



Dorset audience segmentation research



Background & Objectives

Visit Dorset wanted to understand the different types of current and potential visitors to the county, in order to identify potential growth audiences and to support more targeted marketing and offer development. Specific objectives of the research were:

- To identify the current visitor profiles
- To identify target growth markets
- To produce a visitor segmentation



Methodology

15 minute online survey of UK holiday decision makers living in target areas (Midlands & South) during January 2024. This included:

- South West
- South East
- London
- West Midlands
- East Midlands
- East of England

2167 surveys in total, which included 586 who had visited Dorset in the last 3 years.

Quotas were set and data was weighted to ensure it is representative by: region, social grade, age and visitation to Dorset in the last 3 years.

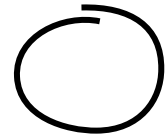
Online research was hosted by Alligator, BDRG Group's online survey specialists.

Segmentation algorithm developed based on the BCP area segmentation and applied to identify the segments in the new Dorset research.

BCP segment profiles and relevant descriptive data about segment characteristics not covered in the Dorset research, are included in this report to provide as full a picture of the segments as possible.

Dorset specific data is based on the research commissioned by Visit Dorset and recommendations area based on this.





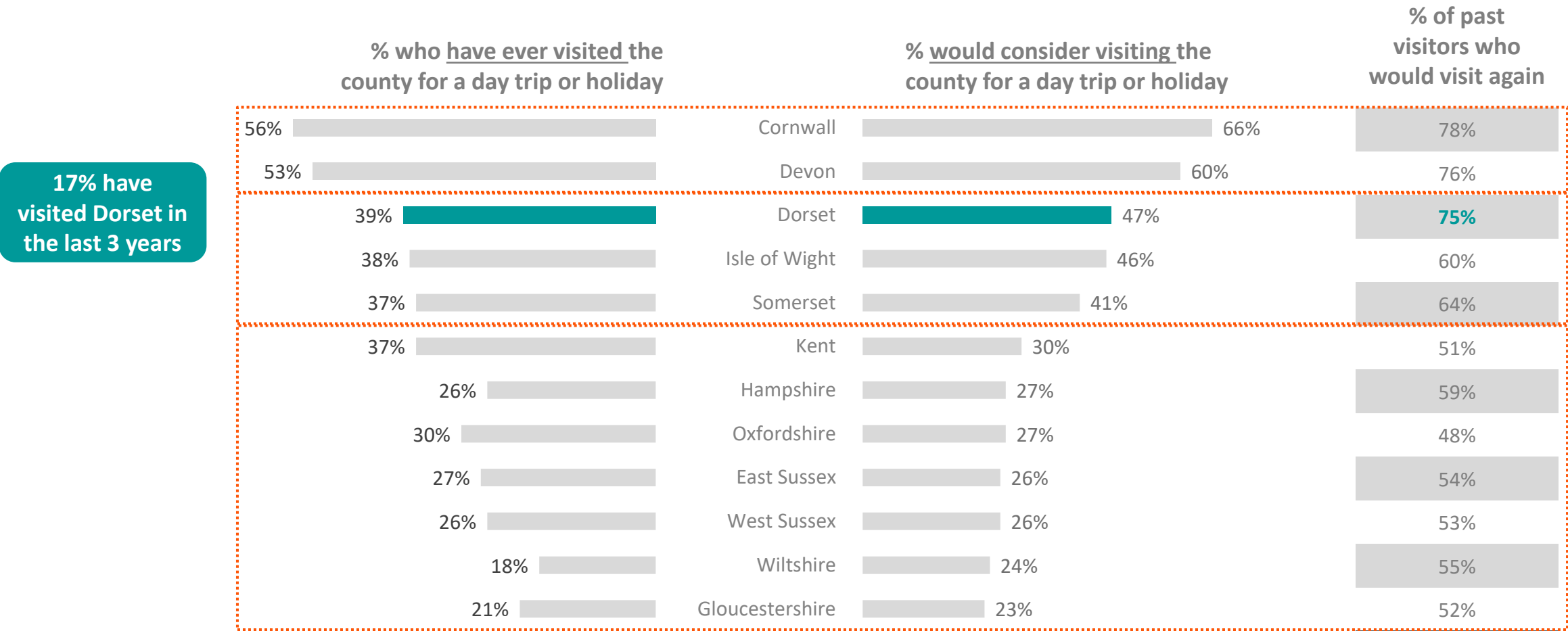
BRAND HEALTH

Interest, perceptions and barriers to visiting

Past visits

Cornwall and Devon stand out as the most desirable and most visited destinations in the South of England - most likely due to the fame/ reputation of these counties. Dorset fall into the ‘second tier’ of past visits/ consideration, alongside the Isle of Wight and Somerset.

