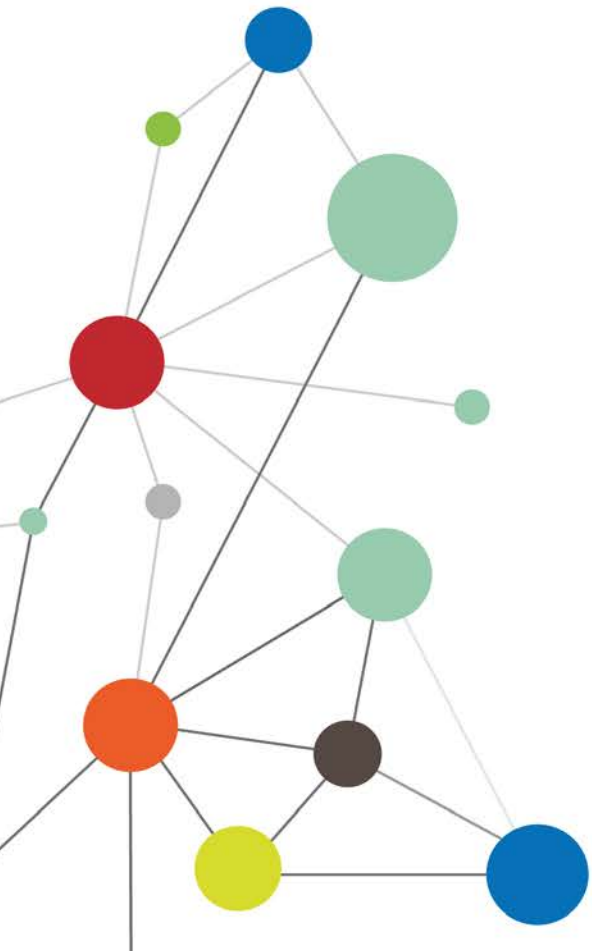
TSE RESEARCH

Coastal West Sussex Tourism Research Project 2016

Postcode Segmentation Analysis



TSE Research
40 Chamberlayne Road
Eastleigh
Hampshire SO50 5JH

TSE RESEARCH

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research@tourismse.com

MRS Evidence Matters™ Company Partner

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Acknowledgements

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Authors

Dr Parves Khan, Head of Research
Kerry Rayment, Senior Research Manager

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This document has been formatted to allow for double-sided printing

1 Introduction

1.1 2014-15 visitors data analysis

1.1.1 This analysis of Coastal West Sussex visitors is based on postcodes which have been collected from multiple visitor enquiry databases during 2014 - 2016. These are:

- 2014: Visit Chichester fulfilment request postcodes
- 2015/16: Brochure request for Worthing postcodes
- 2015/16: Brochure request for Arun postcodes
- 2016: Bunn Leisure visitor postcodes
- 2016: Goodwood visitor postcodes

1.1.2 A list of postcodes from people who have enquired about places to visit/places to stay in the area, cannot of course tell us whether they actually visited. However, the visitor enquiry database can be used to gain an understanding of which consumer segments are showing an interest in Coastal West Sussex visitors and what part of the country they live in. These findings are useful in decision around which new markets to target and the potential size of this market.

