national coastal tourism academy

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Perceptions of the English Coast: Identifying Opportunities for Domestic Non-Visitors





Introduction

To date the NCTA's research has focussed on finding out more about existing visitors to the coast and has published a number of reports on specific markets. However not everyone goes to the coast so the purpose of this study was to explore why this is, who they are, to understand their travel patterns and their perceptions of different types of coastal destination. The objective was to identify the barriers that could be addressed, which non-visitors might be open to staying on the English coast and which types of destination and activities would be most relevant to them.

Background and Methodology

The research had two stages:
An online survey with 1,506 respondents who had not visited the English coast for an overnight stay in the past five years. The sample was nationally representative by life stage, socio- economic group, ethnicity and home origin. To explore the full range of perceptions, six coastal types were developed, based on a series of representative photographs which were used within the survey.

In-depth interviews (50 mins) with 23 respondents to explore barriers and perceptions and identify potential conversion opportunities. Respondents represented a range of different views, barriers and life stages.

NCTA PARTNERS WITH HERTZ

Hertz UK is pleased to be partnering with the NCTA to better understand perceptions of the coast. The UK coast is a fantastic asset and we fully support the NCTA's remit to promote and champion coastal destinations to a domestic and inbound audience.

ABOUT US

The National Coastal Tourism Academy (NCTA) works to accelerate growth in the coastal visitor economy focused on improving the visitor experience, supporting industry and bridging gaps in research for coastal tourism development.

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Key Findings

- Most non-visitors had visited the English coast at some point in the past so had experiences to shape their perceptions. Therefore, unlike destinations abroad, their views were not a 'blank canvas' which has both advantages and disadvantages.

- The vast majority of non-visitors were positive about at least one of the English coastal types.

- Although there is a perception that most people think of England's coast as traditional seaside, most non-visitors are more attracted by other destination types.

- Of the six coastal 'types' and imagery presented:

    - 'Coastal Retreats' and 'Harbour Towns' were the most popular types across all life stages apart from Young Families where Traditional Seaside is the most popular.
    - Views on Lively Towns and Active Breaks are quite polarised

- The main barriers to visiting are a preference for destinations abroad, unpredictable weather and perceived expense. None of these barriers is insurmountable with targeted communication and product development.

- A significant challenge is overcoming inertia – providing a reason to visit now, when there are so many other leisure opportunities and holiday options available.

- The results of this research can be used by destinations to understand how to adapt their marketing and product development to underscore the diversity of their destination's appeal to target the markets they may wish to attract.

The survey audience

Survey results were analysed by the following life stages:

Under 35s
Aged 18-34 with no children, this group is the most likely to have holidayed recently in Europe (**47%**). They look for opportunities to explore local culture (**69%**) and like City Breaks with lots of activities (**65%**). They want to be engaged and entertained on holiday and seek authentic local experiences. Their key reasons for not visiting the coast are a preference for travelling abroad (**47%**) and unreliable weather (**34%**). This is the life stage most likely to be influenced by adverts on social media and online travel reviews.

Young Families
Aged 18-64 with at least 1 child under 13, young families face significant holiday challenges in terms of tighter budget, school holiday restrictions and the need to keep the children entertained. They look for a 'familiar setting and no surprises' (**43%**) and sunny weather is very important (**66%**). The traditional seaside experience appeals but they are concerned about unreliable weather and perceived expense.

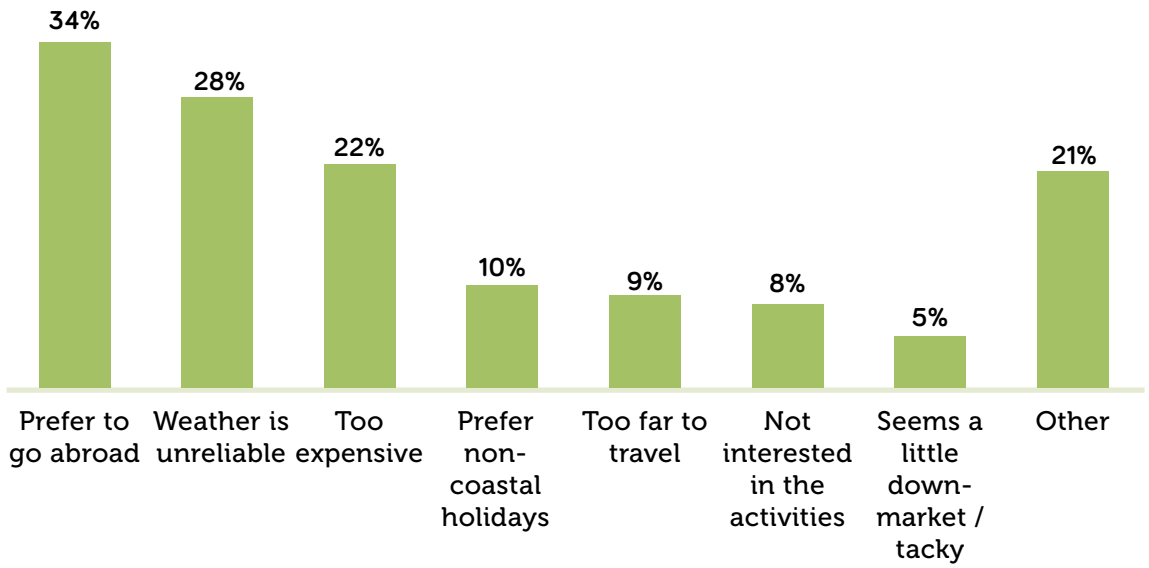
Older Families
Aged 25 plus with at least 1 child at home over 13 years, these families straddle the attitudes of younger and older segments as the children's and parent's interests start to align. They are looking for destinations with varied cultural activities suitable for children with a longer attention span and need reassurance that the holiday will be enjoyable. Many already take day trips to the coast but need to be persuaded there is a reason to stay longer.

Older Independents
Aged 35-54 with no children at home, this group is generally less budget conscious and have fewer constraints on holiday planning. They are looking for destinations that offer escapism from day- to-day life, perhaps rural settings or discovery of a new place so often travel abroad. They are less weather sensitive than some groups and the group most likely to travel to the coast by train.

Empty Nesters
Aged 55 plus with no children at home this is the group most willing and flexible to travel at all times of the year, budget-permitting. They are motivated by opportunities to relax and unwind (**79%**) and are looking for history, cultural events and natural beauty.

Reasons for not visiting the coast

There are a wide range of reasons given for not visiting the coast with the most common ones quantified below.



A need for exoticism is the most significant barrier followed by unreliable weather and the perception that the coast is too expensive.

One third of those who responded 'other' said they went to the coast on day trips or that it was too close to home to stay overnight. When looking at specific types of destinations, the reasons for not visiting were more varied, explained later.

Transport to the English coast



77%
CAR

35%
TRAIN

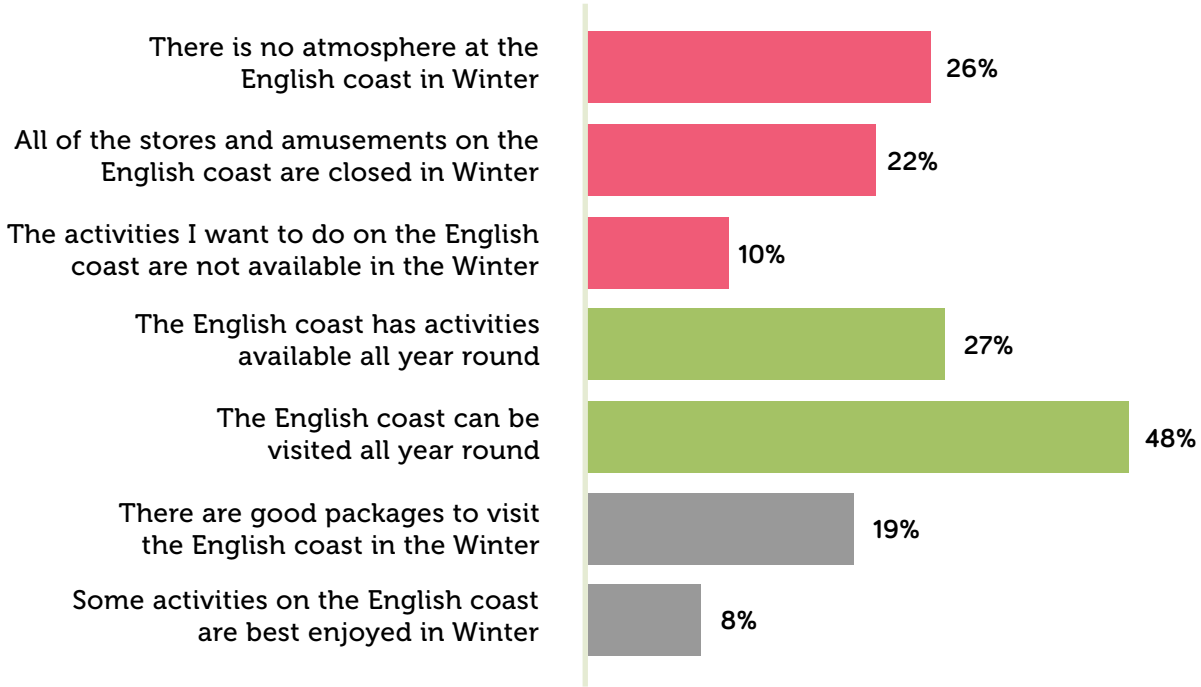
17%
COACH

9%
BUS

Although travelling to rural coastal destinations may seem less straightforward, the majority of non-visitors perceive the coast as accessible, with most choosing to travel by car. Of those who do have concerns over access to the coast, the biggest concerns are rail connections (**62%**), the quality of local public transport (**50%**) and traffic (**44%**). The majority of respondents said they would travel by car to the coast – but **59%** of those in Greater London would go by train as would **50%** of Under 35s.



