

Brand Cluster Development Research

It's Adventure, Close to Nature, Interests & Inspirations and Romance Research amongst consumers of different life-stages

Executive Summary - based on research undertaken Spring 2005

Research objectives

The main purpose of the project was to acquire a deeper understanding of the motivations and priorities influencing consumer behaviour and to gauge their interest in and desire for high quality products and services in relation to four of South West Tourism's key brand clusters: **adventure; nature; interests & inspirations and romance.**

The following is a summary of the key findings and key development pointers for each of the clusters. Whilst the findings are based on qualitative research and as such are clearly not exhaustive, the consistency that came through in terms of consumer motivations and the priorities linked to these have given us a sound base from which to highlight the opportunities for development. In keeping with the exploratory nature of the research, we have tended to outline options where they arose, rather than presenting formal recommendations.

Structure, approach and methodology

Focus groups were held where, to ensure we obtained experienced customer input, the research approach was cluster driven, both in terms of recruitment and structure. This resulted in three focus groups being held per cluster, each focusing on a key target group recruited on attitude as well as experience, mixed gender and a geographical spread across the country.

The fieldwork was conducted between 14th April and 5th May 2005.

Context

It is interesting to note that although each of the clusters was characterized by a discrete set of motivations and associations among consumers, there were also a number of shared themes and overlaps; most notably: **a shared desire for a 'beautiful location'** both in terms of surroundings and as a place to explore to one degree or another; **a shared interest in and desire for quality products/services**, ranging from tuition/ equipment through to accommodation/food depending on the experience; **a shared need for information provision**, especially information that facilitates the decision making process e.g. things of interest within 20 miles; and **a clear overlap in respect of the needs of empty nesters** regardless of experience; in particular a strong desire to go off season, be in a child free space and pay for a higher level of service and quality.

Findings are now described for each of the clusters.

It's Adventure

Focus groups were conducted among families with teenagers, 18-24 year olds and sinks/dinks 25-34. For these people, UK adventure holidays/breaks were not seen as a main holiday but rather as a break away with friends, family and partners. Although there were differences by life stage, there is a clear set of motivations and associations driving this cluster. Importantly, there is more to it than just an adrenaline rush:



Is about	Is not about
Fun	Taking it seriously
Having a sociable time	Team-building [=school, corporate]
Personal achievement	Beating records
Progression/improvement	Training
The thrill/rush	Extreme [for most]
The challenge	The fear [not always/all the time]
Enjoying new experiences	Living out a dream [not often]
Being new to me	Being new per se
Being active	Keeping fit
Chilling out afterwards	Clubbing/living it up

For this experience consumers' **priorities revolve around the activity** in particular, safety, tuition and equipment, but they are also looking for a location that will enhance the experience and for other activities to have a go at. Other priorities are that accommodation is near by and that there is somewhere to socialize as a group.

Main Areas for Product Development

ij] Choice

Whilst consumers taking this type of short break are often motivated by one or two core activities such as surfing, canoeing or caving, all the respondents talked about wishing to also have a choice of "other things to do" in the area. So for a smaller or specialist operator, it is important that they offer other things to do. This can be achieved simply by providing links/information from websites or brochures or even better to create a network of complementary operators in the area which will be of mutual benefit as well as enhance the consumer experience.

ii] Tuition

Consumers are looking for providers that offer well graded, small groups with enthusiastic, patient instructors who are able to recognise how best to help people rise to the challenge. Instructors' attitudes are very important. Consumers continually fed back that they wanted an instructor to be alert, enthusiastic, approachable, patient and committed. The best instructors were often seen as those who could hone in on the group dynamics, who were intuitive enough to understand which participants needed to be pushed and those needing extra reassurance.

iii] Safety

Consumers want reassurance that the provider can meet quality standards. 'Rigorous safety standards' were invariably selected as one of the key quality cues. Well-maintained and checked, ideally new, equipment came through as a strong cue for suggesting high safety standards, coupled with real attentiveness and strong local knowledge which enhance consumers feeling of well being.

