# Shropshire

# Tourism Market Review

**August 2008**

## Summary and Conclusions

The brief for this study posed four questions:

- Whether the identified core segments for the county are still valid?
- Whether there are any key emerging markets that should be considered?
- How current national trends may be affecting Shropshire's markets over the next three to four years and how the county can benefit from these trends in the future?
- What messaging should be used in Shropshire's main markets?

Since the 2004 study examining Shropshire's markets, there is little (in terms of new product development or available market research) to suggest either changes to the potential core market segments or that new emerging markets should be considered.

The key exception to this would be the possible inclusion, as a potential core segment, of another ArkLeisure group – **Cosmopolitans**. These are a very active holiday taking segment and can not be ignored. As a segment, we would categorise these alongside the discoverers – i.e. an emergent group seeking rest and relaxation, and typified by post family ABC1 couples.

The 2004 study identified a number of trends that will influence tourism. These are still relevant but a number of factors have emerged (or become more topical) in the tourism environment (either nationally or sub-regionally) since the last report. The most relevant are:

- Economic slow down / credit crunch
- Climate change
- Evolving regional tourism policy and the development of a Destination Management Partnership for Shropshire.

In our view, climate change is a factor that will have fundamental consequences for the tourism industry – globally and domestically – in the medium to long term and is a factor to watch. However, in the short term it is unlikely to be a major influence on mainstream markets for Shropshire.

The impact of credit crunch is a more difficult call and will depend on the depth of slowdown in the UK economy. It may create opportunities and threats for the domestic tourism industry (depending on different market groups) or may actually have a limited impact.

Changes in Shropshire organisational and policy environment are likely to impact on funding streams and priorities.

We would argue that the market environment and core markets for Shropshire are fundamentally unchanged from the last report. However, appropriate target markets and messages should derive the destination's marketing objectives. In

Shropshire, the broad aims and required outputs from tourism are reasonably well articulated but the more specific marketing objectives are less well articulated.

It is not the purpose of this review to suggest tourism policy for Shropshire but a recommendation arising from this project would be the need to consider and articulate a clearer set of destination marketing objectives for the county.

In crude terms there are two possible approaches to destination marketing – 'tight focus' and 'broad brush'. The approach adopted by a destination will be determined by a range of factors – e.g. strategic objectives, stakeholder priorities and resources.

Shropshire's current marketing approach combines elements of both – positioning and segmentation are quite broad, messaging tight. We would suggest that within the current policy framework and available levels of resource that the approach remains primarily 'broad'. A step change in marketing impact would require a step change in resources and possibly a different approach.

On this basis, we would recommend that the core market for Shropshire should remain the "**rest and relaxation traditionals**". This group is typically 46 – 64, post family, and ABC1. Destination activity should focus on staying (short break / additional holiday) visitors.

Messaging and brand positioning need to be supported by a reality – if they are not believable (or experienceable) they have no value. They also need to have a resonance with the target audience. In general we feel the messaging and themes are broadly right for Shropshire and its core target market. The core messages – historic, countryside, surprising, food etc are all there. However, we would make the following suggestions in relation to messaging / positioning:

- The emphasis on history, while important, is possibly overplayed (particularly in the brochure).
- Countryside and countryside activities (especially walking) probably merit more prominent coverage in both the web and brochure.
- Food and drink are also major strengths and should continue to be emphasised. There are also advantages of potential tie-ins to regional priorities here.
- Surprising, undiscovered, varied (in terms of landscape and walking offer) are strong messages for the county.
- The use of a "green" and "organic" messages should be given more consideration. There are attractive associations to be made but these need to be supported by a reality and there needs to be clarity in messages.
- In terms of the brochure, consideration could be given to organising material more on a thematic (as opposed to geographical) basis. The copy might benefit from being matter of fact – it would give the brochure a wider appeal.
- The "Love from Shropshire" marque could be re-visited. It represents an opportunity to strengthen core brand values such as "surprising Shropshire", or "Tasty Shropshire" etc.