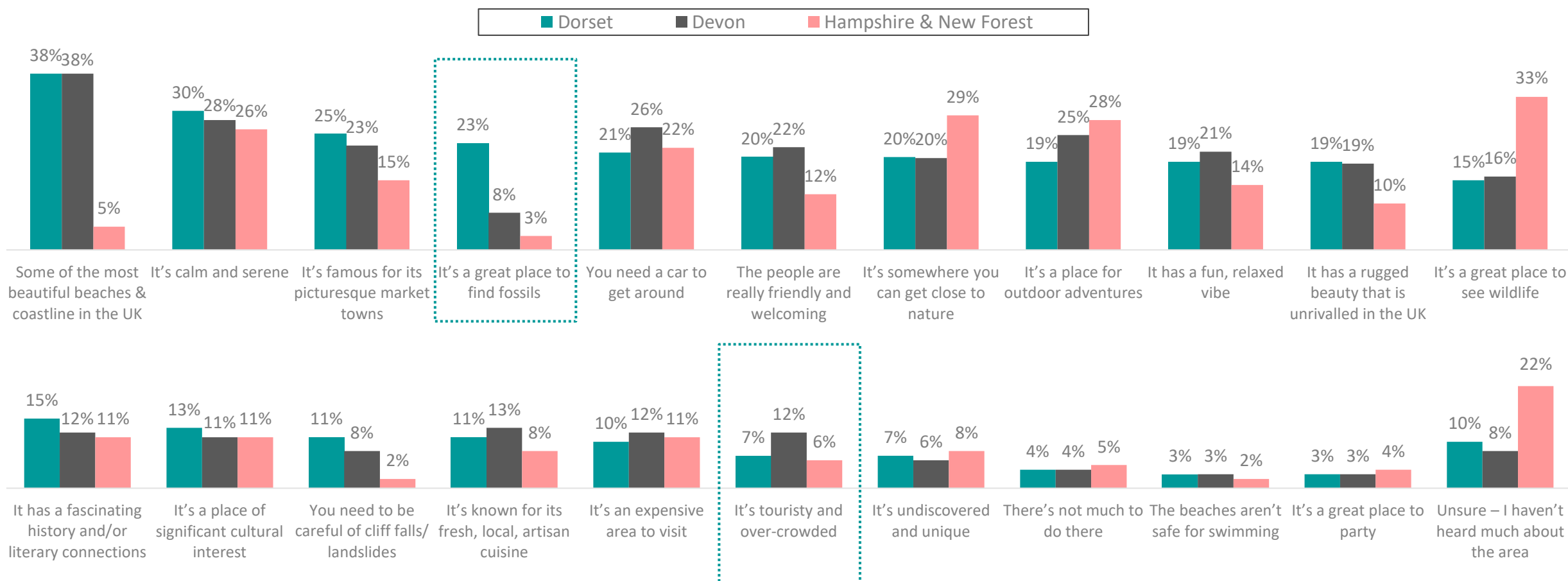
However, revisit potential amongst past Dorset visitors is just as strong as for Devon/ Cornwall, suggesting that Dorset tourism has the potential to grow...



Perceptions of Dorset, Devon & Hampshire

Overall perceptions of Dorset are very similar to Devon, with the key appeal for both being their beautiful beaches and coastline. The county's USP is fossil hunting, but it could also leverage the fact that it offers all the advantages of Devon (and Cornwall) without the volume of tourists – the 'hidden gem' of the South West.

