

Brand Cluster Development Research

Easy Pre-School and Family Holidays / Beach & Beyond Research amongst Mums and Dads of Children Aged 0-16 Executive Summary 1st August 2006

Research objectives

The main purpose of the research was to acquire a deeper understanding of the motivations and priorities influencing consumer behaviour and to gauge interest in and desire for child friendly quality products/services in relation to the two family experiences: Beach & Beyond; Easy Preschool. The following is a summary of the key findings and key development pointers for the experiences. Whilst 3 groups per experience is clearly not exhaustive, the consistency that came through in terms of motivations and priorities have given us a sound base from which to highlight opportunities for development. In keeping with the exploratory nature of the research, these are detailed in the form of development pointers, rather than formal recommendations.

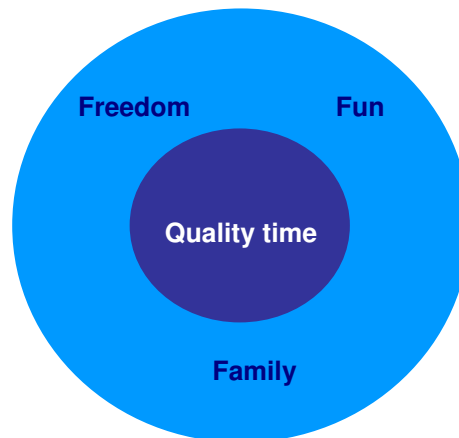
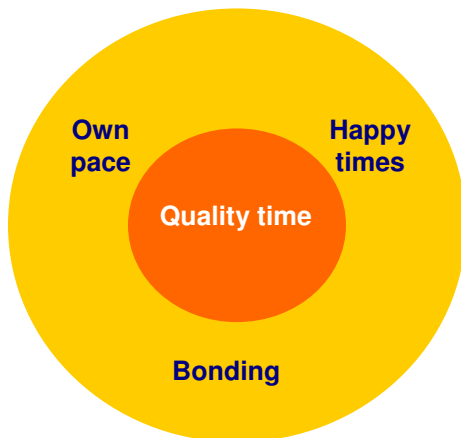
Structure and methodology

To ensure we obtained experienced customer input, in-depth focus groups were held - three groups for Easy Preschool [EPS] and three groups for Beach & Beyond [B&B], each focusing on a key target group recruited on attitude as well as experience, with mixed gender [mums and dads] and a geographical spread across the country. Focus groups were conducted 18th – 30th March 2006.

Feedback from the groups is summarized here.

Same broad motivations for EPS and B&B

The family holiday is a key priority; meeting as it does **the desire to spend time away together as a family unit**. The experiences both center on quality time and on the child/ren. For those with young children the intimacy of the experience is core; whereas with older children, the experience is more about the freedom to do what they like when they like.



Many 'shared truths' among older and younger family groups

- expectations are high, both in terms of physical needs and emotional reward
- it is about making it work for the child/ren; 'family time' not 'me time'
- interest in/desire for quality products/services is focused on the things that are perceived to make holiday more enjoyable for the children and easier for parents
- for all, the beach is central and thus needs to be close – short drive at most
- beyond the beach, having things to do in the area is of huge importance, though little if anything is pre booked
- the internet is used across the board to plan and book the holiday with almost all starting the process via area/accommodation searches on google
- whilst only accommodation tends to be pre booked, all are seeking information that enriches their understanding of the area
- priorities center on creating a relaxed, happy environment which for most means having the flexibility to go at their own pace

But some significant differences

- at the younger end, holiday is parent driven; child focused; at older end [12+] children influence strongly but focus is on individuals - 'something for everyone'
- at younger end it's about "firsts", seeing their faces, interacting; at older end it's more about no rules, having a laugh, experimenting
- at younger end, it's about trying things/places to see what does/doesn't work; at older end, the emphasis is on consolidation - optimising the things that work

Priorities while on holiday are same for both experiences

As well as the criteria listed below, families are looking for a location that will enhance the experience and for a choice of places to visit and/or activities to do. Food is a further consideration, as is the desire to feel welcome and have flexibility.

safe
clean
attractive/unspoilt
space to play
near beach
near food
things to do
basic equipment
welcoming attitude

It is unsurprising that these priorities are true for both EPS and B&B experiences.

