

Coastal  
Tourism  
Forum

16

# Development Opportunities for the Coast

October 17<sup>th</sup> 2016



**HUMAN INSIGHT CONSULTANCY**  
HUMAN WINS

**Active Holidaymakers and the UK**

14 Activity  
Holiday  
Stakeholder  
Interviews

12 Activity  
Holidaymaker  
Interviews

n=1250 Online  
Quantitative  
Survey



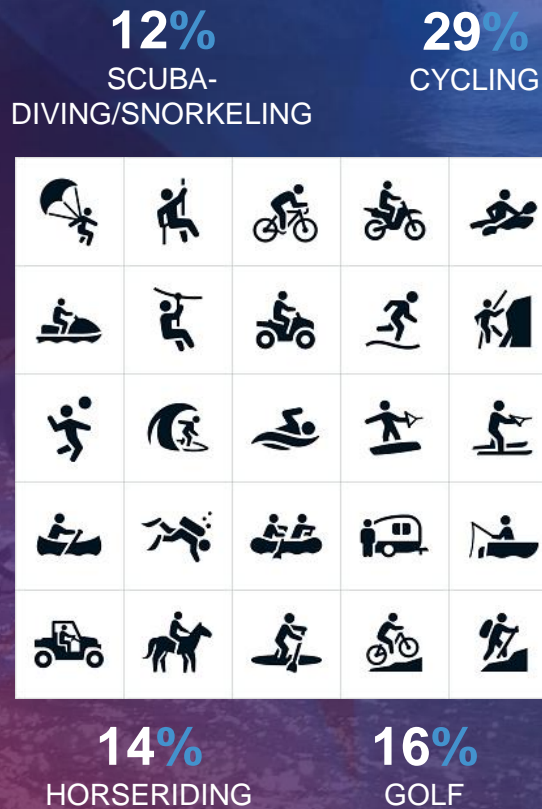
# INTRODUCING ACTIVE HOLIDAYS

1 WHAT ARE THEY?

2 WHY SHOULD WE BE INTERESTED?

# | We're here to talk about Active Holidays – but what are they?

The category is huge and connects with whole range of ages, lifestages, and psychographics



*"We hired motorboats – I was thinking about how it'd look on Instagram"*  
– Paul, Leeds

**8%**  
SAILING/YACHTING

*"I did a little write up each day to on Facebook"*  
– Paul, London

**50%**  
HIKING/WALKING

*"Can't remember what they called it, but we used to call it tomstonin"*  
– Paige, Bristol

*"More for the kids, so we're doing something with them"*  
– Lin, Bristol

**11%**  
SURFING/BODYBOARDING

*"I'd think about an activity holiday. At the moment I just do things like cycling around the Wild Atlantic Way in Ireland"*  
– Kevin, Leeds

**11%**  
KAYAKING/CANOEING

*"The English Coast has this Camelot feeling for me"*  
– Neil, Bristol

# The next generation of coastal holidaymakers had given us a lot of encouraging signs...



It delivers for under 35s in terms of fun, bonding, and relaxation

- ✦ 63% had visited at least once in the past 3 years
- ✦ 79% said that thought of it as having a fun atmosphere'
- ✦ It's already doing a great job for Beach holidays, Romantic breaks, Family holidays, and Ultra-short breaks (one night)

## | But it had also given us a bit of a challenge...

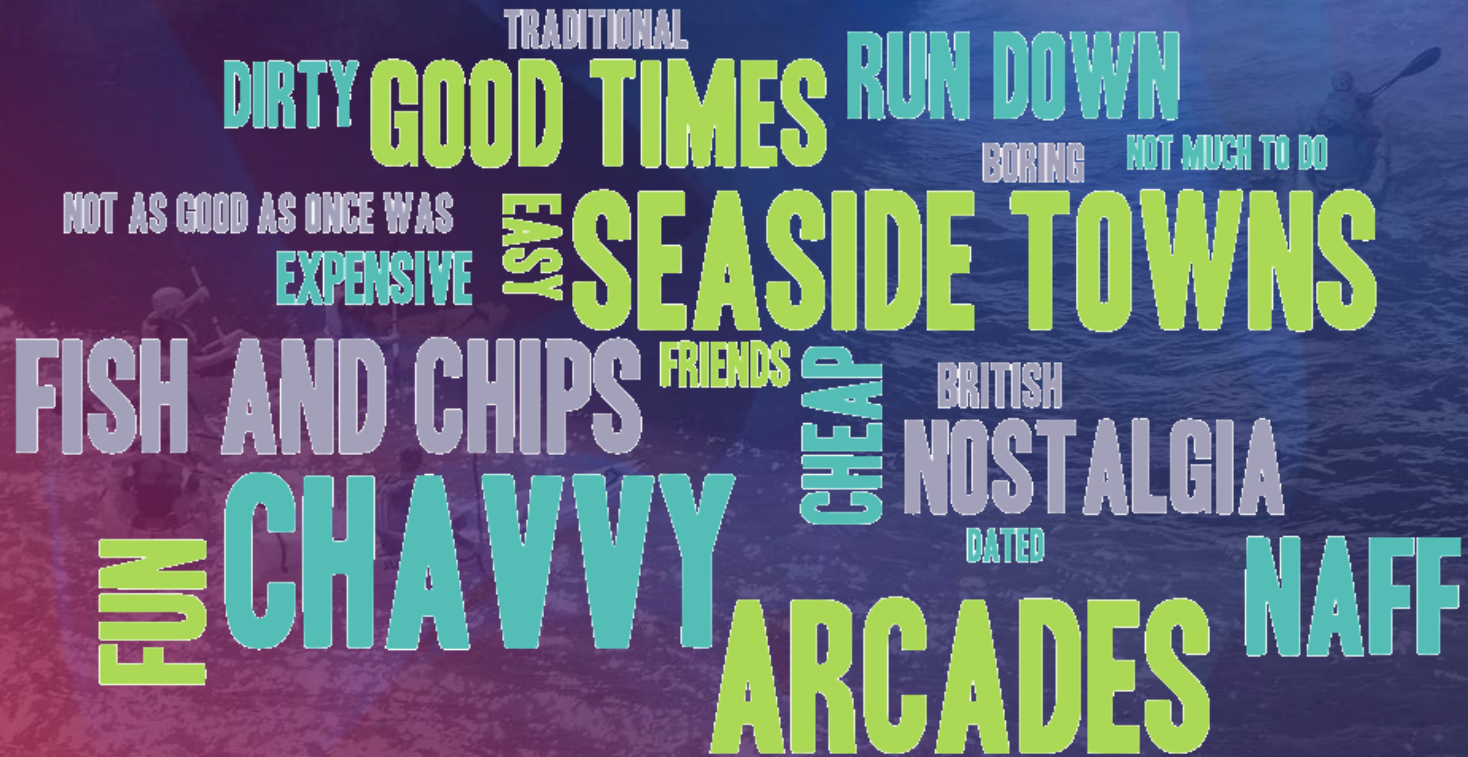


The issue is a lack of knowledge and clarity of message for that under 35 audience

- ✧ 78% said there are “lots of other places I’m more interested in visiting”
- ✧ 53% declared that they “don’t know much about it”

# | The power of the activity lens offers hope...

Compare the Under 35's associations with the Coast...



