL PERCEPTIONS OF THE ENGLISH COAST DURING OFF-PEAK SEASONS

While **37%** of Energetic Enjoyers believe there would be enough for them to do during an off-peak holiday along the English Coast, a higher than average proportion believe that too much would be shut down.

% WHO FIND ENGLISH COASTAL DESTINATION APPEALING FOR OFF-PEAK TRIP

73%

Traditional seaside town / resort

82%

Rural Coast

90%

Small coastal harbour town

ACCOMMODATION

- **1 in 5** believe the quality of accommodation along the English Coast needs to be improved while branded hotels would enhance the English Coast for **48%**
- **29%** believe they could stay somewhere better than they normally would off-peak

WEATHER

- **41%** are not deterred by the weather when visiting the English Coast off-peak
- A lower than average proportion nominated the weather as a barrier for visiting the English Coast off-peak

NATURE AND SCENERY

- **59%** strongly believe the English Coast is as wild and beautiful as other coastlines
- The majority (**55%**) believe the natural scenery is just as beautiful to enjoy off-peak
- **30%** believe that it is better to go walking/hiking during off-peak periods

ACTIVITIES AND ATTRACTIONS

- **47%** are very keen to explore places of historical or cultural significance along the English Coast
- **43%** strongly believe that there are large variations of experiences along the coast
- **27%** are interested in events and activities along the coast

What appeals to Energetic Enjoyers? A coastal destination offering a plethora of attractions, amusements and activities along with the ability to meet new people.

HOW TO ATTRACT

Marketing mediums: Recommendations, review sites and social media are key to attracting the Energetic Enjoyer Empty Nester. However, this segment is more likely than average to look at all marketing material, suggesting they are thorough when conducting their research.

Key messages: Plenty of activities to enjoy and pursue, along with opportunities to socialise and make new friends.

BARRIERS TO OVERCOME

Key barriers to Energetic Enjoyers visiting the English Coast off-peak in general is the quality of accommodation.

There is the potential for Energetic Enjoyers to look elsewhere should they think attractions have limited opening hours.

Energetic Enjoyers still work and will therefore be limited in when and for how long they can visit.

WHAT TO DELIVER / OFFER

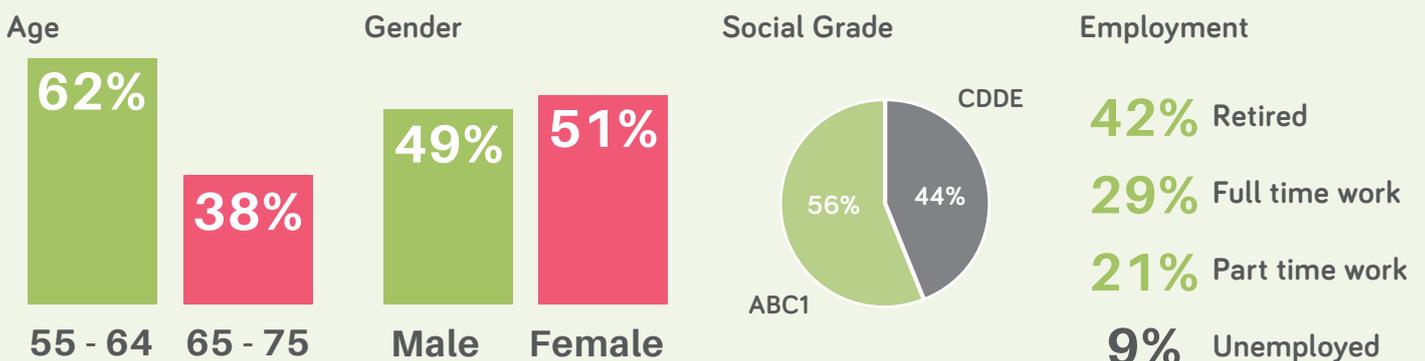
Entertain not educate - Enjoying theatre, theme parks and arcades plays a noticeably important part of an off-peak holiday for Energetic Enjoyers. Offering a holiday with a sense of fun, activity and entertainment will attract this segment. This could be done by advertising local or touring theatre productions or any sort of theme park or unique attractions

Push high quality accommodation - Energetic Enjoyers are hesitant about the quality of accommodation along the English Coast. Improving the quality of accommodation or actively promoting existing higher rating accommodation may help to attract this segment

Promote opportunities to participate in sport - Sporting events or facilities could attract Energetic Enjoyers

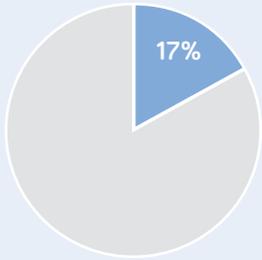
Use the power of advocacy - Testimonials of Empty Nesters could persuade this segment to consider the English Coast for an off-peak holiday due to their strong propensity to consult online reviews or seek the advice of friends or family when deciding on a holiday destination

DEMOGRAPHICS



Pink is lower than average
Green is higher than average

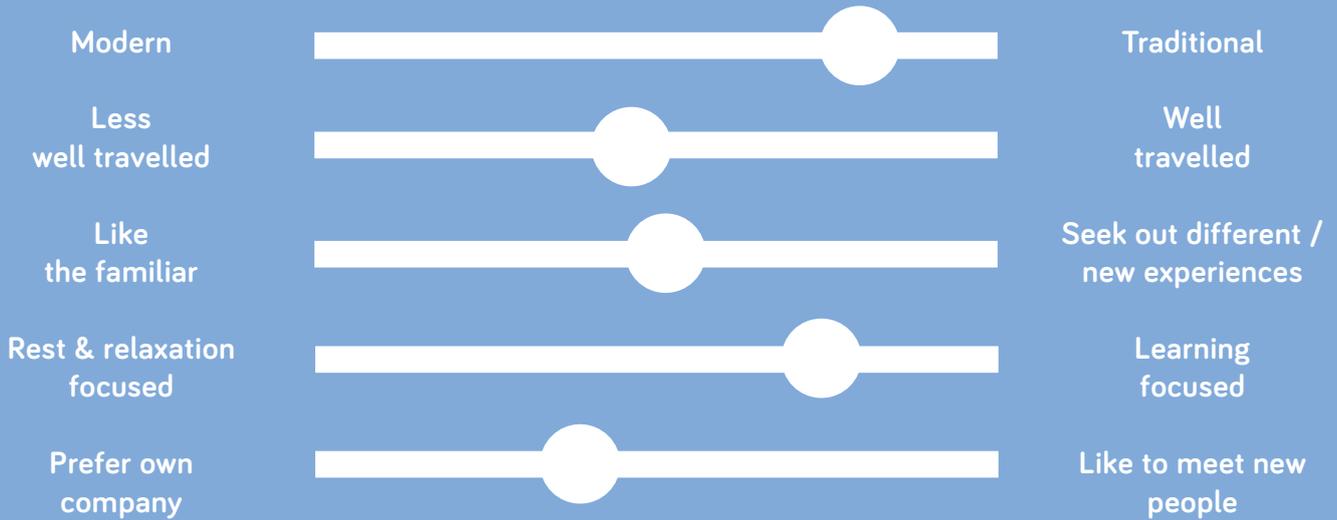
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Natural Coasties

Traditional and comfortable with their current pace of life, Natural Coasties are less sociable and prefer to keep to themselves. They are less well travelled in recent years and show a strong preference to revisit places. They have a notable affinity and connection with nature.

