national coastal tourism academy

Off Peak Coastal Tourism: Potential for growth in the Empty Nesters Market

Perceptions, attitudes and booking patterns of the 55-75 visitor market to England's coast





ABOUT US

The National Coastal Tourism Academy (NCTA) is a Coastal Communities Fund (CCF) project that analyses the nature of coastal tourism to help boost employment and the coastal tourism economy. It works with academia and the tourism industry to share learning, good practice and the creation and dissemination of research that leads to exceptional visitor experiences.

phone 01202 962 071
visit coastaltourismacademy.co.uk
twitter @nctacademy

Key Findings

- By 2024 Empty nesters will be the largest segment of the population (22.6 million) and represent a key market for increasing visits to the coast in the off-peak period
- The primary motivations for visiting the coast currently are to escape and/or relax, to revisit a place or go somewhere new but **65%** would consider the coast as a destination for walking/hiking and **59%** for nature/wildlife
- Three quarters travel with a partner
- Half of over 55s believe the English Coast is as wild and beautiful as other coastlines in the world
- The types of coastal experience preferred are a coastal harbour town, followed by rural coast – traditional resorts should highlight easy access to these types of experience in the vicinity to increase appeal
- **62%** said weather not being as nice was a significant barrier for visiting in winter months – **43%** felt attractions and accommodation would be shut – a perception that needs to be addressed
- Empty nesters can be grouped into six key markets who are open to the idea of visiting the English coast off-peak

Introduction & methodology



Introduction

For destinations and businesses keen to grow the coastal tourism economy, the Empty Nesters market offers great potential. Most importantly they are largely available to take holidays out of the main season and so can help address the issues associated with seasonality faced throughout the English coast.

This report summarises research carried out by BDRC International into the Empty Nester market in spring 2016 and focusses on travel in the shoulder months. It identifies key segments that offer great potential to grow the coastal economy during the off peak season. *

* Off peak season in this context refers to holidays taken outside July, August or other school holidays

Methodology

The first part of the report looks at general characteristics, travel and booking patterns, activities and perceptions of the English coast among Empty Nesters who do not reject the coast. This leads into development of 6 distinct market segments which will help decision makers to understand who and how to target this important group.

There were two phases to the research. First an Intelligence Review which established the baseline in terms of knowledge and helped to design the subsequent questionnaire. The second phase was a nationally representative sample of 1800 adults aged 55-75. All had taken at least one off-peak break in the last 2 years and were non rejectors of the coast.

Scale and Characteristics



Although traditionally **'Empty Nesters'** have been seen as those whose children have left home, for the purposes of this report, Empty Nesters are defined as all those aged between 55 and 74. In 2014, according to ONS there were 18.8 million people over the age of 55 in the UK and by 2024 this group is expected to make up one-third of the UK population (22.6 million).

In the past 10 years there has been a steady increase in the proportion of over 55s in paid work – in 2015 **56%** of those aged 50-64 were still employed. Over 55s are generally better off than younger people both in terms of salaries/pension and investments. However many have restrictions on their disposable income due to supporting children through education or buying property. Their freedom to pursue their own activities and interests are sometimes restricted by caring responsibilities for grandchildren or elderly parents.

Empty Nesters are active users of the Internet. Compared to 10 years ago, when over 55s were significantly less likely to go online, **72%** of those aged 55-64 use the internet on a daily basis – the same as the national average. Those over 65 are less likely to – **48%** but still a massive increase on the **9%** of users in 2006. **48%** of those aged 55-64 used the internet for travel related services. (ONS)

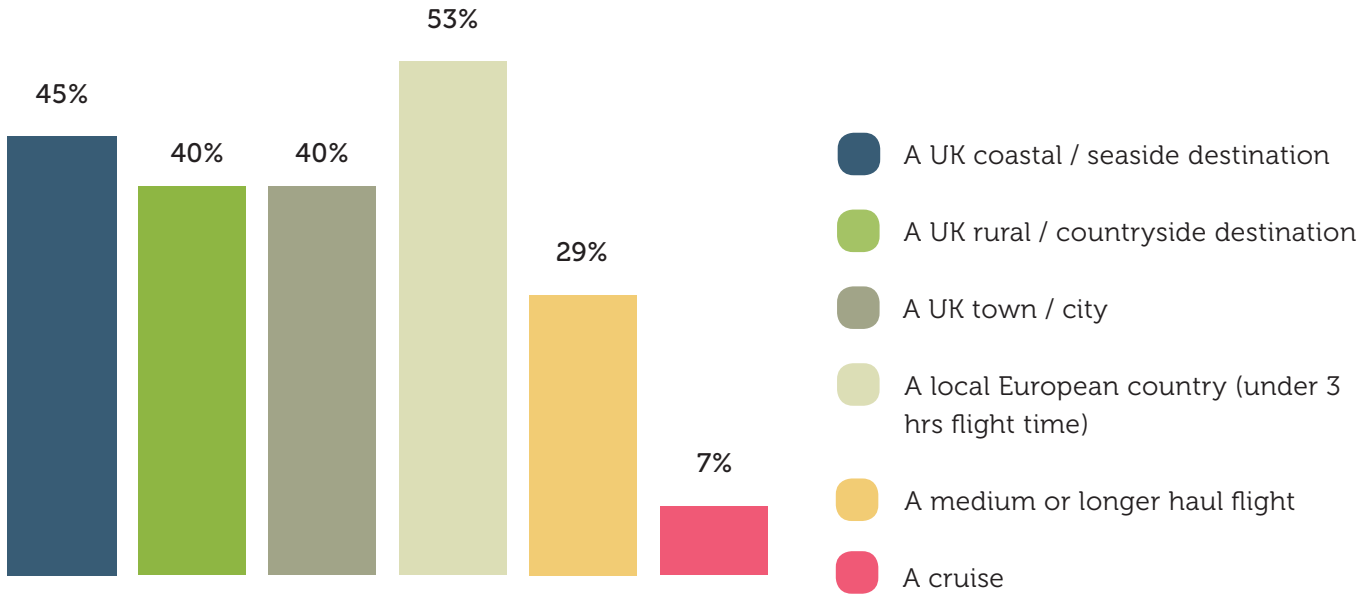
Current Visit Patterns



Empty Nesters already make up a third of domestic tourists to the seaside and are the most likely to take a longer trip to the coast – **53%** spend 4+ nights compared to **48%** on average. They are more likely to travel outside July and August (**72%**) compared to **64%** on average. (GBTS 2015)