# | The power of the activity lens offers hope

...with the wider audience's positive associations of active holidays...







| The strength they bring is the holiday qualities they represent

There's something special here:

SELF-DIRECTION

55%

FUN

51%

STIMULATION

38%

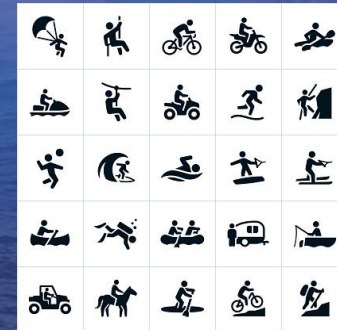
| The strength they bring is the holiday qualities they represent

...and the alignment with the holidaymakers themselves

UK HOLIDAYMAKERS



ACTIVITY HOLIDAYS



**SELF-DIRECTION**

**FUN**

**ACHIEVEMENT**

**STIMULATION**

**PRESTIGE**

JUST THE RIGHT  
AMOUNT OF...

**SELF-DIRECTION**

**FUN**

**ACHIEVEMENT**

**STIMULATION**

**PRESTIGE**



# ACTIVE HOLIDAYS: THE DETAIL

1

HOW STRONG IS THE SECTOR NOW?

2

HOW STRONG COULD IT BECOME?

# | It's a healthy category right now

**18%**  
of UK  
holidaymakers to  
ENGLAND have  
been on an  
active holiday in  
the past 2 years



# | And it seems a bigger market for UK holidays than Overseas holidays



**18%**

of UK  
holidaymakers to  
ENGLAND have  
been on an  
active holiday in  
the past 2 years

**6%**

of UK  
holidaymakers  
OVERSEAS have  
been on an  
active holiday in  
the past 2 years

## | But the reality might be even stronger

When prompted, and having had the holiday type explained...

*“Please note, by ‘Active Holiday’ we mean a trip which includes 1 or more nights’ stay away from home, and participation in one or more activities such as hiking, cycling, golfing, watersports, etc.*

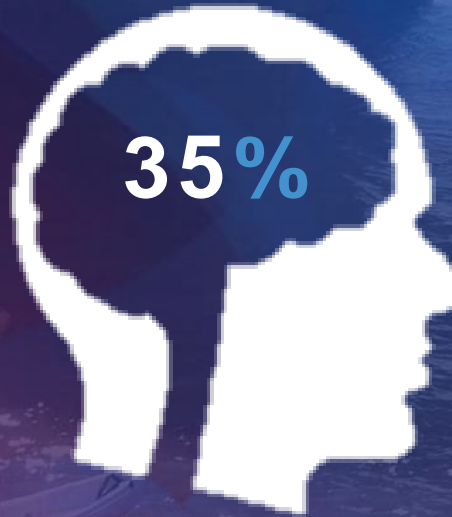
*The purpose of the trip does not have to have been to solely to do this activity.*

*In the past 2 years, have you been on holiday where one purpose of the trip was a specific activity or range of activities, such as, hiking, cycling, golfing, or watersports?”*



| And so might the bigger opportunity

Amazingly...



...are considering one right now!

# | Consideration of activities is also encouraging

Both 'classic culprits' and 'the newcomers'

