

Segmentation



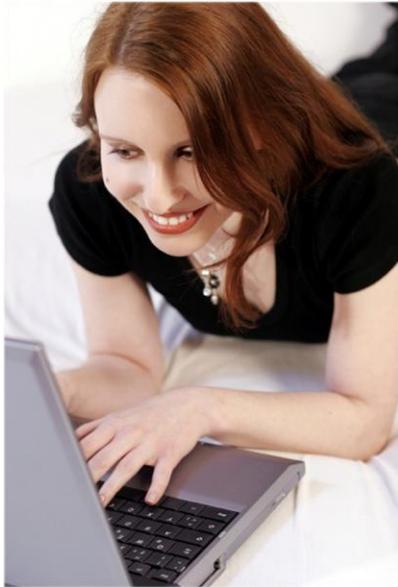
Introducing ArkLeisure

- Whole-Market Segmentation of UK travel consumers
- Created for VisitBritain and adopted by the majority of UK tourism bodies



- Based on values rather than demographics- better predictability
- Research based, with hundreds of thousands of interviews to provide supporting data
- Up to date- Fresh wave of data 2010

How does ArkLeisure work?

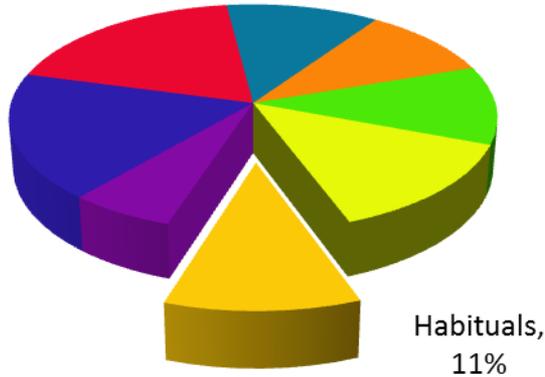


- 10 or 17 Questions that change everything- multi choice.
- Just tick the boxes.
- The questions can easily be added to existing research and customer satisfaction surveys.
- Behind the scenes, hundreds of thousands of research interviews of UK travel consumers which have been cleverly collated to create the only value-based tourism segmentation on a national scale.

- Eight segments tell us everything we need to know about what people like, what they value and therefore what they'll pay more for, or are 'must-have's' in their holiday.
- On the next few pages are examples of data from one of the segments- The Habitual

Example Segment- Habitual

Market Size

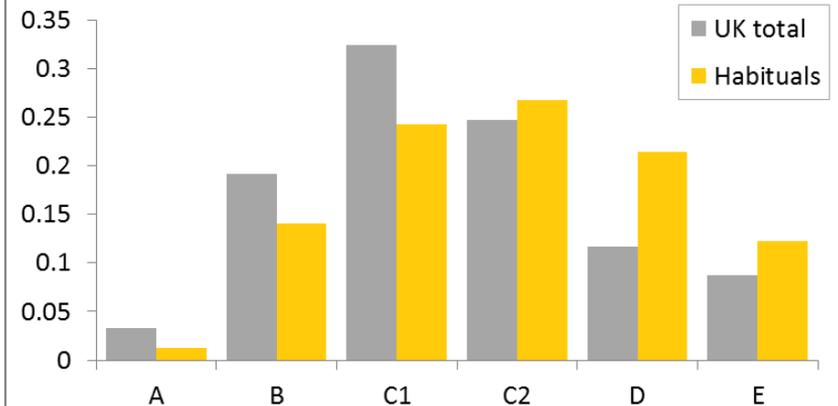


- Strongly traditional
- Strongly resistant to change preferring the familiar
- Value a more relaxed pace of life
- Purchase decisions made on function
- Fashion has little meaning to them
- Very risk averse and show little interest in new options or opportunities
- No interest in arts or culture
- Spend little money, on brands or service
- Find it hard to justify expense of any sort
- Often have limited income

Habituals appear on the market model in the Mass-Market and Risk Averse sectors, being Sustainers rather than Innovators.