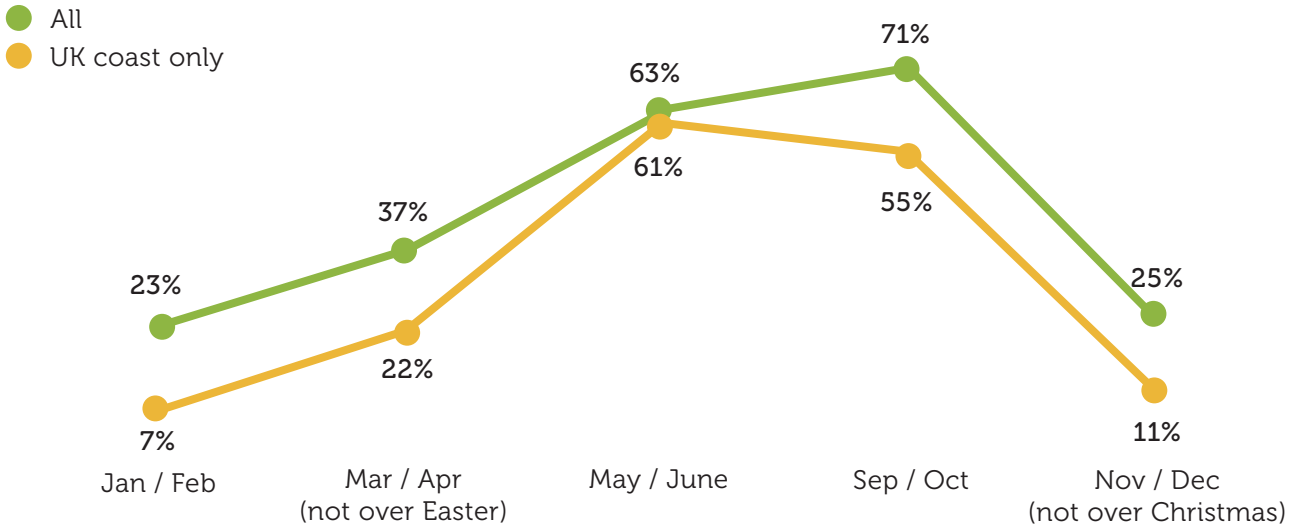
Forty-five per cent of respondents had been to the coast in the last 2 years in the off-peak season and **26%** go at least annually. This is encouraging, but a significant **52%** had visited a local European country.

Holiday destinations off peak in the last two years



Summer is the most popular time for off-peak breaks to the seaside – they are more likely to travel to other destinations in spring, autumn and winter.

When were off peak breaks taken?

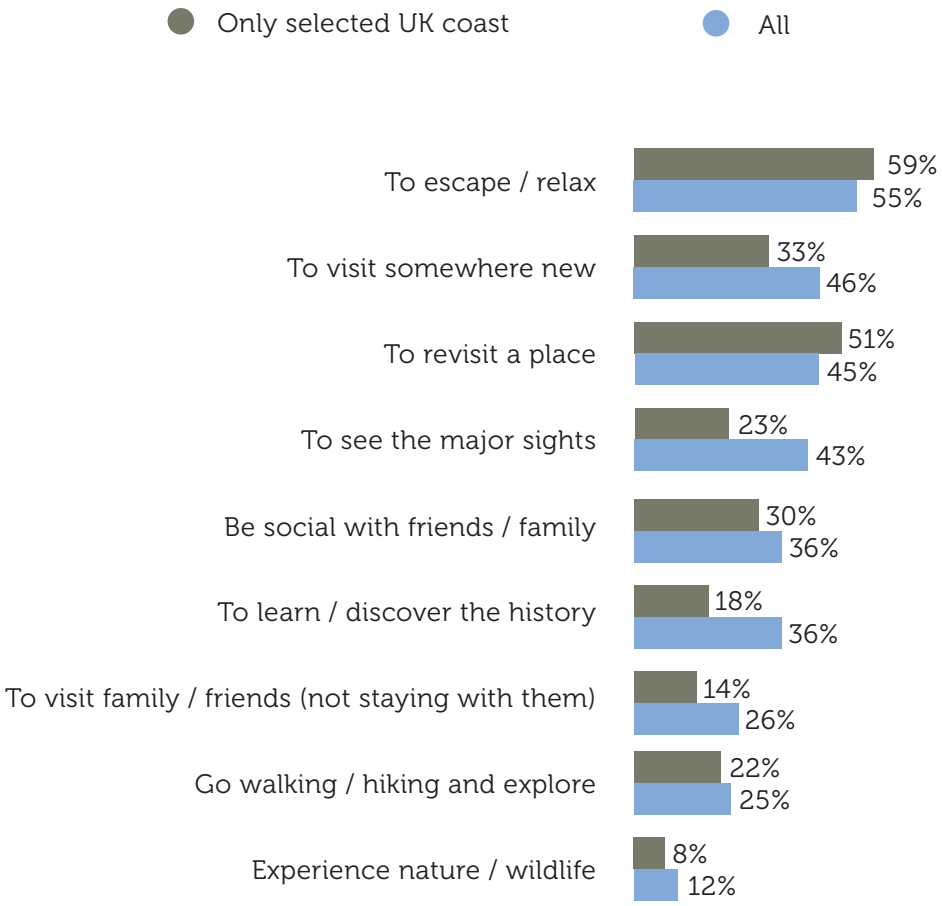


Motivations



Empty Nesters have all kinds of reasons for taking short breaks and the coast meets some of their needs better than others. The most common motivations for visiting the coast specifically as opposed to other destinations are to 'escape/relax' and 'to revisit a place'.

Primary motivations for going on holidays



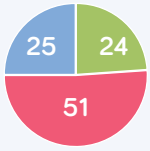
Planning and booking the trip

In terms of planning and booking a holiday, trips to the coast tend to be more last minute as illustrated in the diagram below. For example 42% booked accommodation less than a month before travelling to the coast compared with only 28% of trips abroad

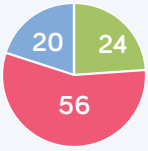
More than 6 months Between 2-6 months Between a month and a day