iv] Adventure

Stunning locations enhance experience and can be leveraged by providers to promote the activity. In addition, many opportunities exist for providers to make experience more adventurous e.g. mix of environments in which to do activity[ies] multi/single activity tours and treks; cabins/lodges by woods/lakes.

v] Socialising

Key opportunity for activity providers is to offer a clubhouse/bar, ideally on site; or to 'nominate' a local pub for après-activity drinks/food; for accommodation providers comfortable, informal living space is key and for all, provision of info on local pubs/restaurants is important, ideally as a link from accommodation.

vi] Accommodation

Accommodation is obviously a must-have for the staying visitor however, for most, this is not something they are prepared to 'splash out' on. It is though, an area where people can be let down or disappointed. Basic expectations are of warmth, cleanliness and dry accommodation, comfortable beds for collapsing in and hot water and showering facilities for washing away the vigours of the day! Added touches of hot water bottles and well-sprung mattress were welcomed. Simple, clean and bright accommodation is also appealing and is sought throughout, including in the bathroom.

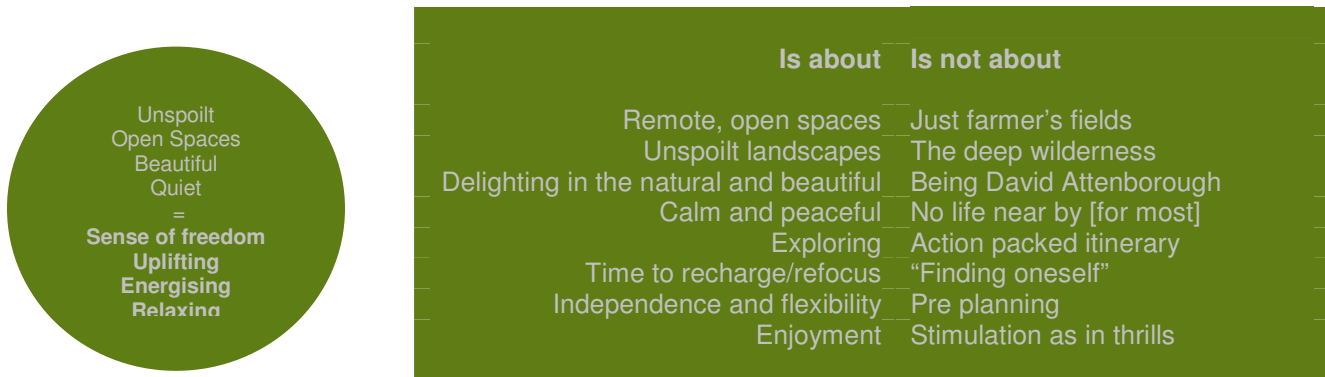
Required accommodation type varies by the type of group, but a stunning location in a natural environment was appealing across all groups.

The main differences in the groups is that families definitely prefer self-catering whilst SINKS/DINKS feel that they have moved on from camping and now prefer B&B's close to the activity whilst the Youth market saw camping as within their budget and being very sociable.

Close to Nature

Focus groups were conducted among empty nesters 50-70; sinks/dinks 25-34 and sinks/dinks 35-44. For these people, getting away to enjoy the natural environment is typically a short break in the UK with friends, family, partners.

Again although there are some differences by life stage, there is a discrete core and a clear sense of what this experience is/is not about:



As a result, **priorities** were also broadly the same: a great location; a nice place to stay; things of interest near by; food and local culture. There were, however, **differences in terms of what was meant by a ‘relaxed, natural holiday somewhere nice’**; for many it was simply about exploring a nice location, taking in stately homes and gardens as well as gentle walks and villages; for others it was more active [e.g. walking v exploring] and was more about being there than visiting things.

