

# **South West Tourism Brand Clusters**

**Prepared for South West Tourism  
by Lynn File Associates**

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## Background

If the South West is to compete in the global tourism market, then it must offer visitors something unique. Today the consumer has extensive choice and will no longer buy just what a region chooses to sell. People increasingly want to be able to personalise and tailor their own itinerary and with growing use of the Internet, they will increasingly take more control, creating their own 'Visitor experience'.

There is therefore a need to identify and anticipate changing visitor needs and desires. By segmenting the market according to customer need, there is the opportunity to target customers more effectively as well as grow sectors of the industry by encouraging collaboration between complementary businesses.

Segmentation is not a new concept in the tourism industry. 'Visit Britain' has carried out research and identified 400 customer segments worldwide. Australia appears to be especially sophisticated in its use of customer segments and, for example, both Tasmania and Queensland set out their target segments on their website.

South West Tourism proposes to carry the principle of market segmentation to the next level, focussing primarily on customers' aspirations and desired experiences.

In order to achieve this, a twofold process must be undertaken: Firstly, identification of the key customer bands in terms of their socio demographics and lifestyle eg Empty Nesters, DINKS etc. Secondly, the task is to identify the key customer segments in terms of their needs and desires. It is through customer segmentation on the basis of needs and desires that the South West can begin to exert real competitive leverage.

On September 26<sup>th</sup> 2003, South West Tourism ran a workshop to begin to identify these key customer segments and identified thirteen which were judged to be the most significant. This was followed up by workshops with Tourism Officers from across the region and then depth workshops throughout November 2003 with providers and industry experts operating in each, to identify the key issues and opportunities facing each identified cluster. (The notes from these workshops are available separately)

As a result of these workshops and subsequent discussions, the thirteen brand clusters were refined to the ten which were seen to offer most potential for the region.

There follows a series of descriptions of each key customer target band and brand cluster. This incorporates the findings of the workshops and also 'fleshes out' the initial ideas and indicates which brand cluster is of most relevance to which customer band. The brand clusters are described in the form of 'positioning concepts' so they include some ideas which are currently aspirational.

## **The Customer Target Bands**

There are seven customer bands which are especially important to the South West:

ONE: Young Free and Singles

TWO: DINKS (Dual income, no kids) and SINKS (Single income, no kids)

THREE: Families with children at preschool age

FOUR: Families with children at primary school

FIVE: Families with secondary school age children

SIX: Empty Nesters

SEVEN: Third Agers

These are now described in turn.....

## **ONE: Young Free and Singles**

This group is mainly aged 16-24. Many are students and so there is a strong bias to the college holiday periods. This group is characterised by a quest for new experiences. Especially at the younger end, a holiday in the South West may be a first taste of independence away from families whereas many of those at the older end will have taken a gap year and travelled the globe. The holiday experience is an opportunity to socialise and to try out things not available where they live eg surfing, extreme sports, off the beaten track activities. It is also about 'sex, drugs and rock 'n' roll'! This customer band are likely to travel with friends. They are experience driven rather than just wanting to see the icons. They have grown up with the Internet and are highly receptive to e-communication. Peer group influence is also important.

## **TWO: DINKS and SINKS**

This group is made up primarily of people aged 25 –35. Many are in demanding jobs and are reasonably affluent. Time is often the most important commodity to them. They are cash -rich but time -poor and so a holiday represents an important opportunity to recharge batteries. For couples, their relationship is a maturing influence, whereas the solos are more self indulgent in their pursuits. They work hard, have good incomes and can reward themselves. As they do not have families, they can put their own needs and desires first and create their own holiday itineraries without having to compromise. They enjoy the planning of the trip and use the holiday as an opportunity to increase their understanding of themselves. For most, the South West will be a second holiday (out of peak season) or short break destination, with weekend breaks of particular appeal to this group and last minute planning and booking a key characteristic. The Internet will be a prime source of inspiration and information. They are looking to escape from everyday reality for a while, enjoy a slower pace of life and have time and space to re-bond with partners and old friends – as well as rediscover themselves and regain a sense of perspective.