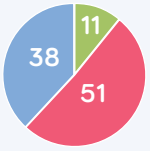
Thinking about the holiday



UK Coast



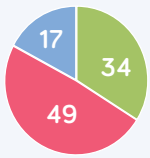
Other UK



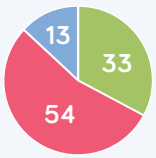
Overseas



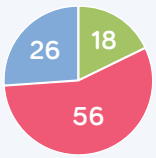
Researching the holiday



UK Coast



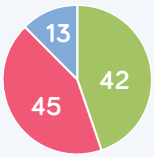
Other UK



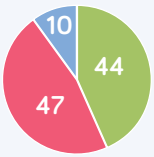
Overseas



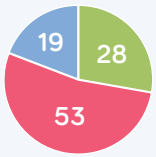
Booking the accommodation



UK Coast



Other UK

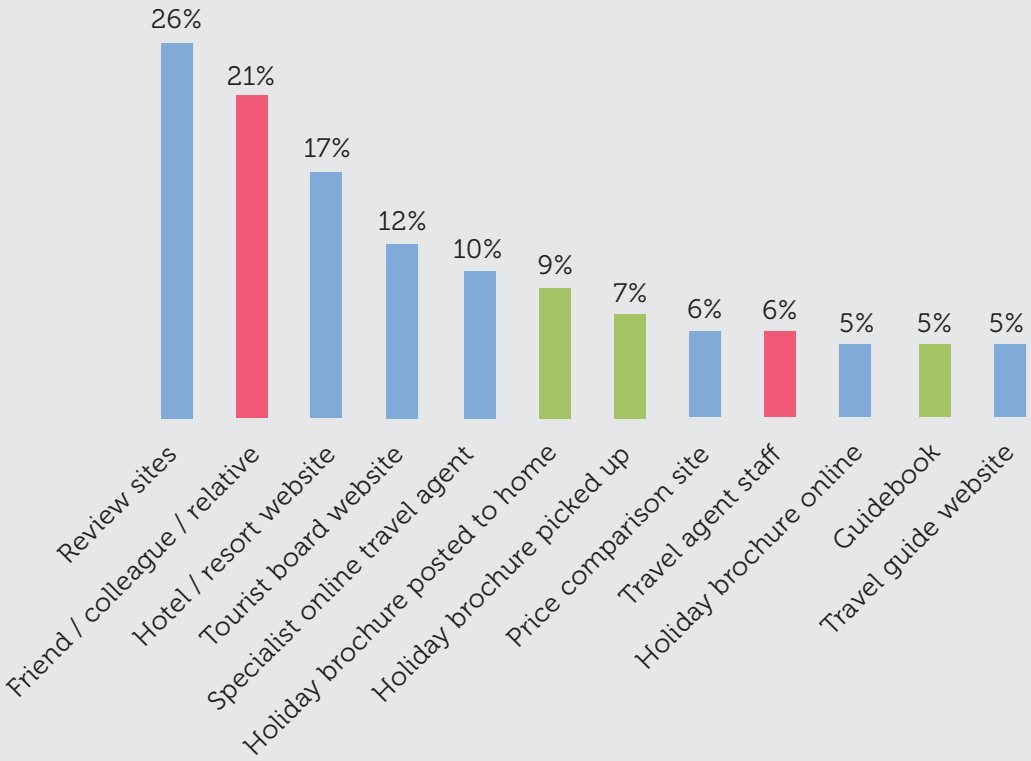


Overseas

Online publicity and review sites are used by 49% of Empty Nesters in making their holiday choices.

Trip planning

Sources of information used to inspire or plan trips



Summarising the information above demonstrates that online sources are the most important influence on the decision-making process

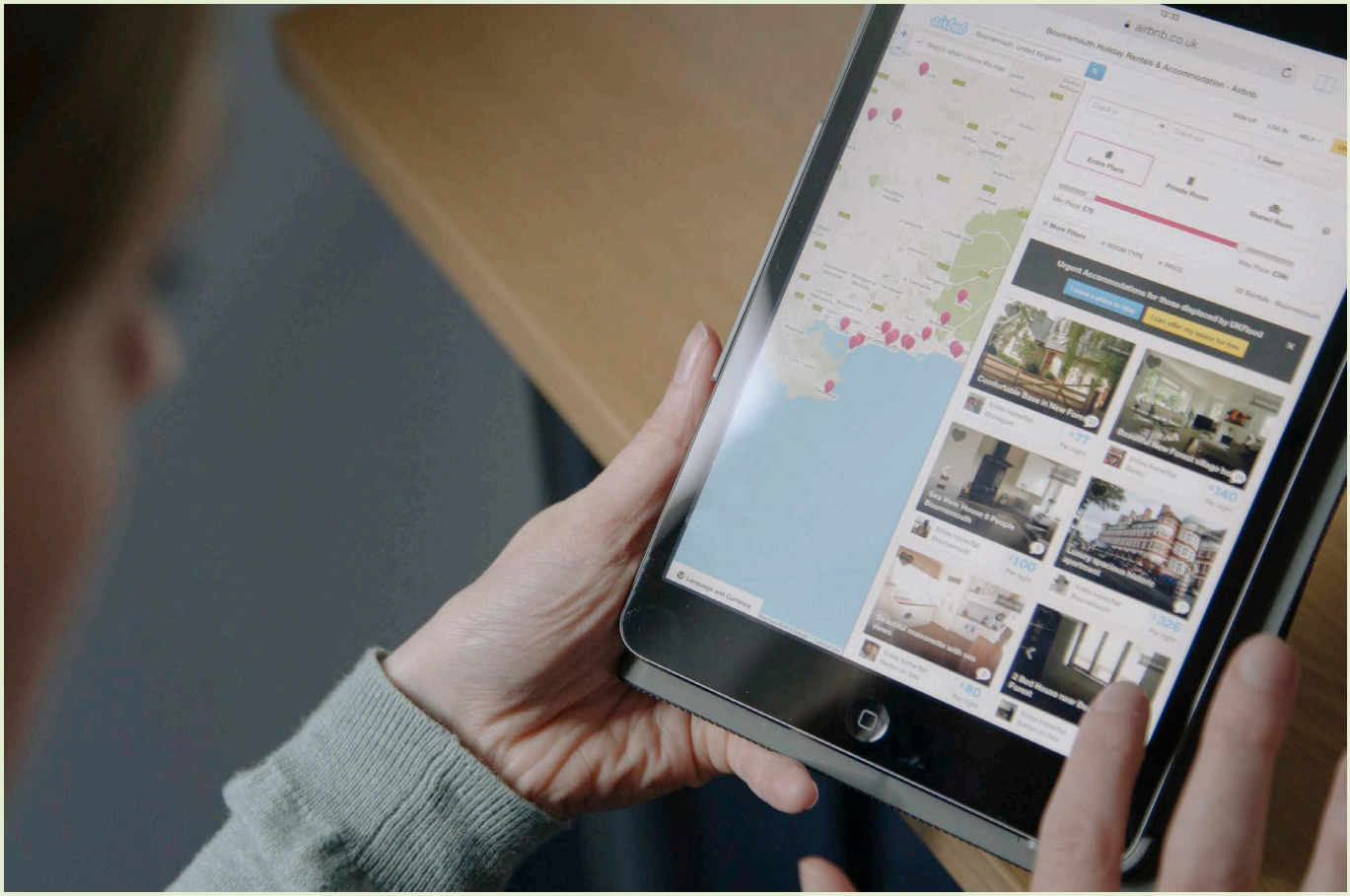
49%
Online publicity and advertising

27%
Recommendation from friends / family

23%
Brochures and guidebooks

13%
TV and Newspaper advertisments

4 in 10 Empty Nesters consult online reviews for most of their trips.