1.2 Note on data and levels of reporting

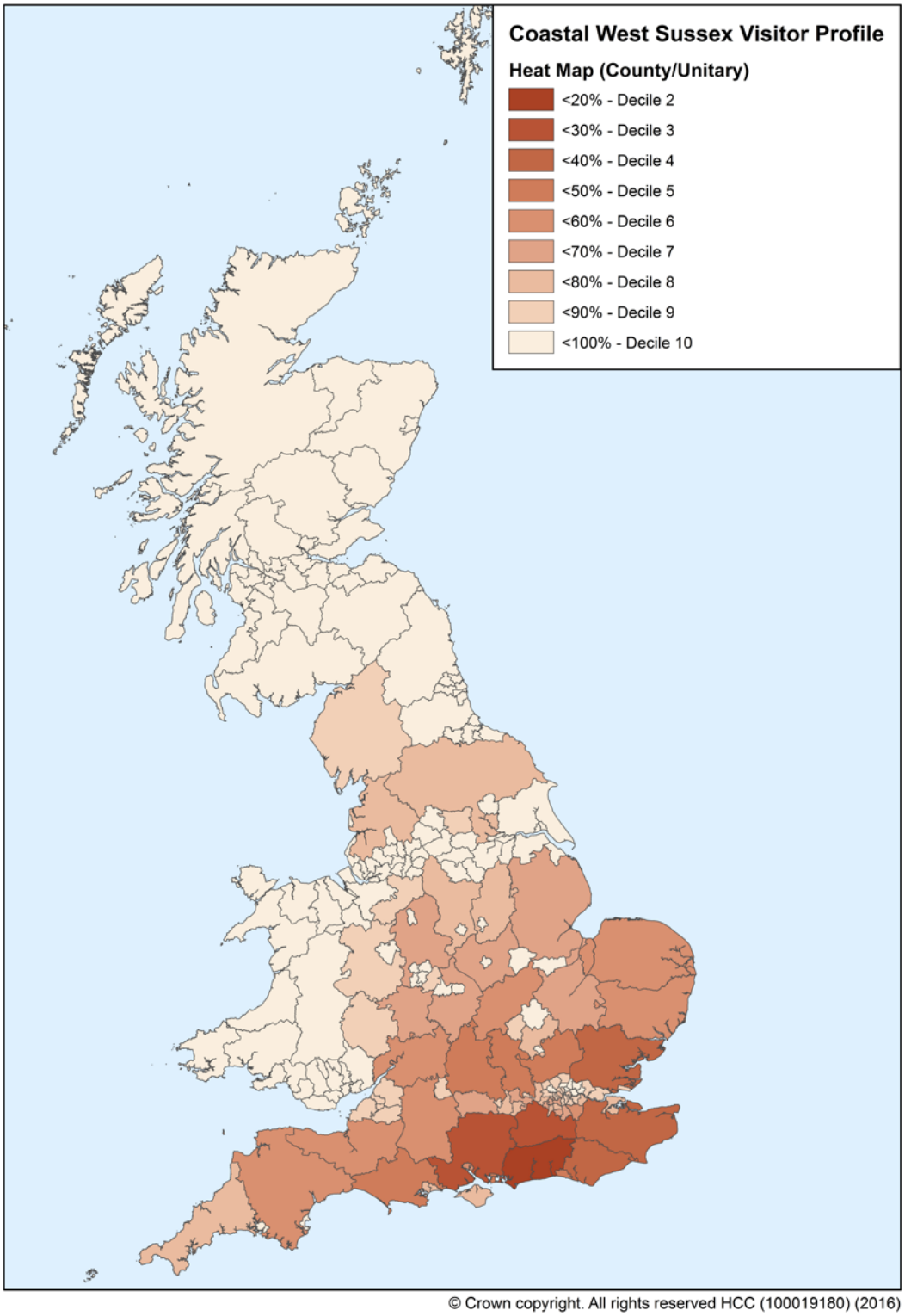
1.2.1 193,872 visitor enquirer postcodes were recorded by attractions and visitor centres across West Sussex. Of those records, 191,317 (98.7% of all collected postcodes) were able to be matched to the Mosaic socio-geodemographic profiling tool for analysis. The remaining 1.3% of records were unusable as a result of being incomplete, obsolete or incorrectly reported/recorded.

2 Mapping

2.1 Distribution of enquirers

2.1.1 This map shows a visual representation of the market penetration of all surveyed visitors during 2014 - 2015 with a fully completed, valid postcode. The postal sectors with a greater count of visitors highlight with darker red and those with zero visitors show as white.

Figure 1: Coastal West Sussex Visitors: Postal Sector (Heat Map)



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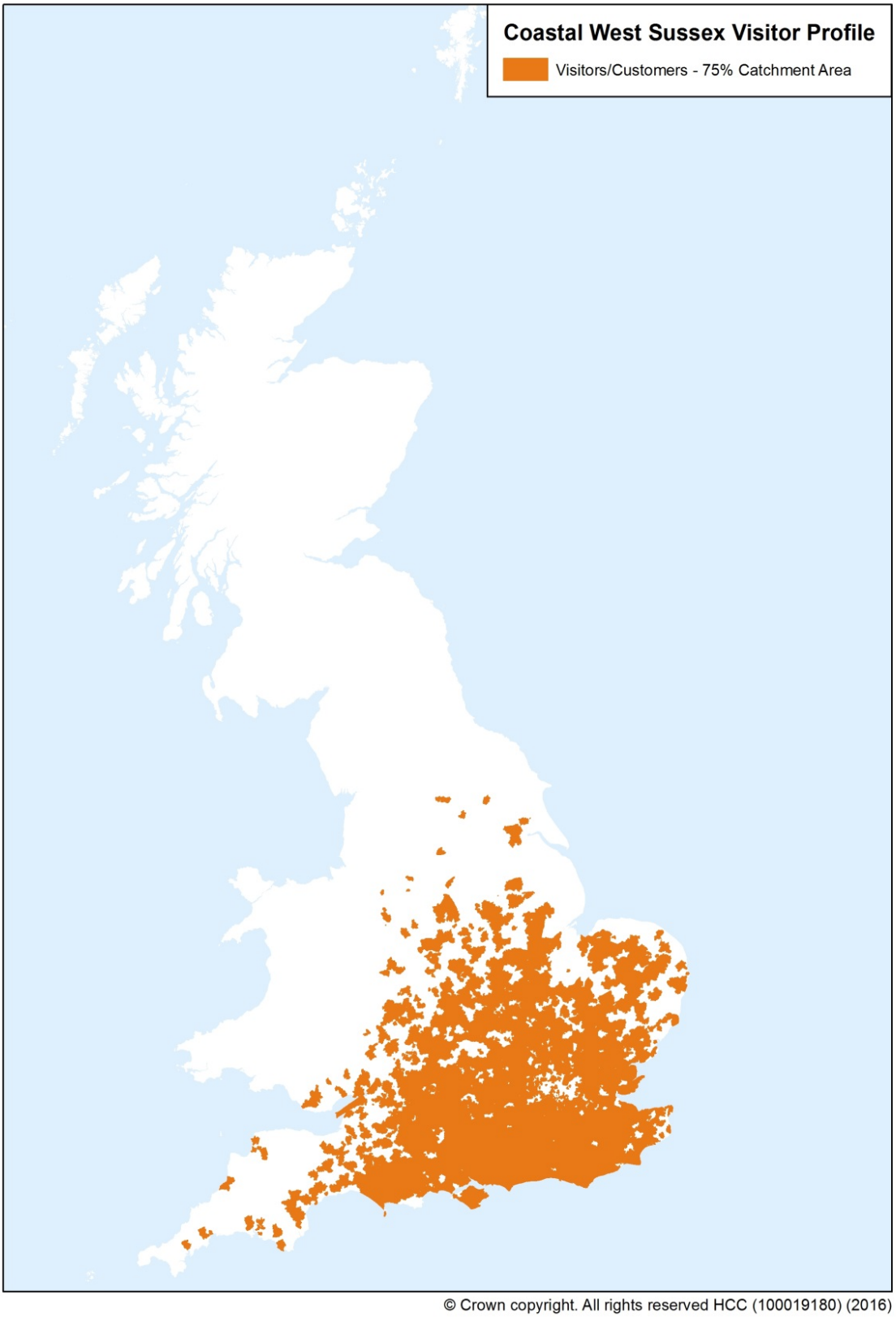
2.1.2 The map below shows the catchment area defined by plotting the core distribution of the uppermost 75% of all visitors during 2014 – 2015 with a fully completed, valid postcode. This is represented via postal sectors.

