SHROPSHIRE'S LEISURE TOURISM MARKETS AND MOTIVATIONS

The main report

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Table of Contents

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Executive Summary

INTRODUCTION (section 1)

Shropshire Tourism Research Unit and Shropshire Tourism commissioned Tourism Enterprise and Management (TEAM), in partnership with QA Research, to undertake research into the motivations of short break and day visitors, and potential future markets for the county.

The specific aims of this work were 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

This study was based on interviews with key players in the county and a thorough review of relevant tourism policy and research. Primary research was also undertaken through a number of focus groups and quantitative telephone surveys.

THE TOURISM CONTEXT (section 2)

Shropshire's Tourism offer

Within commercial guidebooks, Shropshire is receiving less coverage than better established destinations. The **key pulls** to the county are seen as Ironbridge, Ludlow, Shrewsbury and, to a lesser extent, the walking opportunities centred in the south of the county.

The quality of the Shropshire offer is, in relative terms, broadly on a par with its competitors – i.e. neither better or worse.

Tourism Futures
Globally tourism continues to grow but the tourism market place is undergoing significant change. Key factors are:
- Demographic changes – including a growth in disposable income and the middle class, and an ageing population
- Social, lifestyle and travel changes – including increased pressure on leisure time, increased demand for authenticity and individualism, more demanding and "street-wise" consumers
- Market communication changes with the internet impacting on marketing methods and patterns of booking
- Changes in transport (e.g. more congestion and low cost flights), further development of globalised branded products, and changes in patterns of tourism demand (e.g. the growth of cities over other destinations).

These changes present a series of opportunities and challenges to Shropshire.

MOTIVATIONS (section 3)

Factors influencing tips can be categorised into emotional, physical and impulse factors. They can further divided into two elements. Firstly, motivations – i.e. those factors (or 'reasons') that truly push or pull people to a destination, and secondly, needs and desires – i.e. those factors which are generally necessary precursors as part of a trip.

Short Breaks
Among short break takers the key emotional factor was **rest and relaxation**. This is is achieved in different ways by different people – it could be "active relaxation" (e.g. walking) or simply breaking the routine of life. Making or having **time with family, partner, and friends** was another key motivator. Other emotional motivations included **indulgence and pampering**, **active, and discovery**.

Physical factors can be both motivational and needs / desires. **Accommodation** is a key one but others include walking, and local food and drink. Impulse factors included the influence of **family or friends** in destination choice, **special offers** and **travel distance / time**.

Day Trips
Day visitors, in broad terms, have similar motivations to short break visitors – the fundamentals are the same albeit there are some differences.

Principle emotional factors in day trip taking include a **change of scenery / doing something different, relaxation** and **time with family/children.** In terms of physical factors, day trippers undertake similar activities to short breakers. Key ones include eating out, gentle country walking, visiting historic houses, visiting other attractions, and speciality shopping.

Impulse factors are also important considerations for day trippers. Impulse factors include a **special offer**, the **journey** (in terms of distance / convenience but also enjoyment of the journey), and the **weather**.

PERCEPTIONS OF SHROPSHIRE (section 4)

Awareness and images
Awareness and knowledge of Shropshire is, in general, terms relatively low. The constituent parts of Shropshire tend to be better known than the county itself – the best known are Shrewsbury, Ludlow and Ironbridge.

Images of Shropshire that are held are generally rural – they were positive if not outstanding. Perceptions are mainly generic and of a "second division" rural UK destination.

Ironbridge was the only potential icon for the county but for many people this was not associated with Shropshire or it projected an industrial and not a rural image.

Competitive position
In terms of **break type**, comparisons with the other destinations suggest that Shropshire is perceived as competing well against other destinations for rural breaks However, Shropshire does not tend to be on people's consideration list for a short break and it tends to be rated below better established destinations (such as the Cotswolds, Derbyshire/Peak District, Devon and Cumbria/The Lakes District). –

Shropshire, as a short break destination, was tested against factors that were important to potential visitors. In general, there were **poor levels of awareness** of how Shropshire may or may not deliver against these factors. Where it was rated, it scored highest on its ability to deliver the following:

- local quality food and drink,
- good quality independent hotels,
- rest and relaxation, and

- time with friends and family.

For day trips, Shropshire scored highest on its ability to deliver the following factors:

- change of scenery / something different,
- good pub/restaurant,
- travel time and convenience and
- enjoyment of journey.

Promotional activity
Among potential visitors Shropshire Tourism's brochures and the website tended to be rated positively. However, other elements of current promotional activity were not so highly regarded – for example, some promotional copy, the "Love from Shropshire" marque and the "Welsh Borders" tag.

Promotional messages that were straightforward and broad in their appeal seemed to work better. Core messages that were most needed included:

- Where Shropshire is
- What is around it
- Presenting the unknown (e.g. "Surprising Shropshire" and "Did you know"?).

KEY PRINCIPLES (section 6)
A number of key principles can be identified that will help to shape potential target markets and the approach to reach these. These include:

- **Added value** – Shropshire Tourism and its partners should only be involved in promotion or development activity where it can add value to the activities of individual operators.
- **Route to market** - there should be a cost-effective means of accessing market segments
- **Market relationship** – Shropshire Tourism must be able to develop a communication relationship with segments, based on an understanding of their lifestyle values and motivations
- **Core messages,** such as location, context, and offer, should be constantly communicated to target audiences.
- **Market return -** return on investment should be concerned not only with seeking to generate bednight volume but also with awareness and profile raising.
- **Branding approach** – the use of Shropshire as a brand should be used flexibly and within certain promotional activity other products and destinations may take preference.

MARKET SEGMENTS (sections 5 and 7)

Shropshire is attracting a range of day and staying market segments. These can be categorised in two broad main ways:

- Rest and relaxation – rest and relaxation is a primary motivation for staying groups. These groups are visiting Shropshire to unwind and for the experience of being somewhere different. There is likely to be a core set of activities and interests that visitors within this category will have. These will include "pottering" and sightseeing, visiting attractions, shopping (particularly speciality shopping), local food and drink (including pubs and restaurants), gentle to moderate country walking etc. The participation and emphasis given to these interests / activities by individuals is liable to vary – e.g. some individuals may be more interested in walking or shopping than others.

- Special interests – the second category is those segments defined by a special interest or activity. These tend to be smaller markets. While their primary interest or activity will dominate their break or holiday, they will also undertake other activities.

The potential of Shropshire's market segments can be rated on the basis of four factors:

- **Appeal –**this relates to the appeal of the segment **to** Shropshire as a destination.
- **Attractiveness –** this relates to the attractiveness **of** Shropshire as a destination.
- **Size –** the current market size for Shropshire (in relative terms).
- **Growth potential** - the growth potential of the market segment over the next 5 to 10 years for Shropshire.

On the basis of these factors a number of target segments, with different priorities, can be identified for Shropshire. These are summarised in the following table.

Priority	Target segments
Major market investment	Rest and relaxation (traditionals) (Staying) Rest and relaxation (post family discovers) (Staying) Sightseers/potterers (Day visitors)
Market maintenance	Visitors to attractions (Day) Educational visits (Day)
Short to medium market development	Events (Staying) (Day Visitors)
Longer term market investment	Rest and relaxation (family discovers) (Staying)

Resources for market development are limited, and it is therefore suggested that destination marketing should focus on three segments.

Shropshire Tourism should target the two rest and relaxation staying markets (traditionals and post family discovers), 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.

The events and other day visitor segments should primarily be the responsibility of events organisers and individual or consortia of businesses.

In the short to medium term the family discovers should be targeted through promotional activity to the main discoverers segment.

1 Introduction

1.1 Introduction

Tourism Enterprise and Management (TEAM), in partnership with QA Research, were commissioned by Shropshire County Council and Shropshire Tourism to undertake a study into the motivations of short break and day visitors, and potential future markets for the county. The following report represents the key findings of that study.

This report sets out:

- The aim of this study, methodology and definitions (section 1)
- The current context to tourism in Shropshire. This section looks at the policy context, Shropshire's tourism product and how it is presented in guidebooks, and the key national trends in the tourism marketplace (section 2)
- Motivations for short breaks and day trips (section 3)
- Perceptions of Shropshire (section 4)
- Shropshire's current market segments (section 5)
- Key issues and principles for marketing Shropshire (section 6)
- Recommendations for the future (section 7).