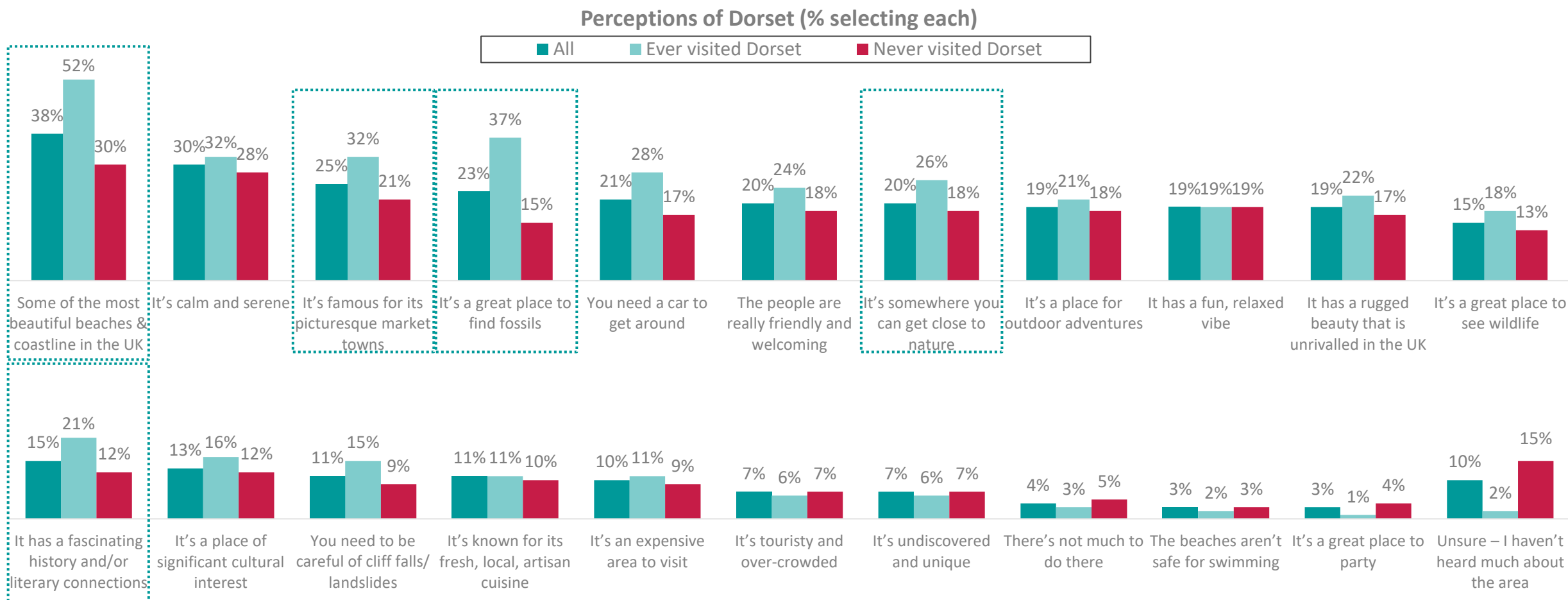
Perceptions of Dorset/ Devon/ Hampshire & New Forest (% selecting each)



Perceptions of Dorset

Past visitors particularly associate Dorset with beautiful beaches, fossils and picturesque market towns. However, only 15% of non-visitors are aware of Dorset's fossil fame, so there is an opportunity to educate on this.

Higher associations with Dorset's literary connections and culture, and closeness to nature amongst visitors suggests these may be drivers of visiting for some.



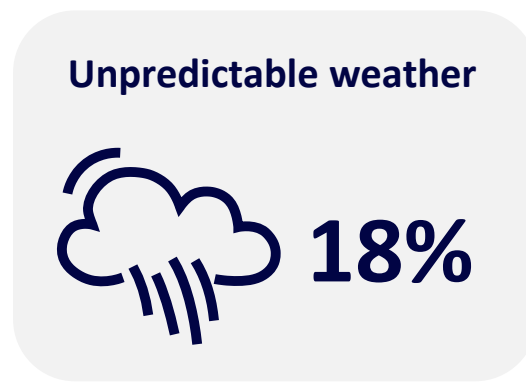
Barriers to visiting Dorset

The main barriers to visiting for past visitors are distance and unpredictable weather (underlining the fact that Dorset competes with foreign holidays as well as other Southern counties).

For non-visitors distance is again the biggest barrier, followed by not knowing enough about the area and what is on offer.

It's therefore important to promote ease of access and rainy-day options as well as the wonderful array of outdoor sights and attractions in the county.

