SHROPSHIRE TOURISM UK LTD

MARKETING

STRATEGY

2015 – 2020

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THE MARKETING STRATEGY

1.0 INTRODUCTION

The aim of Shropshire Tourism UK Limited is ***"To promote tourism in Shropshire & the surrounding area and the generation of wealth and creation of jobs through the development of the tourism industry via an effective, efficient and collective approach. To provide a representative voice for the tourism industry in Shropshire & the surrounding area".***

The purpose of this document is to set out Shropshire Tourism's marketing strategy for the next five years and to help establish the annual marketing proposals and priorities. It will specifically identify:

- Shropshire's Brand Values
- The Market Overview
- Key Marketing Objectives
- Shropshire Tourism's Target Visitor Markets
- The Main Marketing Focus & Activities

The tourism marketing strategy for the company can only be effectively developed alongside the marketing needs of the destination (Shropshire) and the tourism product (the industry). Therefore this document will also assess those needs and those factors that affect the wider industry and the destination as a whole.

With limited resources it is clear that neither the company nor the destination or the industry can market effectively to all potential market segments that Shropshire may appeal to. Therefore it makes economic sense to focus only on those segments that can be readily identified, where there is the greatest product match, the greatest economic return can be gained and that are going to be most likely to respond to the offer.

2.0 BRAND VALUES

Established over the last 18 years, the "*Love from Shropshire*" brand was developed as a means of conveying the essential brand values of Shropshire to potential visitors in Shropshire Tourism's communications. This is distinct from, but complementary to the destination brand.

It is widely accepted that the true value of any brand can only be assessed when viewed from the consumers' perspective. That is to say the brand messages, values and worth our customers attribute to the brand are its true worth rather than what we may think it conveys.

Research has shown that the *"Love from Shropshire"* brand has already achieved high recognition within Shropshire Tourism's target market place and is also being increasingly adopted by other tourism organisations and businesses within Shropshire as its strength as a marketing tool is beginning to be realised.

The difficulty for as diverse a product as Shropshire's tourism offers, is to try and encapsulate that offer under one simple and recognisable message that can be used in the market place.

The *"Love from Shropshire"* logo helps convey the brand values in an easy to identify format – but it is not in itself the brand.

The copy we use and how we write about Shropshire, the style of our adverts, our media choice, the style and methods of communication we use all have to be integrated into conveying the brand values for Shropshire.

More importantly what we actually deliver to our consumers in terms of product and the manner in which we deliver it when they visit determines whether the brand values are upheld and reinforced in the consumer's mind.

Consistency of message and consistency of product is ultimately the key to successful brand building.

To define Shropshire's brand values we need to look at the integral parts of the offer from the consumer's point of view. The phrase ***"Shropshireness"*** has been used frequently to sum up some of those indefinable qualities that make Shropshire unique and help differentiate ourselves from our competitors.

"Shropshireness" could be said to include much of the following sentiments:

Rural, unspoilt, friendly, interesting, unusual, surprising, delightful, less known, nice, slow pace, quaint, quirky, slightly odd, , nice people, hospitable, old fashioned, genuine, honest, undiscovered, oldy worldy, unsophisticated, different, real England.

This description has also been borne out by recent research conducted by Shropshire County Council that shows this is how the consumer actually describes Shropshire.

Many of the consumer's perceptions (and misperceptions) of Shropshire are reinforced (or dispelled) when they actually visit. Shropshire often surprises visitors. In truth Shropshire actually delivers more than many consumers expect. They find that Shropshire is actually quite sophisticated and has more to offer than they expected to find.

These perceptions are the real strength of the Shropshire product when trying to market Shropshire to the unaware and the fact that we do consistently over-deliver to the visitor is borne out by our high level of repeat visits.

We need to identify consumers (market segments) who are most likely to appreciate Shropshire's brand values and are most likely to appreciate the product and show us the highest rate of return for our efforts. We need to ensure that the messages we convey and the communication channels we select reach and stimulate those consumers to buy the product and visit. By doing this, Shropshire Tourism will continue to achieve high conversion rates on our activities and the destination as a whole and tourism businesses will continue to benefit.

By ensuring the brand and brand values are also adopted and applied not just in all our activities but across the industry in Shropshire, brand awareness and brand recognition in the market place will be increased and the consumer reassured and more encouraged to visit.

Shropshire Tourism will offer help and support to organisations and businesses in developing brand consistency. Based on the latest detailed consumer research Shropshire's strongest brand positioning statement is:

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?