This report is complemented by a series of more detailed working papers. These are:

- Working Paper 1: The research and policy context
- Working Paper 2: Shropshire's tourism product
- Working Paper 3: The investigative qualitative research (detailed findings from the initial focus group research)
- Working Paper 4: Short break quantitative research
- Working Paper 5: Day visitor quantitative research
- Working Paper 6: Confirmatory qualitative research
- Working Paper 7: Market segments.

1.2 Aims and objectives of the study

This study comprises two separate but linked aims.

Aim 1 was to identify motivations for short breaks and day trips with a view to refining Shropshire's promotional activity. Specific objectives within this aim were to identify:

- Principal motivations for trips;
- Whether motivations differ according to, for example, different times of year, personal circumstances;
- How these motivations are satisfied;
- The critical elements when determining choice of destination;
- The extent to which, in consumers' perceptions, Shropshire fits their requirements.

Aim 2 was to identify market segments that will provide the basis for future promotional activity for the Shropshire area. Specific objectives within this aim were to:

- Verify which are the most important market segments for Shropshire
- Identify any missing markets which are, or could be, important to Shropshire
- Ascertain market size and growth rates for markets
- Check how the profile of Shropshire's visitors match national trends
- Determine the future direction of Shropshire main markets
- Check Shropshire's product fit with potential growth markets.

1.3 Methodology

This report is based on a number of areas of research and work. These include:

- Interviews with key players in the county;
- Secondary research that comprised:
  - A review of relevant policies and research at county level;
  - A review of relevant research in relation to visitor motivations;
  - Product comparisons with other destinations through a number of guidebooks and brochures.
- Primary research that included:
  - Four focus groups looking at the motivations of short break, additional holiday and day visit takers (see Working Paper 3 for further details);
  - Quantitative research among day visitors and short break takers – this involved 800 telephone interviews (see Working Papers 4 and 5);
  - A further 6 focus groups. Two of these were conducted with potential day visitors and four with potential short break takers. The staying visitor groups were further sub-divided on the basis of psychographic characteristics (Discoverers and Traditionals). These focus groups investigated motivations, perceptions of Shropshire and reactions to Shropshire marketing material (see Working Paper 6).

2 The Current Context

2.1 The Tourism Policy Context

Within Shropshire the principle policies relating to marketing are provided by the Tourism Strategy for Shropshire, and by the Marketing Strategy and Marketing Plan of Shropshire Tourism UK Ltd (the organisation with responsibility for leisure tourism marketing in the county).

The Tourism Strategy for Shropshire identifies that the Vision for tourism should be "to establish Shropshire as a high quality rural tourism destination that uses the area's distinctive landscape, environment and heritage assets to provide unique opportunities for relaxing, short leisure breaks for couples and activity focused family holidays. At the same time Shropshire will continue to take full advantage of its proximity to key markets for the continued expansion of business tourism as well as day visitor facilities."

The strategy focuses on the rurality of Shropshire and the opportunities associated with this, particularly in relation to walking and car touring markets. Central themes to tourism development include the intrinsic qualities of the Shropshire landscape, health and well being, and local produce and local culture.

2.2 Shropshire's tourism product

This section provides a brief overview of elements of Shropshire's tourism product – more detailed information is provided on this in Working Paper 2.

There are about 1400 **accommodation** establishments and 11,500 bedspaces in Shropshire. Over half of these establishments are serviced and about two fifths are self -catering. The accommodation sector in Shropshire is typified by micro-businesses such as bed and breakfasts and self-catering - hotels account for less than a fifth of establishments although they represent a more significant proportion of bedspaces (about a third). The caravan sector also represents a relatively significant proportion of potentially available bedstock (about a quarter).

Less than half of accommodation establishments are known to be inspected.

The main concentration of operators and bedspaces is in South Shropshire. These are mainly smaller operators including over half the counties self-catering establishments. Shrewsbury has the next largest concentration of accommodation (typically hotels), followed by Telford and Bridgnorth.

There are a number of **dimensions** to Shropshire's tourism product. These include sightseeing opportunities (linked to the counties natural and built environment), attractions (notably the Ironbridge Gorge Museums), shopping, events, food, and a number of outdoor activities.

Within commercially available guidebooks the **key pulls** to the county are seen as Ironbridge, Ludlow, Shrewsbury and, to a lesser extent, the walking opportunities centred in the south of the county.

The following table summarises Shropshire's coverage in a range of guidebooks against 3 potential competitors – the Cotswolds, the Peak District and Lake District. The **index** figures in this table show the coverage of competitor destinations relative to Shropshire – Shropshire is shown as a base of 100.

Guidebook Coverage				
Guide Book	**Shropshire**	**Cotswolds**	**Peak District**	**Lake District**
No. of pages coverage				
DK Eyewitness Travel Guide to Great Britain	3	3	5	12
Rough Guide to Britain	7	11	14	23
Index (Shropshire = base of 100)	**100**	**140**	**190**	**350**
No. of properties				
Good Hotel Guide	8	11	8	18
Johansens	7	25	16	25
Good B&B guide	11	12	15	30
Good Food Guide	8	12	8	17
Good Pub Guide	20	28	35	40
Index (Shropshire = base of 100)	**100**	**163**	**152**	**241**

The table highlights that within guidebooks (The DK and Rough Guides), Shropshire is tending to receive less coverage than its potential competitors. This is not necessarily surprising given these are well established tourism destinations.

The second half of the above table summarises the number of properties listed in a range of 'good' guides (i.e. guides recommending establishments of a certain quality). Again Shropshire receives less coverage than its competitors, reflecting to some extent its smaller tourism product.

The following table provides a comparison of the quality grading of accommodation (under the national harmonised scheme) featured in the Shropshire and the Welsh Borders AD 2005 guide with three other guides – the Peak District Visitor Guide 2005, the Cumbria Lake District 2005,and Welcome to the Cotswolds 2005.

Brochure Comparisons				
	Shropshire	**Peak District**	**Lake District**	**Cotswolds**
Serviced Accommodation				
Average star rating	2.7	2.7	2.6	2.8
Percent of advertisers with VB Gold Award	4	8	6	3
Percent of advertisers with VB Silver Award	4	8	19	6
Average diamond rating	3.7	3.8	3.9	3.8
Percent of advertisers with VB Gold Award	7	5	2	7

Percent of advertisers with VB Silver Award	15	17	14	16
Total no. of graded serviced accommodation	109	235	284	185
Self-catering accommodation				
Average star rating	3.6	3.8	3.7	3.7
Total no. of graded self-catering accommodation[1]	76	197	149	96
Holiday, touring and camping parks				
Average star rating	4.9	3.4	4.6	4.0
Total no. of Holiday Parks	8	8	27	1

Note. 1 Excludes agency / multi-unit operations with variable gradings.

The table illustrates that the Shropshire brochure is the smallest of the four. In terms of the grading of serviced and self catering accommodation, the Shropshire guide is broadly on a par with the other guides – neither significantly better or worse. In terms of caravan parks, the Shropshire brochure has significantly higher ratings than the other brochures.

The conclusion of this analysis suggests that, not surprisingly, Shropshire is receiving less coverage than better established destinations, and that the quality of its offer is, in relative terms, broadly on a par with its competitors – i.e. neither better or worse.

2.3 Tourism futures

This section highlights the key demographic, social, travel and other changes that are influencing the tourism market place and their potential impact on Shropshire. Further information on these trends is provided in Working Paper 1.

Tourism trends

Trends include:

- World and UK tourism is forecast to continue to grow.
- About a quarter of Britons only go abroad for a holiday. About a quarter have holidays in the UK and abroad, and about a fifth only holiday in the UK. The remainder do not take holidays.
- VFR and holiday tourism have grown in the last decade. Growth in VFR tourism has been mainly fuelled by younger, pre-family markets. Growth in domestic holidays has been in short holidays, with a continued shift away from long domestic holidays
- There has been an increasing preference for towns and cities as destinations, compared with other locations

Demographic change

There are significant changes in UK demographics – for example:

- The middle class (ABC1 socio-economic groups) is growing and represents the dominant group in UK society – they are the new “mass” market.
- Real disposable household incomes are increasing. The population is becoming better educated with more people at university.