DEFINING ATTITUDES / INTERESTS



CHARACTER & INTERESTS

More traditional in their views and fairly set in their ways, Natural Coasties can be less sociable than average, and tend to keep to within their circle. Not avid users of social media and avoid crowds.

They are lovers of the great outdoors and enjoy beautiful scenery, gardens and wildlife. They prefer traditional destinations over modern.

OFF-PEAK VISITING BEHAVIOUR

Natural Coasties prefer to visit places in off-peak seasons, probably because of their aversion to crowds and the fact that 72% are not working.

They are most likely to be accompanied on holidays by their partner (78%) or children (16%).

They have a strong preference for self-catering accommodation.

DISTINGUISHING VISITING MOTIVATIONS

Nature

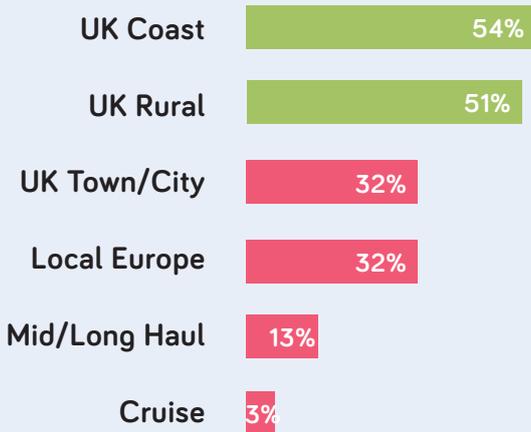
Hiking / walking

Revisiting

Natural Coasties: General Holiday Behaviour

Natural Coasties prefer to holiday in UK coastal and rural destinations and enjoy outdoor activities, such as bird watching, hiking, walking or visiting parks. Self-catering is by far their most preferred type of accommodation. Online publicity and advertising is their most common planning source to plan the holiday, while the majority use leaflets on holiday to plan their activities.

DESTINATIONS TRAVELLED TO IN LAST 2 YEARS



MOST COMMON ACCOMMODATION

41%
Self catering

36%
Premium tier hotel

9%
Holiday park

PLANNING CHANNELS PRE-HOLIDAY



MORE APPEALING ACTIVITIES

Bird watching /
observe wildlife

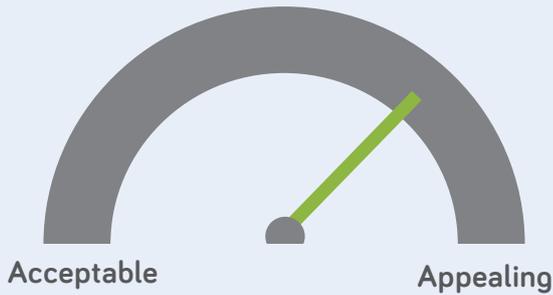
Visit parks
or gardens

Hiking /
active walking

PLANNING SOURCES ON HOLIDAYS

- 63% Leaflets
- 22% Chatting to local people/holiday makers
- 37% Tourist info. centre/ staff at attraction/ accommodation/ restaurant
- 25% Social media

Natural Coasties: Perceptions of the English Coast



24% of Natural Coasties strongly believe the English Coast is becoming a more appealing place to visit and often holiday along the UK coast, with 54% having holidayed along the coast in the past 2 years. They tend to prefer rural coastal towns or small harbour towns, rather than traditional seaside towns or resorts.

GENERAL PERCEPTIONS OF THE ENGLISH COAST DURING OFF-PEAK SEASONS

Generally, Natural Coasties have a positive perception of the English Coast and the majority (65%) would prefer to visit the English Coast off-peak or mid-week, while 18% would only visit off-peak. This may be due to the segment's aversion to crowds and preference for a more solitary and secluded holiday.

% WHO FIND ENGLISH COASTAL DESTINATION APPEALING FOR OFF-PEAK TRIP

63%

Traditional seaside town / resort

91%

Rural Coast

93%

Small coastal harbour town

ACCOMMODATION

- Less likely to think accommodation across the English Coast needs to be improved
- 1 in 5 could stay in better accommodation in off-peak periods

WEATHER

- 44% would not be deterred from visiting the English Coast off-peak because of the weather
- For 57% the poor weather is a barrier for visiting the English Coast off-peak

NATURE AND SCENERY

- 75% believe the English Coast is as wild and beautiful as other coastlines
- 68% think the natural scenery along the English Coast is just as beautiful off-peak
- 65% looking to go on a trip in order to enjoy nature/wildlife would consider going to the English Coast, as would 70% looking to go on a walking/hiking trip
- 29% believe it is better to go walking/hiking during off-peak seasons

ACTIVITIES AND ATTRACTIONS

- Close to 2 in 5 Natural Coasties report that there would be enough for them to do during an off-peak trip to the English Coast
- 44% would like to visit places of historical or cultural significance along the coast
- 41% believe you can have variations in experiences along the English Coast
- 63% looking to take a trip to learn about the history and culture of an area would consider the English Coast for such a trip

What appeals to the Natural Coastie? A coast destination offering a combination of seclusion, familiarity and natural surroundings to explore. The ability to cater to this segment will prove valuable given their strong tendency to prefer to revisit places.

HOW TO ATTRACT

Marketing mediums: Less affected by marketing than other segments. The main way to reach this segment is through online publicity, but they are encouraged by brochures posted to their home, suggesting an active postal campaign could reach this segment. They also have a higher tendency to turn to leaflets when on their trip.

Key messages: Peaceful, secluded environment with the chance to enjoy nature.

BARRIERS TO OVERCOME

Key barriers to visiting the English Coast off-peak are shorter days to sightsee (35%), and the lack of good weather (57%).

Ensure enough self-catering options are available and that in the effort to attract more social segments this quieter and more secluded segment is not scared away.

Traditional seaside towns may find it harder to attract this segment than rural destinations or small harbour towns.