To summarise the key conclusions are:

- Shropshire's core markets remain the same (with the addition of Cosmopolitans) and there are no new emergent markets to seriously consider.
- The last report identified a number of national trends influencing the tourism industry – these remain valid. There is little to suggest that new trends have emerged since then that will create major exploitable opportunities or threats for Shropshire. The impact of credit crunch is difficult to call and climate change is "one to watch" for the future.
- Further consideration should be given to articulating more specific marketing objectives for Shropshire.
- Within the current environment, the present broad marketing approach is right and the primary target audience should remain the "rest and relaxation" traditionals segment.
- Current messages are appropriate but more emphasis should be given to a thematic (not geographic approach) with a greater focus on the countryside and countryside activities

## 1. Introduction

In late 2004, TEAM Tourism Consulting were commissioned by Shropshire Tourism Research Unit (STRU) to identify:

- Motivations for short breaks and day trips with a view to refining Shropshire's promotional activity.
- Market segments that will provide the basis for future promotional activity for the Shropshire area.

The key conclusions from this are outlined in section 2 below.

In 2008 STRU re-commissioned TEAM Tourism Consulting to review and update the conclusions of that research. The specific aims of this review were to identify:

- Whether the identified core segments for the county are still valid?
- Whether there are any key emerging markets that should be considered?
- How current national trends may be affecting Shropshire's markets over the next three to four years and how the county can benefit from these trends in the future?
- What messaging should be used in Shropshire's main markets?

## 2. Conclusions from previous study

The original report (completed in Spring 2005) drew a number of conclusions:

- Awareness and knowledge of Shropshire was, in general, terms relatively low. The constituent parts of Shropshire tended to be better known than the county itself – the best known are Shrewsbury, Ludlow and Ironbridge.
- Images of Shropshire that were held were generally rural – they were positive if not outstanding. Perceptions were mainly generic and of a "second division" rural UK destination.
- Shropshire was perceived as competing well against other destinations for rural breaks. However, Shropshire did not tend to be on people's consideration list for a short break and it tended to be rated below better established destinations.
- Market segments could be categorised in two broad main ways - rest and relaxation, and special interests. The former group represents the main market for Shropshire, with special interests typically smaller markets.
- The study identified a range of market segments for Shropshire - these had different marketing priorities.
- Three markets were identified for major market investment – these were seen as the primary focus for destination marketing and were:
    - Rest and relaxation (traditionals) - staying visitors
    - Rest and relaxation (post family discovers) - staying visitors
    - Sightseers/potterers - day visitors.
- It was felt Shropshire Tourism should target the staying markets, and provide a lead and co-ordinating role for the sightseeing day visitor segment activity, in partnership with attraction groups and sub county marketing organisations.

## 3. What's changed from the initial study?

### 3.1 The tourism environment

The original study identified a number of external factors that were either currently an influence on patterns of UK tourism, and /or would be an influence in the future. In general, these are still valid and the variety of demographic, social, economic, technological etc factors identified will continue to be an influence.

However, there are a number of factors that, while possibly an influence 3 years ago, merit greater emphasis in our current thinking on Shropshire's tourism markets. These include:

- **Economic slow down / credit crunch** – growth in the UK economy is slowing. The threat of an imminent recession, allied to rising fuel (and associated products) and food costs, and a slow down / contraction in the housing markets is impacting (and is likely to continue to impact in the short to medium term) on consumer confidence and spending patterns.

  The extent to which this will impact on the tourism industry is difficult to assess. VisitBritain recently highlighted (based on intelligence from a range of sources) that domestic tourism bookings for 2008 were up. There is a logic to an economic slowdown causing an upturn in domestic tourism. However, key issues will be around length and depth of any recession (and analysts' views are mixed in this respect), and the social and market groups that are affected. Economic slowdown may create some opportunities for Shropshire but also potential threats. The picture is likely to be complex – overseas trips may be substituted for domestic ones, but staying trips may be substituted for day trips. Some groups will be affected, others not.
- **Climate change –** Climate Change, as an issue, is not new. However, it is beginning to gain more mainstream recognition and become an issue that is influencing consumer behaviour. However, at present this tends to be around relatively small changes in consumer behaviour (e.g. re-cycling, re-using shopping bags) or linked to cost savings (e.g. energy efficiency).