Figure 2: Coastal West Sussex Visitors: 75% Catchment Map



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3 Mosaic profile

3.1 Core Mosaic group types

3.1.1 Overall analysis of the mosaic profiling shows that 3 groups stand out when it comes to visitor numbers to Coastal West Sussex; Prestige Positions (17%), Country living (13%) and Domestic Success (13%). These groups boast the majority of the total visitors to the region and are significantly over-represented when one compares this data with the base percentage figures of these respective groups. For example, Country Living only accounts for 6% of the UK population yet 13% make up those who visited Coastal West Sussex. Therefore, there exists a higher propensity to visit than the average catchment area resident.

3.1.2 Prestige Positions accounts for 17% of the target market for those visiting the West Sussex region and thus commands a substantial index of 246. Within this group exists 2 sub-types which are relatively prominent when it comes to visitor numbers - 'Diamond Days' and 'Alpha Families'. These mosaic types are characterised by significant wealth and people who go on multiple holidays; 'Diamond Days' are predominantly retired with no children and have a wide range of investments, whilst 'Alpha Families' tend to be slightly younger. Once again, there is a greater than average tendency to visit Coastal West Sussex.

3.1.3 'Country Living' is another group which commands a high proportion of the target count, producing an index figure of 217. Within this group exists the mosaic type 'Wealthy Landowners', boasting a target count of 7% (from a base figure of 2%). This further adds to the notion that the Coastal West Sussex region is attracting wealthy visitors who see the area as a prime spot to visit for a short break.

3.1.4 'Domestic Success' also commands a relatively large portion of the target count (13%) for this region, with an index figure of 160 produced for this group. With its base count (8%) significantly smaller than its target, there is a higher than average propensity for visitors who appear under this profile to visit Coastal West Sussex. These people are likely to be high earning families who live affluent lifestyles in upmarket homes, which boast excellent commuter links to the capital. Tending to be professionals who are have young children but also intent on following a career path, this ties in with the notion that this group are likely to be working in London. Within this mosaic group exists the 'Cafes and Catchments' and are expected to be earning in the region of £70-90k per annum (combined), whilst they'd be working either in property, financial services, IT or professional services. 'Thriving Independence' is another mosaic type which has a higher than average tendency to visit the area, with its base count half of what its target count is. They also have a strong tendency to take multiple short breaks.

Key Findings

Top 3 Mosaic Groups (B, C, and G) contribute to 43% (80,962) of the total visitor numbers within the sample. All of these groups equate to 5,812,214 households within the UK.

Top 10 Mosaic Types – equate to 39% (73,602) of the total visitor numbers and 18% (5,068,101) of households within the UK.

Group B – Prestige Positions at 31,427 are the most engaged group, providing the highest percentage of those visitor numbers (17%) and are over represented within the catchment area by 10% (base figure of 7%).

Type C10 – Wealthy Landowners provide 7% (12,925) of the total visitor numbers, which is the greatest of any of the mosaic types.

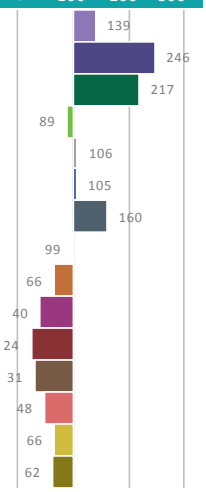
Types C10 (Wealth Landowners) and C13 (Village Retirement) - feature within the top 5 Mosaic types and command a combined total of 11% of the target count.

Attracting wealthy visitors who see West Sussex as a prime spot to visit for a short break

3.1.5 With appropriately designed marketing communications delivered through their preferred communications channels, Mosaic Groups B, C & G will more than likely yield the greatest return on investment based on the current visitors to Coastal West Sussex.