- The population is ageing, with seniors healthier and having higher disposable incomes. As tourism consumers, they will increase faster than general tourism demand. Attitudes are different to generations that are now in retirement and they are also more active ("60 is the new 40").
- Families, as a demographic group, are growing slightly. They are an important group in UK markets taking a disproportionately larger number of domestic trips – they account for about 40% of trips – families with younger children tend to holiday in the UK. Parents are tending to be older.
- An increase in grandparents helping out with childcare and seeking leisure opportunities to occupy their grandchildren – typically they have more "traditional" views of appropriate leisure options.
- The pre-family group is emerging economically but declining demographically.

Social, lifestyle and travel changes

Social, lifestyle and travel changes include:

- Lack of leisure time becoming more of a constraint, with implications for the quality of products and experience demanded – value for time will be as important a concept as value for money, particularly in AB socio-economic groups.
- An increased demand for authenticity and individuality.
- Consumers who are more sophisticated, independent, and demanding, seeking quality experiences, and aware of what competitor destinations offer and able to access them.
- Consumers themselves are changing, so that markets defy traditional segmentation and individuals are increasingly liable to fall within different segments at different times.
- Increased health consciousness, participation in outdoor activities and extreme sports, and a demand for self-improvement and lifelong learning.

Market communication changes

The internet is changing the marketing of tourism - while it is primarily a travel planning tool, its use for booking is increasing and becoming more mainstream. About 52% of UK households have internet access and growth in adoption of new technologies (such as mobile phones, Internet and digital TV) is now slowing. It is estimated that UK Internet use is expected to eventually plateau at about 80% of the population.

The Internet is resulting in:

- Profound changes in the way information can be managed and distributed;
- Consumers and market intermediaries obtaining instant access to richer and deeper information about tourism products and destinations than has ever been possible before – facilitating the trend towards independent and special interest travel;
- Tourism organisations and suppliers promoting their products more quickly and cost-effectively than before and, in an increasingly targeted and customer focused way;
- A move to later bookings, with the possibility of "shopping" via the Internet;
- Tourism organisations being able to develop stronger relationships with consumers, customers, market intermediaries and product suppliers.

Other issues – product, transport, security and sustainability

Other changes and trends include:

- Increased business globalisation and dominance of brands and consolidation, in all sectors including hotels and restaurants. Within this pattern, there has been increased development of brands in different market places – for example the emergence of budget hotels but also boutique hotels;
- A shift to self catering from serviced accommodation for longer stay holidays (whether main or additional);
- Increasing availability of low cost carriers and direct continental train links;
- Increasing road traffic congestion;
- Environmental consciousness will continue to increase, with increased demand for sustainable destinations;

The following provides a brief overview of the potential implications[1] of current trends on Shropshire:

Potential opportunities	Potential threats / counter trend
Continued growth in tourism	Growth in city / town demand, and short breaks abroad
Growth in shorter domestic holidays	
More shoulder month demand	Less midweek leisure demand
Growth of seniors markets	
Family groups – with older (possibly more aware) parents	Parents who are more accustomed to higher standards and a broad range of leisure options pre-children. An increasing proportion of families holidaying abroad
A more middle class, affluent and educated population	Growth of demand from pre-family groups – a market Shropshire lacks a strong appeal
Grandparents and grandchildren markets	
Demand for authenticity and individualism	Demand for branded products
Increased interest in outdoor activities and lifelong learning	Increased demand for arts and culture, and extreme sports
More sophisticated, discerning and demanding consumers	
The shift to quality self –catering over serviced accommodation	
Decreased demand for sun holidays	
Demand for more sustainable destinations	
	Low cost airlines
	The internet – Shropshire a late adopter?
Potential Opportunities AND Threats	
Value for time – Shropshire's distance from some markets	
Traffic congestion – a limit on travel distance from conurbations	
A decrease in destination loyalty as purchasing moves from destination to experience. However, satisfactory destinations will continue to be re-visited	

Shropshire, as a more emerging destination with a relatively new product, is on balance more likely to benefit from trends in the market place than more established destinations (particularly seaside ones). This is however dependent on undertaking the right measures to ensure opportunities are realised.

[1] For more detail on the general implications of these changes and trends, see Working Paper 1

3 Motivations

This section examines the broad motivational factors for short break visitors and day trips. It is based on the investigative focus groups (see Working Paper 3), the quantitative telephone research (Working Papers 4 and 5) and some of the secondary research (Working Paper 1).

3.1 Short break visitors

Existing research suggests that travel motivations can be seen in terms of a "push and pull" concept, which assumes that tourists are pushed by their own needs and pulled by the destination itself.

The research undertaken as part of this project investigated motivations within three broad categories – emotional factors, physical factors and impulse factors. Within these categories two elements emerge. Firstly, motivations – i.e. those factors that truly push or pull people to a destination, and secondly needs and desires – i.e. those factors which are generally necessary precursors as part of a trip. Differentiating the two elements and identifying their relative importance can be potentially problematic (visitors themselves may not make a distinction and rarely rationalise their own motivations) and there is often a degree of overlap between them. The following sections look at the main emotional, physical and impulse factors and their role as motivators and desires for potential domestic short break visitors.

Emotional factors
The key motivational factor that emerged from the research was **rest and relaxation –** 85% of short break takers indicated that they sometimes or often took a relaxing short break**.** This was particularly a factor among empty nesters, and also among respondents who had visited Shropshire. Important elements of relaxation include:

- It is achieved in different ways by different people;
- "Active relaxation" – i.e. relaxing through activity e.g. walking;
- Breaking the routine of life - a change from the routine was a way of recreation and resting.

Making or having **time with family, partner, and friends** was another key motivator – 69% of short break takers indicated they took family based holidays (the proportion was, not surprisingly higher among families), and time with friends and family was rated as one of the most important aspects of a short break.

Other emotional motivations could be identified - these included **indulgence and pampering**, **active, and discovery.** In general, these were motivations for much smaller groups of people – for example, only 28% people indicated they undertook indulgent breaks (with only 5% indicating they did so often – reflecting the ad-hoc nature of the indulgent element), and only 27% had "active" breaks (9% often, possibly reflecting the more hobby nature of active holidays). Both indulgent and active breaks were more likely to be taken by 30 –44 year olds and those with children at home. Similar data is not available for discovery type breaks but the focus groups suggest that elements of "discovery" and going somewhere different were more important specific physical activities but not as important as motivations relating to time and relaxation.

Physical factors

While emotional factors tended to be more motivational, physical factors and activities tended to be both motivations and desires/needs. Important physical factors include:

- **Accommodation** – accommodation was seen as an important element of a short break (nearly as important as rest and relaxation). It can be a motivator and, in many cases, can be more important than the destination (i.e. the primary determinant of where one visits). Even where accommodation is not a motivating factor, it is an important desire / need (a fact also echoed in other Shropshire Tourism research). Preference is mixed between those who preferred the consistency of branded versus chain hotels and the individuality of smaller, more local hotels (reflecting the trend highlighted in section 2.3). The constant factor is however the need for quality.
- **Walking**- this is a popular holiday activity, both a motivator but also a desire/need. It is seen as covering a range of activities – ambling to fell walking. While walking was seen as an appealing part of any break, the use of the car was also seen as essential as many people want to tour around an area.
- **Local food and drink** – these were rated as a very important element of a UK short break but were not an overriding motivator for a break**.** They are more of a desire/need.
- **Shopping** – again this is less of a motivating factor. The key element here was something different to what can be got at home. Individual shops or bargain outlets of chain stores were commented upon.
- **Events** - festivals and events tend to be seen as a pleasant addition to a trip rather than the sole motivator.

There was evidence in the research of **combination** breaks. These have a core activity of purpose e.g. bowling or bird-watching, but also offer the opportunity to undertake other unrelated activities such as countryside touring and sightseeing.

Impulse and other factors

The research identified a number of other important impulse and other factors that influenced short break taking.

- **Family / friends** - The importance of spending time with family and friends is identified as a potential motivation above. However, a family event (such as a wedding) or visiting a family member can often provide a "hook" around which to develop a short break. This sometimes results in visiting a destination that would not necessarily have been chosen otherwise.
- **Special offers** – special offers, such as reader offers in the local and national newspapers and membership schemes, can be an influence on short breaks in terms of timing, destination and potentially the motivation for the break itself. The quantitative research identified this as a relatively important factor in short break taking – less important than accommodation but more important than, for example, pampering and luxury or physical activity.
- **Distance and travel –** distance and time, while not a motivation on short break taking, are nevertheless an influence. Travel time is linked to destination "pull" and, in some cases, individuals will travel five hours plus. Three hours is probably a norm. Traffic congestion or perceived congestion is an issue and will reduce the distance consumers are prepared to travel (particularly for a weekend away). However, a place can also be too close for an overnight stay, unless there is something specific to hold them there.