**61%**  
Hiking/Walking

**43%**  
Cycling

**23%**  
Kayaking/Canoeing

**11%**  
Coasteering

**10%**  
Stand Up Paddleboarding

**22%**  
Scuba-diving/Snorkeling

**21%**  
Golf

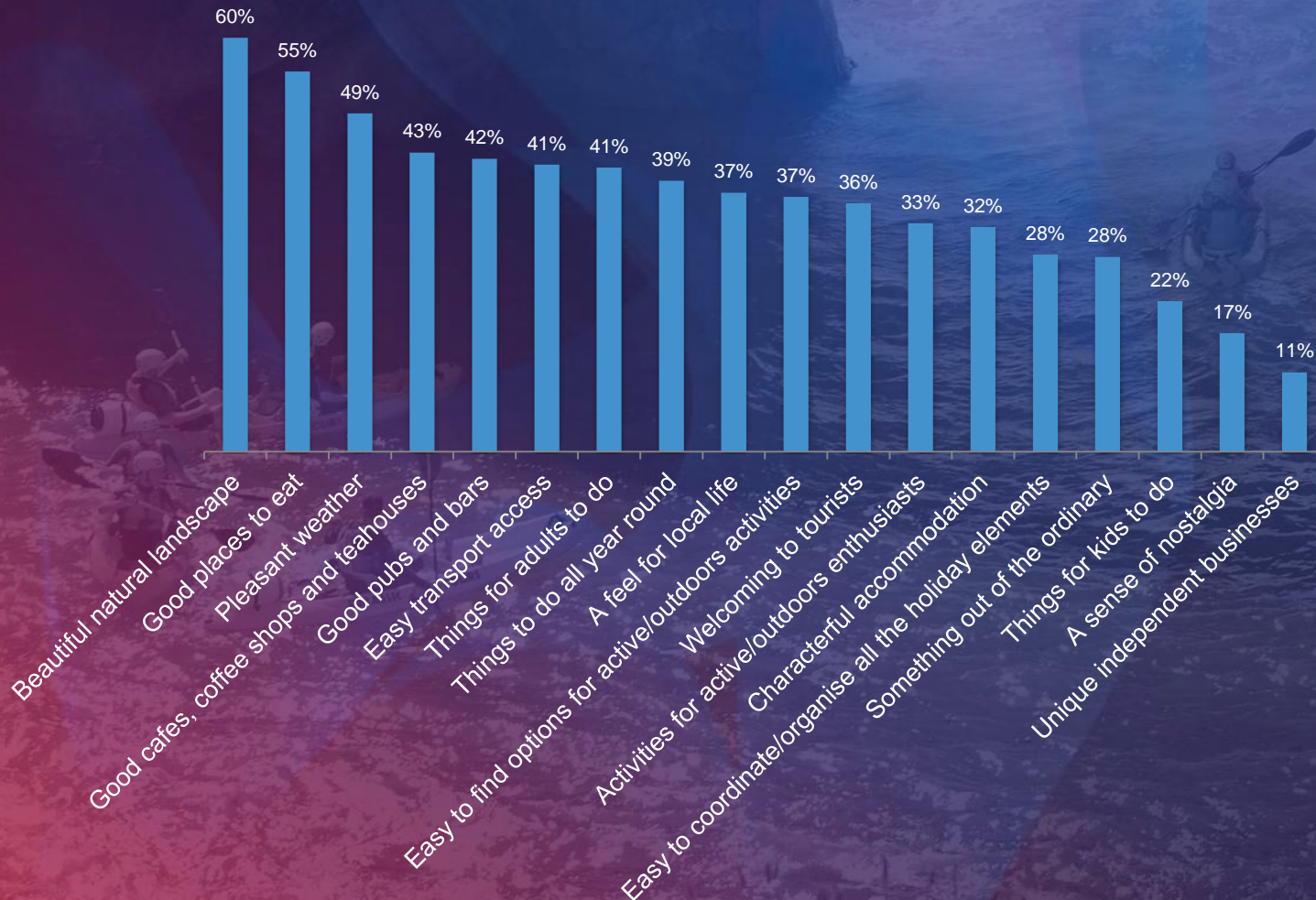
**17%**  
Surfing/Bodyboarding





# So what's going to lead this charge?

There are some familiar things that are important to people



# Let's look at the same data against how well people think the English Coast does at providing those things

What are the strengths and weaknesses, arranged by what's important to people?



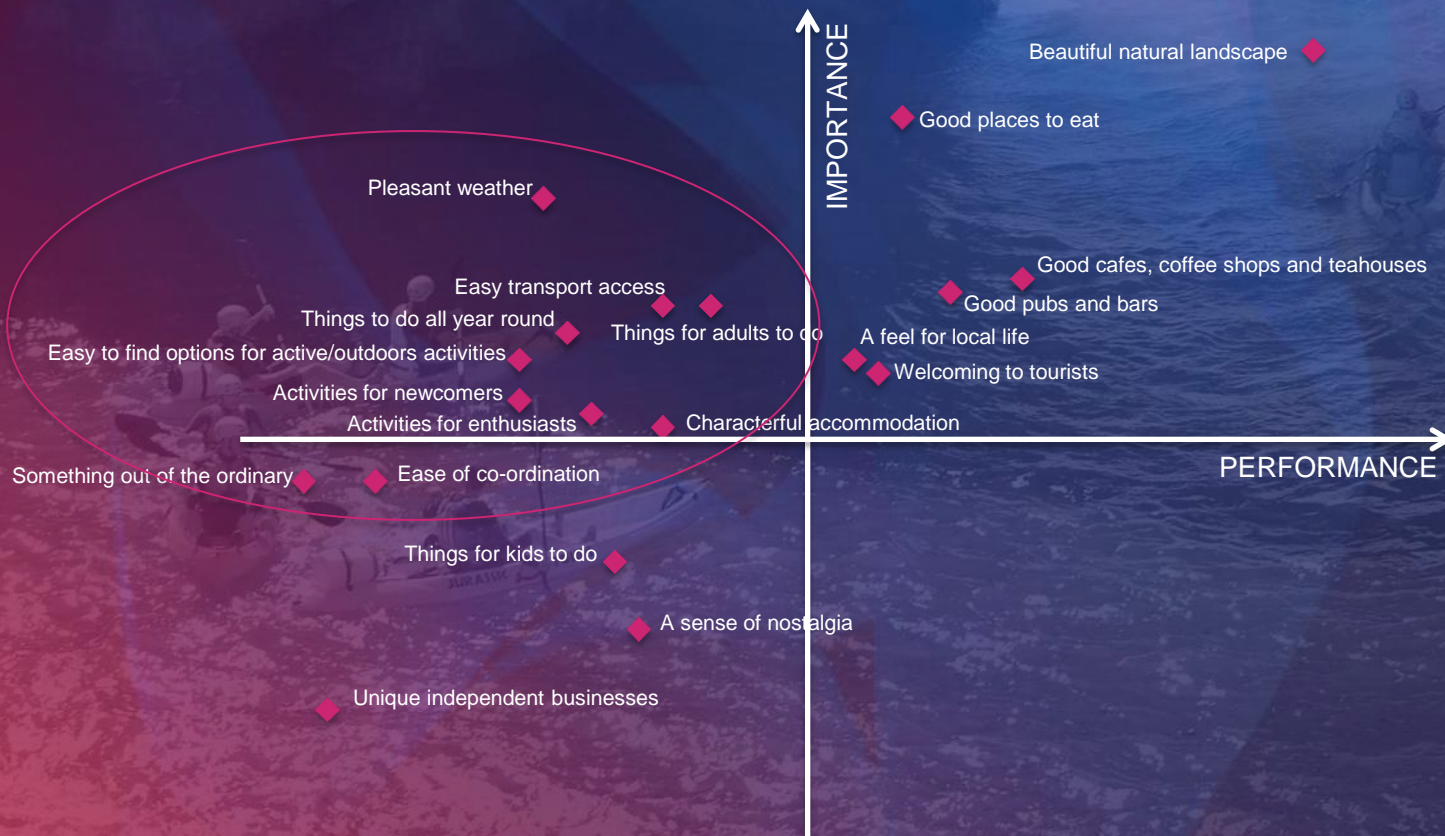
# | Are we good at everything people want?

The English coast has some clear 'Hero' features to play with, and some priority areas to work on



# | Are we good at everything people want?

The English coast has some clear 'Hero' features to play with, and some priority areas to work on



A group of people in swimwear are on a rocky beach. A large white circle is overlaid on the image, containing the word 'SUMMARY'. The background is a mix of blue and red tones.