45% of non-visitors believe that the English Coast is 'closed' in some respects during the winter



Destination Types



To explore perceptions of non-visitors, all respondents were shown a set of images representing six different coastal types and were asked to indicate how likely they were to visit based on the collages. These were not supposed to represent specific destinations but to evoke impressions of a destination type. In reality, many coastal destinations offer an experience that encompasses more than one coastal type – for example Newquay could fit into the profile of an Active Break, Lively Town and Harbour Town depending on the audience being addressed.

Please note the descriptions used in this summary report were not given to respondents, they only saw images of each destination type. The pictures included in the report are representative of but not necessarily the actual pictures used in the research.

Respondents were then asked further questions about 3 of the 6 types of destination:

- Which destinations on the English coast did the imagery make them think of?
- Which emoticons would they use for individual pictures?
- To fill in the gaps from an imaginary postcard from a destination
- To choose adjectives they would use to describe their visit in a TripAdvisor review

Responses were then combined to give an understanding of the perceptions of the different coastal types.

Active Breaks

Representative photographs of an Active Break







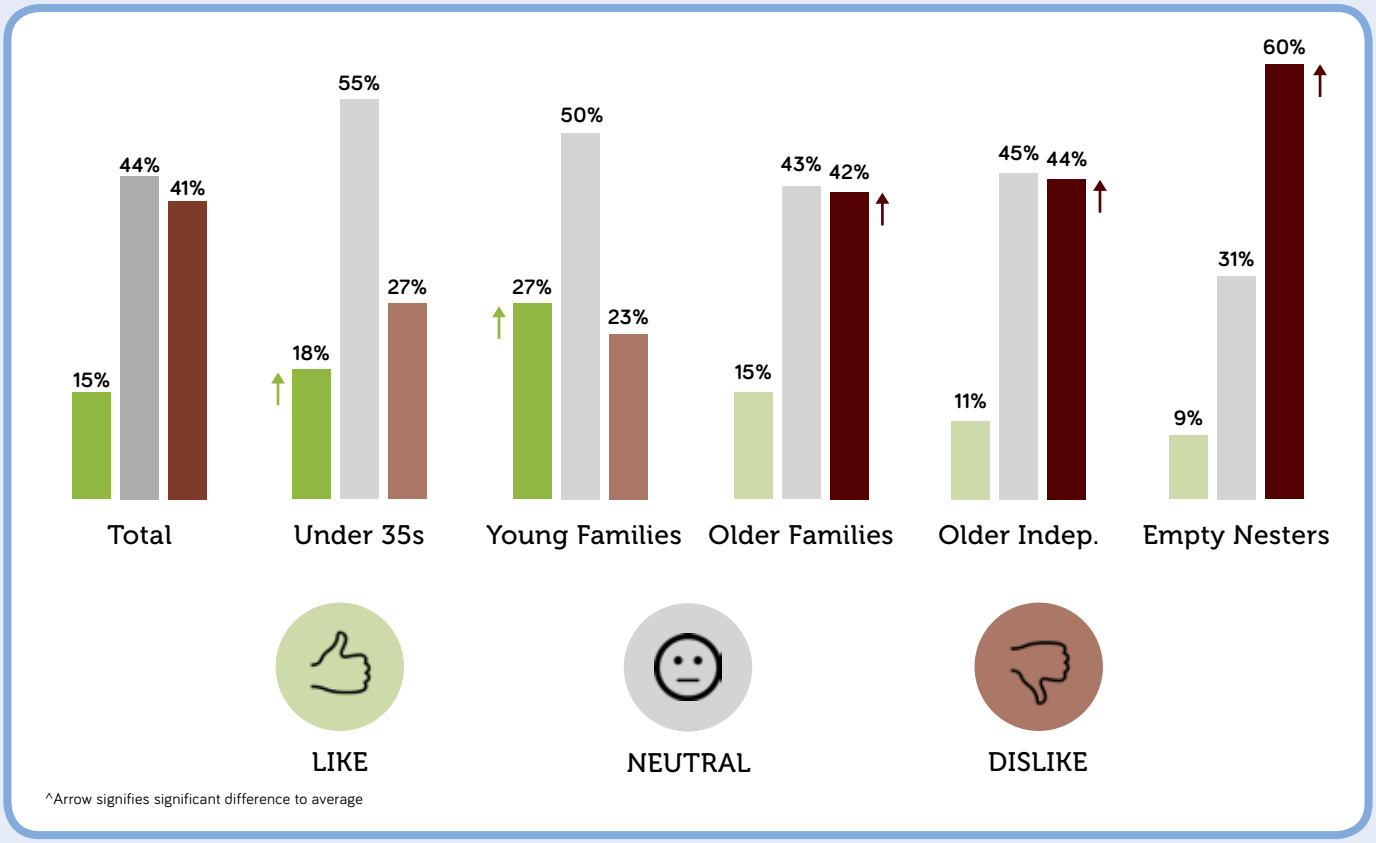






Who is likely to take an Active Break to the coast?

Likelihood to take an Active Break by lifestage



Perceptions on this type of destination are diverse – **15%** said they would be likely to visit but **41%** were unlikely to consider an active break. The life stages most likely to visit are **Young Families** (**27%**) and **Under 35s** (**18%**) with **Empty Nesters** who are very unlikely to visit (**60%**)





Likely Destinations

The destinations that respondents say they associate with this type of break include **Cornwall, Devon and Wales.**

The most popular activity was walking. Older Families in particular responded positively to the walking image with Young Families opting for kiting and canoeing.

Family Fun, good exercise!

Too sporty for me at my age

REFRESHING COASTAL WALK - FAMILY TIME FOR ALL AGES

It looks freezing!

SCENIC WALKS, GREAT WATER SPORTS OPPORTUNITIES

NOT MY IDEA OF A HOLIDAY

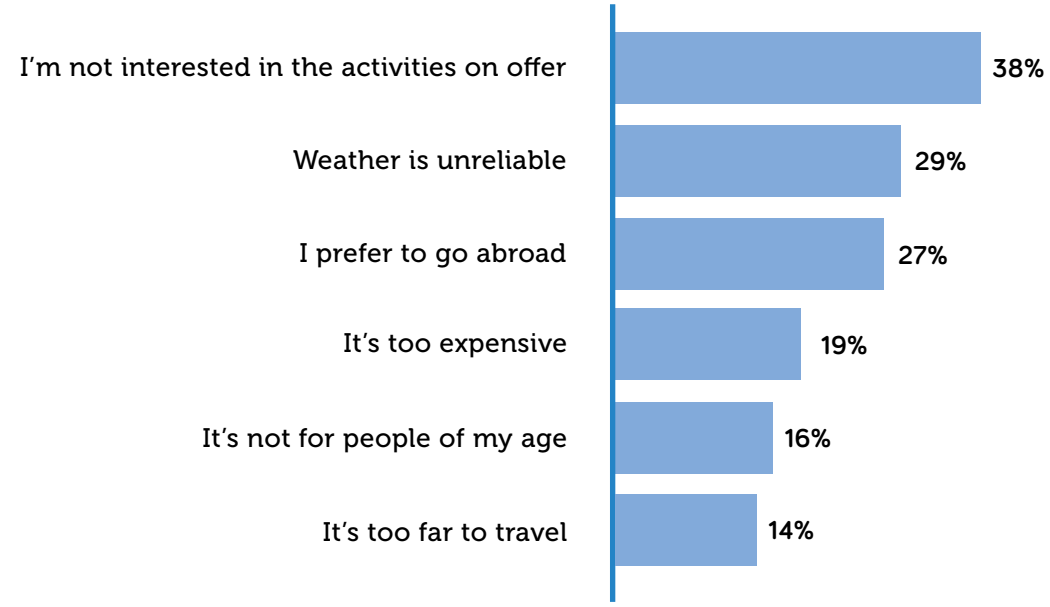
Positive reactions to the Active Break category through the example reviews (post-cards and TripAdvisor) were mostly related to scenic beauty, coastal walks and family activities, whereas negative responses tended to focus on activities looking too cold or energetic.



Having completed the imaginary postcard and TripAdvisor reviews, Young Families (**39%**) and older families (**28%**) were the most likely to recommend a visit.



The main barriers to an active holiday are:



The main reason respondents didn't want to visit an Active Break-type destination was because they were not interested in the activities on offer – significantly higher than the average response to this question.

Perceptions and Summary

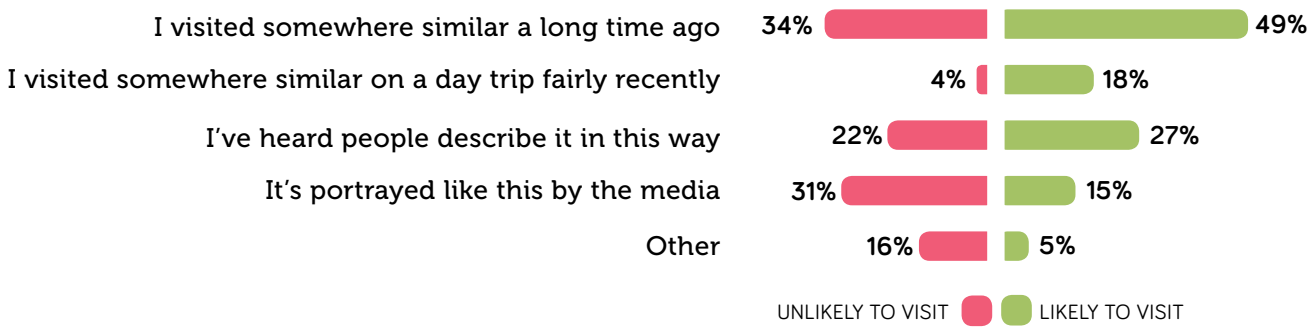


Perceptions of Active Breaks have come primarily from **"having visited somewhere similar before"** (**37%**)

OR

"it's portrayed like this in the media" (**28%**) – particularly for those who are unlikely to visit.