However, as you might expect, there are different emphases:

- the younger the child, the more important safety/cleanliness
- parents of under 5's prefer to walk to beach v. those with older children who like to walk, but will do a short drive
- similarly families of older children will drive farther to visit places and tend to be looking for a broader range of activities v. those with young children
- equipment needs range from the practical stuff [cots] for youngsters through to leisure stuff [TV] for older children

Priorities drive expectations across all businesses

criteria	self catering	hotels	holiday parks	camping	beaches	child attractions	adult attractions
safe	enclosed; no obvious hazards				lifeguards	no obvious hazards	
clean	esp. upon arrival			public areas, esp. toilets			
attractive/ unspoilt	location/environment						
space to play	garden	playgrounds & fields			not too crowded	play area/s	some provision
near beach	a walk or short drive					within 1 hour	
near food	shop on site + choice eateries a walk/short drive				a choice on site		
things to do	a choice on site + within 1 hour drive					on site	
equipment	provision of basics						
welcoming attitude	not just a gesture – interaction plus reflected in facilities/services						

Things to do – preferences largely driven by age and interests of children

Beaches and animals have the broadest age appeal and, as you might expect, children's influence increases with age though interestingly is same principle – doing what keeps them happy! Excepting action sports and to a lesser degree, theme parks, which are seen to be for older children, attractions can appeal to all ages, though parents *always* check that there is something of interest for them before going – thus crucial that this is clearly promoted.

Accommodation – preferences driven by motivation and needs

Self catering: perceived to best meet the needs of families, not least because it provides the greatest flexibility. Key strengths are seen to be: separate bedrooms; kitchen/ washing facilities; space to play; privacy and less worry about mess and noise. In addition, they tend to be on their own, or one of only a few and are considered relatively good value. Thus whilst there is a big con – chores – it is unsurprising that it is universally popular as, in many respects, self catering homes are the simplest option – a comfortable environment into which it is possible to move as much or as little stuff as suits, debunk for a week or two, do/visit things that suit the family, when it suits them, then clean up and move out.

Hotels: intrinsically aspirational, representing as they do the ultimate in terms of the holiday ideal: really clean; being waited on; good facilities and no chores. However, whilst these attributes lead many to stay in hotels overseas, in the UK the negatives outweigh the positives. Most notably, hotels are viewed as expensive – especially when it is no longer possible or desirable to share a room – and as inflexible, particularly in respect of mealtimes. As such they are rarely considered in the context of a UK based family holiday, being rather for the odd weekend/short break or special occasions.

Holiday parks: recognised as offering great facilities for children and as being relatively cheap; however, rejected by many as being too crowded and 'tacky'. Whilst the latter is largely based on outdated misperceptions, the 'full on' style of large holiday parks is simply not appealing to

some. The facilities, evening entertainment and 'time for us' are the upsides which, for others, outweigh the negatives. Small parks, especially those based in woods and/or near the beach were more appealing but accommodation is still seen to be shabby and old fashioned. Across all types of parks, food was perceived to be of poor quality, with most seeing this and accommodation as biggest opportunities for improvement.

Camping: liked for 'close to nature' environment which offers contrast to normal life and for sense of freedom and 'natural fun' it inspires. Camping does however polarize more than any other option with dissenters feeling it is simply too much like hard work and thus the antithesis of holiday aspirations. For those with very young children there are also concerns re being too cold and not clean or safe. Childhood memories affect perceptions as do age of children with most feeling it is best for 5-10 year olds. Although "luxury camping" only appealed to a few, Yurts and Tipis were liked by most, though more for being different/fun, than for luxury element.

This feedback together with motivations and priorities suggests clear areas for development:

i] cleanliness & safety – opportunity lies in reflecting the importance of these criteria, especially for families with young children. This may be delivered relatively simply by providing overt reassurance on the website/upon arrival and via sensory cues e.g. neutral, uncluttered décor. In addition, businesses can drive up perceptions by meeting standards desired by families e.g. provision of *all* safety equipment including stair gates and bed guards; precautionary measures such as signage, ropes and even fun 'safety' tutorials for older children; some form of 'cleanliness and safety guarantee'

ii] choice – here the opportunities are a] plugging gaps in order to deliver breadth and b] ensuring variety within specific area to deliver depth. In particular, families are seeking choice in respect of food, things to do and facilities/services. Importantly, they are interested in quality and indeed expect that businesses on this sort of site will be filtered and thus focus should be on selectivity v. scale.

iii] quality – as quality is linked to child/family friendly standards this is an important area of development with opportunities at two levels: improving actual quality and enhancing perceptions – most notably in the areas of food and service and, for some, facilities and accommodation. Importantly, quality in the context of a family holiday is, for most, about places being smart, attractive, in good repair etc NOT about luxury.

iv] easier – helping to reduce the 'clobber' families need to take with them is a key area of opportunity, and ranges from providing more of the basics through to enabling them to borrow/hire most, if not everything, on site or nearby. Ideas which reduce the chore element, give parents more time and increase flexibility are also liked e.g. informal childcare; flexi mealtimes; warming/cooking facilities; chef; shopping service.

v] fun – this opportunity revolves around capturing and reflecting the emotional mindset driving these holidays, the key vibe being that of enjoyment. Obviously in part this is a job for marketing – in particular the use of visuals [happy, active children etc] which all businesses should be encouraged to employ as they immediately cue child/family friendly as well as being suggestive of a fun place to stay/visit. Businesses can also convey a sense of fun by focusing on the themes that families associate with 'happy times' and fun e.g. simple pleasures - from ball games to nature trails/hunts and trying new things – offering taster sessions/equipment for things that are new/different.