# SUMMARY

1

4 REASONS TO BE HAPPY

2

4 THINGS TO THINK ABOUT

## 4 reasons to be happy:

1

- ✧ NEW AUDIENCES, NOT JUST THE 'HARDCORE'
  - ✧ Only **16%** are by themselves or with other enthusiasts

2

- ✧ POSITIVE, SUSTAINABLE IMPACT
  - ✧ Local Food & Drink Venue **38%**
  - ✧ Meet a Local Farmer **13%**
  - ✧ Food Festival **34%**
  - ✧ Local Craft/Artisan Shopping **30%**
  - ✧ Local Pastime/Activity **22%**
  - ✧ Visit Local Fair/Fete **34%**

3

- ✧ LONG TRIPS – THE KIND WHERE PEOPLE REALLY ENGAGE
  - ✧ **48%** 5 nights or more!

4

- ✧ EVEN HELPS DEAL WITH THE BRITISH WEATHER!
  - ✧ **64%** think this kind of holiday isn't weather-critical!

## | And 4 things to get us thinking:

1

✧ MASS APPEAL, BUT NOT NECESSARILY PULLING PEOPLE TO DESTINATIONS YET

✧ 45% only organised/booked after the trip had been planned

2

✧ IT'S NOT PURELY COASTAL

✧ Only 37% would pick a coastal destination for their ideal active holiday

3

✧ 'ACTIVE/ACTIVITY HOLIDAYS' STILL NEED A CLEAR IDENTITY

✧ Actually, it's not just the industry that has a challenge here - holidaymakers don't know themselves!

4

✧ ORGANISATION/COORDINATION REMAINS A CHALLENGE

✧ Average number of activities picked – 3.5



**HUMAN INSIGHT CONSULTANCY**

**HUMAN WINS**

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[www.oneminutetomidnight.life](http://www.oneminutetomidnight.life)





# Coastal England Shouldering an Empty Nester Market

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Phoebe Wynne  
Research Manager  
BDRC Continental

# Who are BDRC?



**NCTA International Visitor Research**



**Annual Free Holiday Trends report**



**Domestic Tourism business monitors**



**Global Tourism Monitor**



**Hotel Guests Survey**



**Tourism insight reports**

# Empty Nesters: A golden opportunity for the coast

**Growing**



**Financially Comfortable**



**Flexible**

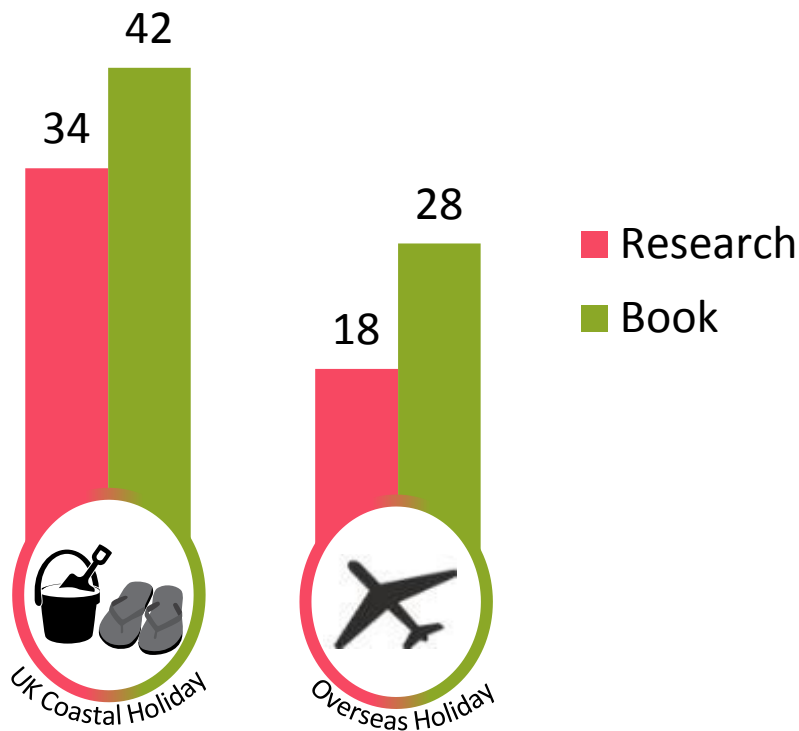


**Aspire to travel**

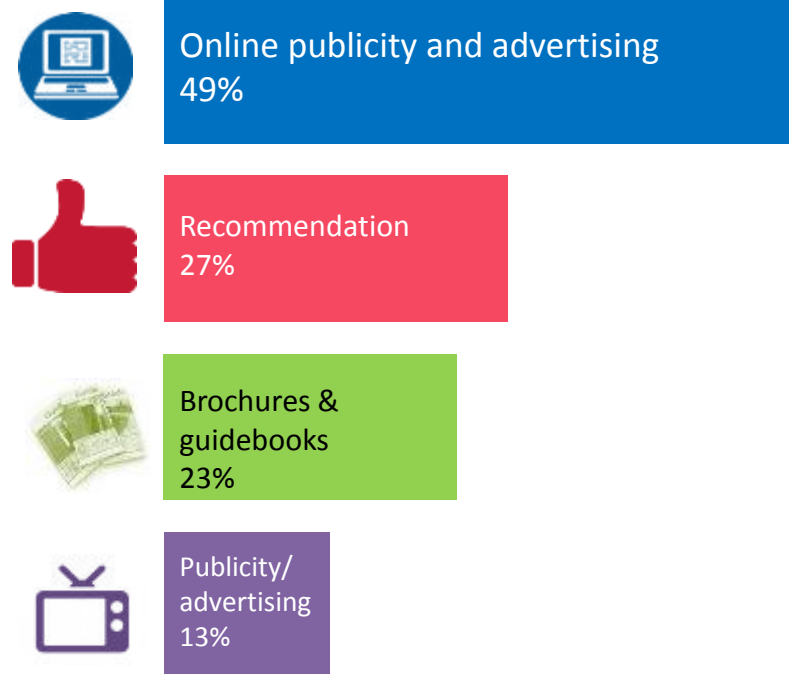


# UK off-peak coastal trips tend to be spontaneous.... and researched online

% of empty nesters who research and book a trip between a month and a day before departure