Where do you think your perception of this destination has come from?



In summary, Young Families and to some extent Under 35s and Older Families could be interested in Active Break-type destinations. Coastal walking appeals across the board but other activities are intimidating including relatively low octane ones such as cycling and more thrill-seeking activities.

Promotional messages should focus on **'plenty to do whatever the weather'**.

Coastal Retreat

Representative photographs of a Coastal Retreat







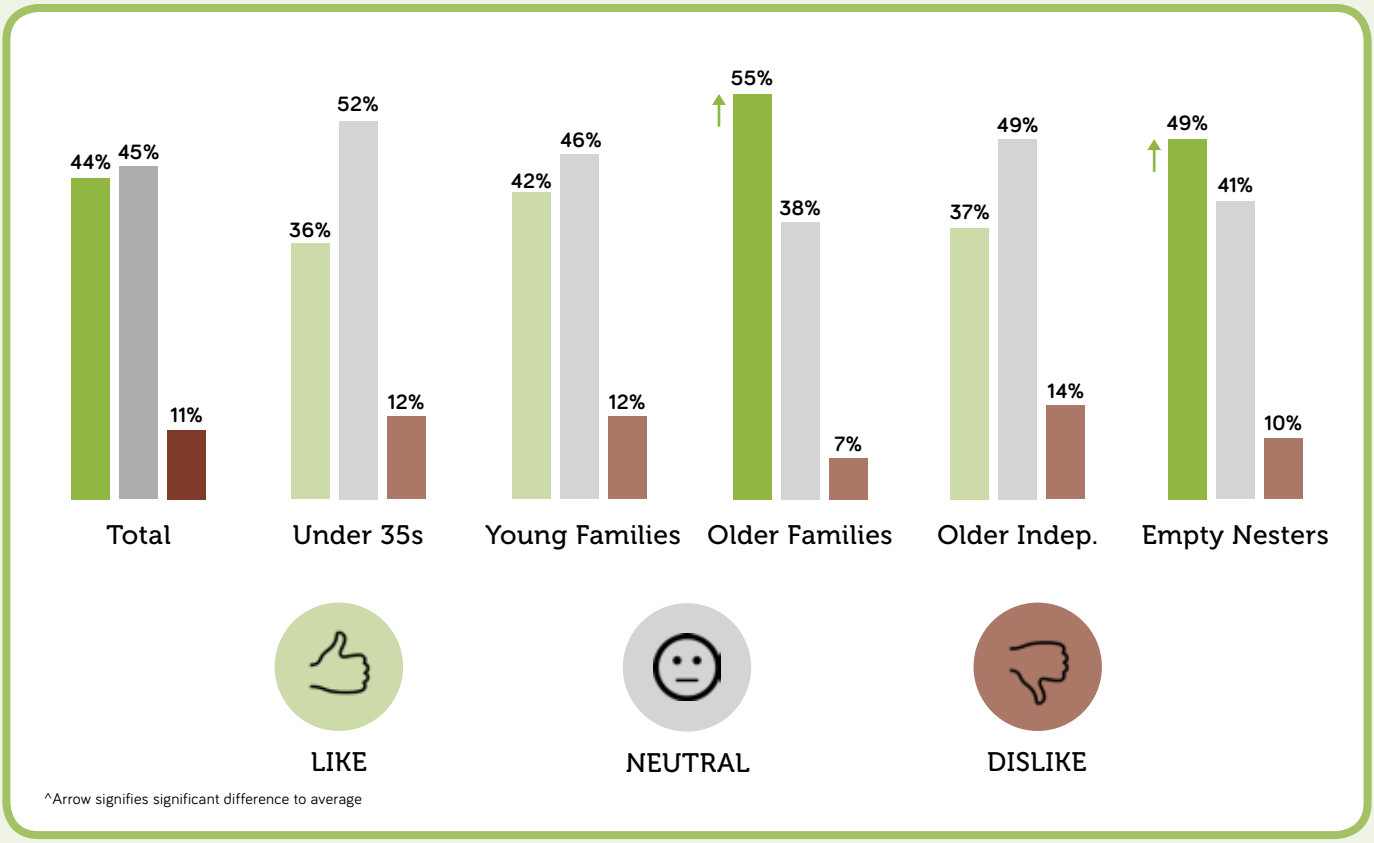






Who is likely to go on a Coastal Retreat?

Likelihood to take a Coastal Retreat by lifestage



Coastal Retreat was the most popular of destination types with **44%** saying they were likely to visit with **Older families (55%)** and **Empty Nesters (49%)** being the most enthusiastic.





Likely Destinations

Cornwall, Devon and Scotland were the destinations respondents were most likely to categorise as a Coastal Retreat.

Of the images depicted for this destination type, a village scene with people walking through a pretty street was easily the most popular image especially for Older Families and Empty Nesters.

Pretty beach with a rustic charm

Quaint pretty villages

MANY HAPPY MEMORIES
STUNNING - LOVELY VIEWS

Boring & quiet

TOO PEACEFUL - NO ENTERTAINMENT

FOR OLDER PEOPLE

TOO ISOLATED AND FAR FROM ANY CONTACT

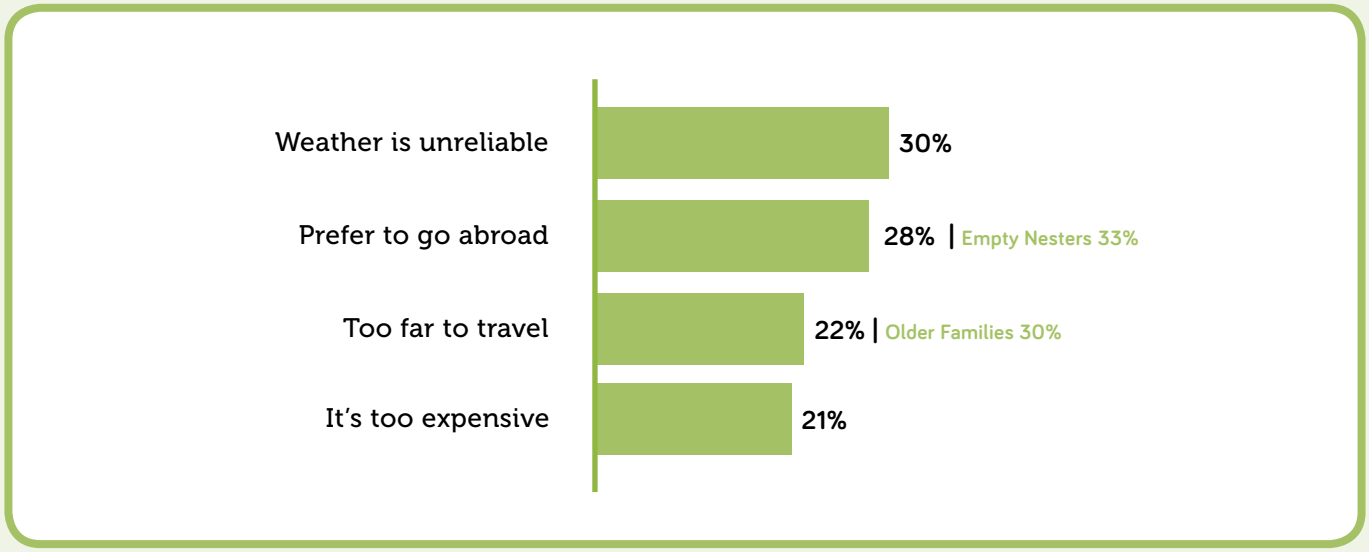
The positive comments suggested by respondents as part of their "review" of a Coastal Retreat focused on natural beauty, happy memories and quiet nature whereas more negative comments centred around 'isolation' or 'being boring'.



Overall, reactions on TripAdvisor and postcard reviews were very positive with the majority recommending a visit, particularly from **Older Families (62%)** and **Young Families (57%)**. Just **4%** would definitely not recommend visiting the destination.



For those who were not interested, the main reasons were:

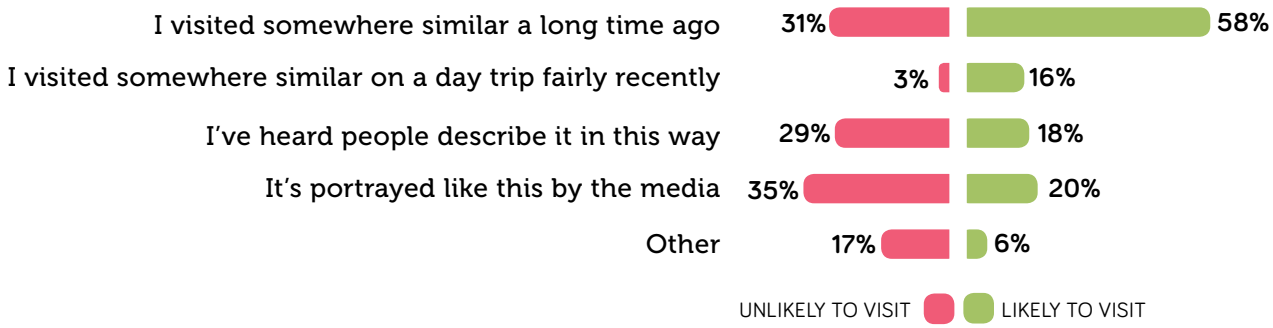


Perceptions and Summary



The overwhelming majority drew their perceptions about this type of destination from **"having visited somewhere similar a long time ago"** and this was especially true for those who were likely to visit.

Where do you think your perception of this destination has come from?



In Summary, although the concept of a Coastal Retreat was almost universally popular, the groups most likely to enjoy it are Older Families and Empty Nesters. The opportunity to explore beautiful coastal scenery is generally of interest but there is no evidence that potential visitors are looking for somewhere really remote – access to facilities and activities are important too.