This statement was tested against several variations and alternatives and was found to have the strongest consumer appeal and interest and the best fit with their preconceptions of the destination.

3.0 MARKETING ENVIRONMENTAL AUDIT

The marketing environmental audit is a systematic examination that endeavours to assess both those internal and external circumstances and situations that are likely to affect our effectiveness in the market place. Some of these may be out of our control, others we need to be mindful of and others we can directly respond to.

The Micro Environment Audit is an internal audit of the market and takes into account those factors that are specific to the organisation, its strategies, strengths and weaknesses, its functions and the competition and how this all impacts on the marketing mix.

The Macro Environment Audit assesses the external factors such as the social, technological, economic, environmental, political, legal and ethical circumstances that affect the market place in general and may impact on the organisation.

In both audits we have looked at the wider industry in Shropshire, Shropshire as a destination and not just how these factors affect Shropshire Tourism as a company.

3.1 The Micro Environment

3.1.1 The Organisation

Many of the company's general strengths and weakness have already been identified in detail in the company's business plan. In overview however, the organisation has a clear focus on its marketing activities and has the professional resources to respond.

The company's reliance on grant income and its limited budgets inevitably restrict our marketing activities however it also makes the company more conscious of the need to be effective and deliver results for its members. There is the potential to secure additional resources and generate new income from other activities. This could then allow the company to undertake greater marketing activities.

The establishment of clear brand values and use of consistent messages to the market place has placed both the company and the destination in a strong position that has seen an increase in market share across its target markets.

3.1.2 The Industry

Independent consumer research has shown that for staying visitors, quality of accommodation and diversity of attractions are the two primary motivators for visitors when selecting a short break destination. Although Shropshire as a whole has always applied an 'inspected only' policy to all its accommodation guides, there is still a gap between what the consumer believes to be available in the county and what actually is available. This gap must continued to be addressed in all tourism marketing activities if market share is going to be increased and the brand values maintained.

The consumer (in all sectors) has increasingly higher expectations in terms of standards and increasingly a willingness to complain. They also are more time precious and time aware. This places real pressure on the industry to "raise its game" and increase the standards of its products and services simply to maintain competitive position.

3.1.3 The Destination

Many of the destination's strengths and weaknesses have been identified in the County Tourism Strategy. There are suggestions in that document as to potential new visitor markets that Shropshire may appeal to; these have now been thoroughly researched as to the likely segment size, characteristics, motivations, sustainability and possible rates of return. It is the results of this research that now forms the basis for the current marketing strategy.

There are currently weaknesses in specific areas of the product that preclude Shropshire from aggressively attacking certain markets. These include limited family accommodation; few facilities that can accommodate overnight coach parties and limited budget/bunkhouse accommodation. In most instances these markets have less disposable income and need to be attracted in volume to give an equivalent spend generation to the markets that Shropshire Tourism has traditionally pursued.

However there is a lack of four-star quality accommodation in Shrewsbury and certain other parts of the county and these facilities do appeal to both high spend commercial and leisure visitors.

There are clear strengths in terms of tourism drivers such as Shrewsbury, Ludlow and Ironbridge and increasingly the Shropshire Hills and that the county overall has a positive image as a destination. Although Shropshire Tourism cannot change the product offer, it has changed the way in which that product is promoted to the market place. Shropshire Tourism has developed a unique (and enviable) style in the way it promotes the county. This particular approach helps differentiate ourselves in the market place and needs to be built on.

Currently there are clearly identified markets that the destination already appeals to. Many of these markets have a high disposable income, are prepared to travel and do repeat visit. In addition there is a potential day visitor market in excess of 15m people within 1.5 hours isochrone of Shropshire.

Shropshire Tourism has used its limited marketing budgets to specifically target those segments of these markets that will show the highest rate of return. Based on the latest detailed consumer research details on the new target segments are provided in **section 6** of this document.

There are also opportunities for Shropshire to provide a branded welcome to its visitors and, as previously stated, the overall brand values for Shropshire are sufficiently strong to provide a sound basis for developing targeted marketing proposals.

3.1.4 The Competition

As a company and membership body we compete with other organisations that supply similar services to ourselves, our member businesses compete with other organisations on the same basis and as a destination we compete with other destinations both within the UK and overseas. Therefore these threats need to be assessed against the company, the industry and the destination.

3.1.5 The Company

The company has several customers it provides services to. These include:

- members and other businesses,
- partner organisations,
- external agencies and organisations, and
- Visitors and potential visitors themselves.

In areas of print production, web site supply, advertising opportunities and member support there are many competing companies and organisations offering some or all of the same services.