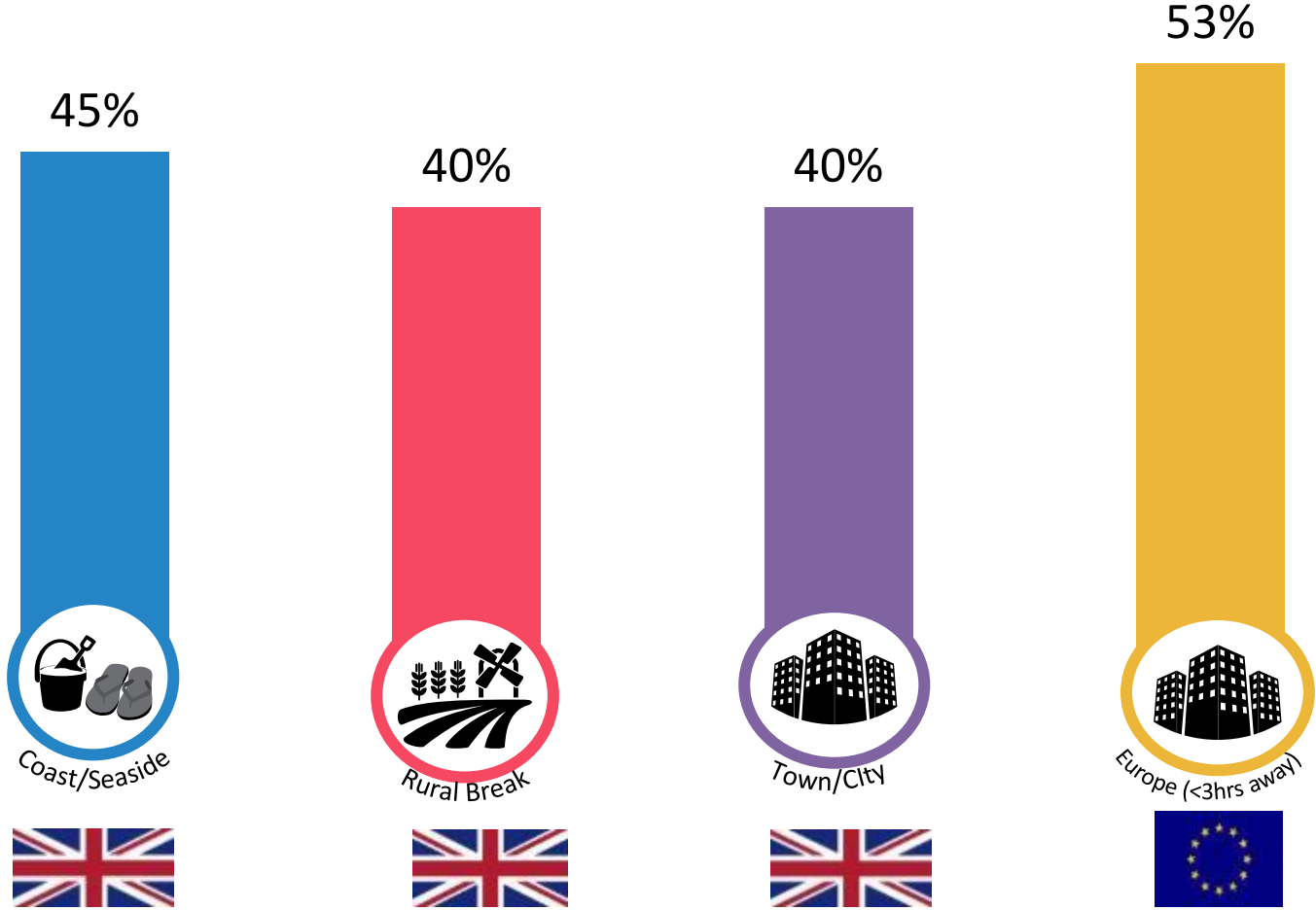


% of empty nesters using sources to research holiday



# Less than half choose to go to the UK coast

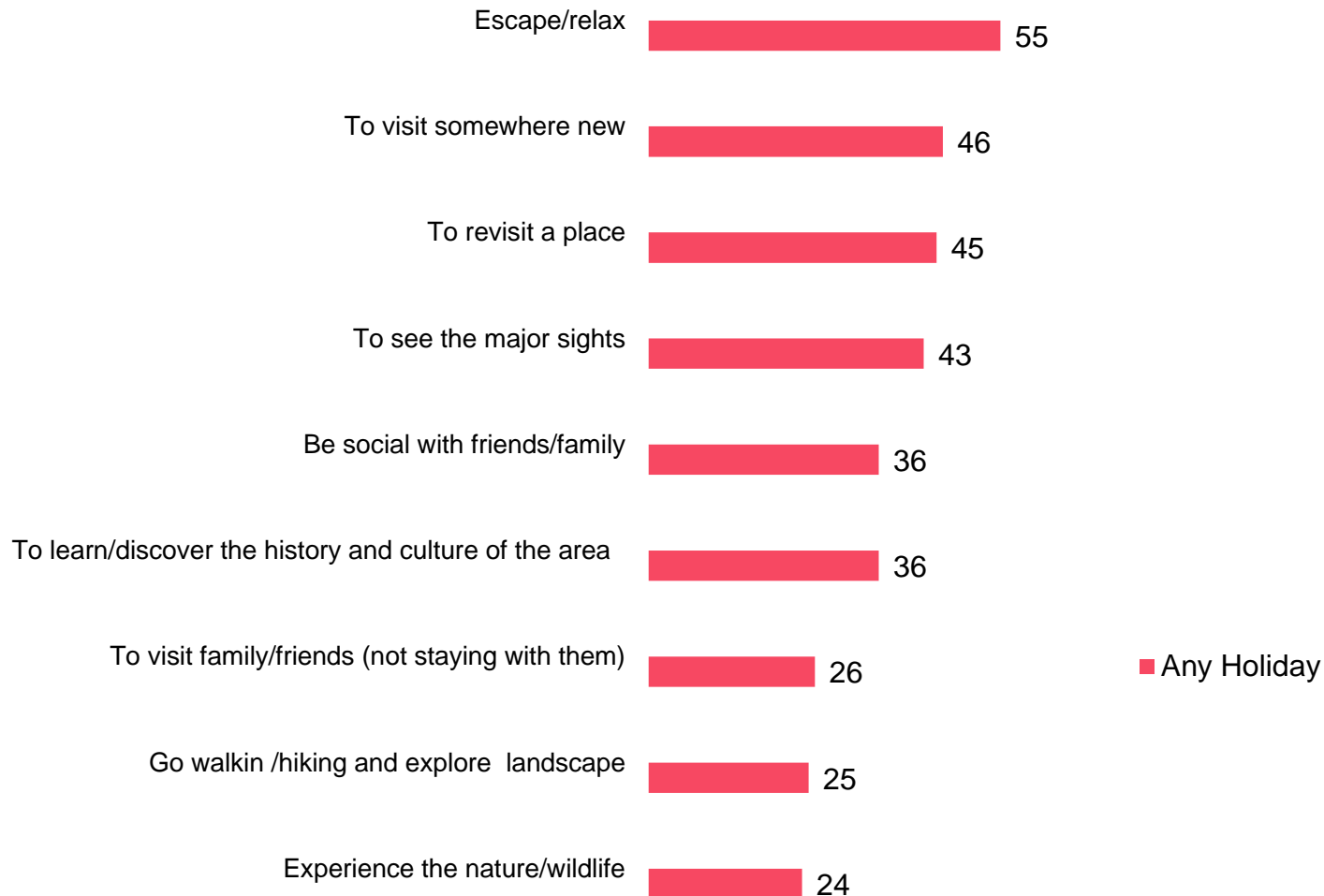
Empty Nester holiday destinations in the last two years