The majority of Empty Nesters book directly with their accommodation provider but for those who use an intermediary, Booking.com is the most popular.

Top 5 booking intermediaries

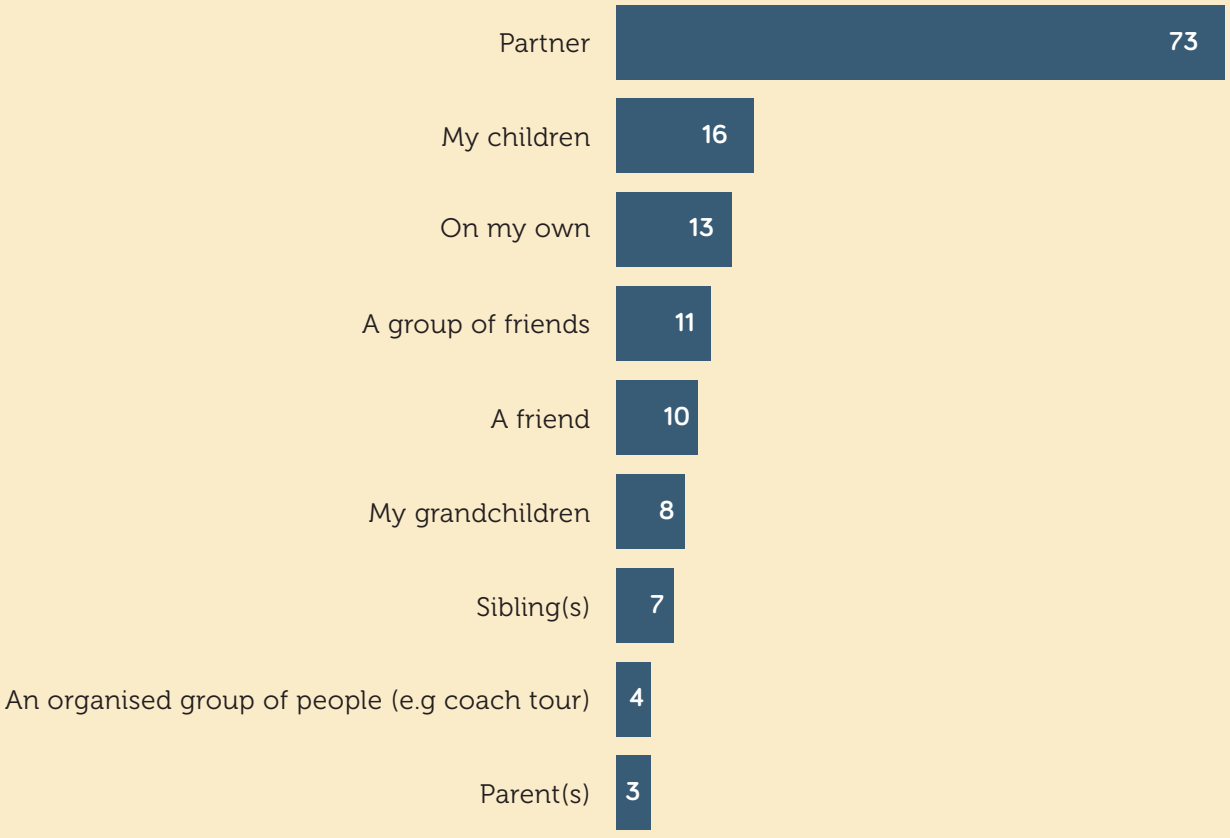
Booking.com	**47%**
Expedia.com	**20%**
Lastminute.com	**14%**
Hotels.com	**13%**
Travelzoo	**7%**



About the trip

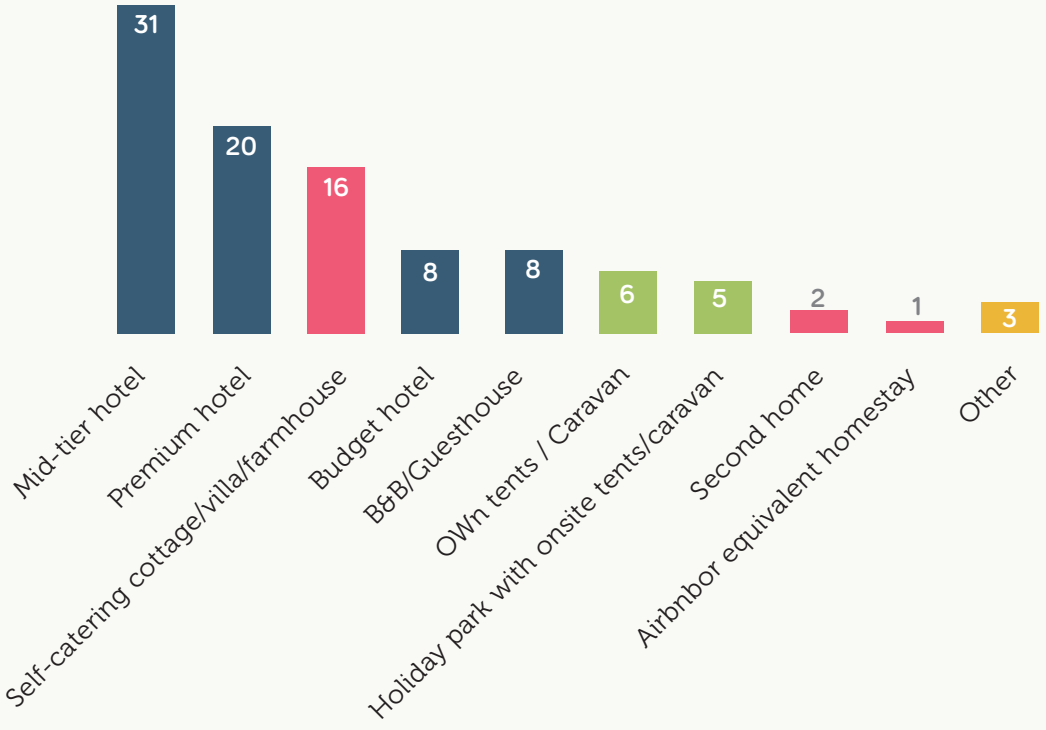
Empty Nesters usually prefer to travel by car (**79%**) particularly when visiting the coast (**89%**). This age group sometimes uses the train (**14%**) or a coach (**14%**) but there is some variation by region. Empty Nesters from London are much more likely to travel by train when going on holiday (**32%**) and for more than **20%** of those in Scotland, North East and North West train is the preferred method of travel. Those in the North East (**13%**) and North West (**10%**) are also the most likely to travel by coach on holiday.