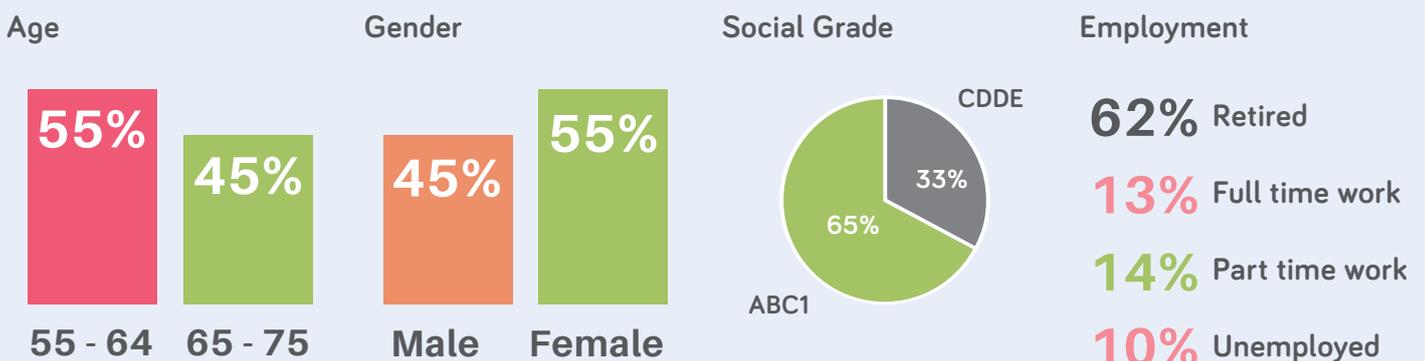
WHAT TO DELIVER / OFFER

Secluded self-catering options - Self-catering accommodation in secluded and peaceful settings will appeal to this segment, particularly those that can only accommodate a small number of guests.

Push unique seasonal wildlife and environmental events - Leverage the fact that this segment likes the outdoors and believes that the English Coast is just as beautiful in off-peak periods by actively promoting any distinct natural experiences that occur off-peak. For instance, is there a particular bird that is migrating to the destination during winter or a type of plant or environmental phenomenon occurring?

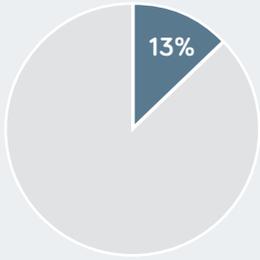
Welcome ramblers: Setting up walking trails along the coast will appeal to this group. They actively use leaflets while on holiday to plan their activities, so producing leaflets which include maps of walking trails or suggested hiking routes will be appreciated by this segment. Organised walking tours or hiking expeditions could also prove to be appealing for this segment, though with their tendency to be somewhat anti-social it may be best to have a limit to the number of walkers per group.

DEMOGRAPHICS



Pink is lower than average
Green is higher than average

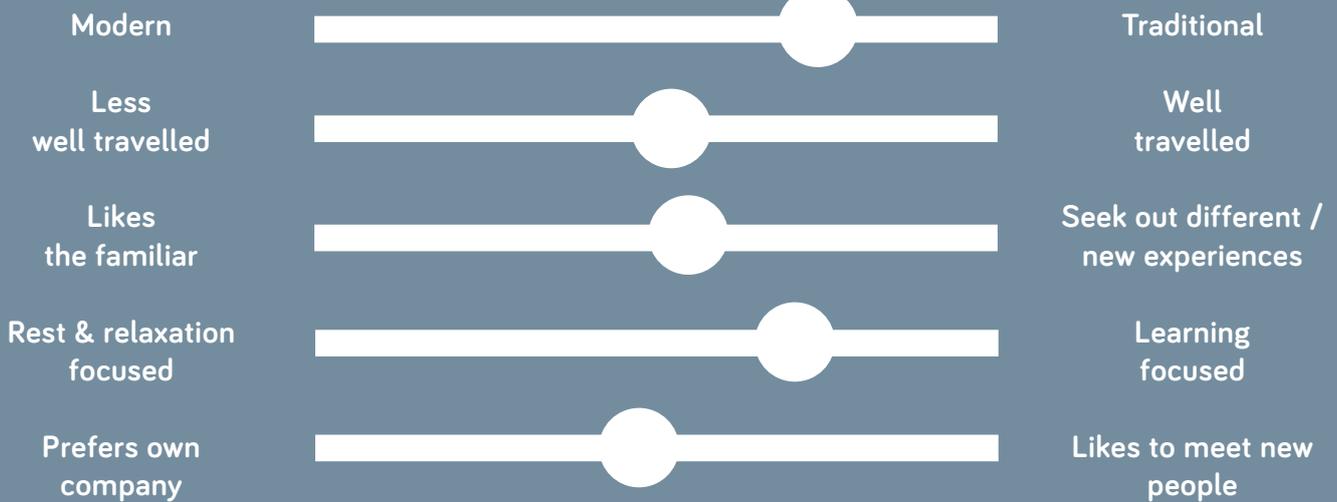
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Contented Coasters

Contented Coasters tend to be reserved and are content with their current pace of life. They are not necessarily looking for a challenge or seeking something different to do. They actively use money off vouchers and are less willing to pay extra to get the right product, suggesting they are somewhat financially restricted.

DEFINING ATTITUDES / INTERESTS



CHARACTER & INTERESTS

Currently content with their pace of life and not necessarily looking for a challenge and being less well travelled, Contented Coasters show a strong likelihood to revisit places, where it is not very important for them to see or experience anything new while there.

They do avoid crowds and will prefer to visit a quiet traditional destination rather than a modern one

OFF-PEAK VISITING BEHAVIOUR

In the past 2 years, **59%** have taken an off-peak holiday to revisit a place, while **42%** have gone to visit friends/family (though not staying with them). **13%** also took a holiday to learn a new skill and **33%** participated in a hobby.

Contented Coasters are most likely to be accompanied on holidays with their partner (**60%**), but are noticeably more likely than average to travel on their own (**23%**)

DISTINGUISHING VISITING MOTIVATIONS

Hobbies /
Photography

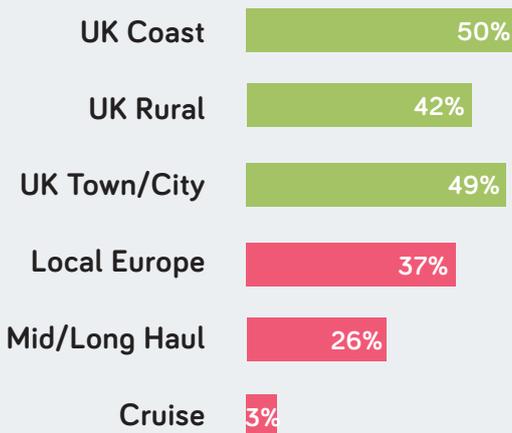
History, Heritage
& Culture

Revisiting

Contented Coasters: General Holiday Behaviour

Contented Coasters are more likely to holiday somewhere closer to home and so tend to holiday within the UK rather than overseas, with a coastal destination the most common UK place visited in the past 2 years. With their preference for the quiet and familiar, this segment prefers to stay in B&B's and are less likely to engage with locals or other holiday makers when on holiday.