There is a concern that weather could be an issue so promotional messages need to focus on natural beauty regardless of sunshine. Young Families are also attracted but they need to be convinced it is not too expensive or isolated – escapism within easy reach of facilities.

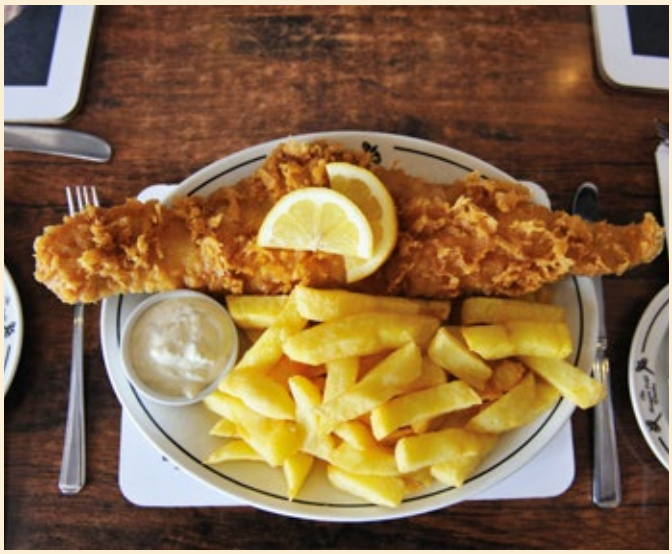
Harbour Town

Representative photographs of a Harbour Town







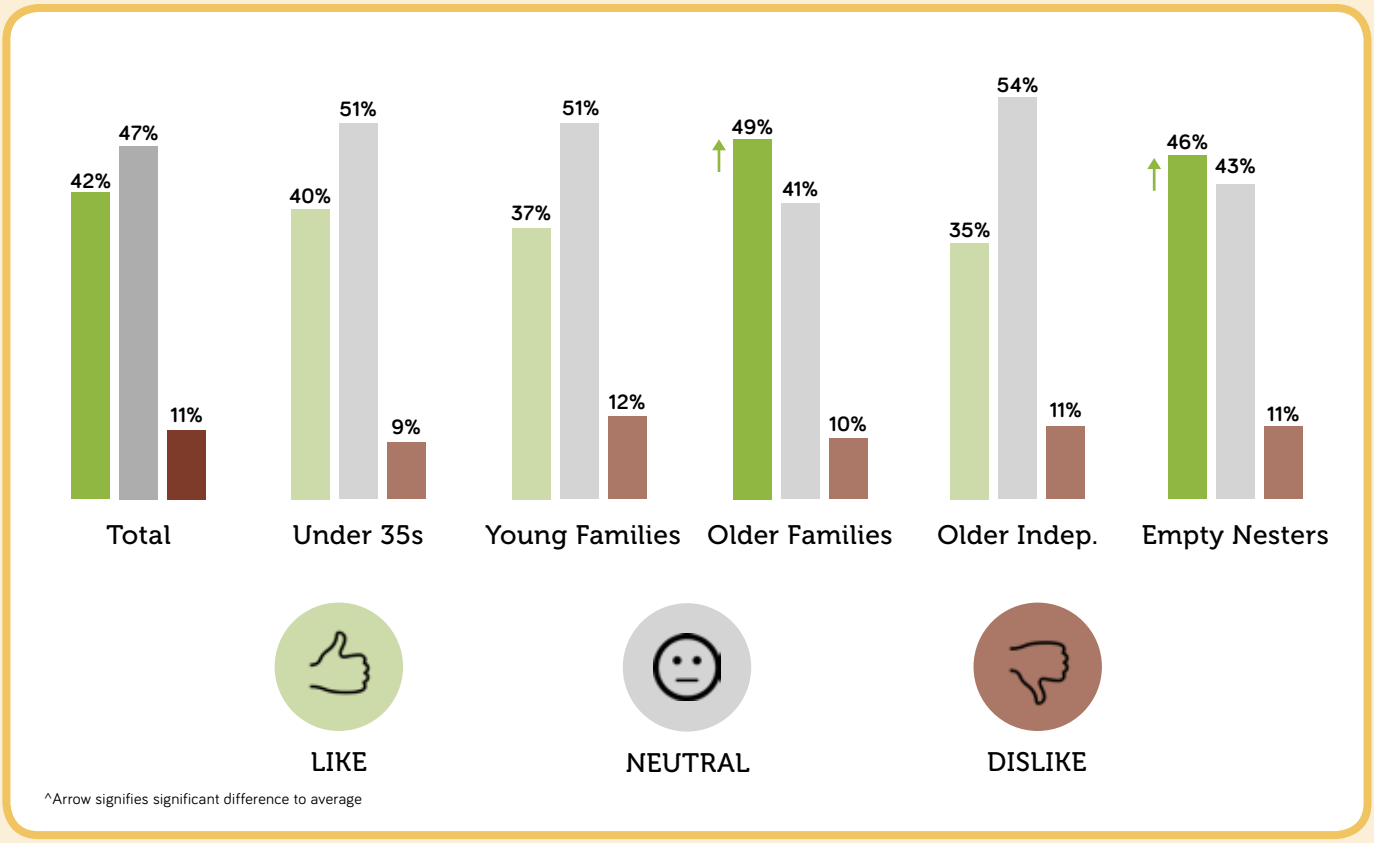






Who is likely to take a Harbour Retreat?

Likelihood to take a Harbour Retreat by lifestage



Overall Harbour Towns are very appealing to non-visitors – **42%** said they were likely to visit, the second most appealing type of destination. **Older Families (49%)** and **Empty Nesters (46%)** were significantly more likely to visit than average.





Likely Destinations

Destinations that respondents were most likely to associate with Harbour Towns were **Cornwall and Devon with St Ives, Brighton and Scarborough** mentioned specifically.

The photographs which appealed most were a fishing harbour (particularly Older Families and Empty Nesters) and the traditional street scene. The word map also reflects the interest in boats, harbour, fishing and dining.

Lovely surroundings, quaint and unspoilt town

Picturesque post-card view

TRADITIONAL HISTORIC FISHING VILLAGE WITH LOCAL HERITAGE AND LOTS OF HISTORY

Boring

NOT A FAN OF ART GALLERIES

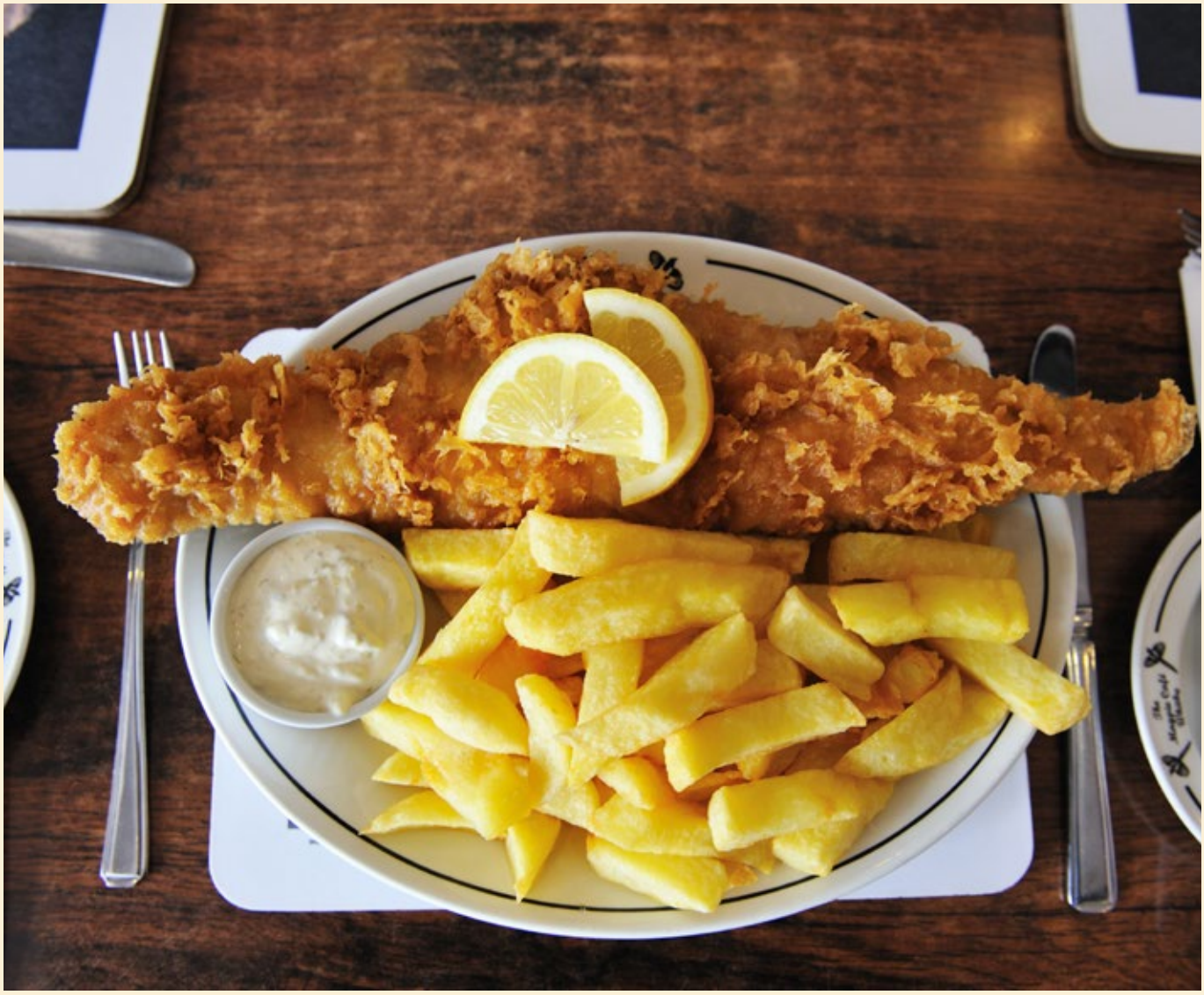
TOO MUCH LIKE HOME

TRADITIONAL LOCALLY CAUGHT FRESH FISH AND CHIPS - YOU CAN'T BEAT IT!