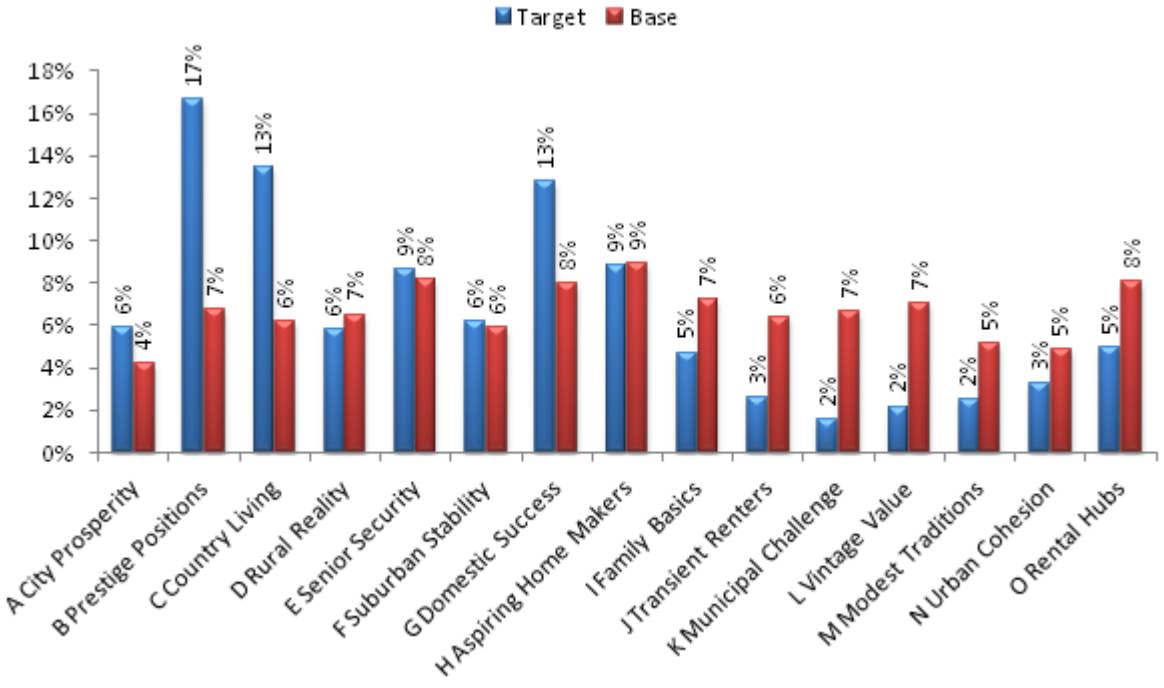
Figure 3: Core Mosaic Group types found in Coastal West Sussex

Mosaic Groups	Target		Base		Comparison	
Group Name	Count	%	Count	%	Penetration %	Index
A City Prosperity	11,067	6%	1,170,299	4%	1%	139
B Prestige Positions	31,427	17%	1,879,451	7%	2%	246
C Country Living	25,405	13%	1,716,369	6%	1%	217
D Rural Reality	10,895	6%	1,802,862	7%	1%	89
E Senior Security	16,348	9%	2,258,661	8%	1%	106
F Suburban Stability	11,610	6%	1,627,170	6%	1%	105
G Domestic Success	24,130	13%	2,216,394	8%	1%	160
H Aspiring Home Makers	16,698	9%	2,480,360	9%	1%	99
I Family Basics	8,890	5%	1,992,713	7%	0%	66
J Transient Renters	4,812	3%	1,753,424	6%	0%	40
K Municipal Challenge	2,974	2%	1,841,381	7%	0%	24
L Vintage Value	4,080	2%	1,953,945	7%	0%	31
M Modest Traditions	4,664	2%	1,426,815	5%	0%	48
N Urban Cohesion	6,100	3%	1,354,052	5%	0%	66
O Rental Hubs	9,404	5%	2,222,854	8%	0%	62
Unclassified	2,813	-	-	-	-	
Base	**188,504**	**100%**	**27,696,750**	**100%**	**1%**	**100**



Note:
Target = Coastal West Sussex: Enquirers (2014 - 2015)
Base = UK excluding Northern Ireland (Households)

Figure 4: Core Mosaic group types compared to national average



Note:
Target = Coastal West Sussex: Enquirers (2014 - 2015)
Base = UK excluding Northern Ireland (Households)

3.2 Core Mosaic group segments - key features

3.2.1 A summary of the most popular Mosaic Segments within each Mosaic Group is presented below.

- **C10 Wealthy Landowners**

Prosperous owners of country houses including the rural upper class, successful farmers and second-home owners

- High value large detached homes
- Rural locations
- Own several cars
- Most likely to own a horse
- Mature married couples
- Own both PC and laptop

- **H30 Primary Ambitions**

Forward-thinking younger families who sought affordable homes in good suburbs which they may now be out-growing

- Cohabiting couples with children
- Aged 26-45
- Good household incomes
- Own with a mortgage
- 2 or 3 bedroom terraces or semis
- Family neighbourhoods

- **G26 Cafés and Catchments**

Affluent families with growing children living in upmarket housing in city environs