This seems to be driven by a **spectrum of interpretation** where, for most, this sort of trip is about enjoying nature in the sense of the outdoors, not in the sense of natural phenomena per se; the upshot of this, we would suggest, is that there are **many levels of engagement** from those who want a ‘full on’ nature experience to those who simply want to be in a beautiful place and see beautiful things. Cutting across these spectrums however is a further shared aspect: for all, it is a highly **sensory experience** with the focus very much on seeing rather than doing.

Main Areas for Product Development

i] Diversity

Diversity of open spaces is obviously a SW strength; it is also at the core of this experience and should be leveraged to ‘wow’ people/draw them in via dramatic, inspiring visuals. Also key is provision of area info. Demonstrating diversity within location is also important – what there is to “see and do” in a radius of 20 miles and within this choice there should be a diversity. Eg. Walks – a choice of short, longer, circular or guided. This information can be given to consumers either on the website by a range of

reciprocal website links to whet their appetites or when on-site by appropriate leaflets or welcome information.

ii] Relaxation

Consumers want to “unwind” and whilst not looking for luxury, they appreciate comfort and ‘little touches’. Country Inns are particularly popular especially those offering sofas/fires and that reflect the positives of **local-ness**.

iii] Freedom

This can largely be achieved via the provision of information already discussed as the key thing here is that people are looking for **ingredients not a ready meal**. e.g. area info; location details; activity options

Other specifics include:

- People are looking for quality delivery of the basics – clean, dry, warm, comfortable beds and a bath/shower. They are rarely looking for luxury as for most this is not felt to be appropriate to this sort of break.
- Key priority is quality of welcome.
- Majority looking for small hotels, B&B type accommodation or self-catering.
- Quality standards were important.
- Food involved good breakfasts, lunch as mainly a pub affair with warm, friendly service and good quality food. The expectation was for local food. Dinner is important, and a good choice of local pubs and reasonably priced restaurants were required. A good local store was also ideal.
- Consideration of leisure facilities opening during off-season months and making low season months more interesting.

Marketing considerations

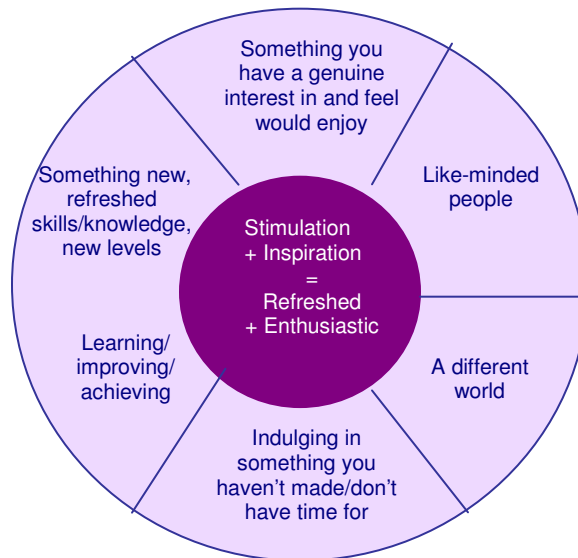
In terms of **promotion**, there would seem to be an opportunity in marketing off season offers, particularly in urban areas within 3/4 hour drive time and particularly among older sinks/dinks and empty nesters.

Interests and Inspirations

Focus groups were conducted among empty nesters 50-70; sinks/dinks 25-34 and sinks/dinks 35-44.

For these people, going away to learn something is a highly considered decision, always researched and planned; it typically takes the form of a weekend/short break in the UK with friends, partners or on their own.

In terms of motivations, there is consistency across life stages, but a spectrum of enthusiasm with most being very enthusiastic, some incredibly so, a few less so.



Not surprisingly, **priorities center on the course** [tuition; what it covers; materials; set up etc]; also a consideration is location with scenic being a key requirement.