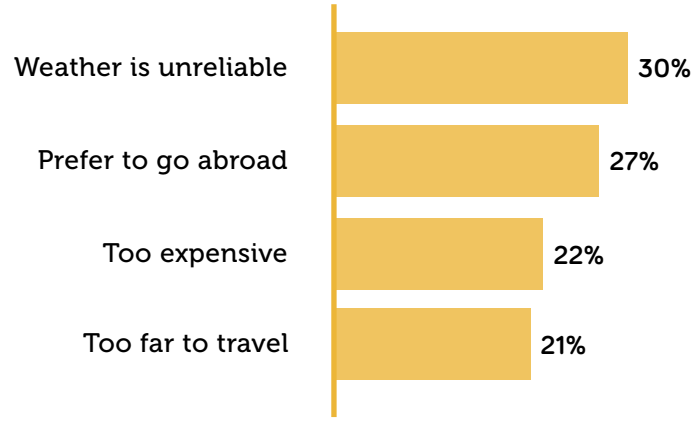
Positive comments as part of the reviews for Harbour Towns were mostly around attractive surroundings and traditional food and culture. For some, the concept was 'boring', 'expensive' and 'too much like home'.



The responses to the imaginary postcard and TripAdvisor reviews saw Older Families being the most likely to recommend a visit (**53%**) but **Young Families and Under 35s** were also quite positive.



The main barriers to visiting harbour towns:



Perceptions and Summary



Past experiences of Harbour Towns are quite positive, reflected in the fact that **58%** of those likely to visit gained their perception from a **"previous visit"**.

Empty Nesters **(64%)** and Older Families **(70%)** are significantly more likely to have obtained their perceptions this way.

In summary, although all visitor segments are interested in Harbour Towns, the strongest market is Older Families. They are particularly likely to be interested in the harbour, boat rides and other activities including cultural attractions.

Secondary markets are Empty Nesters who enjoy the harbour, shops and galleries. For young families and under 35s, promotional messages should focus on the traditional harbour and activities to do whatever the weather, in order to overcome their concerns.

Lively Town

Representative photographs of a Lively Town







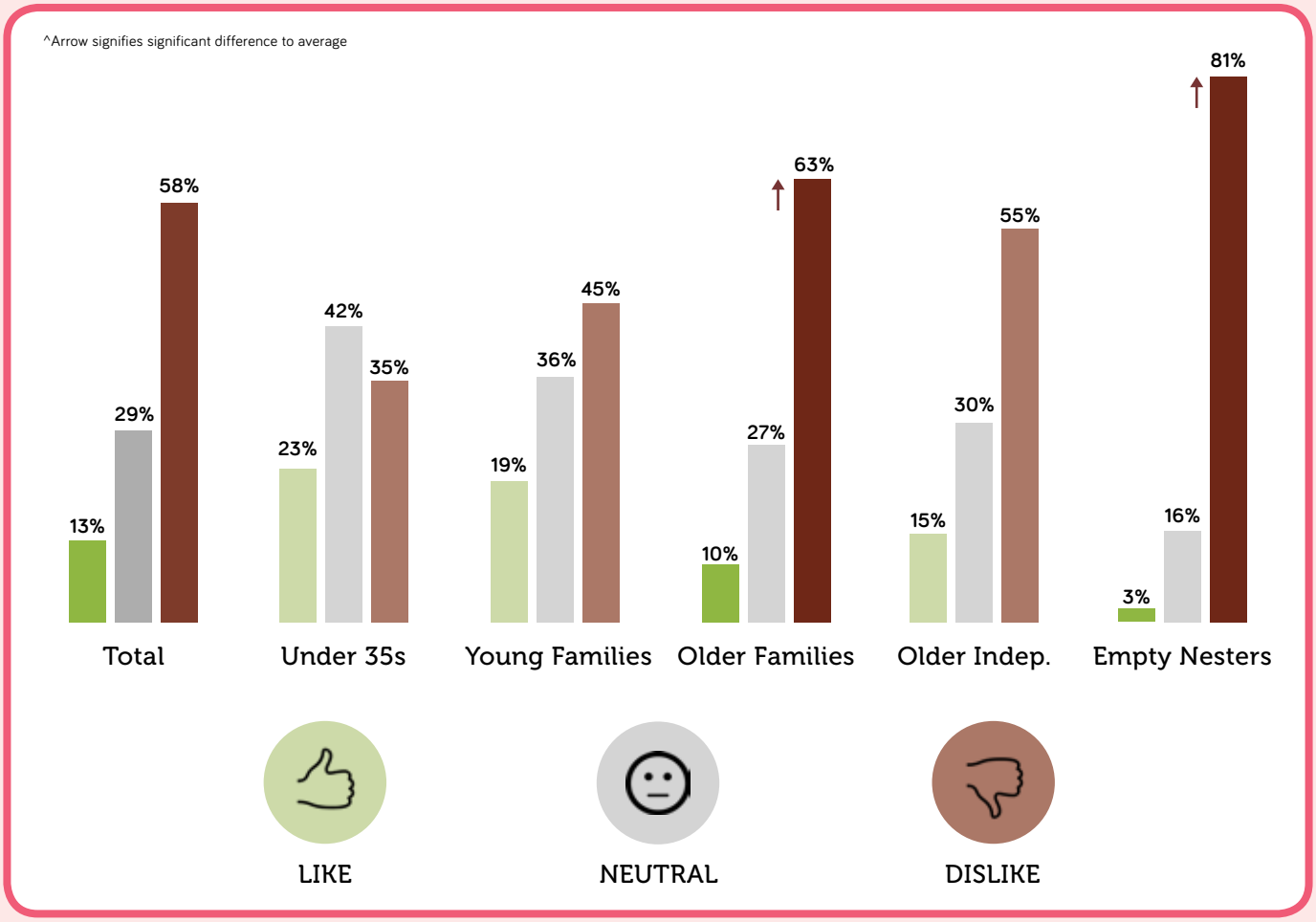






Who is likely to visit a lively town?

Likelihood to visit a lively town by lifestage



Generally there is limited appeal for Lively Towns with only **13%** of respondents saying they would be likely to visit based on the collages presented. Under 35s are the most likely to want to visit (**23%**) followed by **Young Families (19%)** although this is possibly skewed by the picture of the illuminations which received the most positive comments.





Likely Destinations

Respondents associated **Blackpool and Brighton** in particular with this type of destination.

From the reviews of the Lively Towns imagery, there were some positive comments around fun, lovely atmosphere and plenty to do. However, negative reactions focused on ‘noisy’, ‘rowdy’, ‘drunken people’ and ‘tacky’.

Lovely atmosphere for young people

Beach looks great, fun times to be had

Plenty to do during the day and lots going on for the kids (teens) at night

BINGE DRINKERS

BRASH! TACKY!

PEOPLE ENJOYING MUSIC AND HAVING A GREAT TIME

Loud drunken people

TYPICAL 18 TO 30 RESORT WITH DRUNK AND DAFT PEOPLE

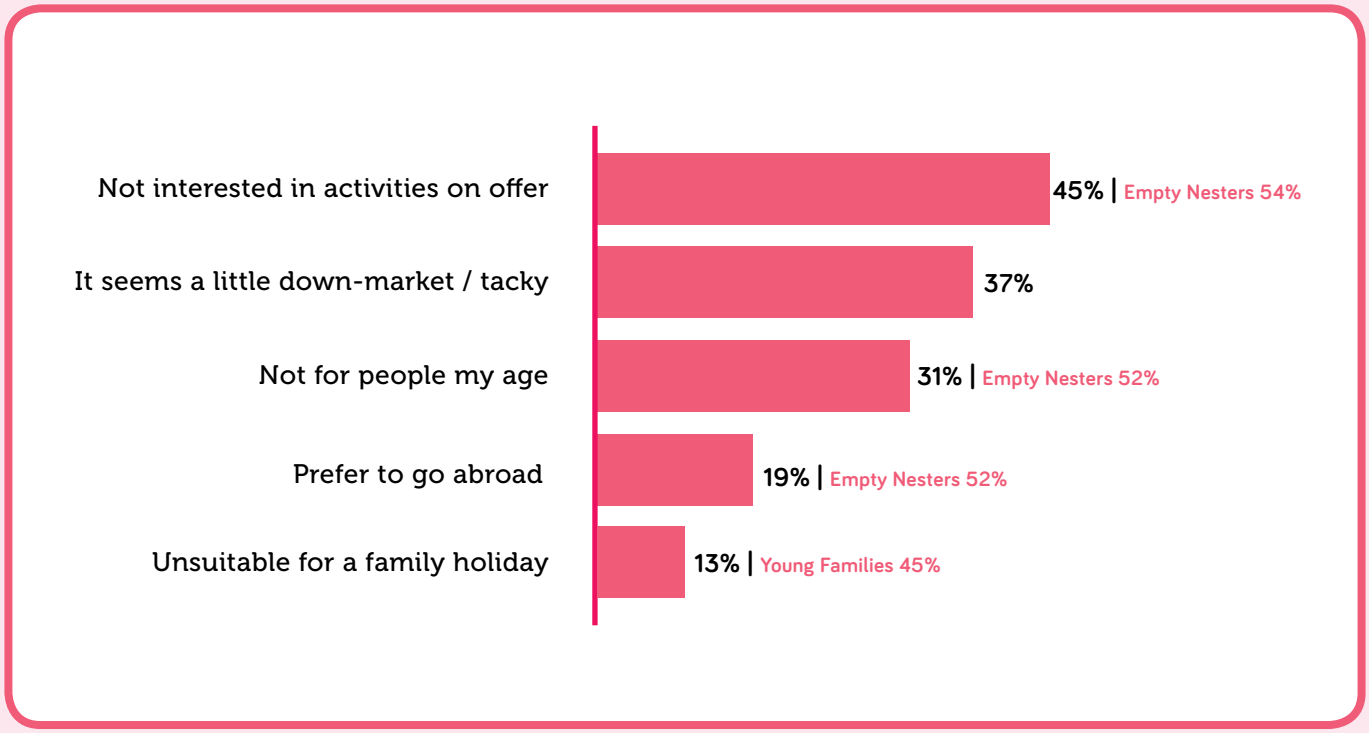
STAG AND HEN PARTIES



Not surprisingly, those groups most likely to recommend a visit were the **Under 35s (33%)** and **Young Families (43%)** although some families felt it was unsuitable for a **family holiday**, see below.