- Professional couples with kids
- Good income
- Pleasant family homes
- Attractive city suburbs
- Proximity to jobs and entertainment
- Most likely to have children 12-17

- **G27 Thriving Independence**

Well-qualified older singles with incomes from successful professional careers in good quality housing

- Singles and cohabitees 36+
- Family neighbourhoods
- Middle managers
- Large outstanding mortgage
- Comfortable income
- Moderate use of internet

- **I36 Solid Economy**

Stable families with children renting better quality homes from social landlords

- Families with children
- Renting from social landlord
- Pockets of social housing
- Lower wage service roles
- Relatively stable finances
- Small bills can be a struggle

- **B07 Alpha Families**

High-achieving families living fast-track lives, advancing careers, finances and their school-age kids' development

- Married couples
- Two professional careers
- School age children
- High salaries, large mortgage
- Online shopping to save time
- Company cars and mobiles

- **B06 Diamond Days**

Retired residents in sizeable homes whose finances are secured by significant assets and generous pensions

- Well-off retirees
- Spacious detaches homes
- Comfortable retirement income
- Wide range of investments
- Check stocks and shares online
- Often take short breaks and holidays

- **C13 Village Retirement**

Retirees enjoying pleasant village locations with amenities to service their social and practical needs

- Retired couples and singles
- Larger village location
- Like to be self-sufficient
- Enjoy UK holidays
- Most likely to play cricket and golf
- Often prefer post for communications

- **B05 Premium Fortunes**

Influential families with substantial income established in distinctive, expansive homes in wealthy enclaves

- Extensive detaches homes
- Substantial income
- Teenage kids & students
- Portfolio of investments
- Directors and senior managers
- High mobile phone spend

- **D14 Satellite Settlers**

Mature households living in expanding developments around larger villages with good transport links

- Mature households
- Live in larger villages
- Close to transport links
- Own pleasant homes
- Online groceries
- Try to reduce water used in home

Group B: Prestige Positions

Key Features

- High value detached homes
- Married couples
- Managerial and senior positions
- Supporting students and older children
- High assets and investments
- Online shopping and banking

Who we are

Age	Household income
56-65	£100k-£149k
Household composition	**Number of children**
Family	1 child
Tenure	**Property type**
Owned	Detached

Overview

Prestige Positions are affluent married couples whose successful careers have afforded them financial security and a spacious home in a prestigious and established residential area. While some are mature empty-nesters or elderly retired couples, others are still supporting their teenage or older children.

Core Features

Prestige Positions are well-educated couples who have reached senior and managerial positions in companies, or have accomplished professional careers. This is also the group most likely to have achieved success as directors of their own profitable businesses.

Prestige Positions live in large family homes even though some of them no longer have children living at home. These are expensive detached properties, frequently with five bedrooms and large mature gardens in easily commutable locations. Of those whose children have grown up many are still offering support, either with a place to live in the family home, or by supporting them through university. For this group the continued financial support of their children is not a problem. Almost all own their own home, many outright and, in addition to sizeable salaries or large pensions, they have a substantial investment portfolio making their financial situation very comfortable.

With busy lives to manage many make good practical use of the internet without spending long hours online. In particular they manage bank accounts online, search for savings accounts with the best interest rates, and save time by shopping online.

In general, Prestige Positions are attracted to premium brands, are able to afford expensive holidays and are well insured often including private medical insurance.

Group B: Prestige Positions

Shops Visited

Waitrose

MARKS & SPENCER

Sainsbury's

Online Activity: Grocery Shopping

With busy lives to manage many make good practical use of the internet without spending long hours online. They look to save time by shopping online especially with Ocado, where they are the second highest users of this online grocery provider.

What newspapers do they read?

THE TIMES

The Daily Telegraph

Online Activity: News & Media

FT FINANCIAL TIMES

Which?