Most empty nesters travel with their partner but sometimes with other family members too.



72% have stayed in hotels, by far the most common form of accommodation. Mid-tier hotels are the most popular type stayed in by a third of respondents.

Types of accommodation stayed in most often (%)



Net: Serviced Accommodation
(mid tier hotel / premium hotel / budget hotel & B&B / Guesthouse)

Stayed in:
80%
Most often stayed in:
67%

Net: Self Catering Property
(Self Catering / second home / Airbnb)

Stayed in:
29%
Most often stayed in:
19%

Net: Camping / Caravan

Stayed in :
18%
Most often stayed in:
11%

Social media use

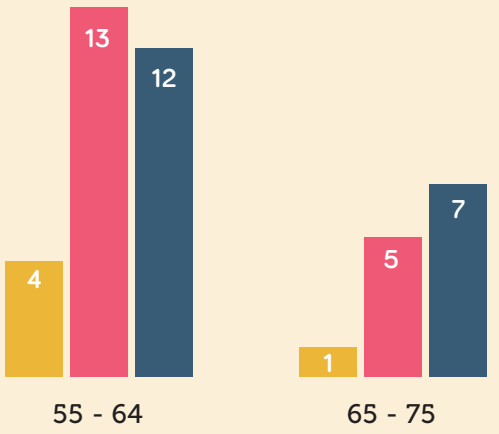
Younger Empty Nesters are quite active users of social media – **19%** posted while on holiday and **44%** afterwards.



While on holiday

19% used social media while on holiday

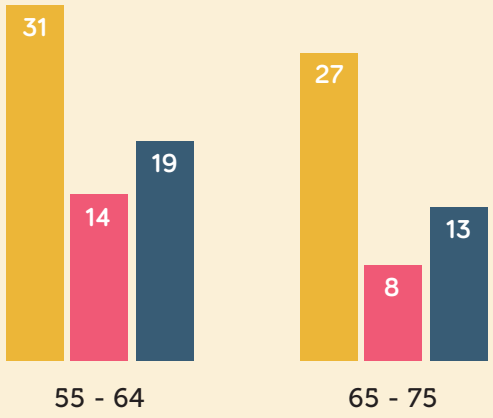
10% used social media while on holiday



After holiday

44% used social media after on holiday

37% used social media after on holiday



- Posted a review on an online review site
- Posted comments on a social networking site
- Uploaded holiday photos/videos onto social networking sites



What do Empty Nesters like doing on holiday?

Majority appeal
(50-66%)

- Taking it easy
- Local markets
- Independent sightseeing
- Local cuisine
- Reading
- Historic properties
- Relaxed / gentle walking

Significant minority appeal
(20-40%)

- Museums & galleries
- Parks / gardens
- Beach
- Shopping for bargains
- Sunbathing
- Photography
- A special shop
- Wildlife / nature

Minority appeal
(5-0%)

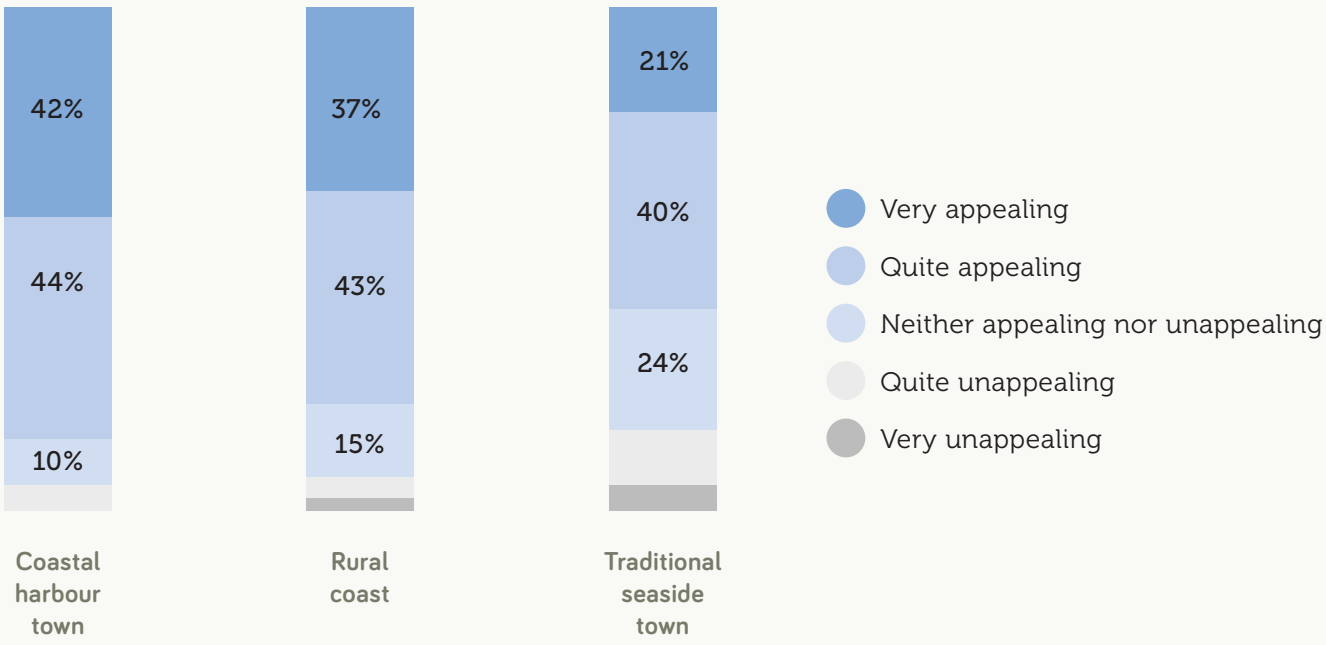
- Local folk culture
- Organised sight seeing
- Theatre / opera / ballet
- Local festival / event
- Hiking / active walking
- Zoo / aquarium
- Bird watching
- Spas & pampering

Perceptions of the coast



- Empty Nesters would generally prefer to visit a coastal harbour town – 86% found this appealing.
- Traditional seaside towns are less popular, see percentages below

How appealing are the following types of coastal destinations?