For those who were not interested, the main reasons were:

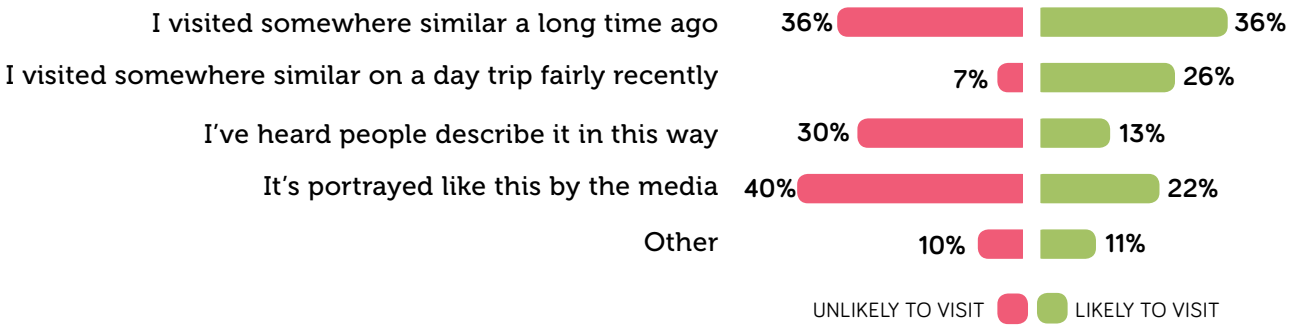


Perceptions and Summary



Perceptions of the destination often come from previous visits **(38%)** – particularly Empty Nesters **(43%)** and Older independents **(43%)**- but a significant **35%** had gained their perception from **"how it is portrayed in the media"**. Those gaining perceptions from the media or those who had **"heard people describe it"** were much less likely to want to visit than those who had **"first-hand experience"**.

Where do you think your perception of this destination has come from?



In summary, it is the liveliness of this type of destination – going out and having fun – that is their very appeal. But while their atmosphere is a positive, they suffer from perceptions of excessive drinking.

Unsurprisingly, the target group for Lively Town's is Under 35s looking for inexpensive fun in a buzzing location. Promoting the great beaches and pulsing nightclubs is a key message, whereas for families, focusing on illuminations and fun in a family-friendly atmosphere offers a positive reason to visit.

Those unlikely to visit have been influenced by images in the media. To draw Older Families, Older Independents and Empty Nesters, it's worth promoting theme parks, walks on the beach and attractions away from the perceived rowdy revellers.

Port City

Representative photographs of a port city







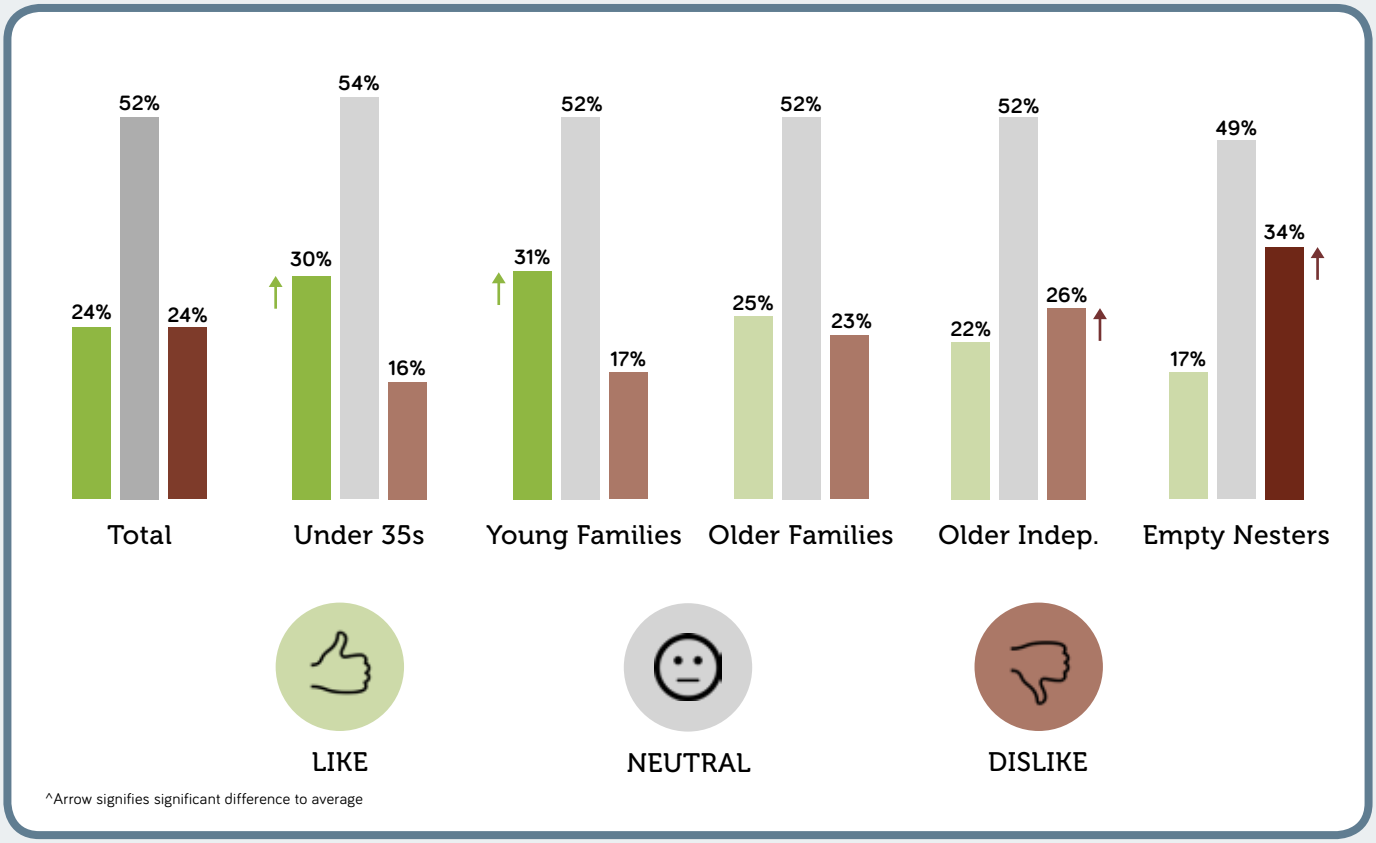






Who is likely to take a Port City break?

Likelihood to take a Port City break by lifestage



One quarter of respondents expressed an interest in visiting Port Cities with **young families (31%)**, with **under 35s (30%)** being the most enthusiastic.

However, one third of **Empty Nesters** said they were unlikely to visit.





Likely Destinations

Southampton/ Portsmouth, Plymouth and Dover were the ports most closely associated with this type of destination.

The most popular images were the aquarium and a picture of an historic ship. Most memorable activities on this type of holiday were shopping and visiting attractions particularly maritime related ones, see the word map.

Good for the kids to explore something different

Great historical sites to explore

Love the idea of visiting big historic cities, full of culture and things to do

BORING UNLESS YOU'RE INTO MARITIME CULTURE

A VARIETY OF THINGS TO DO FOR ALL THE FAMILY

Suggests a busy port, not somewhere relaxing

Don't think people would travel a few hundred miles for a shopping mall

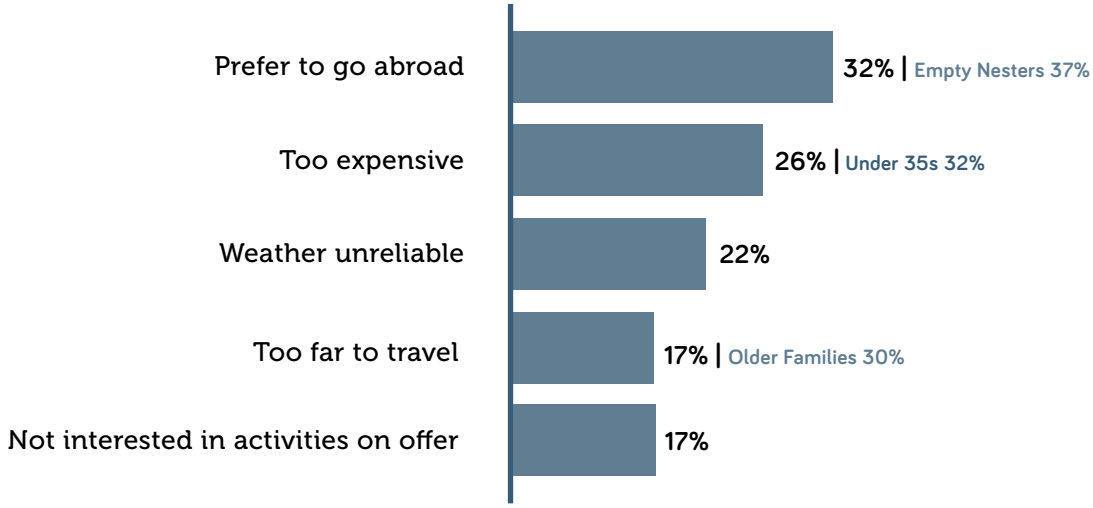


Port Cities prompted positive comments around the variety of things to do for the family, particularly exploring historic attractions. More negative comments suggested port cities would be too busy and didn't feature much if you had no interest in maritime history.