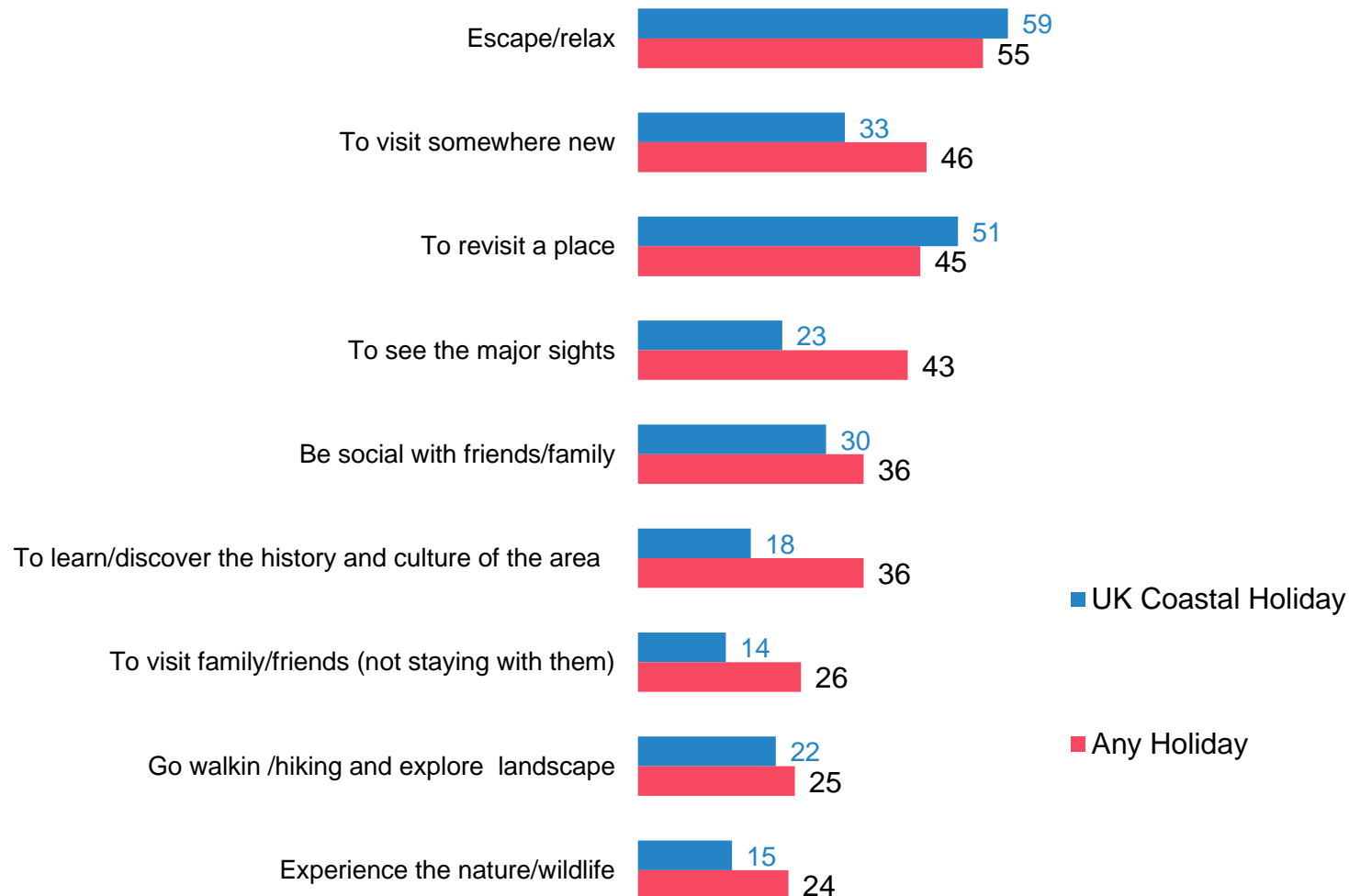
# Barriers to coast we can't change, others we can



# Reasons for visiting UK coast off-peak vary – no ‘one-size fits all’ approach

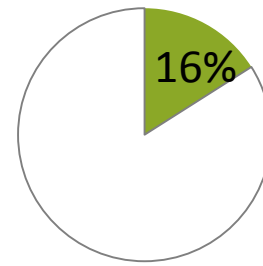


# Reasons for visiting UK coast off-peak vary – no ‘one-size fits all’ approach





# Coastal Enthusiasts



## Key Characteristics

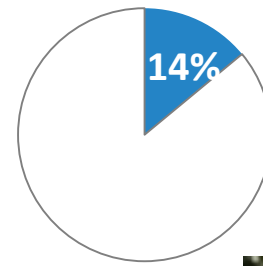
- Active
- Social
- Looking for new places to see
- Advocates of the UK Coast