## **THREE: Families with preschool age kids**

For parents of preschool children, life is one of extremes. On the one hand, it is a very special and life-enriching period, with pleasure and delight in their young children and their development. On the other hand, it is very physically and mentally demanding, with young children making huge time demands on parents. Holidays can present as many challenges and difficulties as they do opportunities for enjoyment. eg finding family-friendly places to eat, carrying around buggies and bottle sterilisers etc. A holiday in the South West is likely to appeal to parents as an easier and more manageable option than taking young children overseas. This group are likely to travel out of the main school summer holiday period eg early summer, early autumn and their South West holiday is more likely to be a main holiday. This is an important target band because if this group have a great time in the South West, they are especially likely to be repeat visitors.

#### **FOUR: Families with primary school age children**

This band of customers are tied to the school holiday periods, - especially the summer break and half terms. 'Pester Power' is now an important influence and most activities will be geared around what the children will enjoy and tolerate. The beach is a prime draw, with indoor pools and theme parks also important, due to their all-weather provision. Parents of children this age have largely forgotten how to enjoy 'Me-time' without guilt and are used to putting their children's needs and desires first. This means that they will especially value any time available on holiday to follow their own interests and put themselves first for once. The parents in this band may also sometimes take out of peak season short breaks, without the children, (leaving them with relatives or friends.)

#### **FIVE: Families with secondary school age children**

Families with older children are more likely to go abroad for their main holiday and the children will be under peer group competitive pressure regarding going somewhere 'cool' /exotic for their holiday. A trip to the South West is therefore more likely to be a second holiday or short break. As the children are now more independent, there is the opportunity for them to 'spread their wings' and try out new experiences in a controlled environment and for parents to have more of a say about activities they would like to do themselves. Parents will try to strike a compromise so that everyone gets to do what they want. Children are more likely to be interested in faster paced activities than adults, who want a mix of active and restful activities. The parents are likely to increasingly value family holidays as it dawns on them that there is only a short time left before their children will be independent.

#### **SIX: Empty Nesters**

This group are mainly aged between late forties and sixties. Their children have left home and they have time and money to spend on rediscovering old interests and finding new ones. They do not feel old and are not ready to give up on adventure. They are likely to take holidays outside the main summer holiday period and (like the DINKS and SINKS) are likely to book last minute holidays. Many of this band will be seeking to reinvent or find themselves through the holiday experience. This includes the 'Children of the Sixties' Baby Boomers generation and there is a significant interest (amongst women especially) in a holistic approach to health and well being – as well as in health and beauty maintenance. They like to amble, are eager to explore and they enjoy trying new things and soft adventure. They have a growing interest in maintaining health and fitness and are looking for a revitalising, refreshing holiday experience. Many will still be working in high pressure jobs and will be fatigued and ready to escape the rat race for a while. They are likely to be attracted by the comfort zone of the South West (easily accessible and safe). They have an interest in quality products, comforts and luxuries.

## **SEVEN: Third Agers (mainly 70+)**

This group are mainly aged 70+ and many will be in reasonably good health. As people get 'old' later, it is important not to stereotype this sector as dodderly and frail! (The 70s are the new 60s, the 40s are the new 30s etc.) Many will be still looking for new experiences on holiday, although clearly this is likely to involve more gentle activities eg walking in gardens, rather than on moors. There will be a certain degree of personal nostalgia and interest in visiting places they used to visit when they were younger, as well as interest in visiting iconic attractions so they have 'done it'. However, their tastes are increasingly sophisticated and the new generation of 'Golden Oldies' is likely to be well travelled and discerning. Personal comfort is a primary travel concern. A recent marketing survey by Datamonitor coins the term WOOFs (Well Off Older Folk) and advocates exploitation of the 'grey pound.'

## The Segments

### 1) Sheer Indulgence

*Primary Target Bands: DINKS and SINKS; Parents in each of the Family target groups; Empty Nesters (and increasingly in the future Third Agers)*

The South West offers an opportunity to reward yourself or celebrate that special occasion in style – enter an oasis of Sheer Indulgence. You can sample the delicious cuisine of our fine restaurants, many with chefs of international reputation such as Rick Stein or Michael Caines, as well as the many chic cafes and restaurants in towns such as Bristol and Bath.