Translating these motivational factors and needs into destination choice is by no means straightforward. Short break selection can be often arbitrary and destinations can be booked without any clear decision-making process being undertaken. Previous research undertaken for Shropshire Tourism highlights that the main explanations fall into three categories:

- "Triggered" decisions – offers, events and family, recommendations etc
- "Wish fulfillment" – always fancied going there
- "Security" decisions – we often go there.

The extent to which these apply will depend largely on the nature of the individual – certain groups are more prone to wish fulfillment, others to security decisions (see Working Paper 7 on psychographic segmentation). However, people will often have a subconscious "wish list" of places they intend to visit when the opportunity arises, and their initial decisions in destination choice will be derived from their own internal knowledge and references. These will result from a range of sources over a period of time – they may or may not include marketing material (although it is unlikely that marketing material would be the only source of information). Marketing activity becomes more important at subsequent stages such as planning and booking a trip, or converting interest into a visit.

3.2 Day visitors

Day visitors, in broad terms, have similar motivations to short break visitors – the fundamentals are the same albeit there are some differences.

Principle **emotional** factors in day trip taking include:

- **A change of scenery / doing something different** – the quantitative research (see Working Paper 5) highlights this as one of the principle factors for a leisure day trip and one of the reasons that destinations can be "too close" for a day trip.
- **Relaxation** – like short breaks, relaxation is a principle motivation for a day trip and very much tied up with the previous point. The research highlighted that it was this type of trip that people were likely to take most often.
- **Time with family/children** is also an important element of day trip motivations – for families with children, 72% highlighted that this was a type of day trip they took often.

The quantitative research (Working Paper 5) identifies other emotional factors – these include **indulgence / a treat**, and **discovery** (i.e. finding new places or trying new experiences).

As with short breaks, emotional factors tend to be motivational. **Physical** factors can be both motivational and /or more simply concerned with activity to occupy time. Inevitably, for physical factors, differentiating between motivations and activities can be difficult (even for the day tripper) – e.g. a shopping trip to Shrewsbury could be motivated by the shopping (the need to buy something specific) or by the emotional need for a change of scenery (with the shopping as a convenient excuse or activity).

In terms of physical factors, day trippers undertake similar activities to short breakers. For example, the West Midlands Regional Visitor Survey (see Working Paper 1) identifies that staying and day visitors to Shropshire shared the same main interests – for day visitors the main ones (in order) were **eating out, sightseeing, shopping, visiting an attraction and walking**. The main difference between the two groups is that staying visitors tend to engage in a wider range of activities (reflecting the time they have in a destination) – day visitors tend to undertake one or two activities on their trip.

This pattern is supported by the 2002-03 Leisure Day Visits Survey for England, Wales and Scotland. This highlights that the four most popular activities for day trips were going out for a **meal or drink**, **walking** / hill walking / rambling, **visiting friends and relatives** (14%) and **shopping** (11%). Similarly, the quantitative research (Working Paper 5) identifies the following factors in order of importance: good pubs / restaurants, gentle country walking, visiting historic houses, visiting other attractions, and speciality shopping. Sport / physical activity was seen as less important than these factors.

Impulse factors are also important considerations for day trippers. Impulse factors include:

- **Special deals** – special deals or offers will, as with short breaks, be a factor although they may be more of an influence on the actual type and destination for the day trip, rather than the actual taking. Special deals for day trips could include reduced entry to attractions, or train and attraction deals.
- **The journey** – the journey is probably more of a factor for day trippers than short breakers given that, in proportional terms, it occupies more of the trip. The journey is an influence in potentially two ways.
    - Travel distance – travel time and convenience was rated as an important factor for day trippers. The Leisure Day Visits Survey for England, Wales and Scotland highlights that an average round trip is of around 15-60 miles - this varied considerably by type of destination. However, a lot depends on the pull of a specific destination – the primary research for this project (Working Papers 3 and 5) suggests that individuals are prepared to travel further – the average maximum was four hours travel time for a round trip. The qualitative research identifies one respondent who was happy traveling from Birmingham to Bournemouth for the day.
    - The actual enjoyment of the journey is also a factor for day trippers, and in the quantitative research (Working Paper 5) this actually rated higher than a number of activities (such as visiting attractions, shopping and country walking). There is a suggestion in the qualitative research of "favoured routes" for day trippers – i.e. they will often look at destinations within relatively narrow corridors that are either familiar or convenient. One example highlighted was Birmingham and the M5 corridor to the south.
- **The weather** – the weather is a factor. While not possibly a major issue in destination choice the weather plays a key role in determining the type and timing of a trip, and in many cases will be a key motivating factor.

Choice of destination will be influenced by a combination of these factors, which will vary not only from individual to individual but from trip to trip, and even by season.

However, a key element in destination choice for day trips is how the consumer perceives the destination they are visiting. Typically, they are not purchasing the destination for their visit on the basis of a wide geographic area, such as a county. Instead destination choice is typically much narrower – e.g. a town (e.g. Ludlow), a specific attraction (e.g. Weston Park) or geographic feature (such as the Long Mynd or Wenlock Edge). The qualitative research (Working Papers 3 and 6) highlighted a number of examples of people that had visited areas within Shropshire for day trips without realising it was Shropshire.

4 Perceptions of Shropshire

4.1 Awareness of Shropshire

Awareness and knowledge of Shropshire is, in general, terms relatively low.

This was particularly the case among the South East based focus groups but also among West Midlands groups (see Working Papers 3 and 6). Knowledge of Shropshire in geographic terms was limited and people are unable to identify its precise location and boundaries.

Awareness of Shropshire is similar to surrounding counties (e.g. Herefordshire and Worcestershire) and levels are slightly lower than Gloucestershire, Derbyshire and Warwickshire. However awareness of, and interest in Shropshire is significantly lower than destinations like the Cotswolds, Peak District and Shakespeare's Country.

Awareness of constituent parts of Shropshire tend to be better known than the county itself – the key ones are Shrewsbury, Ludlow and Ironbridge, followed by Telford and the South Shropshire Hills (and/or its constituent parts). Shropshire as an entity was not widely regarded as a destination.

4.2 Image

Images of Shropshire that are held are generally rural – typical words include 'green', 'farming' and 'open space'. Related to descriptions were emotional benefits such as 'fresh' and 'healthy'. However, these descriptions were mostly generic and not particularly unique or specific to Shropshire.

The South East groups had no strong images of Shropshire and had low awareness of any particular features in the county. They were unsure of whether Shropshire was flat or hilly. Their perceptions were mainly generic and of a "second division" rural UK destination.

West Midlands participants, however, had rustic, traditional and countryside images of Shropshire. They painted a picture of a simple, rural lifestyle. Images were positive if not outstanding.

Other features associated with Shropshire included:

- Market towns (among Midlands respondents)
- History – both industrial and English/Welsh border history (among Midlands respondents)
- Off the beaten track (among London respondents). This could be due to the Shropshire being off their 'radar' and therefore having generic "not London" features
- Potentially a value for money destination – although this was because it was felt it would be less commercial than more popular destinations.

As section 4.1 identifies, awareness of parts of Shropshire were greater than the county itself. Shropshire as a whole did not have a clear identity or associated iconic image that made it stand out. Ironbridge is maybe the best known destination in Shropshire that could potentially serve as an icon. However, there the potential drawback is that this would emphasise Shropshire's industrial history at the expense of its scenic beauty and perceived rural values. In addition, many people, although aware of Ironbridge, do not necessarily know it is in Shropshire and associate it with the Black Country instead.

4.3 Competitive position and potential to deliver

The available research indicates that, in general terms, Shropshire has a low profile. As a consequence, a primary reason for non-visiting is that it does not tend to be on people's consideration list for a short break – people have limited internal reference points on which to base a decision (see section 3.1).

Working Paper 4 provides details of comparisons between Shropshire and a number of potential **competitor destinations** including the Peak District, Lake District, North Wales, Devon, the Cotswolds and Cheshire for a number of different types of break. It was seen as better than Cheshire, very similar to North Wales, but was rated generally less favourably than the Cotswolds, Derbyshire, Devon and Cumbria/The Lakes District.