Those who had visited somewhere similar on a recent day trip were particularly likely to express an interest in visiting a Port City.

For those who were not interested, the main reasons were:



Summary



Many Port Cities have a wealth of history and for some this is big draw, particularly their maritime and naval history. The fact that attractions are less likely to be affected by the weather is a key selling point.

Key target markets for Port Cities are Young Families who are interested in shopping, and the maritime-based visitor attractions. Under 35s are also enthusiastic but need to be confident that the offer is not too expensive.

Traditional Seaside

Representative photographs of a traditional seaside break







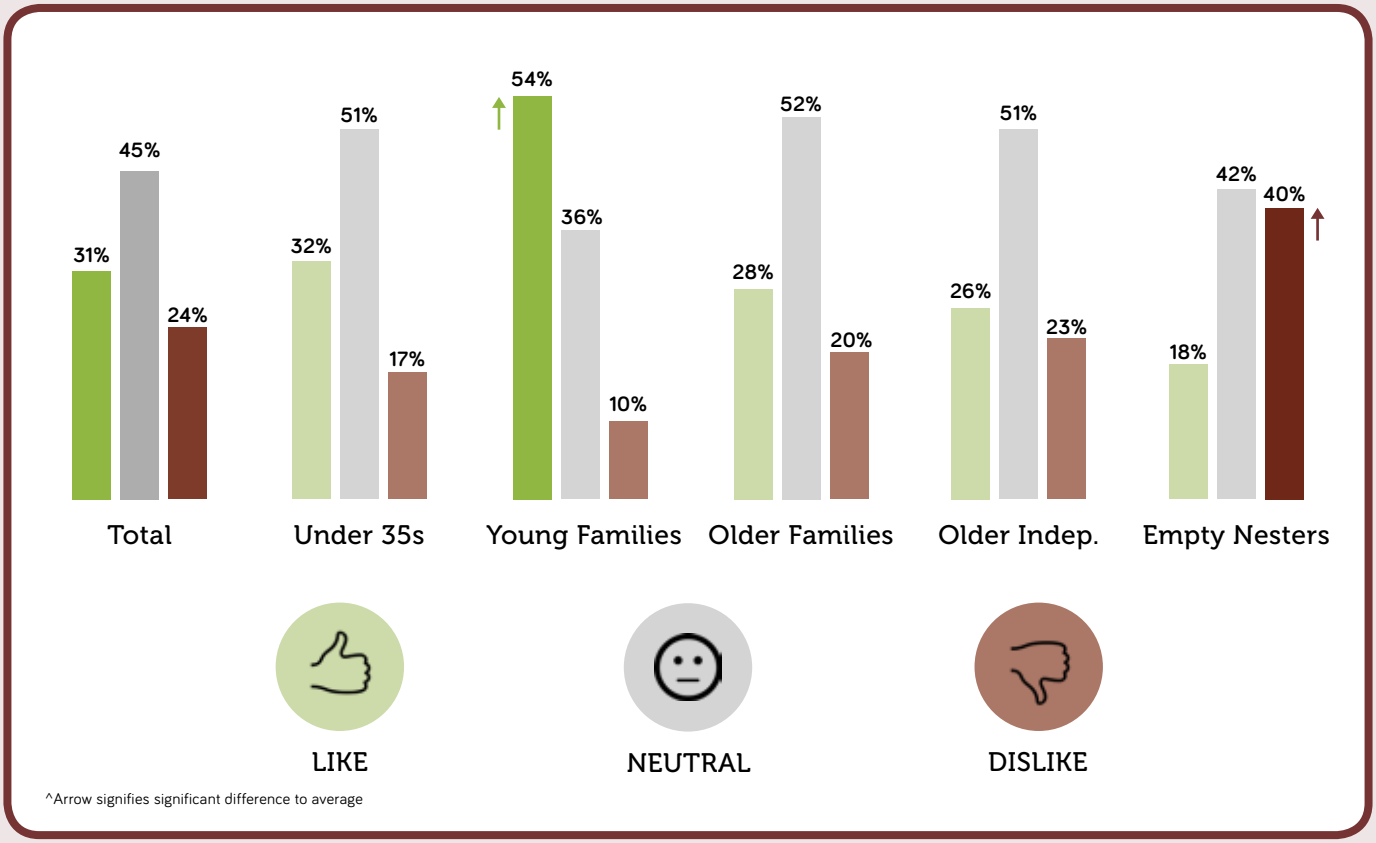






Who is likely to take a traditional seaside break?

Likelihood to take a traditional seaside break by lifestage



Traditional Seaside is the third most popular type of destination with **31%** saying they were likely to visit. Responses were significantly higher from **Young Families with 54%** saying they would like to visit. **Empty Nesters** were the least likely visitors.





Likely Destinations

Brighton, Blackpool and Bournemouth were top-of-mind when considering this type of destination.

Respondents favoured images of traditional fish and chips followed by a beach shot of children building sandcastles. When it comes to the most memorable experience of a visit to this destination type, the beach is by far the biggest draw.