  While we believe that Climate Change in its many potential impacts (particularly carbon / fuel costs, global warming) will be the most important influence on the tourism industry over the next two decades, we do not think that it will be a major factor on mainstream domestic markets in the short term. Inevitably there will be markets where "green" issues are a significant factor in holiday choice but these are likely to be in the minority for a number of years to come. The key tipping point is likely to come in either cost (e.g. travel) or carbon credits / allowances when the market starts to substitute overseas holidays for domestic ones – both of these will be a number of years away. That's not to say that environmental factors will not be an influence – simply that they are unlikely to be a primary (or even secondary) influence on destination or product choice in the near future.
- **Technology change –** the development of digital technologies continues. While the pace of adoption has slowed, the internet is the primary tool for holiday planning and a more mainstream mechanism for booking. There are, however,

two key developments that are pertinent (and will be in the near future) to domestic tourism. These are:

- User generated content (UGC) – web based reviews and recommendations will become an increasingly important tool in holiday planning, particularly in relation to operators (accommodation, attractions etc.)
- The growing importance of mobile technologies – there is an increasing convergence of different digital devices into one mobile function. The combination of sat-nav, internet / email access with telephone means the ability to access rich internet based information on the move will become more mainstream.

These factors may be less of an influence on destination choice but will be an influence on the ways consumers access tourism information and, therefore, the ways destination marketers provide information.

## 3.2 Shropshire's tourism product

While the last few years have seen investment in elements of Shropshire's tourism product – for example investment in RAF Cosford, Ironbridge (£10m investment), Acton Scott, Severn Valley Railway (£5m+ investment) and in Ellesmere. In addition, Shrewsbury Theatre (£28m) and the Music Hall re-development are undergoing major investment that is likely to be felt in 2009 / 10.

This investment has generally been in existing product or the accommodation supply. While this helps improve the competitiveness of individual operators (and the county), it is unlikely either to open up major new markets for the county as a whole or dramatically influence the current positioning of Shropshire in the market place.

## 3.3 Shropshire tourism markets

A significant visitor survey of Shropshire was undertaken in 2007 – this confirms findings from previous surveys:

- The importance of neighbouring areas as generators of day visits, and the widespread origin of staying visitors.
- Among staying visitors the relative importance of middle aged couples. Among day visitors families were more important.
- The importance of ABs, particularly among staying visitors, and C1s.
- The importance of repeat visitors – approximately two thirds of staying visitors (of which quite a significant proportion are frequent repeat visitors).
- Shorter holidays are numerically more important.

In the context of this review the survey does not suggest any significant change in Shropshire's visitor markets.
We feel that the market analysis from the previous study is still valid. There is limited evidence to suggest any significant changes to the identified audiences for Shropshire – e.g. no major new product themes have emerged and available research data suggests that visiting markets are broadly the same (albeit the

incompleteness of research data and difficulties of comparing different surveys could mask minor or underlining changes).

One possible change to the suggested Shropshire segments that ***might*** be considered for targeting would be the inclusion of another ArkLeisure segments **Cosmopolitans**. This group cannot be ignored. They are typically a very active segment in terms of domestic holiday taking and, for most destinations, will tend to be over represented in comparison to their relative size in the population.

As a segment, we would probably categorise this group alongside the discoverers group – i.e. an emergent (for Shropshire) group with the following broad characteristics:

- ABC1
- 45+
- Couples
- Looking for rest and relaxation – this may be more "active" relaxation than is the case for the traditionals and discoverers segment. Cosmopolitans are doers – looking for experiences (which may or may not be physically active). Shrewsbury will be an important (but not the only) element of the draw for Cosmopolitans.

## 3.4 Organisational and policy

The West Midlands Visitor Economy Strategy identifies the key regional priorities as:

- Delivering Birmingham as a premier European city break destination
- Capitalising on business tourism
- Utilising culture and cultural heritage to grow short breaks – capitalising on the Cultural Olympiad
- Delivering a high quality food and drink offer
- Delivering a high profile programme of festivals and events.

Since the last report the organisational change has been the development of the Destination Management Partnership and associated (draft) plan for Shropshire and Telford.

The draft Destination Management Partnership Plan provides a framework for strategic investment. It highlights the need to increase, by 2011, tourism spend by 15% (the equivalent of £24m per annum)[1], and the volume of day visitors by 7.5% and staying visitors by 7.7%. These represent extremely challenging targets in light of the proportion of visits that are discretionary and can be influenced, average growth rates (domestic staying tourism is generally regarded as at best static), and available resources.