There are also other providers of visitor information many of whom Shropshire Tourism works with in partnership – such as tourist information centres, tourist associations, local authorities, regional and national bodies etc. There are also competitors in information provision such as commercial web site providers.

For Shropshire Tourism to maintain its position as the main tourism marketing body in the county it has to ensure that its marketing mix is correct.

Shropshire Tourism is price sensitive and tries to be competitive in all the services it sells and in the charges it applies for information provision. However, price sensitivity does not mean selling services at a discount, indeed it should mean maximising the revenues generated by selling quality at a premium price whilst still providing value for money.

The company's product range is consumer driven, whether that consumer is an individual buyer of advertising space or a visitor seeking information. In all cases the company must continue to be responsive to both industry and visitor demands. This is particularly relevant in areas of E:commerce, printed matter and advertising and especially when looking how best to supply visitor information.

The "Place" element of the marketing mix usually applies to channels for distribution. In the case of the company this could be where we distribute our brochures, how we make visitor information available and how we undertake direct mail. It also covers how we place our services to the membership and wider industry. This will be worked up in more detail in the annual marketing plan. However it is clear that the methodology so far employed by the company has led to a competitive edge being established that needs to be maintained.

The promotional mix covers advertising, press & PR, direct selling, exhibitions and how we use the team to undertake these activities again this will also be covered in more detail in the annual marketing plan. Adopting a cost effective use of our marketing resources and consistently aiming for low cost per response and high conversion rates has also created a competitive position for the company.

In this service business, people form the most important element of the marketing mix and Shropshire Tourism's team are all members of the Tourism Management Institute. Many also hold specialist marketing qualifications and each member of the team have a range of specialist skills. All have local knowledge, an understanding of the industry and above all are customer focussed. This places the company in a very strong position to provide a high level of professional service to its consumers.

The marketing processes the company employs are always being reviewed both in terms of their effectiveness and in whether they can be provided more efficiently. As the company is reliant on the public purse and the monies it can generate from its commercial activities it has to be mindful of the principles of best value and the need to generate business for the members and wider industry within Shropshire. There is a need to integrate its marketing information systems and make better use of the databases we possess.

Monitoring and measuring form an integral part of the company's marketing activities. Continued customer and industry research allows the company to check its own performance and explore new opportunities. It also allows the destination's performance in the wider context to be assessed.

Shropshire Tourism has established itself as the lead leisure tourism marketing body in the county. No other organisation has the same reach, coverage or effectiveness. Whilst it is unlikely that a new organisation could provide the same level and scope of services that Shropshire Tourism provide there is always the danger of new entrants or substitutes coming into play and cherry picking those activities that are potentially lucrative.

The Board and membership need to be mindful that it is only by generating income in some areas that the company can conduct other less profitable marketing activities (such as press and PR work and exhibitions) that still nevertheless benefit the county as a whole and the individual tourism businesses.

As membership grows and closer links are forged with the district tourist associations and other consortia, Shropshire Tourism is well positioned to meet any competitive threat. It is also clear however that with more resource more promotional work could be done. This is particularly true in the increasingly important areas of E:marketing, new media and television.

3.1.6 The Industry

The industry's marketing mix has to be as equally balanced as the company's. The industry, like the destination itself, is competing with existing providers. A generalistic overview would suggest the following:

In terms of price the industry could, in many instances, successfully increase its average room prices in both the serviced and self-service sectors without becoming uncompetitive and without having to increase its offer significantly. The attractions sector does have to be more price sensitive. The Company believes that we should all be trying to sell at full rate and maximising the revenues generated by selling quality at a premium price (whilst still providing value for money) if greater economic benefit is going to be gained without having to massively increase visitor numbers or occupancy.

The standard of welcome and hospitality and the general standard of the product is such that it often surprises visitors and over delivers. This helps support the suggestion that the average prices could be raised. Overall the product does still need some quality improvements but these are generally in the area of service provision rather than significant physical improvements to establishments. As previously mentioned there are possible gaps in the provision of four-star serviced accommodation.

The personal way many businesses operate is still one of the main ways that Shropshire continues to differentiate itself from its competitors. However the visitors increasing expectations in terms of service and facilities cannot be ignored neither can their willingness to complain if things are not right. The industry has an integral role in underpinning Shropshire's brand values and encouraging repeat visits from satisfied customers.

It is clear that for many businesses, promotion through Shropshire Tourism and the local associations is the only cost effective way that they can reach their market place. But faced with ever increasing promotional opportunities the need for businesses to monitor where their business comes from and what works for them must now be considered an essential task. Shropshire Tourism will continue to assist businesses in presenting them with opportunities that work and generate business and visitors for them.