## How to attract:

***Promote plenty of opportunities to explore history and culture, and opportunities to socialise and meet new people***

# Energetic Enjoyers



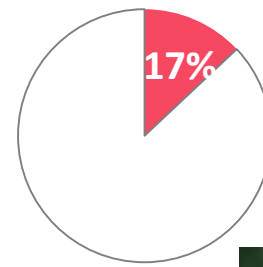
## Key Characteristics

- Lively and playful
- Social
- Enjoy novelties



## How to attract:

***Offer plenty of activities to enjoy and pursue, along with opportunities to socialise and make new friends***



# Natural Coasties

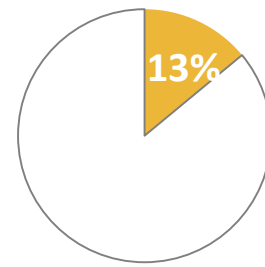
## Key Characteristics

- Less sociable
- Reserved
- Notable affinity with nature



## How to attract

*Promote a peaceful, secluded environment with the chance to enjoy nature*



# Contented Coasters

## Key Characteristics

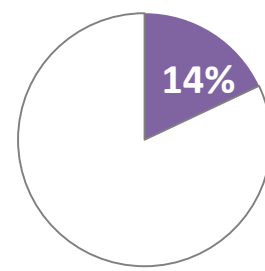
- Slow/medium paced life
- Not necessarily looking for a challenge
- Financially restricted
- Hobbyists



## How to attract

***Promote a financially viable option for a holiday to pursue a hobby or explore history or culture.***

# Aspirational Elusives



## Key Characteristics

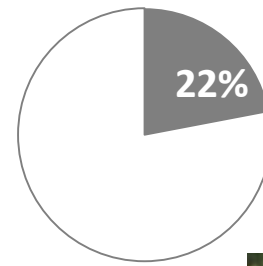
- Keen for adventure and new experiences
- Affluent
- Well travelled



## How to attract

*Offer an array of opportunities to explore history, culture and niche/unusual galleries and museums, with the ability to stay in high quality accommodation*

# Sun Seekers



## Key Characteristics

- Lead a busy pace of life
- Enjoy the sun and traveling abroad



## How to attract

*Offer an array of opportunities to relax and unwind, even when there is a lack of sunshine. A safer and cheaper alternative to an overseas sunshine break*

# The opportunity for coastal wellness tourism

by Jon Young  
BDRC Continental

# What is wellness tourism...?



***“ A wellness holiday is where the primary purpose is to take part in activities and/or use facilities that enhance health and well-being ”***



# Wellness holidays are a mind-set. But have specific requirements.



- It has a vibrant local cultural offer e.g. museums, arts, heritage
- Opportunity for authentic local experiences you couldn't get elsewhere
- Mind & body class activities eg. Yoga, tai chi, meditation
- Range of 'soft' adventure activities eg. Cycling, hiking etc.
- Opportunities to make friends and/or socialise
- It is an area with known reputation for wellness
- Opportunities to develop new skills/ interests
- Range of sports facilities
- A good range of premium leisure activities e.g. opera, ballroom etc.

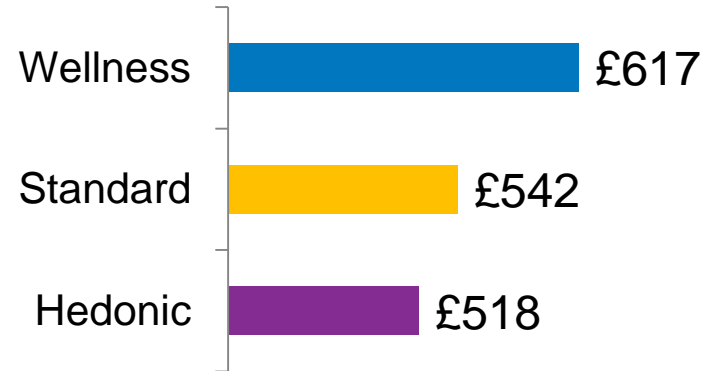
Base: All Respondents n= 1690  
 D9 For each set of attributes shown could you please tell us which is the most important and which is the least important to you when considering a wellness holiday or short-break

# Why should the coast take notice...?

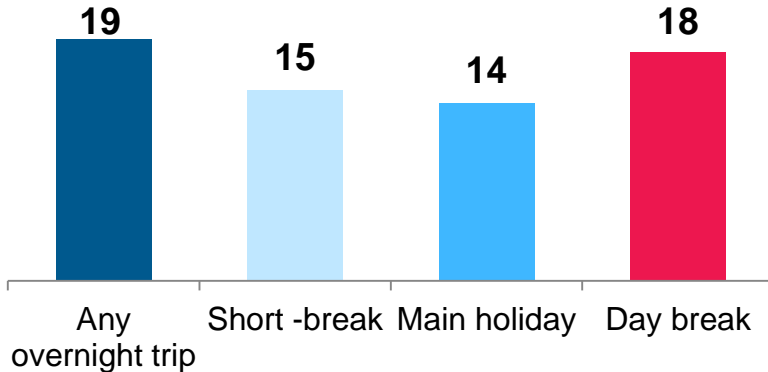
## Global value (January 2016)