The Telegraph

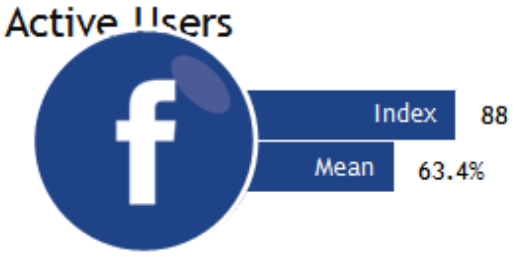
www.ft.com/home/

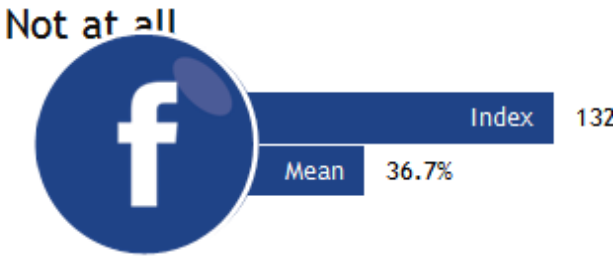
www.which.co.uk

www.telegraph.co.uk

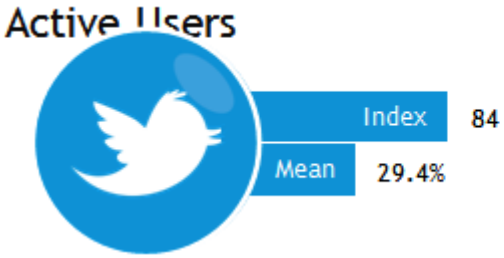
Group B: Prestige Positions

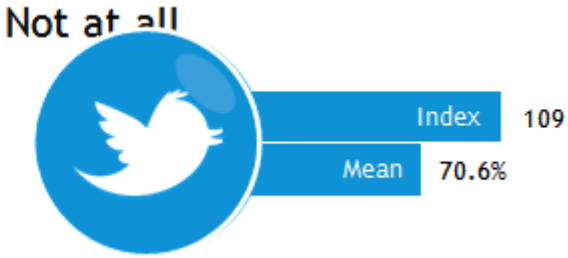
Social/Email Access



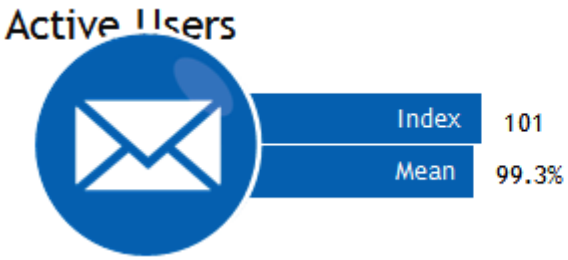


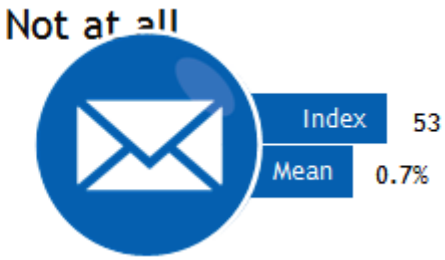
Group B shows a less than average use of Facebook; only 35% check it every day compared to the 44% national average, and they have a very high index score for no usage at all; the third highest of all the groups. Group B also have a below average use of entertainment and lifestyle sites, as well as social networking and forum sites in general with an index score of 87. This combined with their above average use of news sites suggests members of this group may see the Internet as a source of information rather than entertainment.





Twitter usage amongst this group follows a similar pattern to their Facebook usage. Accessing twitter most days is significantly less than the national average with an index score of 79. This low usage of social media could perhaps be correlated with their lower than average interest in new technology. The majority tend to upgrade technology when old devices become obsolete rather than buying new technology when it comes out.





81% of Group B check their emails every day compared to the 77.6% national average, and nearly 100% are active users. Their frequent email usage could be attributed to professional reasons, and their use of the Internet for work purposes is shown by their above average high usage of the LinkedIn website. They also have an above average ownership of smart TVs, tablets and PCs, although a slightly lower than average usage of smartphones.

Group B: Prestige Positions

Note: Index of 100 is the average for the population. Anything below suggests lower use than average and anything above suggests higher use than average.

Online Activity

Index: 85

YouTube

Index: 107

ebay

Index: 103

Google

Index: 188

Index: 183

Carnival

P&O CRUISES

Cruise

Index: 171

FINANCIAL TIMES

FT

Index: 158

Which?

Index: 158

London Stock Exchange

Golf Sites

Index: 137

ancestry

Index: 135

LinkedIn

Group C: Country Living

Key Features

- Rural locations
- Well-off homeowners
- Attractive detached homes
- Higher self-employment
- High car ownership
- High use of Internet

Who we are

Age 66+	Household income £100k-£149k
Household composition Family	Number of children 1 child
Tenure Owned	Property type Named building

Overview

Country Living are well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities. Some people are landowners or farmers, others run small businesses from home, some are retired and others commute distances to professional jobs.

Core Features

Country Living consists of affluent people who can afford to live in pleasant rural locations surrounded by agricultural landscapes. This population is divided between those still in work and retired people.
These people live in attractive, spacious detached homes that are often period properties or named buildings, and the majority are owned.

Incomes are good, either derived from occupational pensions, commuting to well-paid professional jobs or running successful farms or their own businesses - Country Living contains the highest proportion of self-employed people of any group. Asset holdings in the form of stocks and shares are high.

Living in the least densely populated rural locations means car ownership is high. Most households have at least two cars for tasks from grocery shopping, to doing the school run and commuting to work.

Although broadband speeds may be low, the internet is used for practical purposes as it gives this group access to a broader range of products and services than are available locally. The latest technology is not high on their agenda and mobiles aren't used extensively, probably due to less than reliable signals.

Group C: Country Living

Shops Visited

Waitrose

The co-operative

SPAR TESCO LIDL

Online Activity: Grocery Shopping

Internet is used for practical purposes as it gives this group access to a broader range of products and services than are available locally. So with this in mind, many will use online grocery shopping regularly on a weekly to monthly basis. As income is good within this group they enjoy using Ocado for shopping as well as Tesco Online.

What newspapers do they read?