3.1.7 The Destination

It is generally agreed that, for staying visitors, Shropshire's leisure tourism primary markets are domestic short breaks and VFR (Visit Friends and Relations) markets. The overseas markets still represent a small percentage of our total business. The nature and scale of the Shropshire product and the brand values the consumer has for the county put Shropshire in a strong position to build its market share. However there are significant emerging threats from other destinations both in the UK and from overseas.

The budget airline offers and European city breaks must be seen as a real threat to those in the short break market. The recognition of other UK destinations of the increasing importance of tourism to their economy and the imbalance in the resources available to them to promote their destination also present a real threat to Shropshire.

The key to success for Shropshire still remains:

- To differentiate itself from its competitors.
- To be clear about which segments the product most appeals to.
- To be focussed on targeting those segments that will give the best rate of return for the industry.
- To be consistent in both message and product.
- To reinforce the brand at every opportunity.

3.2 Macro Environment Audit

The macro environmental audit looks at those external factors that impact on the organisation, industry and destination and therefore the development of the marketing strategy for the company. A flavour of these factors has been identified as follows:

3.2.1 Social

The UK short break and VFR markets are growing generally. The older (45+) markets have more leisure time and are taking breaks more frequently; they are also taking breaks mid week. The Henley Centre has already identified the decline in the family market as a key trend. The increase in single parent families and single dwellers are also on the increase.

All consumers have increasing expectations in terms of quality, service and value for money but are also more time aware and now equally seeking value for time. The decision making process has also been shortened. People having less time to read weekday newspapers means we should be looking at alternative media opportunities.

3.2.2 Technological

There is greater use of the internet and mobiles as a means to access visitor information. There are also greater demands for instant responses to questions and brochure requests. Visitors are looking to develop bespoke packages and are also increasingly looking to make bookings off the Internet. Web sites are now a vital marketing tool and new marketing opportunities are being presented through social media, direct e:marketing and interactive applications.

The continued development of and greater use of web addresses as a means of servicing campaign enquiries means that the Shropshire Tourism web site must continue to be further developed to keep pace and provide the destination's electronic platform for its members. Further investment is new on line marketing activity is required to meet the consumer and industry needs.

3.2.3 Economic

Although lower UK interest rates have meant more disposable income for some, those relying on savings interest have seen a cut in their income. The gradual dissolution of final salary schemes will see a less affluent retired market in the future. Already the option for early retirement is being eroded. Shropshire Tourism should be seeking new markets to develop and grow.

Budget flights and Euro city breaks are more affordable and can often represent better value for money for the short break market than a UK break.

The global situation and its effects on the pound and subsequent exchange rate still means the UK is seen as expensive to overseas visitors.

3.2.4. Environmental

The rural nature of Shropshire and the increasing weight of green issues make sustainable tourism a county priority. This however needs to be measured against the 86% of visitors who come by private car (and by all indications will continue to do so for the foreseeable future) and the need to generate increased bed occupancy and footfall for tourism businesses.

There may be opportunities for the industry to make operational savings and become greener in their activities. Shropshire Tourism should encourage businesses to think and operate more environmentally friendly techniques.

However there is a certain amount of pressure to target green markets that are not necessarily going to show the best rate of return for our efforts and could see a diversion of funding away from core (and more economically viable) marketing activities.

3.2.5 Political

The political support of the industry has increased at both a national and regional level. The recent changes at national level Visit Britain absorbing Visit England are yet to be fully assessed but their increased marketing role and shift of focus towards overseas markets will impact on our activities.

The local political support is still uneven throughout the county and there is now no longer any funding support from the local authorities. It is expected that there is unlikely to be any funding support in the future. The latest consumer research, following on from the County Tourism Strategy, now provide an unequivocal set of marketing priorities. The DDPs in Shropshire have all recognised that it is a priority to raise awareness of Shropshire as a visitor destination. Recent funding cuts by the local authority however may put them in a position where they will be unlikely to be in a position to deliver local tourism marketing activities going forward. Funding reductions are already impacting on those existing established district tourism organisations delivering tourism marketing. Tourism is not a high economic priority for the Marches LEP and therefore funding support for destination marketing is unlikely to be forthcoming from the LEP.

The dissolution of all regional tourism activity (HETB AWM) has seen the individual county organisations having to operate independently. Overseas marketing is now entirely being delivered on an ad-hoc and individual basis. The emerging super councils/economic power houses is already leading to a more urban focus on destination promotion at the expense of the rural tourism offer and rural destinations.