The South West prides itself its high quality local produce, which includes freshly caught seafood, scallops and lobster as well as locally produced wine. And for that extra special taste experience, why not sample some of the organic food, in which the region excels?

And if you do not feel like doing too much exercise afterwards, well don't worry, because there is nothing better than just indulging your senses on a gentle walk in one of our amazing exotic gardens, where you can enjoy a riot of colour and delightful aromas year round – or feel the sun on your face on one of our sandy beaches or just breathe in the pure air and absorb the stunning clifftop views.

Or maybe take in some art at the Tate St Ives or one of our other art galleries or explore the artists' studios in Dartington. Or enjoy some of the unique shops and waterside ambience of the South West's beautiful cities. Or indulge yourself by doing something special – a hot air balloon trip perhaps or hire a classic car for the afternoon.....

Treat yourself to a spot of pampering – perhaps an aromatherapy treatment, an Indian head massage or a facial (or a stress –busting massage for the men.) Or maybe you would like to try one of the latest therapies, like La Stone....Perhaps you would prefer to just laze in the indoor pool and jacuzzi? Or play golf at a country club? Well, you will be spoilt for choice in the South West.

We can also offer you some of the most gorgeous small luxury hotels in the world, with great leisure centre facilities, phenomenal locations and all the little things you deserve – like crisp linen sheets, fluffy robes and chocolates on your pillow. And now you can try out the only natural thermal spa in the UK in Bath – a stunning revival of a 2000 year old tradition.

Or if you really want to push the boat out, come down to the South West in just a few minutes by helicopter, be swept to your hotel by chauffeured car and then enjoy the seclusion and luxury of an idyllic hotel with a private cove and private yacht.

In the South West, we know how to live well! Indulge yourself – you've earned it!

## 2. Easy Preschool

*Primary Target Band : Families with preschool age children*

We understand how difficult it can be planning a holiday with babies and children aged under 5. That is why South West England is your ideal choice for a hassle free holiday which all the family can enjoy.

In the 'Easy Preschool ' section on the South West Tourism website, you can find links to hotels, holiday parks, cottages, pubs and restaurants which are completely geared up to the needs of younger guests! Our hotels offer early teas for youngsters if they want them (where they can choose from imaginative children's' menus based on wholesome local produce.) Many places where you stay even let you borrow from a wide selection of buggies and back carriers, so you do not need to bring them with you. Oh, and they may well have a wide range of young children's' videos too - and Mini Children's' Clubs run by highly trained nannies if you want a couple of hours off to do your own thing.

There are also a host of places to visit (including indoor all –weather attractions) where you know your children will have a great time. They can enjoy a sense of freedom and adventure and you can enjoy knowing they are safe and happy. Would they like to meet Mr Blobby? He is here in the South West, as are farm attractions, steam railways, boat trips, Paignton Zoo, The National Marine Aquarium and soft play adventure areas galore.

And because we know you need a holiday too, there are many places where it is easy for mum and dad to relax and perhaps enjoy a meal while your children play. Or if you want to have some precious time out alone, use the quality babysitting and nanny services which are available day and night in our hotels –and are offered by the leading South West cottage rental agencies and caravan parks.

There is really nowhere like the South West to discover and relish the sheer magic of early childhood. Watch as your child bottle feeds a lamb or as he splashes happily in the warm, clear seas. Watch the delight in his face as he runs around in the wide open moorland, tucks into his first cream tea, rides his first pony or builds his first sand castle! Many of our beaches are gently shelving and perfect for young children to learn to swim in safety.

There are lots of activities you can enjoy together too. Strap smaller children to your back and explore the fabulous coast path. Or cycle along the Camel Trail, with your children in a trailer. And none of you will ever get bored with the incredible beaches – why not try a different one every day?

The South West : the best place on earth to experience the magic of early years

### 3) **Chill Out**

*Primary Target Bands : DINKS and SINKS, Empty Nesters*

Escape to the South West. You work hard and now you need to wind down and recharge your batteries. The peaceful laid back atmosphere and choice of gentle inspiring activities will help rejuvenate you.

Whether you choose to stay in a converted lighthouse, a thatched cottage, a luxury holiday home in a caravan park or a stylish boutique hotel in the Cotswolds countryside, you know that it is the perfect place to just chill out and relax. In the South West, you will find that life is lived at a slower pace – and if your usual everyday life is full on 24/7 it is the antidote you need to help you unwind.