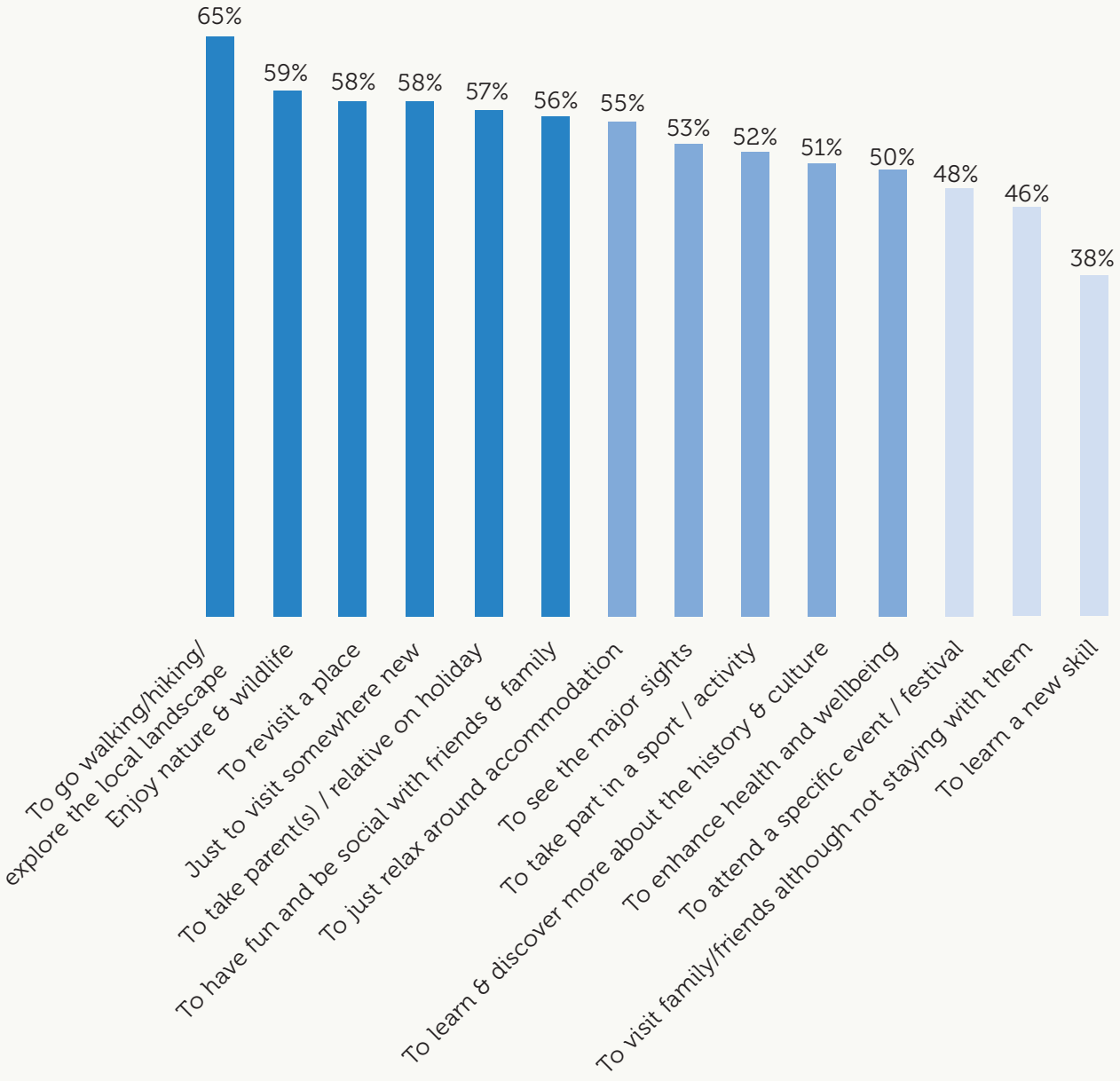
Reasons for visiting





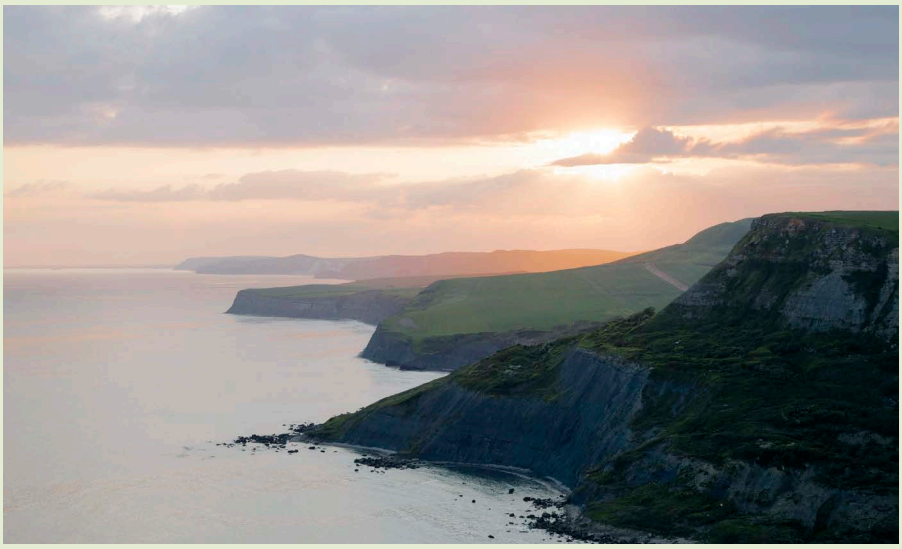
There is significant variation in the kinds of reasons Empty Nesters visit the coast but looking at the group as a whole the chart below shows the most common responses to the question:

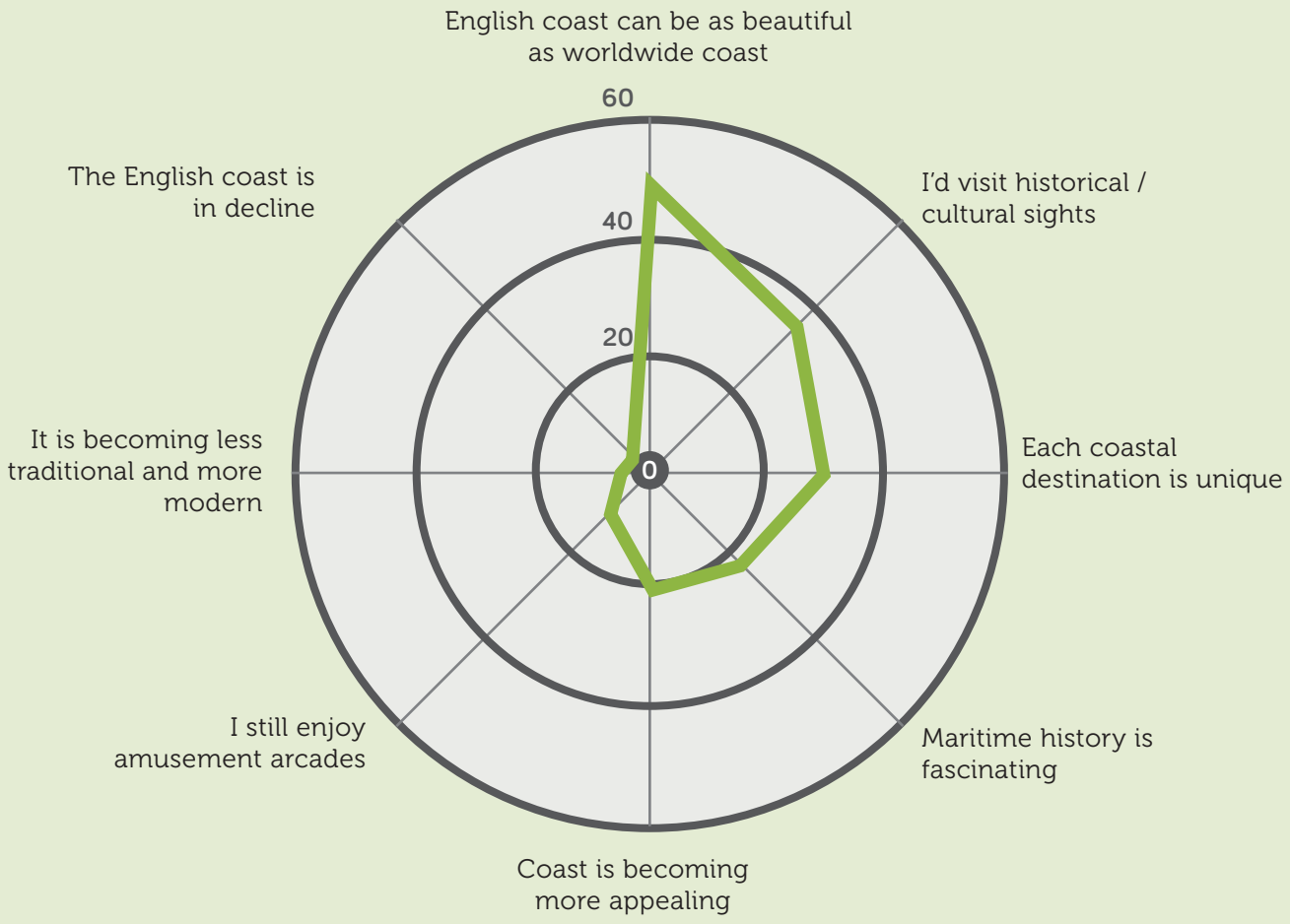
How likely are you to consider an English coastal destination for the trip where your primary purpose is to:



General thoughts on the English coast

Half of all Empty Nesters agreed that the coast in England was on a par with other coastal destinations around the world, however only one third felt that each individual destination had something unique to offer and very few agreed that the coast was becoming more modern.





Thoughts on the English coast as an off-peak destination

Four in ten prefer the coast for an off-peak break because it would be less crowded and just under one third were not deterred by poor weather.





What are the barriers to off-peak coastal visits?



The most significant barrier for visiting the coast off-peak is the weather (**62% of respondents**). There was also a perception among 4 in 10 people that the accommodation and attractions would be closed and a third were concerned that shorter days would mean less time to sightsee.

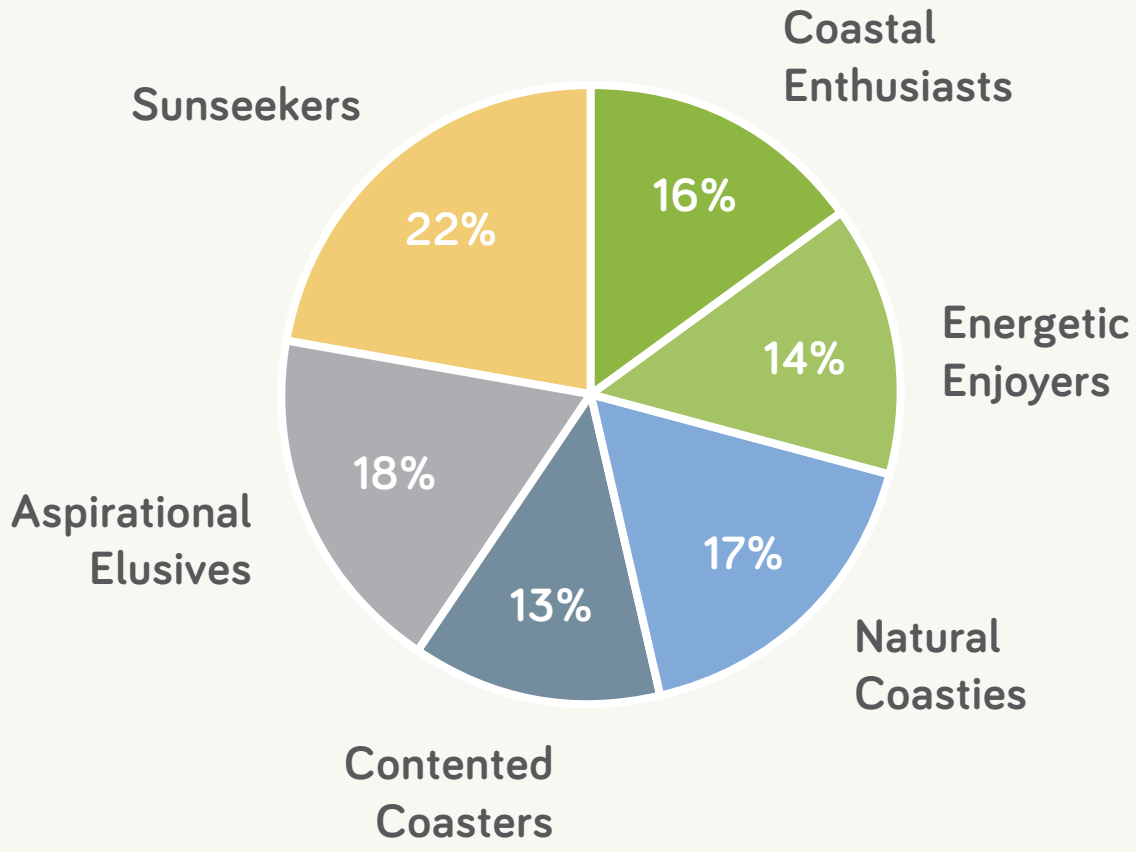
These barriers need to be overcome and perceptions altered in order to attract empty nesters in off-peak and particularly winter months – highlighting the positives of less crowding and challenging the view that the coast is open for business could be key drivers.

Market opportunities

The Empty Nesters market for the off-peak period can be grouped into six key segments based on their lifestyle, aspirations and perceptions of the English Coast off-peak. It's worth noting that none of these groups reject the English coast outright as a holiday destination.