The DPPP has eight strategic priorities. These focus on themes such as cultural and heritage assets, events, business tourism, natural environment, food and drink, market towns, and encouraging sustainable tourism.

[1] NB – based on figures in the DMPP, these figures do not tally

## 4. Current market approach

Shropshire Tourism's marketing approach comprises a number of elements – these include:

- Segments – the core target markets are the ones outlined in the original Leisure Markets and Motivations report - i.e. post family, rest and relaxation, traditionals and discoverers, day visiting sightseers, and post family overseas markets.
- Marque – "Love from Shropshire".
- Advertising media – destination marketing takes place in a number of places – the Daily Telegraph, and Radio Times are key ones.
- Servicing material:
    - Web – www.shropshiretourism.co.uk is the official site. It is organised around a number of areas – attractions, events, accommodation, visitor information food and drink, towns. These have separate sections which lead to either listings / copy, a searchable database (generally easy to use) and / or a separate website (in the case of activities). A new interactive section is being added. When in any particular section, the site also provides potentially interesting cross references to other themes – adding interest and faciltitating browsing.
    - Print – this is a 52 page full colour guide. This is divided into a number of sections including an introduction, area sections (Shrewsbury, Ironbridge, Ludlow and the Shropshire Hills, Bridgnorth and Much Wenlock, Oswestry and North Shropshire), thematic sections (activities, attractions) and listings (mainly accommodation). The guide is a cross between a sales (selling the destination to the first time visitors) and planning (both before and during the trip) tool.
- Messaging – see section 5.4

## 5. Future options

### 5.1 Introduction

In considering future market options for Shropshire, there are three interrelated questions that need to be considered – two of these are posed in the brief for this work, one is not.

The questions are:

- What are the marketing objectives?
- Who should be targeted to achieve these?
- Where should Shropshire be positioned? (i.e. what are the key messages that should be used?)

The following sections consider these questions in more detail.

### 5.2 Marketing objectives

The overall articulated marketing aims (of Shropshire Tourism) are generally clear – i.e. to increase the economic impact of tourism by increasing:

- Volume of visitors
- Average spend
- Length of stay
- The tourism season.

The DMP's targets reveal a similar aspiration but are primarily concerned with increasing the overall value and volume of tourism (see section 3.4 above) - yield and trip timing are less of an articulated issue.

In economic development terms these aims are perfectly sensible. However, in reality they are potentially difficult to achieve (e.g. length of stay is generally getting shorter for staying trips).

Similarly there is no articulation as to the more specific strategy behind meeting the required outputs. For example, is the role of destination marketing to simply facilitate trip taking (a significant proportion of which may have come anyway) or to generate additionality / added value (through for example generating new trips or opening up new markets)? To what extent is sustainability an influence?

It is in these questions that public and private sector agendas, while having some common ground, may be potentially divergent. The private sector is likely to be happy with short term volume of visits, while the public sector will be more concerned with added value concepts.

It is not necessarily the role of this review to suggest Shropshire's policy approach in this respect. However, it is of key importance in answering the two other questions posed above (and in the brief) – i.e. who to target and with what messages. In crude terms, two approaches to destination marketing can identified – these can be termed:

- 'Tight focus'
- 'Broad brush'

The following table summarises some of the characteristics of these two approaches:

| **'Tight focus'** | **'Broad brush'** |
|---|---|
| Very tightly defined markets | Broad(ish) markets |
| Clear messaging and positioning | Broad messaging |
| Excludes a proportion of the destination product | Typically inclusive of the majority of the destination product |
| Influencing | Facilitating |
| First time / lapsed visitors | Repeat visitors |
| High cost per booking / enquiry | Lower cost per booking / enquiry |
| High potential added value | Lower added value |
| Longer term return on investment | Short term returns on investment |

Examples of destinations in the 'tight focus' category include the South West, Wales, and Cumbria. Destinations in the 'broad brush' category would include Cumbria (three years ago), and a number of resorts (e.g. Bournemouth).

There is no right or wrong approach for a destination to adopt and in reality the approach of many destinations is a combination. The adopted approach will be influenced by a range of factors including strategic priorities, stakeholder (especially private sector) priorities, historical approaches, funding streams and available resources.

