

Brand Cluster Development Research

History & Heritage and Relax & Recharge Research amongst Empty Nesters & Sinks/Dinks Executive Summary 1st August 2006

Research objectives

The main priority for this research was to better understand Empty Nesters and Sinks/Dinks and the extent to which History & Heritage [H&H] and Relax & Recharge [R&R] as types of holiday experience could be the answer to their off-season short break needs. This information will help inform how best to develop H&H and R&R both in terms of product development and promotion for businesses. A number of specific considerations for each of the brands were also examined [below].

H&H specific considerations:	R&R specific considerations:
Positioning dull <ul style="list-style-type: none">➤ Ways of making more engaging	Positioning unclear/undifferentiated <ul style="list-style-type: none">➤ Core motivator vs part of experience
Core motivator? <ul style="list-style-type: none">➤ Planning & choosing process➤ Role of places to visit➤ Issues with presenting as brand	Targeting? <ul style="list-style-type: none">➤ Help clarifying best option➤ IE tight vs broad➤ Young pros vs EN's & S/D's
Definition of accommodation <ul style="list-style-type: none">➤ Expectations & options	Definition of product support <ul style="list-style-type: none">➤ Expectations & options

Approach, structure and scope

Focus groups were undertaken where the recruitment and structure was life-stage driven, with 3 x 2hr Empty Nester [EN] groups and 3 x 1.5hr Sinks/Dinks [S/D] groups. Both groups covered a spread of age/life-stage:

- EN's from working [50-60] to retired [60-70] with a mixed middle group [55-65]
- S/D's from Sinks [22-30] to Dinks [30-45] and a mixed middle group [25-35]

All respondents had short break experience, and the EN's were recruited to agree that history, heritage and/or culture is an important part of a break for them.

All groups started with a general discussion about short breaks. Feedback from the groups is summarised here.

Short breaks

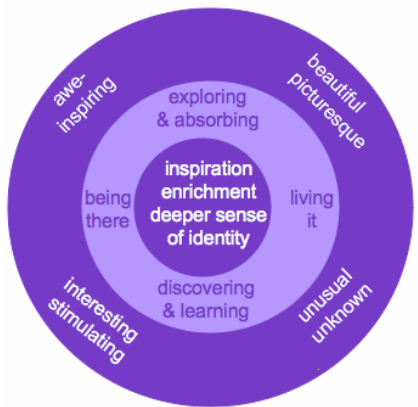
- **What is a short break?** Mostly 3-4 days, a week being a holiday. Usually over a long weekend, sometimes during the week if retired. Often quite frequently, any time of year, often off-peak. City and rural locations in the UK, and cities overseas. Majority staying in hotels with partners or sometimes pubs or b&b's. Occasionally self-catering with group of family or friends. S/D's going camping or to YHA's with groups of friends.
- **Planning & choosing:** Usually have a place in mind, often picked up through recommendations. Invariably search on internet, googling area/place first + hotels or deals. Booking is often last minute either on-line or by phone.

History & Heritage

Feedback on ENs' interest in and definition of H&H as an experience / break....

Role for H&H: Clear even from general discussion that H&H often the most important part of a short break for the EN's; a deep-seated interest that was growing over time, one that couples tended to spend a significant part of their break pursuing together.

What characterises History & Heritage



is about	is not about
exploring & discovering	ticking the list
awe-inspiring & interesting	having to be famous
substance/depth	superficial
learning more about my own country	being a tourist
beauty [often]	pleasant [not enough]

Main areas for Product Development

The following areas have been identified from consumers' priorities and expectations from H&H breaks and represent key opportunities for individual businesses to develop product.

Core product & parameters: Whilst History & Heritage is absolutely core to the brand, consumers are looking for "richness & diversity". They are seeking both a breadth & depth of product when on this type of short break and therefore it is important to demonstrate a wider product base and to broaden it to include cultural aspects such as food & drink, local events, sites that have perhaps a "current" theme rather than merely being historic.