Based on rates of return, it has to be accepted that the urban conurbations of the West Midlands are likely to continue to receive the lion's share of whatever grant/funding support is available. The rural Shires are going to have to "make a case" for their funding bids and will be obliged to work cross border wherever possible and practicable.

There will be pressure to roll out cross-region marketing initiatives that may undermine Shropshire's competitive position or lead to a homogenised approach to tourism marketing. Local and rural marketing initiatives may also suffer as a result of this.

3.2.6 Legal

As society becomes increasingly litigious issues of company and director indemnity needs to be considered. There are increased costs of general insurance and, if packaging is going to be fully developed issues of travel agent bonds that may need to also be considered.

3.2.7 Ethical

Shropshire Tourism is often under pressure to act in a similar manner to the local authorities as it is often perceived as being part of the local council. It is expected that Shropshire Tourism will have impartial neutrality and promote every aspect of the tourism product. This may be seen as politically desirable but does not necessarily make best marketing sense.

Whilst Shropshire Tourism will always act with probity, the Board must support the view that Shropshire Tourism (and indeed Shropshire) must always play to its strengths. It must use those elements of the tourism product that are going to generate the greatest level of motivation in the visitors mind and the most appropriate rate of return for our marketing efforts.

4 SWOT ANALYSIS

Bringing together all these factors we can see how Shropshire is currently placed from a marketing perspective to meet the challenges and opportunities.

4.1. Strengths

Clear brand values
Growing brand recognition
Appealing product offer
Recognised primary drivers Shrewsbury/Ironbridge/Ludlow
Developed style
Low conversion costs
High business generation
Proven successes
Identified media opportunities
Good databases
Identified & responsive markets segments
Increasing destination awareness
Good reputation
Good press and PR contacts
Industry support
Partnerships
Increasing web presence
Strong online presence
Strong professional team
Growing markets

4.2 Weaknesses

Marketing information systems not fully integrated
Partnership interests not always shared
Limited resources and funding
Absence of local authority support or funding
Competing interests of the DDPS and local tourism groups
Difficulties in responding quickly to marketing opportunities
Brand values not fully integrated and supported throughout Shropshire
Comparative low awareness of Shropshire
Marketing operations are distanced from the customers
No iconic image

Low overseas markets
E:marketing opportunities not fully exploited
Social Media opportunities not being fully exploited

4.3 Opportunities

Clearly Identified target markets and segments
Developing Product offer
Restoration of USA and North American markets
North Europe/Scandinavian markets
New media opportunities
Emerging markets
Funding opportunities
Increasing reputation and membership
Regional & Cross County opportunities
Growing support at district level
Event and Accommodation opportunities
Sources of data from accommodation and attraction providers
Online social media opportunities

4.4 Threats

Budget Airlines/Euro city breaks
Other UK destinations
Other advertising providers
Competitive market place for advertising/services
Other Web site providers
On line travel agents
Air B&B
Funding processes, sources and structures
Regional demands
European unrest (overseas markets)
Terrorism Threats (overseas markets)
Potential impact from an exit from the EU
Alterations in Exchange Rates

5.0 OBJECTIVES

The aim of Shropshire Tourism UK Limited is ***““To promote tourism in Shropshire & the surrounding area and the generation of wealth and creation of jobs through the development of the tourism industry via an effective, efficient and collective approach. To provide a representative voice for the tourism industry in Shropshire & the surrounding area”.***

In delivering the company’s aim and mindful of the needs of the industry the company should aim to help the following be achieved:

- **An increase in the number of visitors to Shropshire**
- **An increase in the average visitor spend**
- **Prolong visitor stay**
- **Extend the length of the tourism season**
- **Create new employment opportunities**

- **Safeguard existing tourism jobs**

These aims should be considered when setting Shropshire's marketing objectives. The overall marketing objectives should therefore be:

- **To raise awareness of Shropshire as a visitor destination**
- **To market Shropshire as a visitor destination**
- **To encourage visitors to visit Shropshire**
- **To provide visitor information and routes to purchase**
- **To provide marketing opportunities and support for the industry**

6.0 TARGET MARKETS

The main target segments that Shropshire's tourism product and offer appeals to most and that can be readily typed, are reachable and who are likely to bring the greatest rate of return have been identified. This has been based on the latest (Arkenford) psycho-graphic and socio-economic profiles, detailed consumer research undertaken by Team Tourism, QA Research, the Shropshire Tourism Research Unit and Shropshire Tourism.