In terms of **break type**, the comparisons with the other destinations suggests that Shropshire is perceived as more competitive as a destination for rural breaks, followed by spending time with friends and family breaks. It was less competitive for indulgence, rural physical and off the beaten track breaks.

For a range of factors of importance in both short breaks (Working Paper 4) and day visits (Working Paper 5), Shropshire's **potential to deliver** was measured against relative importance. In general, Shropshire's potential to deliver was on **a par with the relative importance of most factors** – i.e. for factors that were of greatest importance to consumers, Shropshire's perceived ability to deliver against those factors was also the highest.

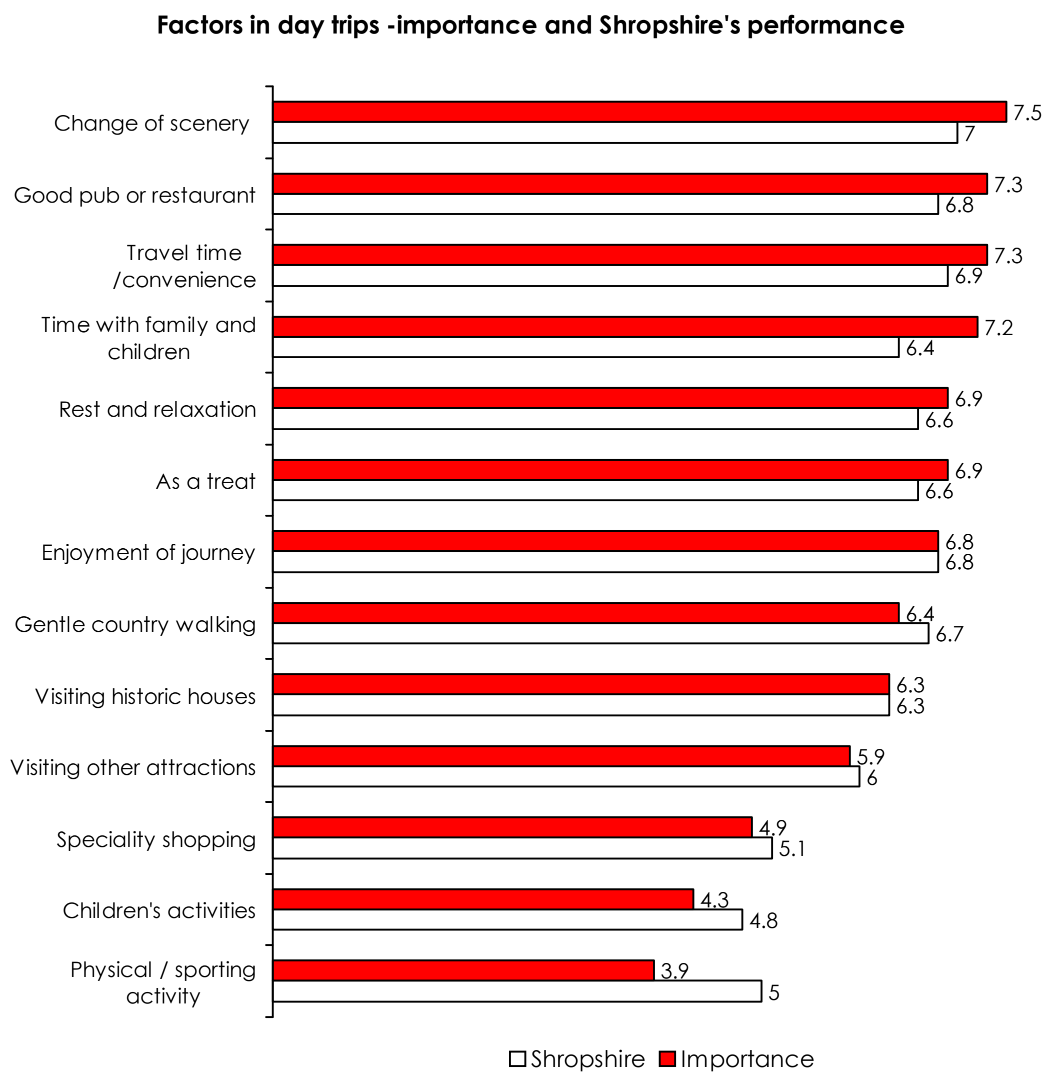
The following chart shows the importance of different short break factors compared with the perceived performance of Shropshire.

Factors in short breaks -importance and Shropshire's performance

In relation to this chart:

- Shropshire scored highest on its ability to deliver the following factors: local quality food and drink, good quality independent hotels, rest and relaxation, and time with friends and family. These were all important factors in short breaks.
- It scored lowest on children's activities and sports/ physical activities. These were less important short break factors.
- There was however a relatively significant gap between the importance of certain factors to short break takers and Shropshire's potential ability to deliver. Factors where Shropshire's performance was rated below importance included time with friends and family, rest and relaxation, travel time and convenience, and special promotions and deals.
- There were however **poor levels of awareness** of how Shropshire may or may not deliver against these factors.

The following chart shows the relative importance of factors in day trips and Shropshire's perceived ability to deliver these.



In relation to day visits:

- Shropshire scored highest on its ability to deliver the following factors: change of scenery / something different, good pub/restaurant, travel time and convenience and enjoyment of journey.
- It was lowest on children's activities.
- Differences between importance in factors for day trips and Shropshire potential ability to deliver were minimal.

4.4 Shropshire's promotional and advertising material

Shropshire's current promotional and advertising material (including brochures, the website and specific advertisements) was tested among a number of focus groups (see Working Paper 6).

The main **Shropshire Guide** was generally seen as good but not outstanding. Specific comments;

- Some of the photography was seen as spectacular although views were more mixed in relation to the cover photograph of Ironbridge, which was seen as "dark" by some but impressive by others. In addition, as section 4.2 identifies there is some confusion about the association of Ironbridge with Shropshire.
- The balance between text and photography was seen as about right, although there was a feeling there was too much information ("like a Yellow Pages for Shropshire").
- The association with the Welsh Borders (on the front cover) often went unnoticed and tended to be viewed ambivalently.
- The need for Shropshire's location to be provided within the context of its surroundings was emphasised.

The day visitor guide (**Places to Visit**) was seen as good. Key elements of it were felt to be:

- Good photography – "the more the better"
- Glossy
- The events listing – this was seen as a key page that had value, would increase the shelf-life and retention of the leaflet and would prompt a day visit
- The booklet form – this was generally preferred because fold-outs can be difficult to handle
- The divisions in the Shropshire leaflet – these were generally liked as they related to different visit and visitor types, and their different needs
- Completeness.

The map in the places to visit guide was criticised for its lack of clarity and usability. The need for information on what was around Shropshire was again emphasised

The Places to Visit guide was seen as having more general appeal than the other more specific guides (such as The Magic of Shropshire with Mary Webb, and On the Trail of King Arthur). It was the guide people would pick up first.

That said they would not consider requesting pro-actively a day visit guide to Shropshire – they might, if it was seen, pick it up when in the area for future use.

The Shropshire Tourism **website** was viewed positively by potential day visitors and short breakers. Photographs and colours were liked (although line drawings were not). The website would be used as a functional (rather than inspirational) tool and it was felt that it offered appropriate information in terms of accommodation, events etc. Day visitors would however prefer more emphasis on events. Other sections and services were commented on positively - specifically the brochure request facility, and the "Did you know?" section.

However, the need for a good map showing locational context (with an indication of what there was in the surrounding area) was again emphasised.

In terms of **advertisements**, potential day visitors responded more positively. They reacted positively to certain features in advertisements (particularly the "Shropshire Option") that:

- Were direct and straightforward
- Were clear in terms of what was being promoted
- Had a broad appeal.

However, the series of ten small advertisements that were tested among potential staying visitors did not elicit such a positive response. They were seen as "cheesy", "down market" and "misleading or too obscure"

The "**Love from Shropshire"** marque was generally not viewed positively, and was felt to be a "bit tacky", "cheap" and a "poor copy of New York".

Similarly some of the **copy** used in brochures and advertisements was seen as "tacky" or "too creative". Examples included a "jolly good dose", "A jolly nice place to visit" and "Deliciously different". The use of "empty" in advertisements had negative connotations and was seen as potentially "running the county down".

In addition to testing current promotional material, a number of **"position" statements** (a two paragraph descriptions of Shropshire based on different themes) were tested (Working Paper 6).