Main areas for Product Development

i] Variety

In consumers' minds there are no limits to the breadth of activities that could be offered. Depth of choice can be created by a variety of set ups e.g. basic to up market, younger/older, by attitude/ethos. Consumers are also ideally looking for variety within the subject – something that suggests a fresh approach.

ii] Passion

Injecting passion into both the teaching and the socialising aspects of the course provides an opportunity for businesses to excel, especially if core to ethos versus bolted on; similarly there is opportunity to reflect/convey passion in communications via use of language and visuals.

iii] Learning

Consumers want a set-up that reflects the importance of learning – eg. Small groups, calm environment and taster sessions. However it should be noted that whilst complete immersion is often desirable, for some consumers there should be some flexibility to opt out/take a break.

iv] Socialising

The two key opportunities here for providers are a] to create sociable environments such as a meal together in the evening, even if accommodation is off site [i.e. at local pub] and b] to give careful consideration to positioning and grading to optimise chances of attracting like minded and like skilled people.

Marketing considerations

If wishing to develop a website, holidaycourses.co.uk is a good blueprint as it captures the spirit as well as the sense of what we have learnt; tonally, it is important to reflect motivations and capture passion.

In terms of **promotion**, the softest markets would seem to be London and local SW areas, with empty nesters the softest target; focusing on singles/couples especially among sinks/dinks would seem sensible with off season also offering a key opportunity especially if tied into a package.

Romance

Focus groups were conducted among female empty nesters 50-70; female sinks/dinks 25-34 and males 35-50. For all groups, a romantic trip is typically a weekend/ short break in the UK, sometimes Europe; [longer] romantic holidays are generally felt to be for very special occasions and so are associated with exotic locations abroad. For all expectations for this sort of trip are high.

As with the other clusters, the romance experience is driven by a clear set of motivations and associations, most of which were spontaneous versus prompted.



Is about	Is not about
Being together	Locking selves away
Intimacy	Sex per se
Doing things together	'His' and 'Hers'
Unplanned, relaxing activities	Advance planning
A bit of luxury	Decadence
Making an effort	Making do
Selecting elements to suit	'One suit fits all' packages
Quality touches	All the frills

Not surprisingly, **priorities here revolve around surroundings**: accommodation, especially the room, location/setting and restaurants/food; also of interest are things to do, facilities and extras. However, these are very much 'nice to haves' which can enhance/improve the experience but which are not core to its success.

A final point to note here is that although romance overlaps with indulge, it is also distinct from it insofar as romantic trips are mainly about creating an environment that is special versus luxurious per se. Thus whilst for some special = luxury, for **most special = quality**.

Main Areas for Product Development

i] Quality of surroundings

Consumers will choose providers that offer attractive, private, 'explorable' settings, ideally located near things to do. Development opportunities for providers lie in ensuring that rooms allocated to this experience are spacious, with views, good quality basics etc so that people are delighted rather than disappointed [their biggest fear]. One nice touch might be to allow people to choose their room when booking. Facilities also enhance especially if about sharing/intimacy e.g. hot tub v pool.

ii] Quality of service

People are seeking a hassle free time so an attitude of 'nothing is too much trouble' goes a long way as do extras/ little touches e.g. picnic kits; drawing curtains; late check out

iii] Quality of food

Consumers on this type of break are looking for that “special” dining experience so for providers who do not offer evening meals, your guests will want recommendations of restaurants - especially those offering outstanding local specialties, fresh fish etc. Again superb service and little touches are important as is a choice of quality pubs, bars, cafes and restaurants for other meals. Here awards do influence as the fear of disappointment still prevails.

iv] Unusual/unique

Focus here should be on intrinsically romantic places that offer something special e.g. will deliver dinner to the table of the temple. Obviously this area also offers potential PR value.

Marketing considerations

It is worth noting that whilst red is undoubtedly a signifier of romance, people are not generally looking for the clichés; as such, an **aspirational, understated tone** that conveys [rather than overtly says] special was felt to be most appropriate. As with the other clusters, visuals are hugely influential, especially those showing the exterior, the setting and bedrooms.