It is these segments that concentrated marketing effort must focus on over the next five years. The methodology used to reach these markets and communicate effectively with them will require new techniques to be applied alongside those traditional and proven methods that Shropshire Tourism has used successfully over the last 10 years.

The market segment overview is as follows:

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

Market segment	Main Characteristics	Main motivation and activities
Riding	• AB • Life stage 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.
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 undertaking 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.

Market segment	Main Characteristics	Main motivation and activities
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 • Life stage 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 indeed, Shropshire itself.

Staying visitors will tend to be from the North West (13%), South West (10%), London and the South East (30%) and West Midlands (13%). Areas like the South West, North West, and West Midlands show higher than average propensity to generate visitors. In contrast, there is evidence to suggest that Shropshire has a relatively low market 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.

The following section looks at the market segments identified and rates them on the basis of a number of criteria. 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) of the Visitor Markets

	Weak	Medium	Strong
High		**Rest and relaxation (family discoverers) (S)**	**Rest and relaxation (Traditionals) (S)** **Rest and relaxation (post family discoverers) (S)** **NB Cosmopolitans (S) now added**
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) to the Visitor Markets

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

This does not of course mean that other markets or market opportunities are ignored but it gives an indication of the likely levels of marketing spend that should be directed and where the greatest effort should be made.

Shropshire Tourism is mindful of the county tourism strategy's objective of achieving a 15% growth in the annual value of tourism in Shropshire that is to say some £75m pa annum. To achieve this target growth those visitors markets that offer the greatest product fit, greatest inclination to visit and highest rate of return on investment must be considered a priority.

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 (Potential Number of Visitors)	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)	NB Cosmopolitans (S) now added	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)	

Market 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). 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). 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). 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). 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) Cosmopolitans (Staying)
Short to medium market development	Events (Staying) (Day Visitors)
Longer term market investment	Rest and relaxation (family Discovers) (Staying)

.

The key segments 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 its 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 Discoverers, 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 E:mail 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.

As recommended by Team Tourism, the following tables outline in more detail the approach to Phase 2 activities for each of the three main segments.

Key Segment 1	**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%) does 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.
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.

Key Segment 2	**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 Visit Britain'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 organisations, particularly those with a distinctive or special offer.

Key Segment 3	**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, and 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 accommodation establishments (to increase spend and dwell time) • Development of database of event providers
Tourism infrastructure required	Events, Way marked walks Providers of learning /activity/experience opportunities Signage. Interpretation uses.
Partners	
Key partners	While Shropshire Tourism would act as the co-coordinating 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.

Key Segment 4 Cosmopolitans (staying visitors) See profile in annex 3

Although no detailed analysis was conducted by Team Tourism for Shropshire's overseas markets the following information has been prepared from Shropshire Tourism's consumer data and research. It is recognised that there are many socio-economic similarities between the UK staying visitor for Shropshire and the overseas profile.

Key Segment 5	**The Overseas Markets (Post Family Discoverers & Traditionalists)** **Core Markets:- USA/North America, Netherlands, Belgium and Scandinavia.**
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 set against a background of real England. Shropshire is easily accessible as part of a touring holiday and 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)	Shropshire's overseas visitors are generally independent thinkers and relatively quite high spenders, 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. This particular segment will be from ABC1 socio-economic groups and 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', real England, 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, there are opportunities for educational visits at Ironbridge and other key historic attractions in the surrounding region.
Marketing activities	Specific marketing activities should include: • Press advertising in quality overseas publications aimed at key groups • Emailing to Visit Britain'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; 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 Note: There has also been significant Press and PR work within Australia and work with Japan, Germany, France and Italy. Previous visitor research shows that these markets have also all been traditionally

	good for Shropshire. This work should continue.
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). • Activity holidays that include opportunities to learn new skills, have new experiences, including those related to health and well-being
Partners	
Key partners	This would be primarily a Regional Tourist Board led activity with sub regional destination support. However Shropshire Tourism could involve tourism organisations, particularly those with a distinctive or special offer at a local level and develop some of its own E:Marketing and Press activity.

Recent world events have seen a significant shift in the levels of overseas visitors in particular from North America into the UK. That said there does not appear to be such a significant downturn in Shropshire's overseas business and it has been those honey-pot destinations that have suffered most. Generally we should continue to concentrate on second or third time overseas visitors to the UK but down scale our activities until these markets are more confident.

7.0 CONCLUSION.

This marketing strategy will form the basis for Shropshire Tourism's annual marketing proposals for the next five years. These marketing proposals will be developed into a series of specific actions in line with the available annual budgets and seek to maximise the rate of return on activities for all its members and partners.