DESTINATIONS TRAVELLED TO IN LAST 2 YEARS

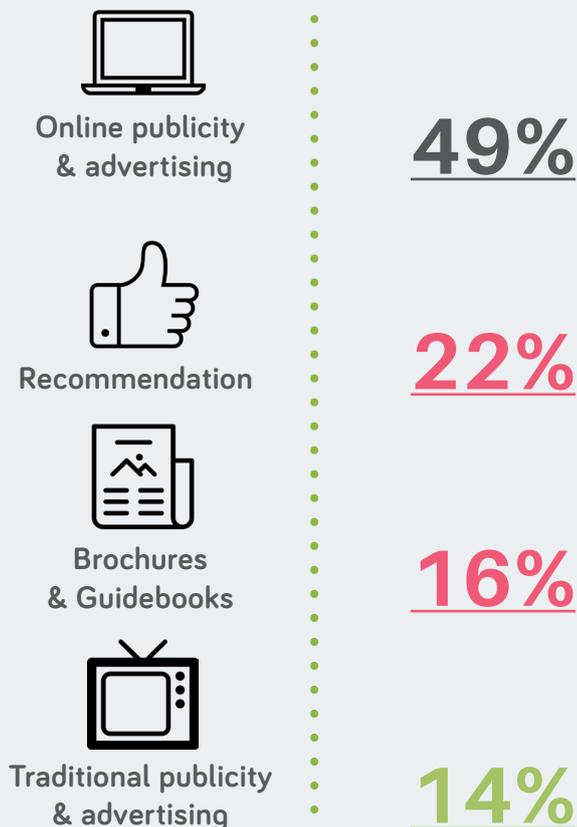


MOST COMMON ACCOMMODATION

64%
Guest house
/ B&B

34%
Budget
Hotel

PLANNING CHANNELS PRE-HOLIDAY



MORE APPEALING ACTIVITIES

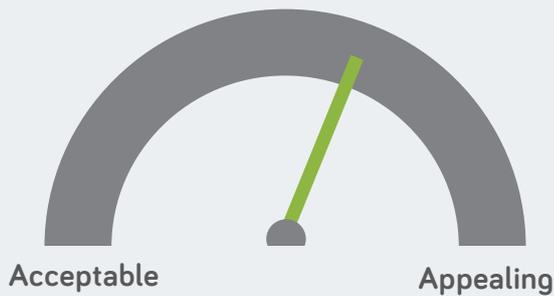
Visiting friends
/ family

Participate in a
hobby

PLANNING SOURCES ON HOLIDAYS

- 61%** Leaflets
- 29%** Chatting to local people/holiday makers
- 44%** Tourist info. centre/ staff at attraction/ accommodation/ restaurant
- 29%** Social media

Contented Coasters: Perceptions of the English Coast



50% of Contented Coasters have visited a UK coastal destination in the past 2 years, though **13%** state it is becoming a more appealing place to visit

GENERAL PERCEPTIONS OF THE ENGLISH COAST DURING OFF-PEAK SEASONS

46% of Contented Coasters agree on some level that they would only visit the English coast off-peak, with 40% stating they would prefer to visit off-peak because it won't be as crowded.

% WHO FIND ENGLISH COASTAL DESTINATION APPEALING FOR OFF-PEAK TRIP

63%

Traditional seaside town / resort

81%

Rural Coast

86%

Small coastal harbour town

ACCOMMODATION

- Only **7%** think the quality of accommodation on the English Coast needs improvement and branded hotels won't increase the appeal of the English Coast for this segment
- **1 in 5** firmly think accommodation will be cheaper off-peak

WEATHER

- **23%** strongly agree they would not be deterred by the weather when visiting the English Coast off-peak
- Less likely than average to nominate the poor weather as a barrier to visiting the English Coast off-peak

NATURE AND SCENERY

- **45%** strongly believe the English Coast is as wild and beautiful as other coastlines
- 2 in 5 strongly agree that the natural scenery along the English coast will be as beautiful to enjoy off-peak, which is relatively in line with the average
- As likely as the average to think that the shorter days will affect an off-peak holiday to the English Coast

ACTIVITIES AND ATTRACTIONS

- **9%** looking to go on a holiday to revisit a place they know would consider the English Coast
- **31%** strongly agree that there are places of cultural and historical significance they would like to visit along the coast
- Just over a quarter believe there are large variations in the experiences you can have on the English Coast and only a small proportion (**7%**) believe too much will be shut down off-peak

What appeals to Contented Coasters? They like to visit places they know, and will need to stay in cheaper accommodation due to their lower social grade and limited financial situation

HOW TO ATTRACT

Marketing mediums: While slightly more likely than average to be influenced by a tourist board website, newspaper advertising or factual TV programme, Contented Coasters turn primarily to review sites when researching their holidays.

Key messages: An affordable holiday option that allows this group to pursue a hobby or explore history or culture and to socialise and meet new people.

BARRIERS TO OVERCOME

Contented Coasters have a strong tendency to choose destinations where they can visit family or friends, which English Coastal destinations will have little control over.

Contented Coasters also do like to visit historical or cultural places, yet less than a third would consider the English Coast for such a pursuit.

WHAT TO DELIVER / OFFER

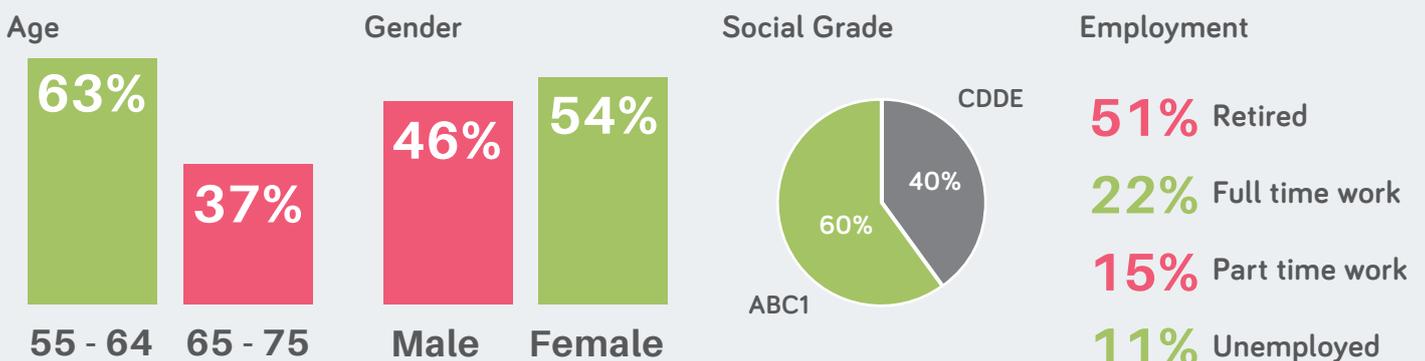
Promote financial value - Ensure Contented Coasters see the financial value in visiting the coast off-peak in terms of lower priced accommodation and lower attraction entry prices.

Evoke their memories of past visits to the coast - Contented Coasters revisit places they know and enjoyed, so evoking memories of past visits to the coast will peak their interest.

Market traditional B&B accommodation available within the area - This segment steers clear of modern places and also has a strong affection for B&B's and will be drawn to destinations that provide homely and traditional accommodation of this type.