The "Surprising Shropshire" statement was rated the most highly. This statement was:

"Shropshire is widely known as the ideal place to take a few days away from the stresses of urban life for all it has to offer from scenery, food and gardens to unspoilt market towns, historic abbeys, castles and legendary hospitality. But what many visitors often don't know about are some of the more unusual sights and attractions that set Shropshire apart from other destinations. For some, it comes as quite a surprise to learn that there is a Sweet Pea Festival as well as Shrewsbury's legendary Flower Festival and that some historians regard Shropshire as the original kingdom of King Arthur. Perhaps more widely known is that Shrewsbury is the birthplace of Charles Darwin and that the Cadfael Mysteries were set among the ruins of Shrewsbury's Abbey.

There is a canal suspended 125 feet above the Dee Valley; The Wrekin is a hill peak from which you can see fifteen counties, Shropshire's geology includes rocks that started their life south of the equator and the Ironbridge Gorge World Heritage Site celebrates the birth of the industrial revolution with no less than ten hands-on museums. Did we mention we have the hot air ballooning capital of the world at Oswestry, an international story-telling extravaganza and that Sunday lunch is served on the 16 mile steam train journey on the Severn Valley Railway? Surprised?"

Key factors in this choice were that it:

- Was informative and provided a taster of what was on offer – e.g. specific elements of it appealed to the imaginations of groups
- Challenged pre-conceived ideas of the county
- Had a wide appeal (other positioning statements, e.g. on food and drink were seen as too narrow)

These factors applied in equal measure to both previous visitors to Shropshire and non-visitors.

Key points arising from this section are:

- Current promotional material (brochures and website) are generally seen as good.
- The need to ensure that Shropshire is also shown in an appropriate context both in terms of location and surrounding attractions.
- The importance of "surprise" to potential visitors (E.g. "Surprising Shropshire" and "Did you know"?).
- Promotional messages that are straightforward and broad in their appeal seem to work better.
- Consideration needs to be given to the use of the "Love from Shropshire" marque and "Welsh Borders" tag in the future.

5 Market segments – current

Working Paper 7 outlines the detailed approach adopted in relation to market segmentation of Shropshire's visitors.

To summarise, five parameters have been used to help identify potential market segments. These are:

1. Tourism type;
2. Socio-demographic characteristics;
3. Psychographic characteristics;
4. Activities;
5. Motivations.

Segments are based, in the first instance, on their motivations and/or their primary activities. These can be categorised in two broad main ways:

- Rest and relaxation – rest and relaxation is a primary motivation for core staying groups and some emergent segments (see below). These groups are visiting Shropshire to unwind and for somewhere different. There is likely to be a core set of activities and interests that visitors within this category will have. These will include "pottering" and sightseeing, visiting attractions, shopping (particularly speciality shopping), local food and drink (including pubs and restaurants), gentle to moderate country walking etc. The participation and emphasis given to these interests / activities by individuals is liable to vary – e.g. some individuals may be more interested in walking or shopping than others.
- Special interests – the second category is those segments defined by a special interest or activity. These tend to be smaller markets. While their primary interest or activity will dominate their break or holiday, they will also undertake other activities.

In certain instances segments are also further differentiated by psychographic characteristics and/or lifestage characteristics.

Market segments have also been divided into three principal groups:

- Core staying – this group represents the current main staying market segment for Shropshire. This is liable to the be the biggest staying segment;
- Emergent/special interest staying – these are staying segments that are, in relative terms, smaller than the core group. They are either special interest groups which are always likely to remain minority groups or emerging segments that may, over time, have potential to become larger and more mainstream for Shropshire;
- Day visitors – groups visiting for the day. This category includes special interest segments and more mainstream markets.

The following table summarises, within these three groups, Shropshire's key potential markets, their main characteristics, and main activities / motivations.

Market segment	Main Characteristics	Main motivation and activities
Core Staying Market Groups		
Rest and relaxation – traditionals	• ABC1C2 • 50+ • Couples • Traditionals	The main motivation is rest and relaxation. This segment will also undertake a number of other activities including sightseeing, walking, shopping, eating out, passive activities etc.
Emergent / Special Interest Staying Market Groups		
Rest and relaxation – post family discoverers	• ABC1 • 45+ • Couples • Discoverers	Same broad motivations and activities as the core rest and relaxation group but different psychographic characteristics and therefore values and interests. More likely to be attracted by opportunities to have new experiences.
Rest and relaxation – family discoverers	• ABC1 • 30-45 • Families with young children	As above
Riding	• AB • Lifestage and party will vary and could include older families, couples, groups and solos.	Primary motivation is riding (either from a riding school or with own horse). Other activities may be undertaken but these are likely to be secondary.
Walkers	• ABC1 • Couples • 45+	The primary motivation for this group is walking. Other activities will be incidental.
Cyclists	• ABC1 • Solos, groups, couples. • 25-55	Primary motivation is cycling – possibly centre based or possibly touring.
Time with family / friends	• ABC1 • Varied ages • Mixed groups (friends/extended family)	The primary motivation of this group is meeting up with friends and family in an appropriate location. This group will undertake a range of other activities, which may or may not be incidental in the destination choice. This group is more likely to stay in self catering accommodation.
Indulgence	• AB • 45+ • Couples	For this group, the trip is a treat (possibly celebrating an occasion) – the indulgence could involve eating out in a good restaurant(s) and staying in quality hotels. This segment is probably closely linked to the rest and relaxation in motivation and activities but positioned more as an indulgence.
Sport	• Varied	The main motivation is participating in some form of sporting/physical activity – e.g. golf, fishing
Coach groups	• C1C2 • 60+ • Couples	While the main motivation of this group is broadly rest and relaxation, and a change of scenery, it is distinguished from other segments primarily by its socio-demographic characteristics and route to market. Activities will be primarily sightseeing, visiting attractions and shopping.
Events	• Varied	The events market group will be motivated by a specific event that meets their interests. The event will represent the primary (and in some cases only) activity of the visit.

Market segment	Main Characteristics	Main motivation and activities
Health and well being	• AB • Groups • 35 – 55	While health may be an important sub theme for some segments, this group is more explicitly motivated by health and well being and associated activities. Development of this group would require further product and market development.
Canal users	• ABC1 • 30-60 • Groups / couples	While this group's main motivation is rest and relaxation, it is (like the coach group) distinguished by mode of transport/accommodation and route to market. Activities will be primarily confined to canal side (eating out, passive activities) but may include some other activities such as sightseeing.
Educational groups	• 7-16 year olds	Usually with a strong educational or activity motivation.
Special deals	• BC1C2 • Traditionals and Functionals, • Over 55	Visiting places of interest, shopping, and pottering around towns and villages are likely to be the activities undertaken by this group.
Day visitor market groups		
Events	• Varied	The day visitor equivalent of the staying market identified above.
Visitors to attractions	• BC1C2 • Couples / families • All ages	The motivation for a visit to Shropshire for this group is to visit an attraction. They may be also undertake other activities as part of the day out. Characteristics of this group will vary widely – this will be partly influenced by the specific attraction and its appeal.
Educational groups	• 7-16 year olds	The day visitor equivalent of the staying market identified above.
Shopping	• ABC1C2 • Couples / families / mixed groups • All ages	The motivation of this group is a shopping trip to Shropshire, although other activities may be pursued as part of this. Shopping maybe general high street shopping (in e.g. Shrewsbury or Telford) or more speciality shopping.
Sightseers/potterers	• ABC1C2 • Couples • 45+	This group's primary motivation / activity is simply to have a day out – browsing and pottering at some of the sights or market towns. They may undertake some secondary activities, such as shopping, visiting an attraction, or going for a short walk.
Walkers	• ABC1 • Couples • 45+	As the staying visitor group.
Sports	Varied	The day visitor version of the same staying group.
Cyclists	• ABC1 • Solos, groups, couples. • 25-55	The day visitor version of the same staying group.
Riding	• AB • Lifestage and party will vary and could include older families, couples, groups and solos.	The day visitor version of the same staying group.
Eating out	• ABC1C2 • Couples • 45+	The primary activity would be coming to Shropshire for a meal out (lunch or evening meal) at either a restaurant or pub.