A fun day out for the whole family

Perfect British beach

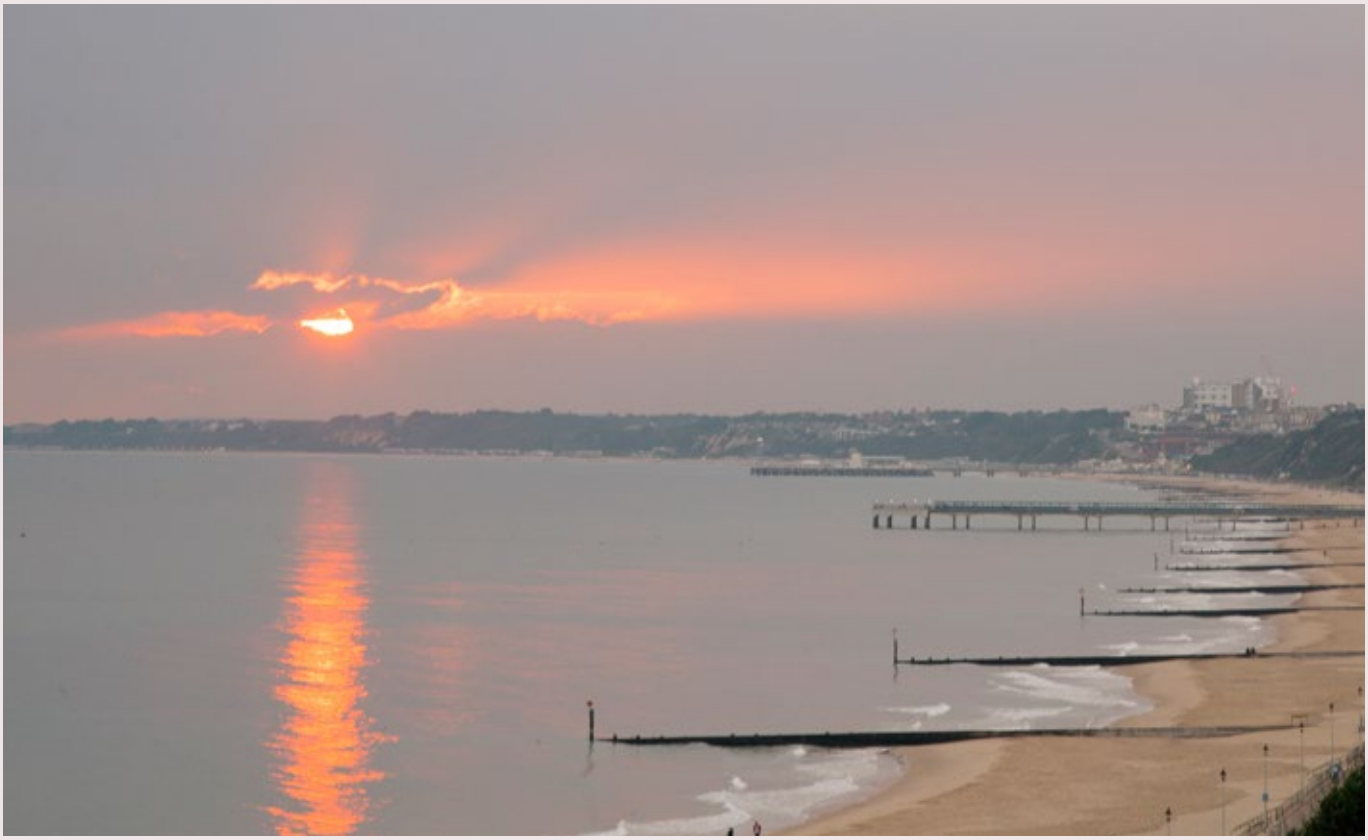
Looks a bit grey and unexciting

WE NEVER GET SUNSHINE IN THE UK FOR A COASTAL HOLIDAY

OLD FASHIONED AND HARDLY EXCITING

TRADITIONAL FUN FOR THE CHILDREN

Seaside fish and chips are the best! Fond childhood memories



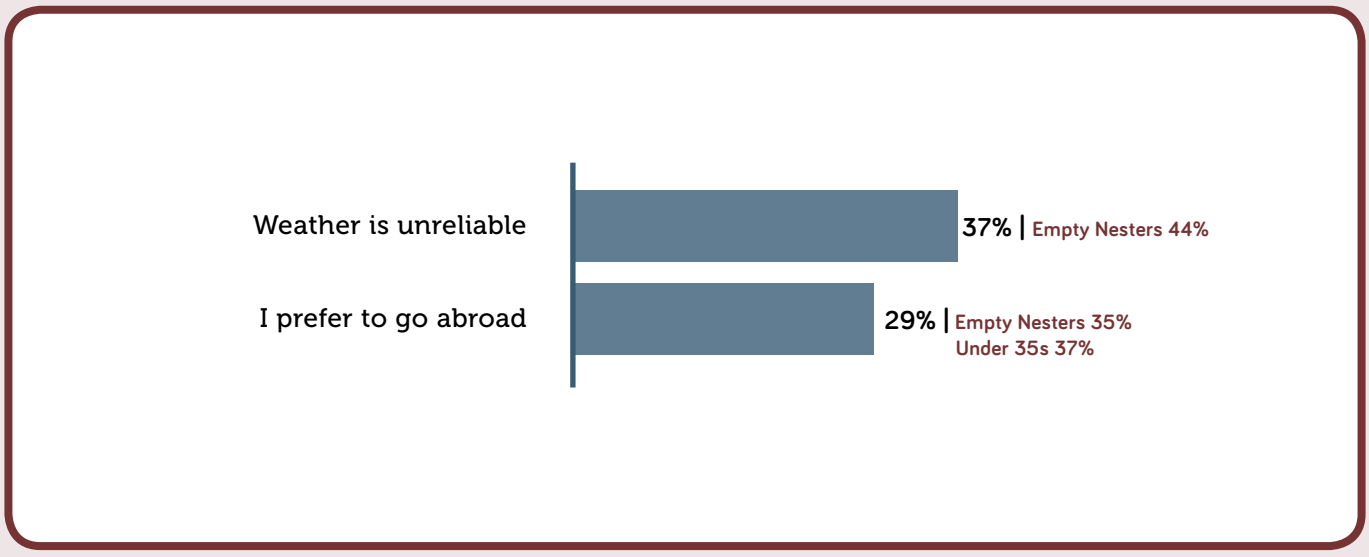
Traditional family fun, a perfect British beach and seaside fish and chips comprise the positive comments from 'TripAdvisor' reviews and postcards comments. However, conversely, the vagaries of the British weather and the impression that these resorts are old fashioned and boring present challenges.



The main barrier to wanting to visit a Traditional Seaside destination is the unreliable weather (**37%**), particularly for Empty Nesters (**44%**).

Some **29%** voiced a preference to go abroad, this was particularly true for Empty Nesters (**35%**) and Under 35s (**37%**).

For those who were not interested, the main reasons were:



Perceptions and Summary



The vast majority of respondents had gained their perceptions of the destination **"from a previous visit" (53%)**, particularly Empty Nesters at **60%**.

Under 35s **(25%)** and Young families **(38%)** had often gained perceptions from **"a recent day trip"**.

In summary, traditional Seaside destinations evoke an idea of a golden age of domestic British holidays. It is seen as a good place to spend a day, often with family, enjoying ice cream or fish and chips but reliance on good weather is a concern.

The key target group for Traditional Seaside is Young Families who are looking for family-friendly beach activities and associated traditional food. Under 35s are a secondary market attracted by the retro aspects of the seaside – piers, towers, beach huts - unavailable elsewhere, a sense of shared heritage. For Older Families the traditional aspects of a seaside holiday are important.

Promotional messages should include activities that can be enjoyed whatever the weather and a good base to explore surrounding areas and highlighting family-friendly offers on accommodation and travel.

Summary and Recommendations





Matching destinations to lifestages

Ranking of destination types each lifestage is likely to visit (scores /10)

	Under 35s	Young Families	Older Families	Older Independents	Empty Nesters
1	Harbour Town 6.7	Traditional Seaside 7.2	Coastal Retreat 7.5	Coastal Retreat 6.5	Coastal Retreat 7.0
2	Coastal Retreat 6.5	Coastal Retreat 6.7	Harbour Town 7.0	Harbour Town 6.4	Harbour Town 6.9
3	=Traditional Seaside =Port City 6.1	Harbour Town 6.5	Traditional Seaside 5.8	Traditional Seaside 5.6	Port City 4.8

Coastal Retreats and Harbour Towns are the most popular destinations according to the average scores shown above, for all age groups except Young Families who favour Traditional Seaside towns. It is worth destinations considering how they could 'package' their destination with other destination types to strengthen their appeal.

For example engaging Under 35s by messaging the many and varied activities on offer in Harbour towns, Coastal Retreats, Seaside Towns and Port Cities alongside authentic local experiences could inspire visits from this group.

Where responses are polarised, such as Active Breaks, Lively Towns and Port Cities, targeted communications is key.

In terms of target markets, the analysis of each coastal type shows that for all destination types Young and Older Families should be addressed by all destination types with the exception of Lively Towns. However, school holiday restrictions reduce the opportunities for growth for family holidays.

So although it is important to continue to target product development and marketing to the family market, destinations need to focus on secondary markets out of season particularly at Easter, half term and two-night weekend breaks, destinations need to focus on secondary markets. For both Harbour Towns and Coastal Retreats these are Empty Nesters.

Turning barriers into opportunities

The research has highlighted the reasons visitors don't stay on the coast currently – but none of these is insurmountable and can be turned into opportunities:

Overcome Inertia

The vast majority of respondents expressed some interest in visiting one of the coastal destination types, but just haven't got round to it. So destinations need to create compelling reasons to visit now! Although special events and festivals are ideal for this, it could also simply be a seasonal message. Uninspired non-visitors who feel indifferent to the coast need to have their interest sparked, marketing campaigns need to open their eyes to the wealth of opportunities easily accessed on the English coast beyond summer.

Turn day trips into overnight stays

Some non-visitors regularly visit the coast for day trips but don't think of staying longer. Day trips could be seen as an opportunity to persuade visitors to stay longer or come back another time. Could attractions offer incentives for repeat visits if packaged with an accommodation offer?

Competition from holidays abroad

The attraction of going on holiday abroad – good weather, interesting food, value for money - are so persuasive that destinations are unlikely to be successful in convincing non-visitors to trade this for a break on the English coast as their main holiday. However, based on the positive comments about some destinations, there is a huge opportunity to promote short breaks out of season focussing especially on Coastal Retreat and Harbour Town themes.

Weather is unreliable

This is a challenge for non-visitors – but less so for Port Cities and Lively Towns. We cannot change the British weather but there is plenty to do on the coast apart from sit on a beach.

Marketing coastal destinations for year-round breaks, rather than focusing on bucket-and-spade summer holidays in sizzling heat under cloudless skies might seem a bold move, but potentially one that will reap results. Destinations need to focus on activities which can still be fun when the weather isn't ideal (walking, water sports) and promote their all-weather attractions particularly cultural and historic ones.

The coast is closed in winter

Some 45% of non-visitors see the coast as closed in winter. Although there may be certain locations where some businesses close for part of the year, the coast itself is always accessible and presents a very different type of experience off-peak that visitors may not have considered. For destinations that remain open through the Autumn and in early Spring, emphasising what there is to see and do can start to change this 'closed' perception.

Too expensive

The perception that the coast is too expensive affects Young Families and DE socio economic groups particularly. One third thinks that England is more expensive than abroad. To counteract this, offering deals, discounts and special offers need to be more actively promoted. Comparisons with destinations abroad are unhelpful!

Too far to travel

To persuade the 9% who think the coast is too far to travel, it's important to promote proximity to lesser known resorts – after all everyone within England is within 70 miles of the coast.

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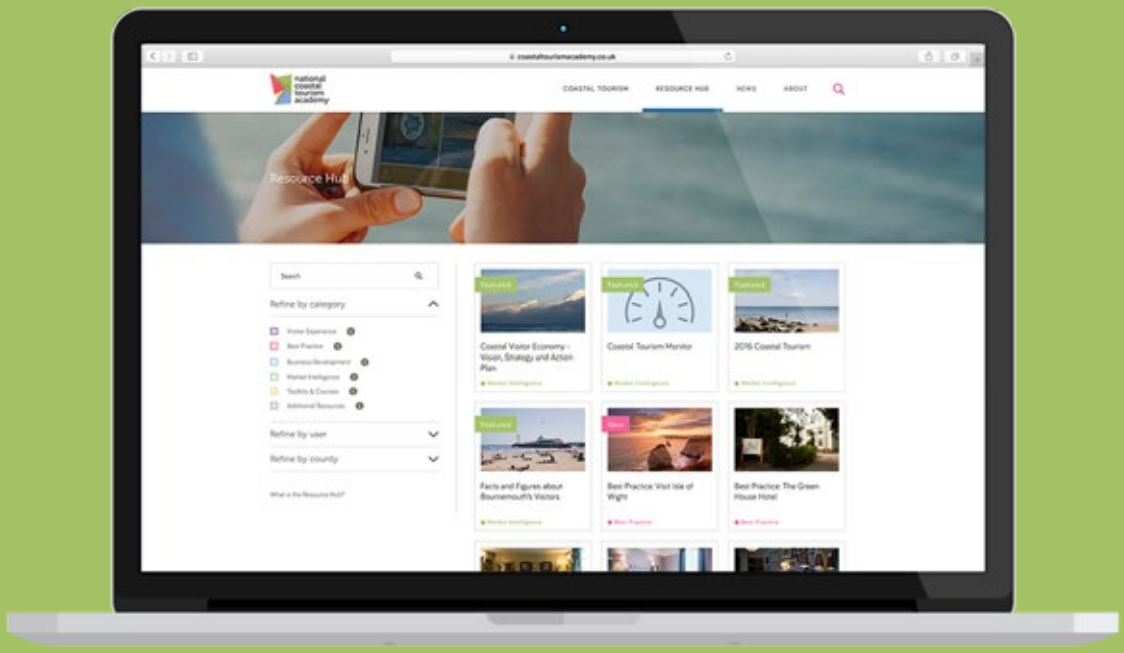

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Publication date: September 2017
Version: 1.0

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