At present, Shropshire's approach is probably a combination of both approaches – some elements of the approach (e.g. positioning, and segmentation) are quite 'broad brush' but some elements are more tightly focused (e.g. messaging) on specific groups. Media buying has elements of both.

There are arguments in favour of a more 'tightly focused' approach to give Shropshire a more distinctive positioning in the market place (e.g. 'Shropshire – England's food county'). This approach may add more longer term value (in e.g. generating new trips that are unlikely to have come anyway). However, there are practical considerations. A 'tightly focused' approach like this may have a higher cost particularly to generate a significant outcome – in an environment of limited resources, it is not always an appropriate course of action. Similarly there is a danger of generating business at the expense of other markets.

There is also a dilemma in taking a 'tightly focussed' approach. Shropshire, as a destination, has not undergone significant product (or market) decline and as a consequence does not need to re-invent its appeal (compared to destinations like Cumbria or resorts). Similarly it has a broad appeal and, in contrast to destinations with more limited appeal does not need to be targeting very specialist markets. In addition, visitor surveys suggest that it is attracting a reasonable proportion of first time visitors (interpretation of what is a "reasonable" proportion can be a little double edged – is a high proportion of first time visitors but a small proportion of repeat visitors good?).

On balance, therefore, we would suggest that, if the resourcing position remains the same, that Shropshire continues to adopt more of a 'broad brush' approach. However, the approach may need to be adjusted in places to ensure a greater balance (see section 5.4).

We feel that if there a desire to make a step change in the marketing approach and make a greater difference in the market place, there would need to a step change in available resources.

## 5.3 Who to target?

Shropshire's tourism markets are potentially complex - hence the need to debate a potential approach.

The desire for an economic return (in terms of overall impact but also spend per visit etc) highlighted in the DMPP and Shropshire Tourism's Marketing Plan suggests the need to target overnight business – either short breaks or short (up to a week) additional holidays. We would endorse this.

Shropshire's staying markets fall into two broad categories:

- Rest and relaxation – differentiated by ArkLeisure groups– traditionals, discoverers and cosmopolitans (see section 3.3) and lifestage.
- Special interest groups – walkers, horse riders, event visitors etc.

Under the 'broad brush' approach the core target audience should be the rest and relaxation group (the more specialist groups can be catered for with proactive targeting and should not be a priority). This is however a large group and a key question is whether to target one market within the rest and relaxation category such as Traditionals, or whether to target other groups (i.e. cosmopolitans and discoverers) as well.

Traditionals make up about 12% of the UK population. It is our belief that there is plenty more of this market for Shropshire to exploit in the short to medium term. This group is likely to yield the best return on investment in terms of trips and bookings. In addition:

- Targeting multiple markets is likely to result in diluted or possibly mixed messages;
- The ability of a destination marketing organisation (such as Shropshire Tourism) to target its audiences (particularly when they are segmented by values) to a very specific degree is relatively limited – the available media is simply not that refined. Inevitability messages targeted at one group will reach another.

Our recommendation is that the core market for Shropshire should remain the "**rest and relaxation traditionals**". This group is typically 46 – 64, post family, and ABC1. Core geographical areas, in terms of likely RoI, (if relevant – a lot of media is non geographic specific) would be the North West, Midlands (East and West) and East of England. Targeting this group is likely to reach other groups (e.g. the discoverers and cosmopolitans), albeit the messaging may not be as focused.

Initiatives targeting other market groups (e.g. day visitor groups) and special interest markets should ideally be led by appropriate product clusters (e.g. attractions, or activity operators), although these could be delivered by Shropshire Tourism.

### 5.4 Where to position – what messages?

The postioning and messaging of the destination are as important as the target audience (and in fact are inextricably linked).

Shropshire (as described in the Shropshire Tourism marketing plan) is:

- Rural
- Unspoilt, old fashioned, genuine, oldy worldy, real England
- Friendly, delightful, nice, quaint, nice people, hospitable, honest
- Interesting, unusual, surprising, less known, quirky, slightly odd, undiscovered, different
- Slow pace, unsophisticated.