Visitors will come from reasonably well-defined geographic catchment areas:

- Day visitors will tend to be from the North West (particularly Cheshire, South Merseyside and Manchester), the West Midlands Metropolitan area, Staffordshire, Wales and Shropshire itself.
- Staying visitors will tend to be from the North West, East Midlands, South West, East of England and London and the South East. Areas like the South West, North West, Midlands (East and West) and East of England show higher than average propensity to generate visitors. In contrast, there is evidence to suggest that Shropshire has a relatively low penetration of visitors from London and the South East. However, in volume terms this represents one of Shropshire's bigger markets and this, combined with its relative affluence, makes it a core area.

Section 7.1 identifies the relative size, growth potential and appeal of these market segments.

6 Issues and principle

6.1 Key issues

A number of key issues can be identified from research in relation to marketing Shropshire as a leisure tourism destination. These include:

- **Limited awareness** – awareness and knowledge of Shropshire as a leisure destination seems to be relatively limited. It is on a par or lower than neighbouring destinations.
- **Distinctiveness in the marketplace –** Shropshire lacks perceived distinctiveness and differential in the marketplace. Perceptions are mainly generic and of a "second division" rural UK destination. It has no strong icon that is representative of, or strongly associated with, the destination. Quality of the product offer is on a par but no better than similar destinations.
- **Exposure in the marketplace** – In a competitive market place Shropshire is not necessarily getting the exposure of competitors. It is perceived as having a potentially poorer offer than a number of competitor destinations.
- **Constituent areas versus the county** – in many cases, awareness of constituent parts of Shropshire is higher than the county itself – this is particularly the case for Shrewsbury, Ludlow, and Ironbridge. This raises a question of what the appropriate "brand" should be – more local areas, the county, or even the sub-region (e.g. Welsh Borderland)?
- **Resources –** Shropshire, like many destinations, lacks the resources to make a significant impact in the market place and produce a widespread perceptual shift among the population.
- **Promotional activity** - There are good elements to current promotional activity – brochures and the website were rated highly. However, potential respondents were not responding positively to elements of current promotional activity – for example, some promotional copy, the "Love from Shropshire" marque and the "Welsh Borders" tag.
- **Visitor satisfaction** – Despite perceptions, Shropshire has the ability to "surprise" and exceed the expectations of the potential visitor, and does deliver a satisfying experience.

6.2 Key principles

Arising from these issues (section 6.1) a number of key principles can be identified that will help to shape potential target markets and the approach to reach these:

- **Optimum mix** – a key aim of looking at new and different segments will be to seek to achieve an optimum business mix within Shropshire and within its constituent parts and tourism business, with potentially higher yield, less seasonality and weekend bias, and opportunities for growth.
- **Added value** – from a destination perspective, Shropshire Tourism and its partners should only be involved in promotion or development activity where it can add

value to the activities of individual operators. Very small or specific niches may be best managed by individual operators or groups of operators.

- **Route to market** – in the selection of markets for promotion purposes, there should be a clear route to market – i.e. a cost-effective means of accessing well-defined groups of consumers or intermediary buyers.
- **Market relationship** – in approaching particular segments, Shropshire Tourism must be able to develop a cohesive communication relationship, based on a sound understanding of the lifestyle of the target segments and the media most likely to be used. The nature of the messages would also be informed by the lifestyle values identified. Different techniques and different media should be used for different segments. While there will be a series of core messages (see below), these should be strongly tailored to the specific target audience.
- **Core messages –** a number of core messages should be constantly communicated to target audiences. These include Shropshire's location, what surrounds it (both geographically and attractions), its key sub county destinations (Shrewsbury, Ludlow, Ironbridge and possibly the South Shropshire Hills), and the potential experiences on offer.
- **Market return –** while marketing should, in general, focus on achieving a good return on investment this should not necessarily be concerned entirely with seeking to generate bednight volume. Marketing should also focus on seeking to address issues of awareness and in certain groups seek to raise the profile of Shropshire – in these instances the return on investment may be longer term.
- **Product development** – the development of the product is a necessary precursory to the development of future markets. While for most markets, the core of the product already exists, this may require further development or better presentation in line with segment aspirations.
- **Market led and product fit** – linked to the previous point, promotion and development activity needs to be strongly market focused and there needs to be an appropriate market / product fit. The needs and likely requirements of a market group need to be followed through the whole process of gaining their interest through providing information, making the booking to the actual visit.
- **Branding approach** – the use of Shropshire as a brand should be used flexibly and within certain promotional activity other products and destinations may take preference. For example, the use of key sub-county destinations (such as Ironbridge, Ludlow and Shrewsbury) should be more prominent for day visitor markets.

These key principles are reflected in the recommended future course of action (section 7 below).

7 Recommendations and the course of action

7.1 Market segments in the future

The following section looks at the market segments identified in section 5 and rates them on the basis of a number of criteria (further details are provided in Working Paper 7). These are:

- **Appeal –**this relates to the appeal of the segment **to** Shropshire as a destination.
- **Attractiveness –** this relates to the attractiveness **of** Shropshire as a destination to the segment.
- **Size –** the current market size for Shropshire (in relative terms).
- **Growth potential** - the growth potential of the market segment over the next 5 to 10 years for Shropshire.

In the following matrix, each of the market segments has been rated on a score of 1 to 3 against the **appeal / attractiveness parameters.** A score of 1 corresponds to a low attractiveness or weak appeal, whereas a score of 3 equates to high attractiveness or strong appeal. The scores are **relative to each of the segments listed**. Staying visitor markets have "(s)" after them; day visitor markets a "(dv)" after them.

Appeal (to Shropshire)	Weak	Medium	Strong
High		Rest and relaxation (family discoverers) (S)	Rest and relaxation (traditionals) (S) Rest and relaxation (post family discoverers) (S)
Medium	Indulgence (S) Special Deals (S)	Riding (S) (DV) Walkers (S) (DV) Time with family / friends (S) Coach groups (S) Events (S) (DV) Health and well being (S) Shopping (DV) Sightseers/potterers (DV) Eating out (DV)	Visits to attractions (DV) Educational groups (DV)
Low	Cyclists (S) Sport (S)	Canal users (S) Educational groups (S) Sports (DV) Cyclists (DV)	

Attractiveness (of Shropshire)

In broad terms, three priorities of segments can be identified at a destination level. The market segments highlighted in yellow (top right) are a higher priority and represent market / product groups which must be maintained and developed in the future.

In the following matrix, size is rated against growth potential. For **size,** the scoring is from 0 to 3 – a score of 0 means the segment is relatively non-existent at the moment, a score of 3 means, in relative terms, that it is quite large. **Growth potential** has been rated from – 2 to +2, with a score of –2 indicating significant decline, a score of 0 meaning a static market, and a score of +2 equating to significant growth potential for Shropshire.

Market size	Poor (-2 to -1)	Low (0)	Medium (1)	Good (2)
Large		Visits to attractions (DV) Educational groups (DV) Shopping (DV)	Rest and relaxation (traditionals) (S) Sightseers/potterers (DV)	
Medium		Eating out (DV)		Rest and relaxation (post family discovers) (S)
Small		Walkers (DV) Coach groups (S) Canal users (S)	Walkers (S) Time with family / friends (S) Events (S) (DV) Special Deals (S)	Rest and relaxation (family discoverers) (S)
Very small		Riding (S) (DV) Cyclists (S) (DV) Indulgence (S) Sport (S) (DV) Educational groups (S)	Health and well being (S)	

Growth potential

The matrix is divided into four groups, using Boston Matrix terms. These are

- **"Cash Cows" –** low growth / high volume (top left of the matrix, shaded in lavender). These represent the current core markets of the area and produce the revenues that support businesses and will enable investment for the future. Future priorities will be about maintenance of these markets.

- **"Stars"** – medium/good growth and medium/high volume (top right of the matrix shaded in yellow). Stars are volume markets with growth potential – they typically require investment with a view to growing the market and ultimately converting it into a cash cow.
- **"Problem children"** - medium/high growth potential and small volume (bottom right, shaded in blue). These are growth markets but low volume. They raise the question as to whether investment should be made in a segment to convert it to a Star (i.e. higher volume) or whether investment should be reduced on the grounds that it can be spent better elsewhere.
- **"Dog" -** Low growth potential and small volume (bottom left, highlighted in green). These generally do not represent a good return on investment.

Combining the analysis from these two matrices suggests a number of target segments for Shropshire. These will have different priorities. They are summarised in the following table.