Why not live an alternative lifestyle for a weekend? Spend quality time with your partner or meet up with old friends to share a cottage. Slow down and re-connect with the people who matter to you or just take time to find yourself and restore your equilibrium. No need to do anything except enjoy the company, catch up with the papers, enjoy a bottle of claret by a log fire and perhaps amble around the countryside for some fresh air.

You can even stay in a cottage where, so you can have a complete break, a chef will prepare fabulous meals for you – you don't need to lift a finger!

Just meander around the antique shops and galleries in the many quaint villages. If you feel like something a bit more energetic, why not explore some of the region's extraordinary history and heritage or enjoy some of the many leisure activities and attractions on offer? While away a few hours fishing on the banks of a lake. Or try out some gentle complementary therapies or treatments to help you detox, unwind and restore a sense of well being.

A particularly good time to come is Spring or Autumn. Spring comes to the South West earlier than anywhere else in the UK, so you can bask in the warmer air and shake off those winter blues. And the South West often enjoys long Indian summers, stretching well into the Autumn, when the beaches are deserted, the blackberries are growing on the hedgerows and the gardens are often at their best.

What's more, you can take your pick of relaxed, friendly olde - worlde pubs, where you will be made to feel at home and where you can get to know the locals.

And after enjoying the countryside and breathing in the fresh, unpolluted air, you will find you sleep like a baby and awake refreshed. You will return home feeling rejuvenated.

The South West – Chill out and get back in touch with yourself.

#### **4. It's Adventure!**

*Primary Target Bands : Youth; DINKS and SINKS; Families with Secondary School age children – and increasingly in the future Empty Nesters*

It's time to challenge yourself! Try out new and awesome activities for the ultimate adrenaline sports rush.

The South West can offer the widest imaginable range of adventure activities for every age and ability level – on land and on sea.

Here is your chance to push yourself that little bit further....

Bodyboarding, surfing, kite-surfing, abseiling, quad bike racing, paragliding, yachting, canoeing, scuba diving, sailing - Whatever you want to try, try it! There is full instruction available and you can be sure that safety standards are paramount.

And as you would expect from the UK's adventure capital, we now have some of Europe's hottest extreme sports centres. Check out what is available at Watergate Bay in Cornwall or Poole in Dorset for the most extreme experience of your life.

Try waveski, - the ultimate blend of surfing and white water kayaking or mountain boarding, the closest thing to snowboarding for the off season - Off road skateboards that let you glide and slide down grass or sand.

Or in the Forest of Dean, you can try out a whole range of thrilling land based adventure activities.

No other region of the UK can offer so complete and varied a range of leading edge adventure experiences.

Live the adventure in the South West!

## 5. Romance

*Primary Target Audience: DINKS and SINKS; Empty Nesters*

The seclusion, peace and beauty of the South West make it the ideal spot for a special break with your partner.

You will find a choice of romantic hideaways and country house hotels where you can stay in style in enchanting suites with antique four poster beds, many with open fireplaces in your room.

Through clicking on the Romance section of our website, you will find ideas for places to stay which are especially romantic – lonely cottages on windswept moors, clifftop castles, traditional low beamed thatched cottages and exquisite stylish waterside hotels.

Feel the wind in your hair on the open moors and have a moonlit walk on an empty beach under the starriest sky you have ever seen.

You will be spoilt for choice when it comes to cuisine, with most restaurants offering mouthwatering fresh local produce. There are all kinds of romantic dining choices – candlelit dinners in atmospheric surroundings; beachside bistros with the waves crashing outside. But if your idea of a romantic weekend is for the two of you to simply be alone together, many hotels would be delighted to serve you dinner by candlelight in your own room.

Many of the hotel rooms offer jacuzzis ensuite and double baths – often surrounded by aromatherapy candles. Some even provide a ‘bath butler’- who will prepare your bath with specially selected oils for you. You will find a wide range of complimentary massage oils available in your room and, naturally, chilled champagne and fresh flowers await you on arrival.