Push photo opportunities - The pursuit of hobbies is more prevalent among this segment, with photography being a particular favourite. Promoting unique photography opportunities such as dramatic landscapes or unique historical buildings could help to attract this segment to a destination

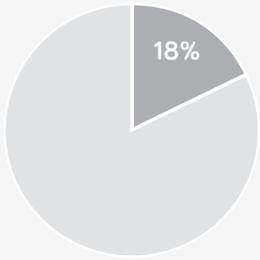
DEMOGRAPHICS



Pink is lower than average
Green is higher than average

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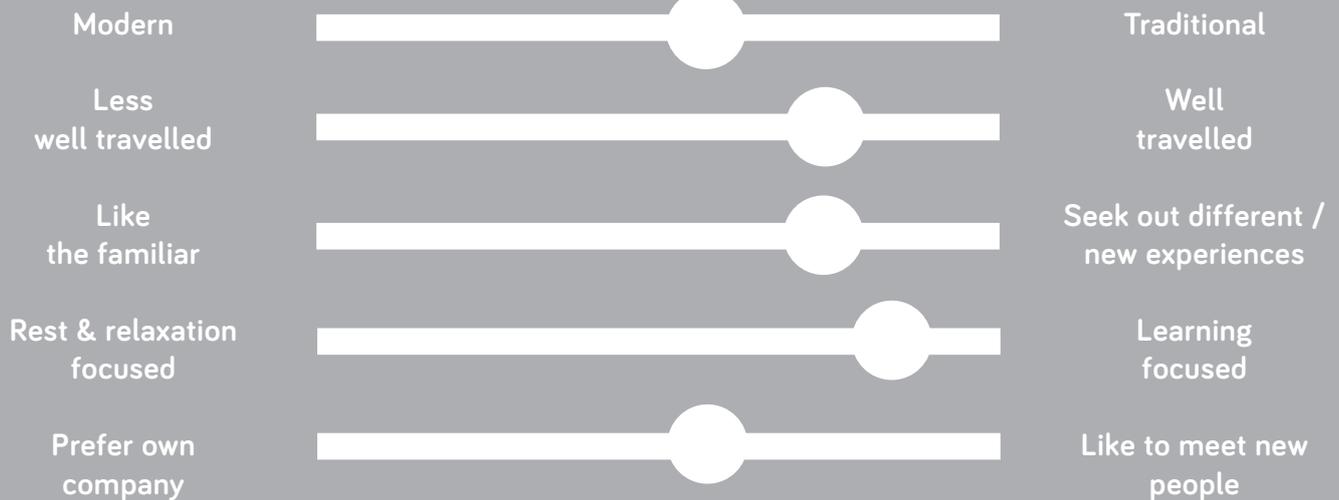
Pink is lower than average
Green is higher than average



Aspirational Elusives

With a strong focus on exploration and discovery, Aspirational Elusives are very well travelled and are always on the look out for new experiences. They are more likely than average to be able to pay more for the right product.

DEFINING ATTITUDES / INTERESTS



CHARACTER & INTERESTS

A stronger than average tendency to pursue a life of challenge and novelty encourages Aspirational Elusives to visit new places. In the event that they do revisit a place they will want something new to do there.

They are less likely than average to view themselves as traditional and so are more likely to be drawn to more modern places, but are as likely as the average to want to avoid crowds.

OFF-PEAK VISITING BEHAVIOUR

In the past 2 years, **81%** have taken an off-peak holiday to sightsee, while **80%** simply visit somewhere new. **67%** also took a holiday to learn or discover about the history or culture of the place they are visiting.

Aspirational Elusives are most likely to be accompanied on holidays with their partner (**78%**) or their children (**19%**). Close to **1 in 5** will use their own camping/caravanning equipment during an off-peak holiday.

DISTINGUISHING VISITING MOTIVATIONS

History, Heritage & Culture

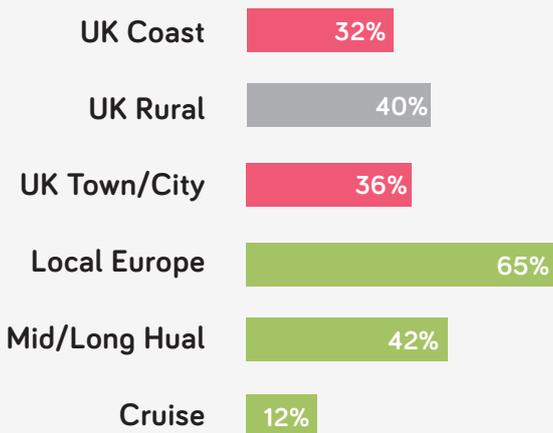
Sightseeing

Aspirational Elusives: General Holiday Behaviour

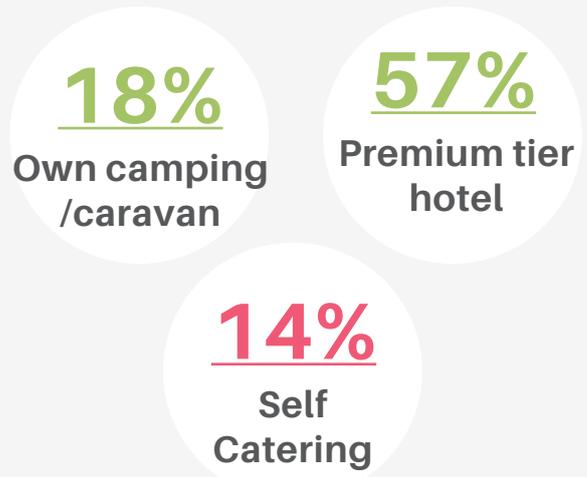
Aspirational Elusives have a higher tendency to travel overseas for a holiday, though just over a third have travelled to the UK coast in the past 2 years.

Close to a third will chat to locals or other holiday makers while on holidays, reflecting their tendency to immerse themselves in the place and culture they are visiting.

DESTINATIONS TRAVELLED TO IN LAST 2 YEARS



MOST COMMON ACCOMMODATION



PLANNING CHANNELS PRE-HOLIDAY



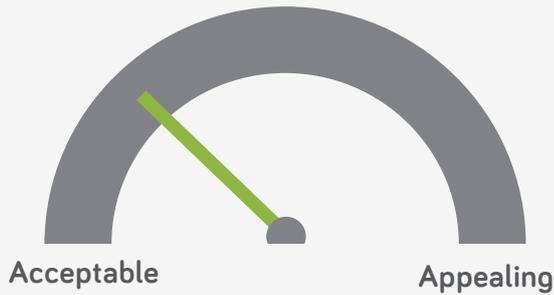
MORE APPEALING ACTIVITIES

Museums / Galleries Local Life

PLANNING SOURCES ON HOLIDAYS

- 58% Leaflets
- 31% Chatting to local people/holiday makers
- 51% Tourist info. centre/ staff at attraction/ accommodation/ restaurant
- 29% Social media

Aspirational Elusives: Perceptions of the English Coast



32% of Aspirational Elusives have visited a UK coastal destination in the past 2 years, and **33%** look to take a sightseeing holiday in the next 12 months would consider going to the English Coast, to learn and discover history/culture while on holiday.