In addition, there are a number of attributes that are perhaps not included, particularly in relation to the landscape – beautiful, varied, rugged and gentle.

Shropshire Tourism's website and brochure copy covers a number of themes including:

- History and heritage
- Green / organic / environmentally friendly (mainly in brochure)
- Quality assured
- Food and drink
- Walking and countryside
- Activities – walking, cycling, horse riding, golf, canals, ballooning

We would make a few observations in relation to current messages / brochure and website copy:

- Different emphasis is given to different themes in the brochure copy – history and heritage is the overwhelming theme. Within this a number of messages are portrayed - particularly around Shropshire's 'quirkiness' and 'old fashioned' feel. Other themes are less well developed and, in the brochure, are covered within area sections (e.g. food – Ludlow).
- The current brochure is quite copy heavy – i.e. there's a lot of it. It provides a lot of potential detail that probably is not needed at the decision making stage of a trip has more function when in the destination.
- The brochure is organised primarily by area, with a couple of sections on themes (attractions and activities).

- Imagery is typically destination based – images of "like minded" visitors are limited (in both the brochure and website).
- The brochure copy is distinctive but will not necessarily be to everyone's taste – something reflected in the focus groups undertaken in the original market review. The copy, is more likely to appeal to traditionals than other groups, but is perhaps too tightly defined and orientated to an exclusive audience.
- The current brochure starts on an "organic" theme which is a fine message but "green" messages are mixed – rural with environmental sustainability.
- The website copy is more straightforward and likely to have a wider appeal.
- The website organisation is relatively logical and functional (which is fine) but some elements are slightly lost – activities (subsumed under an attractions section) is a notable point.

Messaging and brand positioning need to be supported by a reality – if they are not believable (or experienceable) they have no value. They also need to have a resonance with the target audience. In general we feel the messaging and themes are broadly right for Shropshire and its core target market. The core messages – historic, countryside, surprising, food etc are all there. However, we would make the following suggestions in relation to messaging / positioning:

- The emphasis on history, while important, is possibly overplayed (particularly in the brochure).
- Countryside and countryside activities (especially walking) probably merit more prominent coverage in both the web and brochure. The countryside is one of Shropshire's major assets and walking as an activity in Shropshire is as popular (if not more) as visiting an attraction and almost as popular as shopping. The recent Müller TV advertisement is illustrative of this and there should be some opportunities to "piggy back" on this. This does not necessarily need to be an overt "As seen on TV" message which would probably be a turn off to the target audience.
- Food and drink are also major strengths (illustrated not least by Ludlow but also in the way of the Müller advert.) and should continue to be emphasised. There are also advantages of potential tie-ins to regional priorities here.
- Surprising, undiscovered, varied (in terms of landscape and walking offer) are strong messages.
- The use of "green" and "organic" messages should be given more consideration. There are attractive associations to be made: Green= countryside / environmentally friendly; Organic = countryside / food. However, these need to be supported by a reality. How environmentally friendly is Shropshire tourism sector compared to other destinations? Does it have a high proportion of organic farmers / outlets? There also needs to be clarity in the messages – does "green" equate to rural or sustainable?
- Similarly, the use of value for money messages (in the context of credit crunch) should also be considered carefully. It may have potentially negative connotations on either the destination or the consumer. It also needs to be backed by a reality – to what extent is Shropshire a value destination?

Other suggestions include

- Consideration could be given to organising the brochure material more on a thematic basis as opposed to geographical. Geography is probably more appropriate for in-destination material but themes will be better for pre-visit. This is particularly the case given there are currently separate brochures for most / all areas of Shropshire.
- The copy in the brochure might benefit from being matter of fact – it would give the brochure a wider appeal.
- The "Love from Shropshire" marque could be re-visited. While it has been used for a number of years, and is an engaging enough logo, it does not necessarily have a strong resonance with consumers (from focus groups undertaken as part of the original research). Given its wide usage in Shropshire Tourism's media (advertisements, letterhead, website, brochure etc), it represents an opportunity to strengthen core brand values such as "surprising Shropshire", or "Tasty Shropshire" etc.