But if your budget does not stretch to a top hotel, you can of course still experience the special romance of the South West – which is all around you! The stunning landscape and the unspoilt beaches make the perfect setting for those special times and you can share its special romance, whether you are staying in a top resort hotel, a luxury holiday home in a caravan park or camping in a small tent.

In fact the South West is so romantic it is a perfect place to get married. There are all kinds of unusual venues on offer in the South West, including an underground cavern, a farmhouse or even a converted fort. And now you can even plan to get married in our beautiful countryside – on a clifftop, a sandy beach or our glorious moors.....embrace the special romance of the South West.

The South West - The perfect romantic destination

## 6. It's Cool!

*Primary Target; Young Free and Singles 18- 24*

The South West is the cool place to be.

Get in the water in Newquay and be part of the wildest surfing scene in Europe.

And at night, let your hair down in the many incredible pubs and clubs, where every single night is the best party you have ever been to.

It's all about a lifestyle, it's about getting out there and being part of the scene.

There are no plans, no schedules – just hang out with great people your own age from around the world and do it your own way. The relaxed beach bars in Cornwall are THE place to really experience the whole surfing culture. Experience a whole new world, where life is lived at the edge. And if you are new to surfing, in the water you will experience a buzz which is one of the best you have ever known

But there is more to the South West than surfing. You will find the same buzz at festivals like Glastonbury and in the new extreme sports meccas around the South West.

And the clubbing scene in Bristol is world famous, giving New York a run for its money. Bristol is responsible for some of the most seminal leftfield dance music that's ever emerged from the UK. Whatever you do, don't miss Blowpop for some cardinal breakbeat chaos, - it's the biggest night out in Bristol. Whether you come to the city with friends or on your own, you will soon meet other like- minded people and have a blast!

In the South West, you will find that you can be a traveller, not a tourist. Find your own way, do as much or as little as you fancy. Be an individual not one of the crowd.

When you leave the South West, you will have had all kinds of new experiences and made all kinds of new friends.

The South West –it's about cool new experiences, cool new people.

## 7. The Traditional West Country Beach Holiday

*Prime Target Band: Families with Preschool Children; Families with Primary School Age Children*

South West England offers the definitive family beach holiday -and probably the best beaches in the world!

Miles and miles of safe sandy beaches where your children can have the time of their life. They can swim in the warm seas, jump around in the sand dunes, make sandcastles, bury each other's bodies in the sand – whatever they want. They will be free and healthy and simply never get bored.

West Country beaches often have rocks to clamber over and rock pools where they can find crabs, shells and other treasures with their fishing net.

Even on days when the water is not that warm, with a wetsuit your children will still be able to make the most of everything on offer and splash about happily, maybe try body-boarding or even surfing.

And there are no end of simple pleasures you can share with your child. Why not fly a kite, play beach cricket or tennis – or help them build the biggest and best sand castle on the beach.

Of course, the day is not complete until you have eaten a picnic with sand in the sandwiches, dropped your ice cream in the sand and tried to clean all the sand out of your child's ears.

Many of the beaches are backed by cliffs or dunes with not a house in sight so you soon feel that ordinary life is a million miles away.

And when you feel like a change of pace, the whole family can have a great time at one of our huge range of attractions and theme parks close by.

It's the stuff that memories are made of.

South West England – for the timeless family beach holiday experience

## 8. Discovery

Prime Target Bands: SINKs, Empty Nesters

Life is all about discovering new things. Discovering new things about yourself and learning new things you can do.

The South West, with its easy accessibility, is the ideal place to set yourself the challenge of discovery. Be inspired by the beautiful surroundings as you venture into new areas.

The sense of achievement you feel will instill a new confidence that you will take back to your everyday life.

So what do you fancy? Learn to become a gourmet cook on a residential weekend hosted by a world famous chef. For example, you will have a great time improving your cookery skills at Percy's Hotel at Virginstowe, using only fresh local West Country ingredients.

Or take part in a creative writing or water-painting workshop in Dartington or at a country farmhouse or watermill.

Enjoy finding out about new therapies like Indian Head Massage or Reiki.

Or simply learn an activity you have somehow never got round to – golf, horse riding, sailing, windsurfing, pottery, yoga or something unusual you just fancy like falconry or archery perhaps. The choices are endless.