It will be necessary to continue to review the company's marketing strategy in line with prevailing marketing conditions, the company's own performance and the needs of the tourism industry within Shropshire.

APPENDICES 1 , 2 , 3 ARCKENFORD PROFILES OF KEY SEGMENTS

TRADITIONALS

CORE VALUES
Tradition, Independence, Anti brand – 7.9
Willingness to pay for more – 4.6
Willingness to pay for service – 7.1
Interest in risks, new opportunities, challenges – 5.5

OUTLOOK ON LIFE

Traditionals segment is a main stream market whose members are relatively self reliant and internally referenced People with possibly tendencies towards being sustainers.

The Traditionals segment are not brand-averse, although brand is not a key purchase driver, however they do tend to be more likely to hold more traditional values. Functionality is far more important than style. Whilst this group are not swayed by products with style and individuality, they will still go for something out of the ordinary. They value good service, and this is something that they will pay for, especially individual attention. However, they are unlikely to justify spending on expensive alternatives. They tend to live life at a relaxed pace, and enjoy intellectual challenges, arts and culture.

MARKET SIZE & LIFESTAGE

Traditionals represent 12.4% of the population. This group contains the smallest proportion of ethnic minorities (3%). They tend to be the older members of the mass market. Approximately 45% are aged 46-65. A third of the group are post family, and a further 40% are retired.

This segment is predominantly ABC1 and the average income is £20K. They are evenly spread throughout the country. They are low users of internet, yet a high proportion (over 40%) purchase goods using the web. They are likely to undertake some physical exercise, and enjoy Arts and Culture and Gardening and listening to the radio. A good night out involves classical music, opera or ballet or socialising with friends.

Top Options
Coach holidays
Caravan Club
Hotel breaks

HOLIDAYS

The types of holiday that most appeal to the Traditionals segment are familiar destinations. Bargain breaks and holidays off the beaten track are of interest for some of this segment. They are far more interested in a bargain break than a last minute holiday deal, and package holidays hold little interest for this group as do activity or theme related holidays.

Weekends Away – The Traditionals segment makes up 12.2% of the Weekend away market. They are more interested in English options than almost any other segment.

Short Breaks - They make up 12.7% of the short break markets and take more than 50% of their short breaks in England. York, the Lakes, Devon, Cornwall and the Isle of Wight are all popular options.

Long Holidays - this segment make up 10.8% of the market. They are moderately active, but 3 times as likely to travel abroad than to opt for an English option. They generally favour destinations closer to home: France, Italy and Greece in Europe and Cornwall in England.

Activities on Holiday

The Traditionals segment are likely to enjoy visiting attractions on offer when on holiday. They prefer all kinds of more traditional attractions Museums, Galleries, Gardens, Churches and Historic sites. In the evening they mostly enjoy theatre or arts events.

Holiday Options
Visiting a Special Place 1.36
Exploring a new region 1.34
Countryside holiday 1.32

DISCOVERERS

OUTLOOK ON LIFE

CORE VALUES
Tradition, Independence, Anti brand – 7.1
Willingness to pay for more – 5.0
Willingness to pay for service – 5.9
Interest in risks, new opportunities, challenges – 7.5

Discoverers as the name suggests are independent of Mind. They are the group least likely to be worried about what others might think. They are little influenced by style or brand unless it represents values they are seeking. Function far out rates style as a purchase driver.

This doesn't mean that they do not spend their money. In fact, this group are quite high spenders, and value new products and services as well as new experiences. However, they will judge their value for themselves. If the product suits their needs and is right then they will spend their money.

They value good service. They live a relatively relaxed pace of life. They enjoy intellectual challenges but arts and culture are not really an important part of who they are.

MARKET SIZE & LIFESTAGE

Discoverers make up 12.8% of the market. 5% come from Ethnic minority groups. This segment is predominantly C1 and 57% are male. The average income of£25K is second only to Cosmopolitans.

Discoverers are mainly aged under 55. They are most likely to fall into the age band 26-35. Members of the group are most likely to have children at home (42%) and a further 25% are post family.

They are the most active internet users, half of them purchasing goods online. They enjoy attending sports events, computer games, reading and listening to music (live and recorded). They also enjoy comedy. They are the most active day visit market.

HOLIDAYS

Top Options
Lastminute.com
Trail finders
Self catering

Discoverers are more likely to take a bargain break or last minute holiday deal than a package holiday. This group are more likely than most to holiday off the beaten track, and express some interest in activity holidays or those with a theme. They are less likely than the norm to go to familiar destinations or visit destinations near to family or friends.