## Appendix 1: Market Profiles

| **Segment** | **Rest and Relaxation (Traditionals)** |
|---|---|
| **Key dimensions** | |
| The experiences to be offered to visitors | Relaxing break offering an authentic experience that is special, yet safe. The experience would include sightseeing (market towns, scenic drives etc) local food and drink, speciality shopping, arts and crafts, visiting attractions, museums and gardens, quality cultural events, gentle walking) |
| **Markets and marketing** | |
| Market focus (characteristics of target audience) | Traditionals represent 12.4% of the population.  This market will tend to be from older age groups – typically they are aged 46-65.  Most of this segment will be post family, and a significant proportion retired.  They are predominantly ABC1.<br><br>They are relatively low users of internet, yet a high proportion (over 40%) do purchase goods using the web. In general, they are likely to undertake some physical exercise, enjoy arts and culture, gardening and listening to the radio.  A good night out involves classical music, opera or ballet or socialising with friends. |
| Market potential | This market is evenly spread throughout the country and there will be significantly untapped potential within Shropshire's core catchment areas.<br><br>This market has reasonable disposable income. |
| Marketing messages, and positioning | The key messages are of rest and relaxation, 'Be yourself,' authentic experience, and not following the crowd.<br><br>For example, describe a short break experience: 'Stay in a fine country house or cosy B&B, enjoy a fine meal in England's gourmet heartland, walk the 'Blue remembered hills' or stroll along the banks of the River Severn, pick up some art or antiques, see gardens and castles... find some space to breathe, have some time for yourself. |

| Segment | Rest and Relaxation (Discoverers) |
|---|---|
| **Key dimensions** | |
| The experiences to be offered to visitors | The experience on offer is one of somewhere new and different to explore, with new experiences, 'surprises' but easily accessible for a short break or day trip. Specific activities will include sightseeing (particularly off the beaten track), local food and drink, walking, visiting museums and attractions, and speciality shopping.<br>This market will be seeking special breaks using quality self-catering and more exclusive or distinctive hotels. |
| **Markets and marketing** | |
| Market focus (characteristics of target audience) | Discoverers are independent thinkers. This group are quite high spenders, and value new products and services as well as new experiences. They also value good service. They live a relatively relaxed pace of life and enjoy intellectual challenges. This group are more likely than most to holiday off the beaten track and are also keen on last minute breaks and self-catering.<br><br>This particular segment will be from ABC1 socio-economic groups. It is likely to be dominated by post family groups, although any campaign activity should not necessarily ignore families as a potentially emergent group. These are likely to be 'Caring Families' who place an emphasis on their children's development and education within their leisure experiences. |
| Marketing messages, and positioning | Key messages to this segment are of Shropshire as 'England undiscovered', the place you haven't visited yet, exclusive and authentic, off the traditional tourist trail, space to breathe.<br>For the emerging market of families with children, the opportunities for educational visits at Ironbridge and other attractions are important, linked with excursions outside the county to Alton Towers for example. |

| **Segment** | **Rest and Relaxation (Cosmopolitans)** |
|---|---|
| **Key dimensions** | |
| The experiences to be offered to visitors | Like Discoverers, the experience on offer is one of somewhere new and different to experience. Cosmopolitans, in a short break, will be looking for a number and range of diverse activities – often unusual. They are an active segment in both senses of the word – i.e. they look to do a lot and are physically active.<br><br>Interests and desired experiences are likely to include good food and drink, theatre, museums, and more active experiences – walking, cycling, riding, ballooning. Speciality shopping will also be important. Shrewsbury and Ludlow are likely to be primary draws for this segment. |
| **Markets and marketing** | |
| Market focus (characteristics of target audience) | Cosmopolitans are active and confident – they do what they want. They are early adopters but see themselves as stylish (rather than fashionable). They still value and seek functionality in their purchases but are a high-spend market who will buy expensive alternatives. For this group, to be given individual attention is very important and they will pay for it.<br><br>Cosmopolitans while a relatively young segment are spread across all groups. They comprise 15% of the population but over 20% of the short break market. They are mainly C1s but a high proportion are ABs – they are a higher earning segment with a significant proportion based in London. |
| Marketing messages, and positioning | Key messages to this segment are of Shropshire as 'England undiscovered', the place you haven't visited yet, exclusive and authentic, off the traditional tourist trail (a welcome change from a European short break!), space to breathe but also pursue an interest or interests. |