Or take part in the many Life Coaching courses which aim to help you discover more about yourself, how to overcome obstacles and take control of your own future.

The South West – the most inspiring place on earth to discover new interests and directions

## 9. History and Heritage

*Primary Target Bands: Empty Nesters, Third Agers*

The South West has a unique history and heritage and you can enjoy its rich legacy.

The wonderfully preserved historic houses and glorious gardens are varied and fascinating, offering unusual glimpses into life in the past. Explore a stately home, a fifteenth century manor house or a perfectly preserved Victorian family home.

Or our wonderful ancient village churches and magnificent inspiring cathedrals.

What's more, nowhere has more intriguing castles and fortresses than the South West. Walk the battlements at Pendennis Castle, one of Henry the Eighth's coastal strongholds and you can imagine the heroism and terror as it came under attack. Or be awe-struck by the commanding views of the town from the Norman stronghold at Totnes.

You can delve into the Arthurian legends at Tintagel or experience the life of the ancient Romans at Bath. And watch a 19<sup>th</sup> Century port and tin mine being brought vividly to life at Morwhellam Quay where you can have hands on experience of how it would have felt over 100 years ago.

There is also a rich industrial history in the South West. Old ivy covered engine houses still pepper the landscape in Cornwall and there are opportunities to go down an old tin mine.

And, of course, the South West has a rich and varied maritime history. See where the Pilgrim Fathers set sail from Plymouth to a brave new world in America. Or explore the smugglers trail around the rocky coastline or visit SS Great Britain in Bristol.

There is also a fascinating literary history. Explore the mellow villages of Hardy's Dorset, Jane Austen's Bath or the haunting coastal scenery you will recognise from the novels of Daphne du Maurier.

Glimpses into ancient history are especially rewarding – be it at Stonehenge, the White Horse in Wiltshire or amongst the mysterious stone circles on Dartmoor and Bodmin Moor. At Chyauster Ancient Village, you can visit a 2000 year old Romano – Cornish settlement, whose walls still stand amongst the wild flowers and heather. And would you believe Exeter still has its own Roman Soldiers!

Uncover the secrets of Bronze and Iron age settlements. There are no less than 25,000 acres of Bronze Age field systems on Dartmoor. Wander amongst it all and imagine.

The South West is somewhere where history comes alive as nowhere else.

## 10. Close to Nature

*Primary Target Bands: Empty Nesters, DINKS and SINKS*

In the South West, you really can get close to nature.

The South West Coast Path is unique. There is nothing else like it anywhere in the world. Walk along glorious cliff tops with stunning unspoilt coastal scenery at every turn. And the Jurassic Coast – 95 miles of coastline in Dorset and East Devon – is the first natural World Heritage Site in England.

Or walk on Dartmoor or Bodmin Moor, - just wild, untouched moorland for as far as the eye can see. In fact, it is the largest open space in Southern England. The wild ponies, swirling mists, granite tors and wooded river valleys will take your breath away.

Get up close to the amazing flora and fauna and watch out for kestrels, badgers and rare birdlife.

Imagine feeling the sea spray from crashing waves on your face. The beaches are often deserted out of season, so make the most of the experience.

Nowhere else in the UK offers so much variety of landscape in such close proximity.

Whether you want to walk by the sea, on moors, or in rolling green countryside, there are literally miles of pristine nature for you to explore.

And whether you want to pitch your own tent or stay in comfortable B &Bs or inns, you can be sure of a friendly welcome. The South West is completely geared up to make sure that you get the most out of your trip. So you will find that most B &Bs are happy to provide a picnic for your rucksack, dry your boots and walking clothes or supply any maps – as well as give you useful local tips to really get you off the beaten track.

Of course, The South West offers all kinds of delicious food and drink, fresh from the land, - so make the most of the chance to eat local produce and enjoy the taste sensation of organic foods. Farmers markets are a wonderful chance to sample a variety of local fare.

Walking is probably the easiest way to get close to nature in the South West, but there is plenty of scope and provision for bike and horse riding too. So get out there and enjoy the fresh air and the stunning views. Or get a new perspective by taking a break at a farm where you can help with the lambing or the harvesting.

The South West – where you really can get close to nature