GENERAL PERCEPTIONS OF THE ENGLISH COAST DURING OFF-PEAK SEASONS

35% of Aspirational Elusives will only visit the English Coast off-peak. The majority find a rural coast or small coastal harbour town appealing, with traditional seaside town/resorts appealing to **40%** of Inspirational Elusives.

% WHO FIND ENGLISH COASTAL DESTINATION APPEALING FOR OFF-PEAK TRIP

40%

Traditional seaside town / resort

72%

Rural Coast

78%

Small coastal harbour town

ACCOMMODATION

- **36%** believe that branded hotels could enhance the English Coast
- **66%** believe on some level that accommodation is cheaper off-peak, while **63%** believe they could afford to stay in somewhere better

WEATHER

- **46%** are not deterred by the weather when visiting the English Coast off-peak

NATURE AND SCENERY

- **34%** strongly believe the English Coast is as wild and beautiful as other coastlines
- More likely than average to think that the shorter days will affect an off-peak holiday to the English Coast
- **24%** think the natural scenery would be just as beautiful to enjoy off-peak

ACTIVITIES AND ATTRACTIONS

- **24%** are very keen to explore places of historical or cultural significance along the English Coast
- **22%** strongly believe that there are large variations along the coast
- While limited opening hours is the strongest barrier for visiting the English Coast off-peak, **26%** agree there would be enough for them to do

What appeals to Aspirational Elusives? A coastal destination offering unique historical and cultural experiences and activities.

HOW TO ATTRACT

Marketing mediums: Inspirational Elusives are highly likely to use multiple sources when planning holidays, suggesting they are fairly thorough when planning. Make sure communications are consistent across mediums and keep an eye on messages posted on review sites as this is the most popular source for this segment.

Key messages: Plenty of opportunities to explore history and culture.

BARRIERS TO OVERCOME

Key barriers to visiting the English Coast off-peak for Aspirational Elusives are shorter days to sightsee (**35%**) and the lack of good weather (**57%**).

Reassure the segment that activities and attractions can still be enjoyed off-peak, perhaps even highlighting unique experiences that can only be enjoyed over the shoulder months.

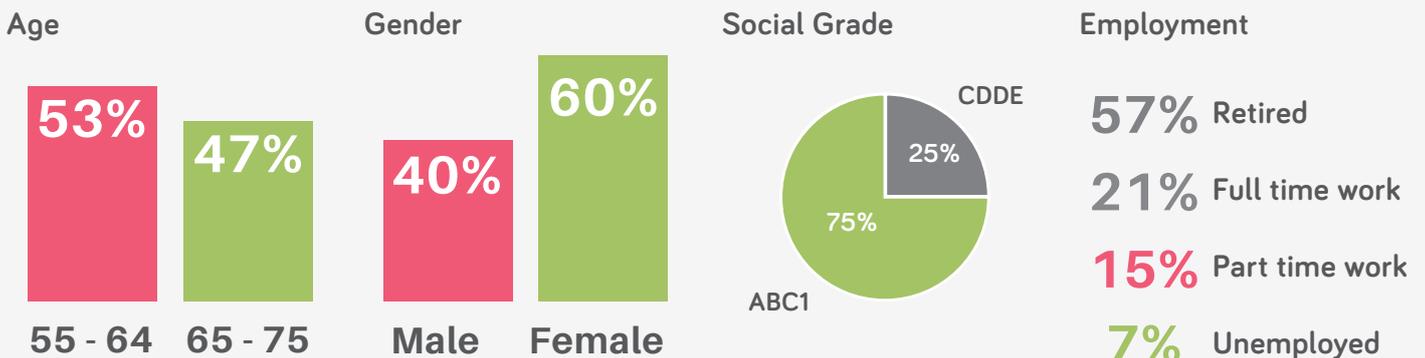
WHAT TO DELIVER / OFFER

Promote the uniqueness of the local culture - Actively promote unique community events and traditions that Aspirational Elusives can participate in or observe and ensure they are informed of what they can learn and take away from the experience. History is also important and a destination's history and historical sites will peak their interest.

Push exclusive and high quality accommodation - Improving the quality of accommodation along the coast or actively promoting existing higher rating accommodation may help to attract this segment. With an Aspirational Elusive's affinity with learning about local life they may also be attracted to unique accommodation such as lighthouses or beach cottages.

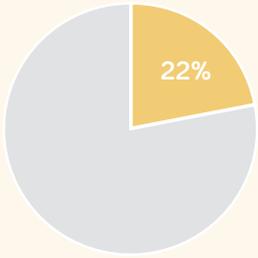
The sun never sets on the English Coast - Ensure they know of any key attractions that will be open off-peak or any activities that can only be done during off-peak periods. The shorter days deter this segment from visiting the coast and therefore destinations should ensure there are activities that they can do at night. Packaged itineraries to pre-book could work well.

DEMOGRAPHICS



Pink is lower than average
Green is higher than average

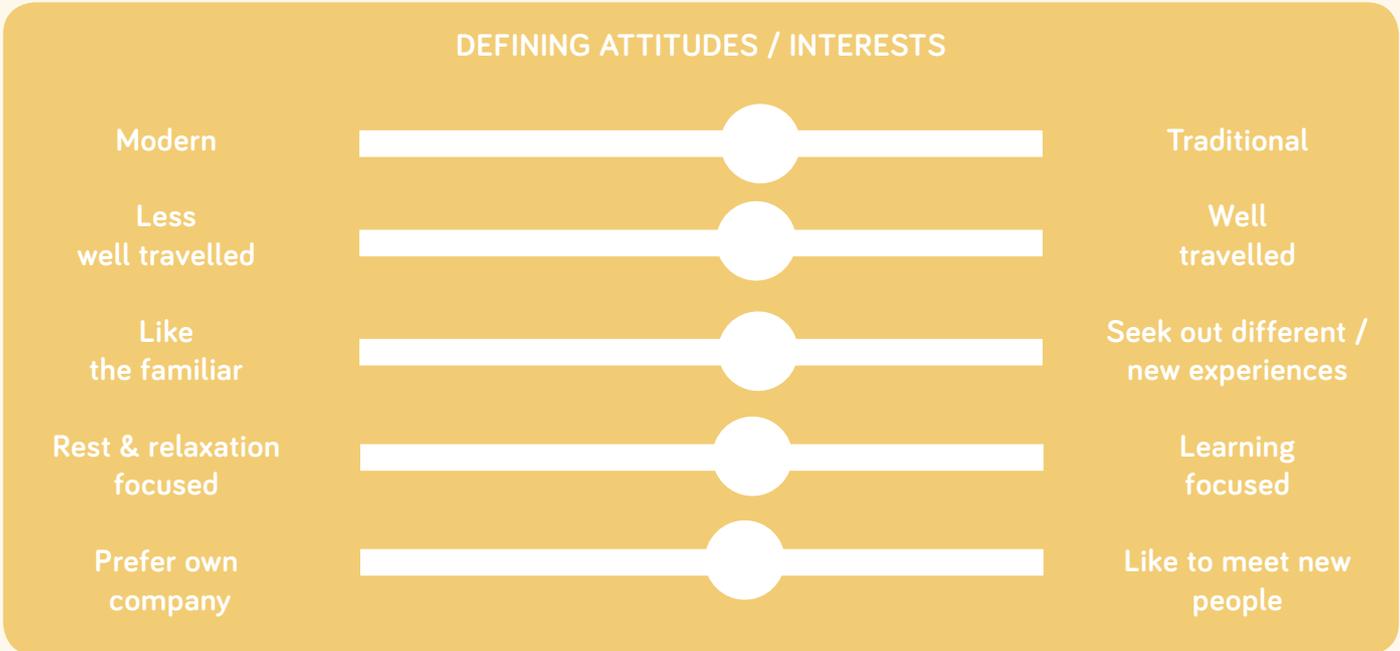
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Sun Seekers