The Daily Telegraph

Daily Mail

Online Activity: News & Media

Met Office

FT FINANCIAL TIMES

BBC WEATHER

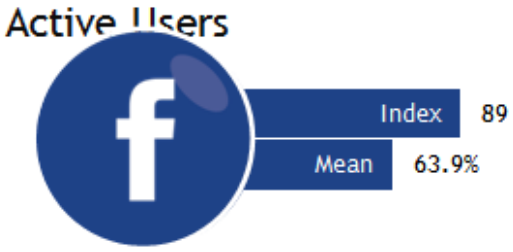
www.metoffice.gov.u

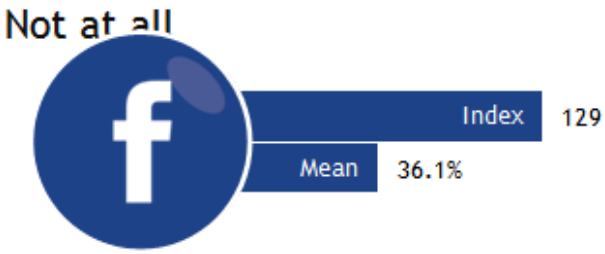
www.ft.com/home/u

www.bbc.co.uk/weather

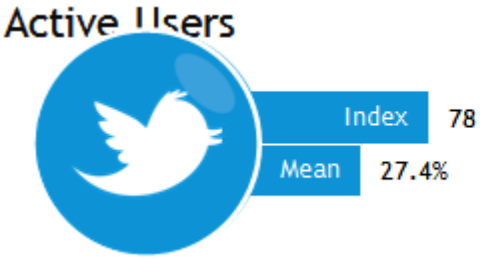
Group C: Country Living

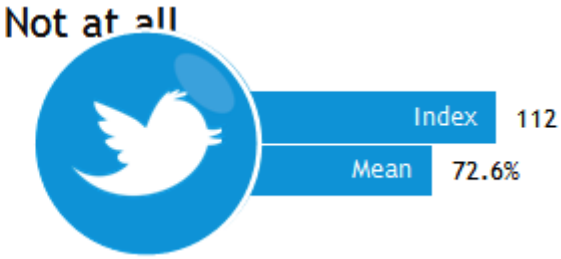
Social/Email Access



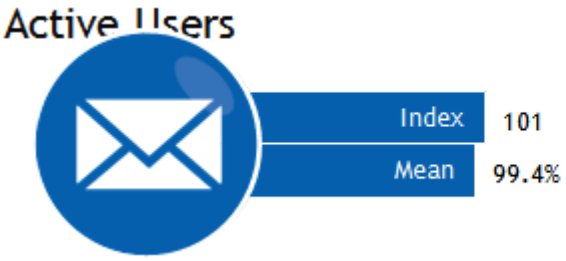


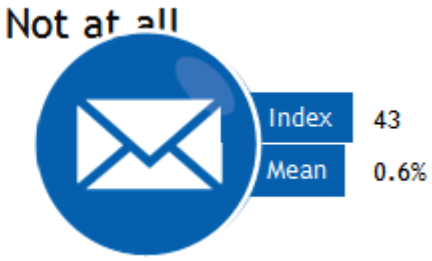
Only 35.3% of this group check their Facebook accounts daily which is quite substantially behind the national average of 44%. Instead this group have a higher propensity to visit Facebook on a monthly basis compared to most of the other groups. This could be down to the level of technology within the household, as this group are the most likely to use a PC within the household compared to owning a smartphone.





The trend continues with Twitter also, as this group are third least likely to have a Twitter account, only beaten by Group E & L which are traditionally elderly in age. For the 27.4% that do access Twitter, it is likely they will enjoy using this form of social media on weekly basis, though this is still marginally below the national average of 6.8%. This could again be linked with the lower then average use of smart phones which is 10% below the national average of 71.8%.





99.4% of Group C are active email users which is the second highest group, only beaten by Group A. With 80% checking their emails every day, and a further 15% checking their emails most days of the week, this is 2% higher then the national average. Though with such high data supporting email usage, this group still slightly prefer post as a means of communication for offers and promotions.

Group C: Country Living

Online Activity

Note: Index of 100 is the average for the population. Anything below suggests lower use than average and anything above suggests higher use than average.

Index: 81

Index: 127

Index: 103

Index: 184

Index: 159

Index: 179

Pets/Animals Sites

Index: 151

Motorsport Sites

Index: 154

Index: 141

Index: 144

Group G: Domestic Success

Key Features

- Families with children
- Upmarket suburban homes
- Owned with a mortgage
- 3 or 4 bedrooms
- High Internet use
- Own new technology

Who we are

Age 36-45	Household income £70k-£99k
Household composition Family	Number of children 2 children
Tenure Owned	Property type Detached

Overview

Domestic Success are high-earning families who live affluent lifestyles in upmarket homes situated in sought after residential neighbourhoods. Their busy lives revolve around their children and successful careers in higher managerial and professional roles.

Core Features

Families in Domestic Success are headed by couples typically aged in their late 30s and 40s, many of whom have school age children. Parents in this group are the most likely to have a degree and may have delayed having children until their careers were established.

They now live in good-sized three or four bedroom detached properties, owned with a considerable mortgage outstanding. Their lives are now settled and they have very comfortable standards of living. These are homes they can expect to stay in while their children grow up.

Company car ownership is high, a benefit of working for well-known organisations or professional firms in sectors such as finance, property, information technology and professional services.