SEG profile

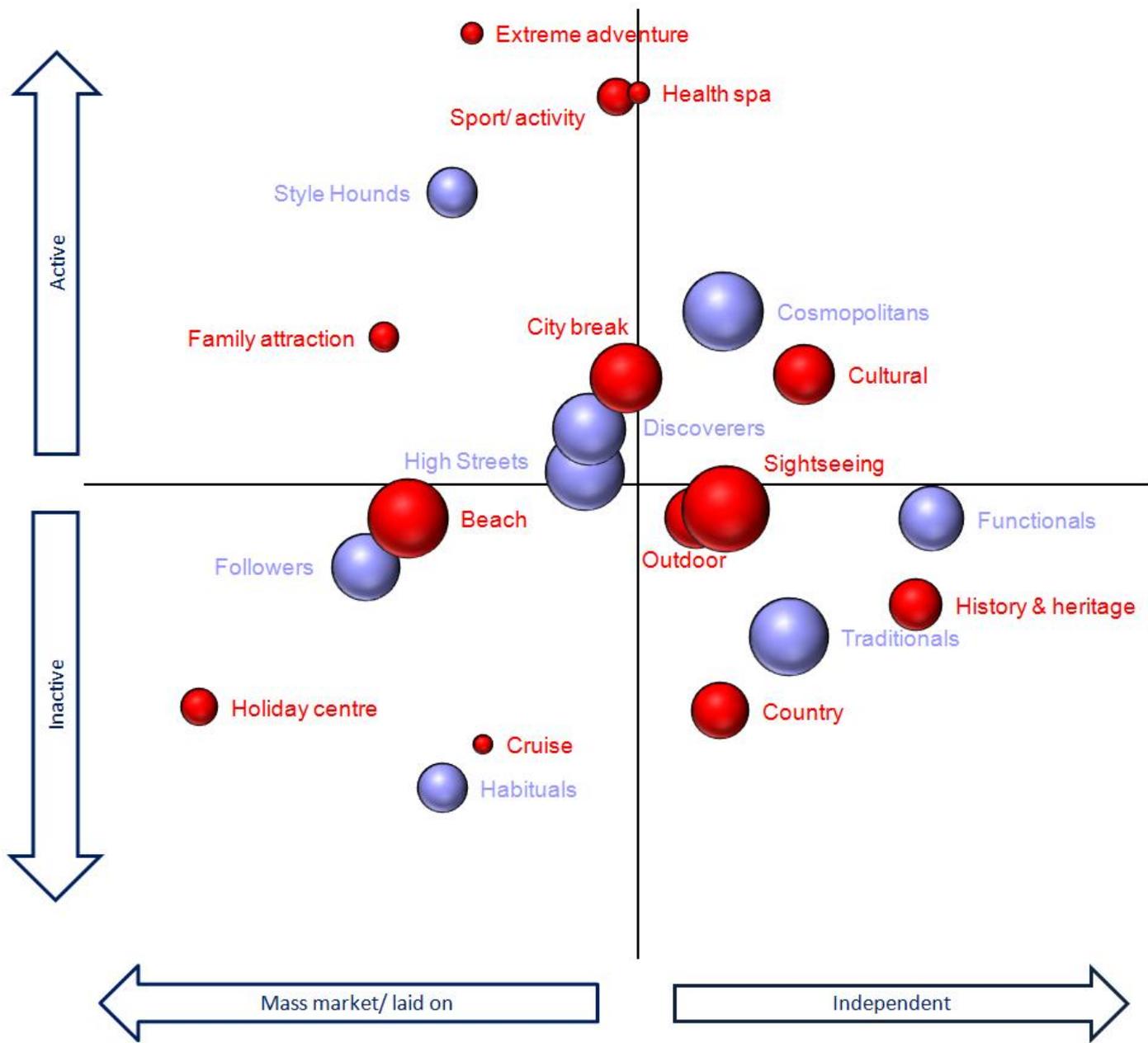


What ArkLeisure Tells Us About Holidays

ArkLeisure, developed over eight years of on-going research is the only values-based segmentation specific to the UK travel consumer.

It can tell us the following about each segment:

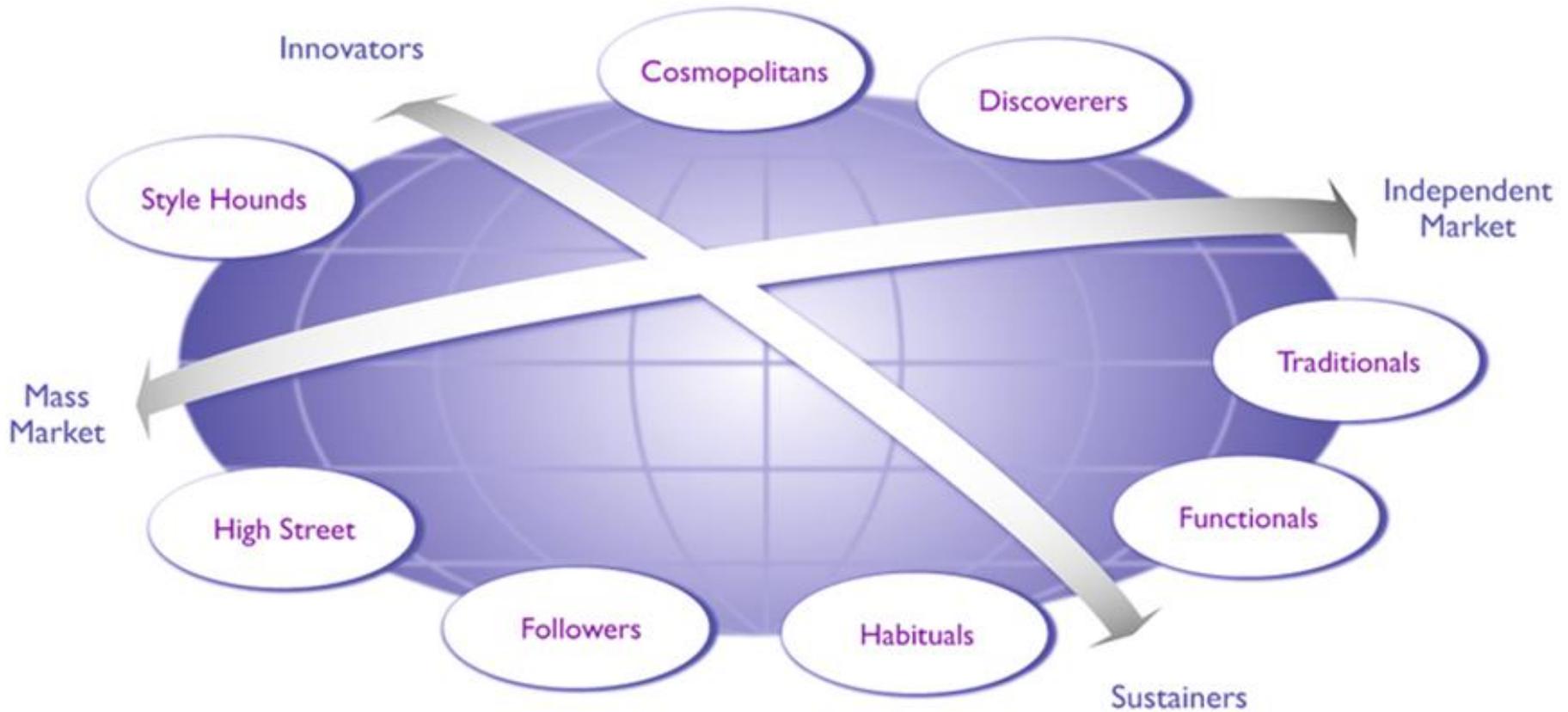
- Holiday Preferences
- Media Preferences
- Marketing messages which work for each segment
- Attitudes to 'Staycations'
- Attitudes to Sustainability
- Identifies which segments are interested in Cultural Tourism and which kinds match each segment
- Internet and Social Media use by each segment
- Leisure Activity Preferences
- %age of the population, age, and demographics for each segment
- TV watching
- Types of attractions which appeal to each segment
- Attitudes to Luxury