Somewhat well travelled with a busier pace of life than the average, Sun Seekers are unlikely to be seeking a challenge or on the look out for something new to do.

DEFINING ATTITUDES / INTERESTS



CHARACTER & INTERESTS

A busier pace of life leaves the Sun Seeker more likely than average to want a slower paced holiday, with only a small amount of exploration and discovery included.

As they prefer to relax in the sunshine they tend to holiday in overseas destinations rather than the UK and consequently take longer breaks of 4 or more nights.

OFF-PEAK VISITING BEHAVIOUR

In the past 2 years, **60%** of Sun Seekers have taken an off-peak holiday simply to relax around their accommodation, while close to half have chosen a destination purely because it is somewhere new (**49%**).

They are most likely to be accompanied on holidays with their partner (**69%**) or on their own (**15%**). They prefer to stay in mid-tier/ premium hotels.

DISTINGUISHING VISITING MOTIVATIONS

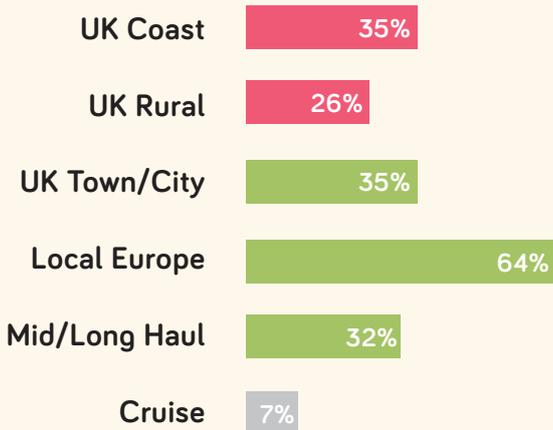
Relax/escape around accommodation

To be social with friends and family

Sun Seekers: General Holiday Behaviour

Sun Seekers have a higher tendency to travel overseas for a holiday, though just over a third have travelled to the UK coast in the past 2 years. A premium/mid-tier hotel is by far their most preferred type of accommodation, with going to the beach or sunbathing popular activities.

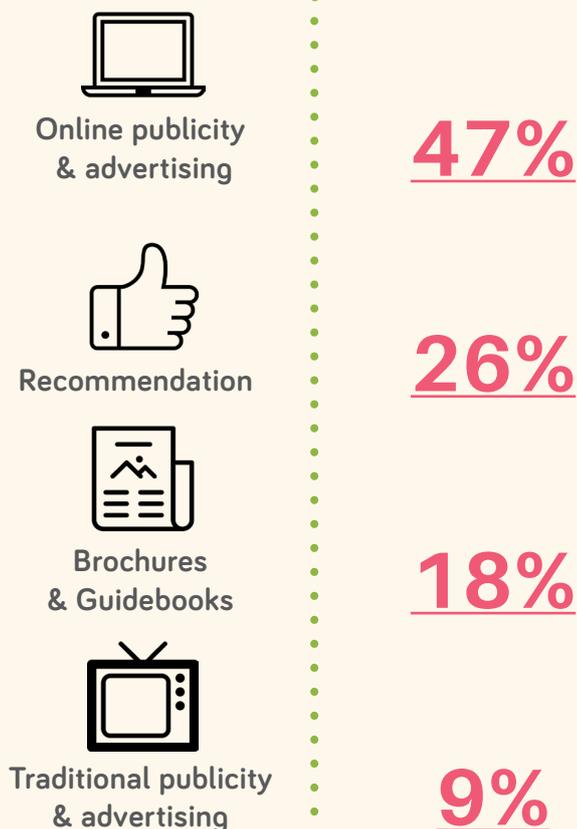
DESTINATIONS TRAVELLED TO IN LAST 2 YEARS



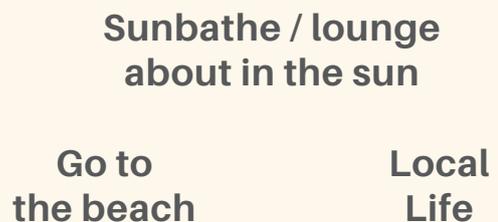
MOST COMMON ACCOMMODATION



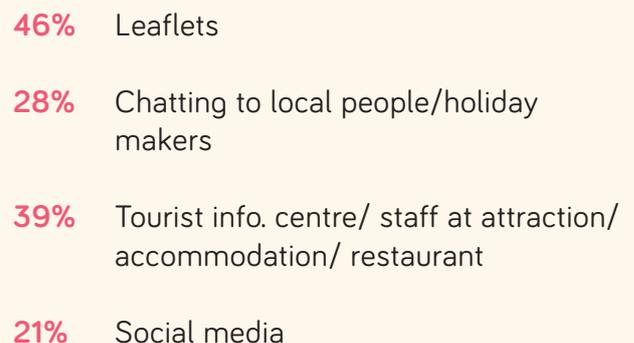
PLANNING CHANNELS PRE-HOLIDAY



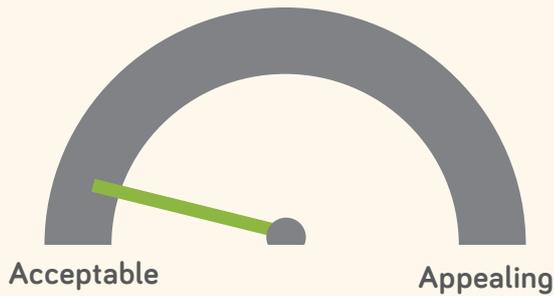
MORE APPEALING ACTIVITIES



PLANNING SOURCES ON HOLIDAYS



Sun Seekers: Perceptions of the English Coast



35% of Sun Seekers have visited a UK coastal destination in the past 2 years, with **54%** believing on some level that the English Coast is becoming more appealing as a place to visit.