Domestic Success are frequent internet users. As well as being constantly connected for work, they enjoy the time-saving convenience of banking, shopping and managing bills online. They love owning the latest technology and, in addition to smartphones, they are the most likely group to own tablets.

Group G: Domestic Success

Shops Visited

Sainsbury's

Waitrose

TESCO

MARKS & SPENCER

Online Activity: Grocery Shopping

Domestic Success are frequent internet users. They enjoy the time-saving convenience of shopping online. They will frequently use online super markets and have a higher than average propensity to use Ocado, Sainsburytoyou and Tesco's for home delivery.

What newspapers do they read?

the guardian

THE INDEPENDENT

Online Activity: News & Media

Which?

Mail Online

NEWS NOW.CO.UK

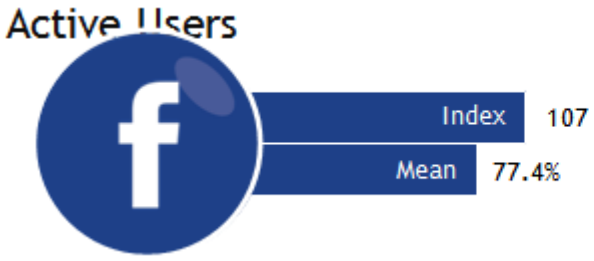
www.which.co.uk

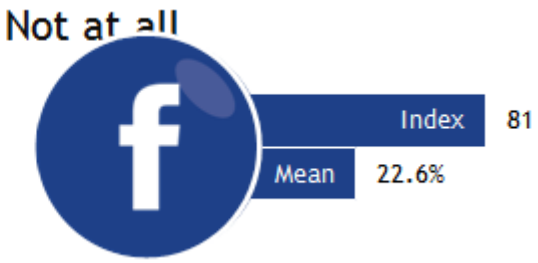
www.dailymail.co.uk

www.newsnow.co.

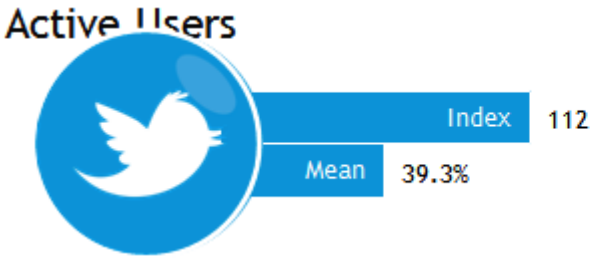
Group G: Domestic Success

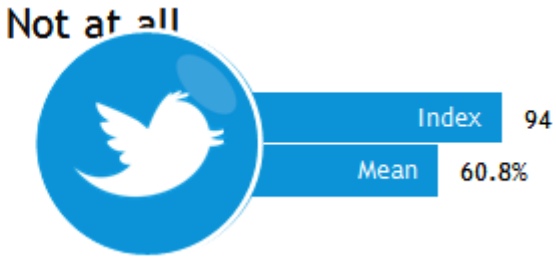
Social/Email Access



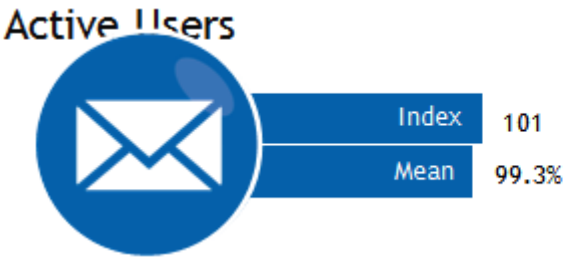


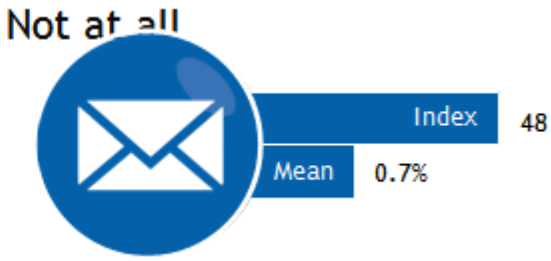
Data shows that Group G have a distinctly higher than average usage of Facebook. 47.9% access Facebook every day, and this ties in with the high internet usage of this group who tend to manage accounts, shop and bank online and also the presence of children in the household which may result in a higher use of technology and social media.





17.6% of Group G access Twitter daily and the index score of 127 shows this to be significantly higher than the national average. Their high usage of Twitter could be explained by the fact that this group is the most likely to own tablets with an index score of 124, and have an above average use of other forms of technology including smart TVs and smartphones.





77.5% of Group G check their emails every day, and email is also their preferred channel of communication. It is possible that this regular usage is for work related reasons as Group G often have successful careers in sectors such as finance. 72.3% surf the Internet every day, a percentage greater than the national average (67.8%), and this could be partly related to Group G's strong preference for new technology, with a high percentage buying new technology within 6 months of its release.

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Online Activity

Note: Index of 100 is the average for the population. Anything below suggests lower use than average and anything above suggests higher use than average.

Index: 94

Index: 91

Index: 100

Index: 123

Index: 119

Index: 131

Index: 118

Index: 118

Index: 115

Index: 115

Accredited by:

Contact: research@tourismse.com