Priority	**Target segments**
Market maintenance	Visitors to attractions (Day) Educational visits (Day)
Major market investment	Rest and relaxation (traditionals) (Staying) Sightseers/potterers (Day visitors) Rest and relaxation (post family discovers) (Staying)
Short to medium market development	Events (Staying) (Day Visitors)
Longer term market investment	Rest and relaxation (family discovers) (Staying)

7.2 The marketing approach

The key segments identified in section 7.1 have differing marketing priorities and will require different approaches.

In broad terms, this should be as follows:

- **Market maintenance** – visits to attractions and education visits segments. These are relatively mature markets experiencing a mature and well developed product. This market should be primarily the responsibility of individual attractions and consortia of attractions.
- **Major market investment** – three segments are identified for major market investment. These are two staying visitor segments, based on the experience or motivation of "rest and relaxation" and different psychographic characteristics (discoverers and traditionals), and a day visitor market based around the experience or motivation of sightseeing and pottering. These three should be the priority for the destination as a whole. Shropshire Tourism should concentrate its activities and resources on the two staying segments. Shropshire Tourism should also work, as a lead and co-ordinating organisation, with sub-county destinations

(e.g. towns and districts), attractions, and other operators to create promotional campaigns for the day visitor market.

- **Short to medium term development –** the "events" segment represents a priority for the short to medium term. Priorities will be partly around further product development and promotion. While some of this responsibility lies with individual events organisers, Shropshire Tourism has a role in the development of this sector through it s promotional functional. While a lot of event promotion will be tactical (i.e. the promotion of a specific event to its target audience), there will be a need for more co-ordinated promotion of events. Shropshire Tourism should undertake this promotion as part of its major market investment activity (see above) rather than as a separate activity.
- **Longer term investment –** one segment, the staying segment based on the rest and relaxation by family discovers, is identified as requiring longer term investment. This is a potentially emerging segment, and short to medium term priorities will be around product development and potentially the development of family orientated information (e.g. itineraries and child friendly accommodation). This segment, in the short to medium term, is unlikely to elicit the best return on investment, and in an environment of limited resources should not be a priority. Marketing to this group should be linked to promotional activity to the main discoverers segment (see above).

As highlighted above, the key focus of Shropshire Tourism's activity should be on major market investment within three segments. Within this, there should be a number of major areas of marketing activity. These are as follows:

1. **Awareness raising** - there is still a relatively low awareness of Shropshire as a destination, and the focus of activity needs to address the challenge of extending awareness whilst generating actual business and bookings for the businesses in Shropshire. There is a need for a professional media liaison operation which would include general press and PR activity and dedicated editorial and photographic resources that would support the key messages - including reinforcing understanding of where and what Shropshire is. Press releases and editorial would be tailored to the needs of each type of publication and/or segment.

2. **Consumer advertising** (above the line). This should include both press and radio, including the key messages and reinforcing location references. Again, the content of advertisements and media used would be geared specifically to each segment, either 'Traditionals' 'Discoverers' or day visitors, in order to appeal to their particular emotional and psychographic values.

3. **Brochure and website development**. The main short breaks brochure would focus on messages related to the 'traditionals' market, whereas the website would highlight those elements that are most likely to appeal to the 'Discoverers'. There would, of course, be overlap between the emphases of each of these.

4. **A direct mail campaign**. This could target 'traditionals' via a postcard in the form of an 'invitation' that creates a sense of exclusivity. Content would include details of special breaks to be booked by a certain date, for specific times of year.
This could be done in conjunction with coach/tour operators to their own databases, as well as direct to independent visitors via bought in databases or magazine inserts.

5. **A regular email campaign**. This would be aimed at 'Discoverers' that would provide last minute opportunities and offers for short breaks and, separately, for day trips, and information on specific events of interest to this market. Short breaks in quality self-catering or unusual hotels are likely to be particularly attractive.

These activities can be divided into two discrete phases. Phase I is about increasing awareness (the first marketing activity above). Phase 2 would be about selling experience (marketing activities 2 to 5 above) – i.e. generating and converting interest to business.

The following tables outline in more detail the approach to Phase 2 activities for each of the three main segments.

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. They are 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 county and there will be significantly untapped potential within Shropshire's core catchment areas. 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. 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.
Marketing activities	Specific marketing activities should include: • Radio advertising (Classic FM, Magic,) • Editorial features in Gardening magazines, weekend supplements (particularly the Telegraph and Mail) • Weekend features in local papers in North West, East Midlands, M40 corridor

	• Features in Caravanning magazines • Postcards for direct mail (using bought mailing lists) • Promotion of packages and reader offers to coach and tour operators including joint local press and radio advertising with operators
Product development	
"Soft" product development	Development of specific itineraries of activities and car tours featuring things to do both in and around Shropshire. The less well-established parts of Shropshire (such as North Shropshire, Oswestry and Bridgnorth) would be important, as would certain locations beyond the Shropshire borders such as Powys Castle, Shugborough, and parts of Herefordshire.
Tourism infrastructure required	• Range of quality accommodation including country houses, B&Bs etc • Quality caravan sites • Coach parking, dropping off points and driver facilities • Attractions particularly National Trust properties, and gardens • A well coordinated programme of arts and cultural events to support short break opportunities.
Partners	
Key partners	Primarily a Shropshire Tourism led campaign. However potential partners would include Local Authorities, Tourism Associations, consortia of attractions and accommodation, and individual businesses.

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. 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. 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. 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.
Marketing activities	Specific marketing activities should include: • Press advertising in weekend supplements (Independent, Guardian) • Emailing to VisitBritain's database of respondents to the Outdoors campaign • Media campaign including information provision for independent guidebooks, a proactive editorial programme including creating/selling-in news, features and pictures; advertorial deals including special supplements, readers' offers and competitions; broadcast-media programme sponsorships/product-placements; strategic display advertising, possibly including TV channels such as the History Channel and National Geographic • Database marketing of special offers

Product development	
"Soft" product development	Soft product development could include further developments of the Shropshire Tourism website to enable this segment to create their own itineraries. Examples could include further information on speciality food producers, geographic mapping of good pubs/restaurants with accommodation etc.
Tourism infrastructure required	• Quality accommodation, particularly with character or historical links. • Opportunities for walking with heritage trails and landscape interpretation (such as the Stiperstones, Long Mynd etc). • Opportunities for cycling, horse-riding, boating etc • Activity holidays that include opportunities to learn new skills or have new experiences, including those related to health and well-being
Partners	
Key partners	This would be primarily a Shropshire Tourism led campaign but would clearly involve tourism organizations, particularly those with a distinctive or special offer.

Segment	Sightseeing and potterers (Day visitors)
Key dimensions	
The experiences to be offered to visitors	"A day away from it" / "A change of scenery" discovering the surprises of Shropshire. Specific activities could include pottering around Shropshire's distinctive market towns, speciality shopping, eating out, gentle country walking Also: A day at the races, Family days out at Attingham Park/ Ironbridge, a Canal Trip, etc
Markets and marketing	
Market focus (characteristics of target audience)	Demographically this group would be relatively broad in its characteristics. Typically visiting as couples and generally 45 plus. They would be mainly from ABC1 socio economic groups (although C2s would also be important).
Marketing messages, and positioning	Take a day to live the life you want to live, be who you want to be, expand your horizons, clear your mind
Marketing activities	• Develop database of contacts with local TV, radio stations and newspapers in Birmingham, Stoke on Trent, Worcestershire, Manchester, Liverpool, Wales (both BBC and commercial stations). • Regularly supply press stories on events, special attractions, stories • Above the line advertising campaign featuring commercial radio stations and local and regional press • Database and CRM development with new and existing contacts, featuring forthcoming tailored events and day trip itineraries 'Try pony trekking in the Shropshire Hills, followed by lunch in a village pub…experience the thrills of Ludlow races, then enjoy a gourmet meal and a leisurely stroll by the river'
Product development	
"Soft" product development	• Development of the Shropshire website to enable 'pick & mix' of activities and itineraries. • Encourage special offers and tie-ins between attractions and catering establishments (to increase spend and dwell time) • Development of database of activity providers
Tourism infrastructure required	Events Waymarked walks Providers of learning /activity/experience opportunities
Partners	
Key partners	While Shropshire Tourism would act as the co-ordinating organisation in this campaign, a significant amount of activity would be undertaken by sub-county marketing

	organisations (e.g. Local Authorities, Town Centre management organisations, Tourism Associations and attractions consortia. This campaign will also include individual businesses, ranging from retail to catering in both towns and rural areas.