GENERAL PERCEPTIONS OF THE ENGLISH COAST DURING OFF-PEAK SEASONS

30% of Sun Seekers are somewhat likely to only visit the English Coast off-peak. The majority find all types of English Coastal destinations appealing, with a small coastal harbour town resonating the best with this segment.

% WHO FIND ENGLISH COASTAL DESTINATION APPEALING FOR OFF-PEAK TRIP

55%

Traditional seaside town / resort

65%

Rural Coast

78%

Small coastal harbour town

ACCOMMODATION

- **35%** believe that branded hotels could enhance the English Coast
- **52%** believe accommodation is cheaper off-peak, while **48%** believe they could afford to stay somewhere better off-peak

WEATHER

- Less than a third believe the English Coast is a sadder place to be off-peak
- For **62%** the poor weather is a barrier for visiting the English Coast off-peak

NATURE AND SCENERY

- Close to 1 in 5 believe the English Coast is as wild and beautiful as other coastlines
- **11%** think the natural scenery along the English Coast is just as beautiful to enjoy off-peak
- Less likely than the average to think that the shorter days will affect an off-peak holiday to the English Coast

ACTIVITIES AND ATTRACTIONS

- **42%** looking to take a holiday in the future to primarily relax around the accommodation would consider the English Coast for such a holiday
- The fact that too much will be shut down is the second strongest barrier for visiting the English Coast off-peak for this segment
- A quarter would be happy to focus on indoor activities during an off-peak holiday to the English Coast

What appeals to Sun Seekers? A coastal destination that can offer an opportunity for relaxation and tranquillity.

HOW TO ATTRACT

Marketing mediums: The main way to reach this segment is directly through hotel/resort websites and review sites.

Travel agents are also more commonly used as planning sources for this segment than the average.

Key messages: The destination offers an array of opportunities to relax and unwind, even when there is a lack of sunshine

BARRIERS TO OVERCOME

The key barrier to visiting the English Coast off-peak for this segment is the lack of sunshine and poorer weather, followed by the perception that the coast will be quiet off-peak and that too much will be shut down.

Overseas destinations will be the English Coast's key competitor when it comes to attracting a Sun Seeker.

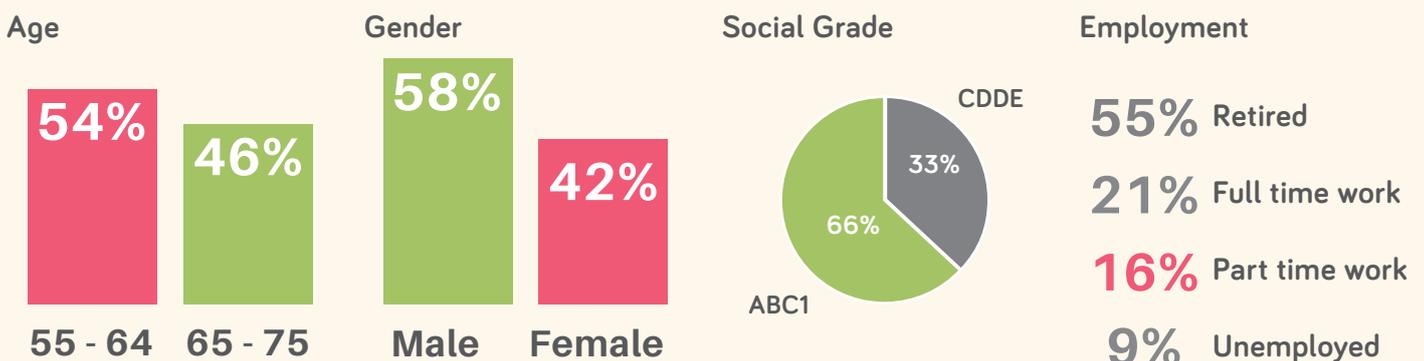
WHAT TO DELIVER / OFFER

Promote rest and relaxation opportunities - This segment simply wants to rest and relax when on holiday and while they do prefer to do this in the sun, they will not necessarily reject the English Coast because of its low probability of sunshine. Instead they will look to the English Coast as a place to retreat and unwind. Pushing the wellness options could attract this segment.

Change perceptions: The coast is alive and vibrant during off peak seasons - After the lack of good weather, Sun Seekers are unlikely to visit the coast because they believe too much will be shut down and it will be too quiet. Sun Seekers enjoy being in a crowd and are just as likely as the average to want to be social with friends and family while on holiday. They want to be in a vibrant and lively location and so to attract this segment destinations need to play down the 'quietness' of the off-peak season.

Push the fact it is more cost effective than overseas holidays - Weather notwithstanding, this is a group that could be attracted to the English Riviera.

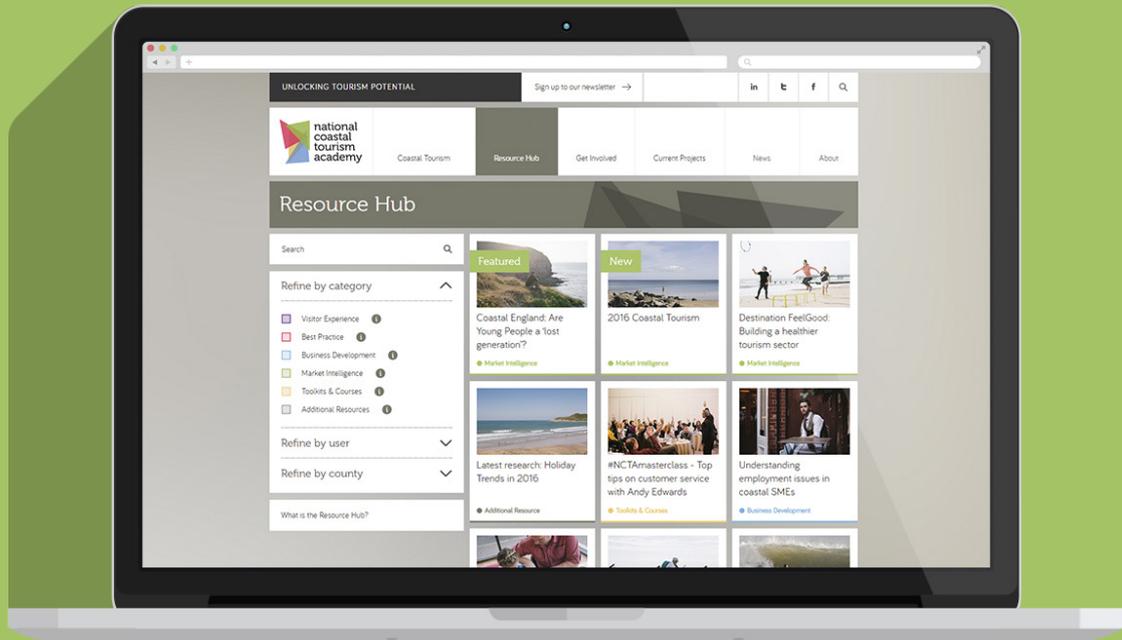
DEMOGRAPHICS



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