Weekends Away - The Independent segment account for 14.3% of the weekend market. They are three times as likely to stay in England for a weekend away rather than go abroad.

Short Breaks - This segment makes up 13.8% of the Short Break. Overseas Options are more often chosen than English destinations but not by much. For shorter breaks favoured destinations include Scotland, Wales and the Lakes. Some also choose Paris.

Long Holiday - Discoverers make up 11.3% of the long holiday market. They are less active in this market and 4 times more likely to go overseas. They tended to prefer long haul destinations for a long holiday. These included Florida, Australia, New Zealand and America. Nearer to home, Cyprus is also in their top five list.

Activities on Holiday

Discoverers enjoy a mix of activities. They are as likely to visit museums as they are wildlife attractions and funfairs. They also enjoy sporting events, and eating out.

Holiday Options
Sun and Sea 1.41
Visiting a Special Place 1.32
Exploring a new region 1.25

COSMOPOLITANS

CORE VALUES
Tradition, Independence, Anti brand – 7.5
Willingness to pay for more – 6.9
Willingness to pay for service – 7.6
Interest in risks, new opportunities, challenges – 7.7

OUTLOOK TO LIFE

Cosmopolitans are strong, active confident individuals, who do What they want rather than following any particular fashion. Cosmopolitans view themselves as stylish, but individuality rather than fashion is most important they are quite happy to adopt traditional values when they feel they are appropriate. They are comfortable to try things that are out of the ordinary. Whilst early adopters of new ideas this is not based on fashion trends but on their personal interest in new products and opportunities. They will be the early to try out new products, especially in the field of new technology (boys & their toys?). However, they still value and seek functionality in their purchases. They 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.

They are risk takers; this is reflected in their purchases, but also in their desire for things that are new and different and provide them with new challenges, both physical and intellectual. This includes an appreciation of art and culture. Life for this group is full and active, yet peace and relaxation is still valued in the right circumstances.

MARKET SIZE & LIFESTAGE

The Cosmopolitan makes up 15.2% of the population and has the highest ethnic representation of all the segments (18%). They are a 'young' segment; over 40% are aged under 35 (a quarter aged 16-25). However, the mean age is 42 with the group showing good representation across most age bands. Over a quarter of the group are pre-family, A third with family, and a further 38% post family, demonstrating the quite high proportion of older members of the segment.

Whilst this segment is predominantly made up of C1 people, a quarter are from AB SEG segments. The average income is highest of all segments at £26K. A high proportion live in London.

Cosmopolitans are high users of the internet, more for information as opposed to purchases. They are a very active market , with the highest proportion undertaking 10+ hours of exercise per week. They enjoy a range of activities, including Arts and Culture, Cooking and Shopping. A good evening out is very varied, with Opera, Ballet, Theatre and Classical Concerts being popular as well as clubbing.

HOLIDAYS

Cosmopolitans are most active of all groups A key target for all holiday providers. They just love to get away. The variety and types of holiday enjoyed is far greater than for any other segment. Whilst Cosmopolitans are one of the groups most likely to select a package holiday to achieve their aims they are just as likely to organise a holiday themselves. They enjoy activity holidays, or a holiday with a theme, or to get 'off the beaten track'. Seeking a holiday that has low impact on the environment is also attractive. They are just as likely to plan a bargain break as they are to take a last minute holiday deal.

Top Options
Trailfinders & backpacking
Eurocamp

Weekends Away - They make up 21.4% of the Weekend Away market, the largest single group and 1 in 4 weekends will be overseas.

Short Breaks - They make up 21.6% of the short break market making them the most active group. For a short breaks favoured options include some city breaks (London and Paris) but also more scenic locations (Lake District and Scotland).

Long Holidays – They make up 22.6% of the long holiday market and Only while 1 in 4 holidays are taken in England they are still more likely to take a holiday in England than any other group. Cosmopolitans favour destinations like Australia, and the US or Italy and Egypt closer to home. The destinations that appeal most are those that are less likely to attract the mass market. No UK destination appear in their top 10.

Activities on Holiday

Cosmopolitans enjoy a wide range of activities on holiday. Whilst they enjoy drinking, clubbing and eating out, they are just as likely to go to appreciate theatre / arts entertainment. In terms of attractions they prefer museums and galleries to historic sites and gardens.

Holiday Options
Visiting a Special Place 1.34
Exploring a new region 1.31
Sun and Sea 1.29