x = 46%, y = 42%

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The ArkLeisure Model



Cosmopolitans

Confident, stylish, and willing to give anything a go once



- Strong, active, confident and stylish
- Do what they want rather than follow any particular fashion
- Risk takers – a desire for things that are new and different
- They like new challenges, both physical and intellectual
- Life for this group is full and active, but with an appreciation of art and culture
- Comfortable trying new things that are out of the ordinary
- Happy to adopt traditional values when appropriate
- Find it easy to justify buying expensive alternatives
- High-spending market

High Street

Brand over function, these individuals are indulgent and prefer to be advised



- Like to take their information from other sources rather than discover things for themselves
- Prepared to spend money on luxury which tends to mean more things
- Brand and style are more important than functionality or individuality
- Not the first to adopt new products but they will be ahead of the majority of the market
- An active segment that is moderately interested in intellectual pursuits, arts and culture
- Keen to follow along when a fashion has been established

Followers



Risk averse, these individuals prefer the tried and tested

- Strongly influenced by their peers and by the media
- Unlikely to value things that are new and different
- They will try things that are new to them as individuals
- A similar aversion to what might be considered old fashioned as Style Hounds, but much less interest in 'new' options
- Avoid risk and will take up options when others have shown they work
- Lag behind other groups when it comes to new products and services
- Little interest in intellectual challenges, arts & culture
- Service means freebie extras like Satellite TV and sun beds thrown in

Functionals



Both price driven and practical, these individuals are expectant of service

- Self reliant
- Very price driven and value functionality strongly over style
- Traditional values
- Not prepared to pay for fashion, style or 'individuality'
- Not early adopters of new ideas
- Interested in new experiences, and happy to try things new to them
- Enjoy intellectual challenges, traditional 'arts and culture'
- Resistant to spending
- Service is something that they expect as opposed to something they will pay extra for

Discoverers

Valuing technology, authenticity
and independence



- Independent individualists
- Not worried about what others might think
- Little influenced by style or brand unless it represents their personal values
- Value technology, new products, services and experiences
- Function far out rates style as a purchase driver
- High spenders on what they want – but intolerant of substitutes or image based advertising
- Enjoy intellectual challenges but 'arts and culture' are often negatively perceived
- Value good service – which means enabling them to do what they want
- Live a relatively relaxed pace of life

Traditionals



Service orientated individuals with a relaxed pace of life



- Self reliant and independent
- Hold traditional values
- Unlikely to justify spending on expensive alternatives.
- Value more traditional established brands
- Functionality is far more important than style and individuality
- Value, and will pay for, good service, which for them means recognition and individual attention
- Enjoy intellectual challenges, arts and culture
- Relaxed pace of life

Style Hounds

Fashion conscious early adopters
who actively pursue excitement



- Very brand/ fashion conscious
- Do not want to be seen as old fashioned
- Early adopters
- Will pay for better service – which to them means 'more to do' or more fun
- No real interest in 'sophisticated' arts, or cerebral activities
- Fun and excitement is what defines a good time
- Risk takers - they live a full and active life
- Like to be part of the latest trends
- Strongly influenced by others
- Ready to spend money

Habituals



Strongly averse to change, these individuals hold dear traditional values

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For more information

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