The "richness & diversity" can be conveyed by use of language and visuals by including interesting/intriguing facts, things they did not know, by conveying a general sense of greater variety - cultural as well as historic, local too. Using more unusual, warmer visuals and evocative language help make websites/brochures more atmospheric – drawing the consumer in & helping capture the essence of the region/your product.

Accommodation: For this type of break, consumers are invariably staying in hotels, b&b's or pubs. They particularly like the idea of 'pubs & inns' since they are seen as local and part of community. When choosing places to stay, the priorities are to be nearby/in places of interest, and simply to be clean, comfortable, simple and good value. There is a key opportunity here for deals targeted at EN's off-season. However, a property that was 'local' in character or with specific historic or special interest would be a bonus. Consumers also want to be given reassurance through quality grading and businesses should highlight places of historic/special/local interest nearby as often a search for accommodation will be very specific around a particular site of interest.

Food: An important part of getting to know a place; local food is definitely sought out [producers too], as well as places where locals eat. Most are having breakfast where they are staying, a snack whilst out for lunch and dinner out. Consumers' would definitely appreciate inclusion on food and drink on web-sites although they would be unlikely to book this aspect before going.

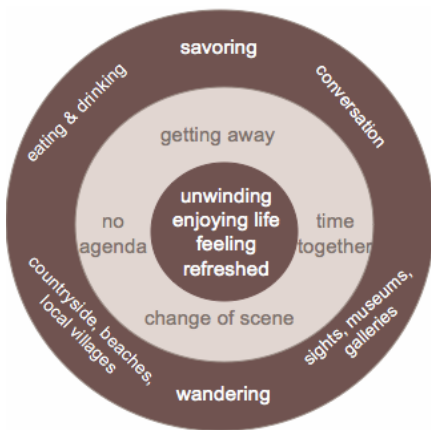
Itineraries: a good source of ideas for their short-break even if they will not follow them exactly!

Relax & Recharge

Feedback on S/Ds' interest in and definition of R&R as an experience / break....

Role for R&R: From the research, it is apparent that a significant number of breaks are taken where the motivation is simply to get away from it all and to be somewhere else which is relaxing and refreshing. What consumers do on this break is unspecific, usually involving a mix of things – taking your time, not rushing... but doing something not nothing! Feedback suggested this was true of ENs as well as S/Ds.

What characterises Relax & Recharge



is about	is not about
doing something	doing nothing
being alive	being asleep
taking your time	slow, slow, slow
spontaneity	planning
quality	luxury
basic pleasures	indulgent pleasures
anyone	yuppies
peaceful mood	isolated/remote
enjoying company	me, me, me

Main areas for Product Development

The following areas have been identified from consumers' priorities and expectations from R&R breaks and represent key opportunities for individual businesses to develop product.

Accommodation: On the whole, consumers for this type of break are looking for mid-market smaller quality hotels but not exclusively. They are also interested in self-catering, hostels and camping. It is therefore difficult to be specific about type of accommodation but generally consumers are looking for something a bit special or possibly a bit different; style is a personal choice. When looking for somewhere to stay however, they want plenty of visuals; the sense of locality is important, they want to know they're near a pub, or shops; they do not want to be isolated.

Food: Taking your time over good food is a core activity for this cluster – so definitely want it to feature on websites/literature. Unlike other clusters often happy to linger over long lunch. Not just about good food, but good conversation [a treat too].

Things to do: Consumers want to see options available, but in reality may not do a great deal. Want 'interesting' and 'active' things too – don't want things to do to look boring; however for this type of break, consumers are **not** expecting spas/pampering – this is definitely more a fit with indulgence than relaxation.

Language – the idea of "Escape" is what needs to be conveyed in marketing, having freedom, no agenda and an enjoyable change of scene. The research clarified that this cluster should not simply be about chilling out – indeed much of the current 'unwind, chill out' seems to fit more with an 'indulgence' mindset.