**\$494  
billion**

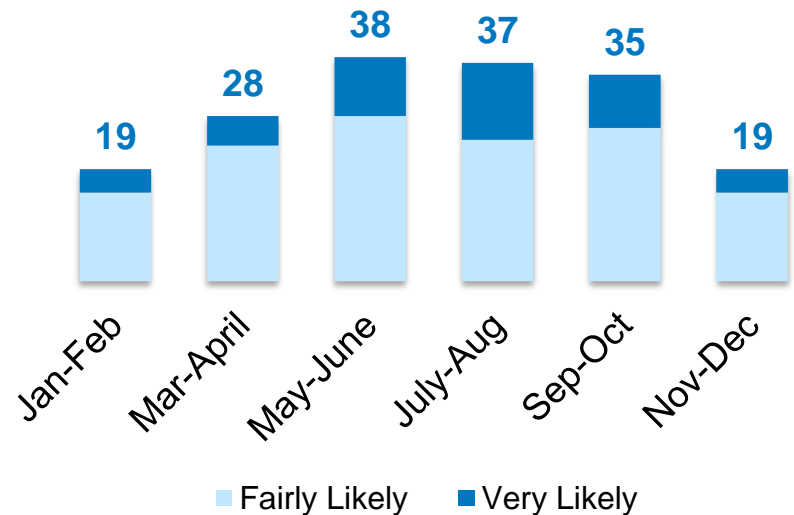
## Average spend on holiday type



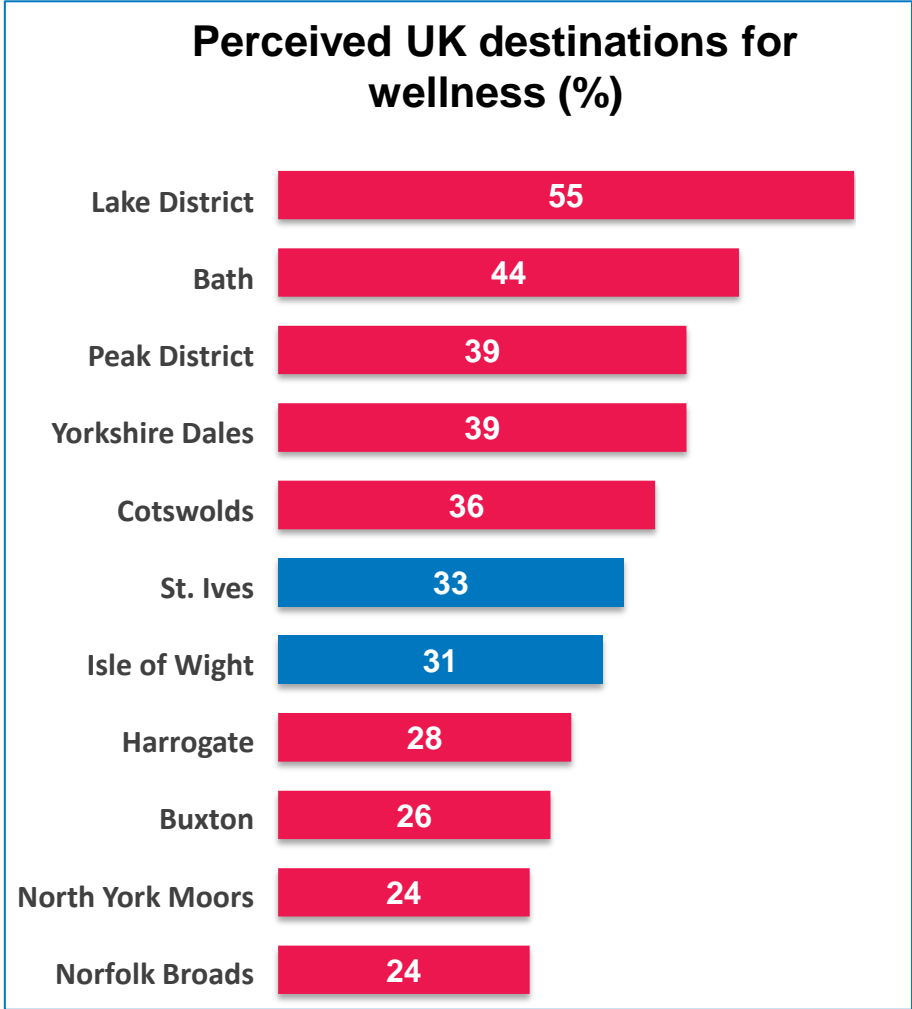
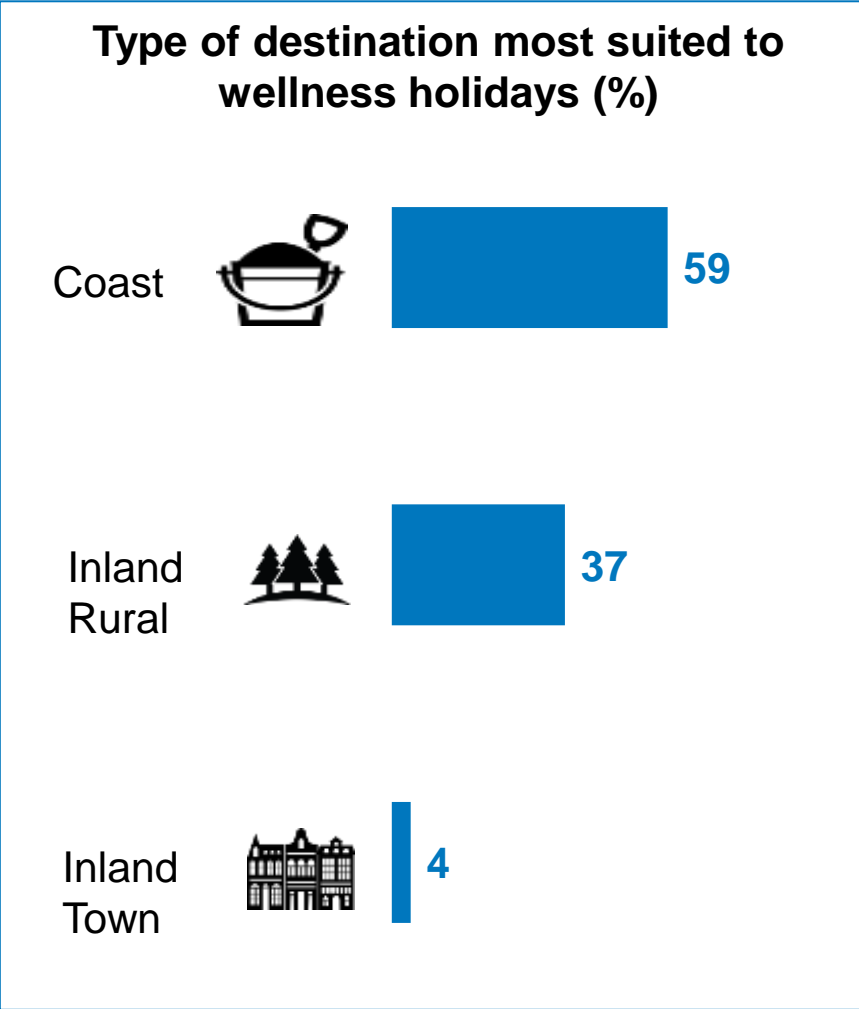
## Wellness holidays/trips in the last 12 months (%)



## Times of year likely to take a wellness holiday (%)



# The coast is the preferred type of destination for a wellness holiday, but...





“If opportunity  
doesn’t knock,  
build a door”

*Milton Berle*

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## NCTA Research

[coastaltourismacademy.co.uk/resource-hub](https://coastaltourismacademy.co.uk/resource-hub)