For each of these segments there is a detailed portrait of the aspirations, key activities enjoyed whilst on holiday as well as likelihood to consider a break on the English Coast. These can be found on the NCTA Resource Hub and will help business and destinations to develop their product and marketing accordingly.

Empty Nesters market segmentation:



The six segments....

Coastal Enthusiasts - 16% of the market

- Of all segments these have the most positive perceptions about the coast
- They lead very active lives, always looking for things to do
- More likely to be female and ABC1
- 56% have been to the coast – but as likely to have been to other places
- Tend to stay in mid-tier hotels or premium hotels – possibly greater disposable income
- Usually travel with their partner but also with other friends
- They use online tools
- Interested in sightseeing and local life. More likely to do everything apart from 'just relax'

A strong market. Promote how good coast is off peak, loads to do, what's open, focussing on natural and cultural/historic opportunities. Particularly up market hotels, B&Bs and self catering

Energetic Enjoyers - 14% of the market

- 2nd most positive perceptions of the coast
- Likely to be older, C2DE and working
- Travel with their partner in mid-tier or premium hotels (but not to same extent as Coastal Enthusiasts)
- 12% stay in holiday parks making them the most likely group to do so. They like brand hotels
- 51% had been to English coast – but they are more likely to have been to Europe
- Like doing things on holiday, sport especially but also visiting attractions, entertainment, arcades
- More likely to use all forms of publicity

Will be attracted by better accommodation, plenty to do off peak. Need to know what entertainment is available rather than go out and find their own

Natural Coasties - 17% of the market

- 3rd most positive perceptions of the coast – better than average
- More likely to be retired
- They like to use leaflets to find information and many consult the National Trust handbook when deciding where to go
- Avoid crowds, have an affinity with nature, like revisiting places, traditional
- 54% have been on an off peak coastal trip (more than average) - and the coast is the most likely place they have been
- 41% use self catering (average 16%)
- Like walking, enjoy nature/wildlife, like learning about area, visiting heritage, enjoy going back to same place. Very attracted to visiting off peak

Strong market – promote good quality self catering accommodation and natural heritage

Contented Coasters - 13% of the market

- Perceptions about the coast are pretty average
- 50% have been to the coast on an off peak break
- May travel alone
- Younger
- Like B&Bs – 64% compared to average of 8%
- Into hobbies, visiting friends and family
- Will be attracted to lower price options, going back to places, and using vouchers – like to feel they have value for money - not always cheap but feeling they haven't overpaid

Attracted by traditional elements and the advantages of cheaper prices off peak

Aspirational Elusives - 18% of the market

- Quite negative about the coast because they think weather will be a problem and everything will be shut
- Need high standard accommodation – like premium hotels (36% average is 20%)
- More likely to be female, ABC1 and retired. Travel with partner
- Only 32% have been on an off peak break to coast. Twice as likely to have been to Europe Like sightseeing, exploring, visiting must-see sights, walking, going somewhere new – generally want to do everything and feel they've seen everything in a place
- Very online savvy – use review sites

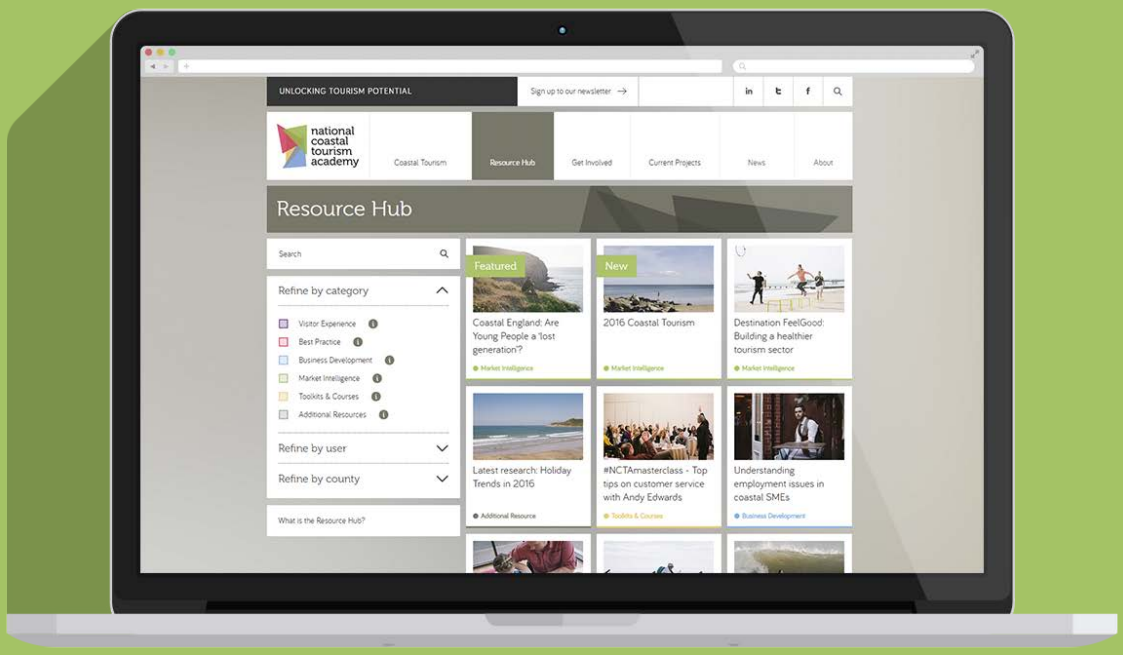
Harder market to attract due to initial perceptions – but are still open to visiting the coast and should be possible to promote and change perceptions, coast does meet most of their needs but awareness is an issue – they are not a lost cause!

Sun Seekers - 22% of the market

- Most negative about the coast
- Put off by the weather
- More likely to be male
- 35% have visited coast off peak but 68% have been to Europe
- Rest and relaxation key motivation. Not interested in sightseeing, exploring, nature or going somewhere new
- Like being social – more likely to travel with friends
- 54% like to use mid tier hotels – 31% on average

This market is much more likely to prefer Europe but may be persuaded in late spring / early summer if the weather is right and relaxation is on offer – but it's not a priority market!

Visit our Resource Hub



Sign up for free access

coastaltourismacademy.co.uk/resource-hub

Connect with the NCTA

linkedin.com/company/national-coastal-tourism-academy
facebook.com/nationalcoastaltourismacademy
twitter.com/nctacademy

For more contact Jo Edom
jo.edom@coastaltourismacademy.co.uk
01202 962 572

Publication date: August 2016
Version: 1.1

Copyright
'Off Peak Coastal Tourism: Potential for growth in the Empty Nesters Market'
© 2016 National Coastal Tourism Academy.
All Rights Reserved.