Main barriers to visiting Dorset, amongst those who would not consider visiting (% selecting each)



Column %	Ever Visited	Never Visited
Too far to travel	46%	37%
Unpredictable weather	24%	17%
Too expensive	16%	17%
I prioritise other types of destinations	11%	12%
Poor transport links to the area	14%	9%
Too touristy	8%	9%
Difficult to get around the destination by public transport	8%	9%
There are nicer seaside towns	4%	8%
Not enough activities/ things to do	8%	7%
Lack of all-weather attractions	9%	7%
There are better beaches	6%	6%
Nothing of cultural interest there	3%	6%
Too many families	4%	5%
The area doesn't cater well for people with accessibility needs	3%	3%
Not enough decent accommodation	1%	3%
Don't know enough about the area	6%	23%
Another reason	7%	1%

02

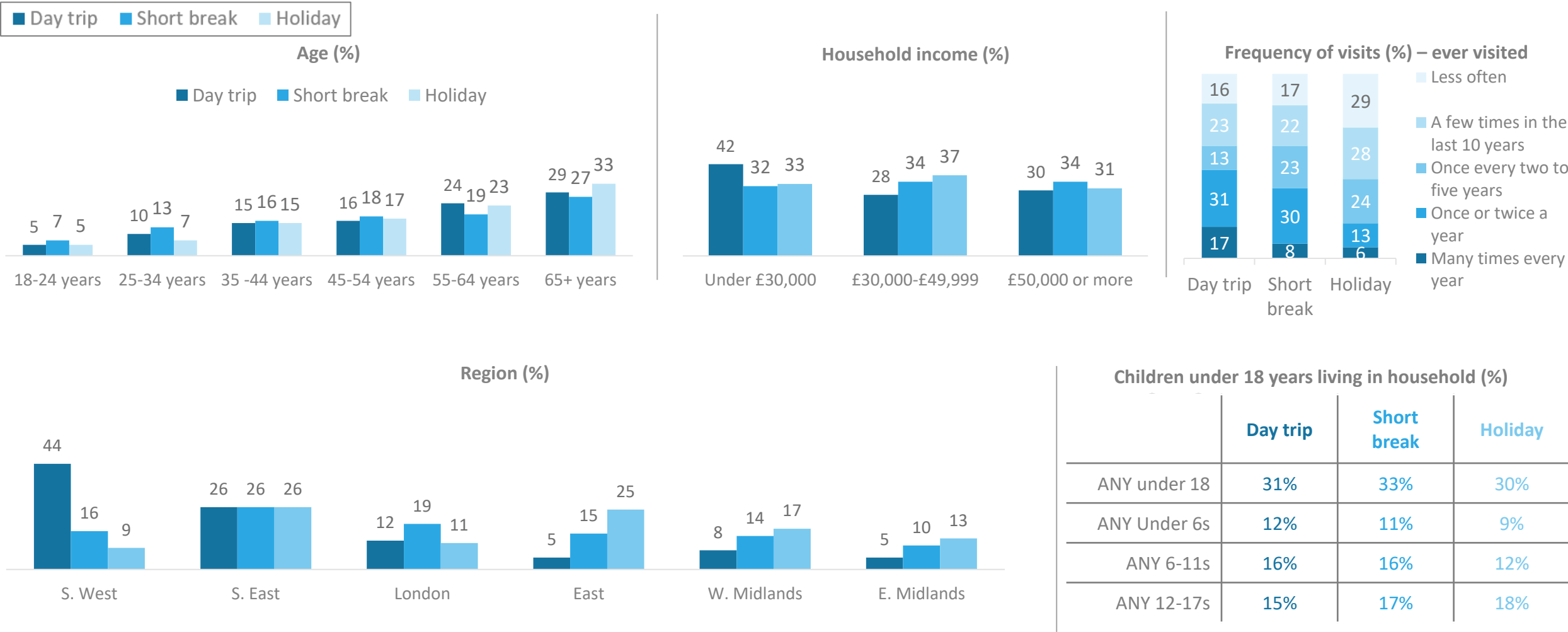
DORSET VISITORS

Visitor profile, motivations and behaviour

Past visitor profile – day vs. stay (1)

Day trippers are more likely to live in the South West and so are able to visit Dorset more regularly. Nearly half visit every year, so they may be looking for new ideas of places to see/ things to do, but have a lower average household income so may have less to spend.

Short breakers are most likely to visit from London and SE, while those taking a longer holiday travel further, with over half visiting from the Midlands.



Region (%)

S. West

S. East

London

East

W. Midlands

E. Midlands

44

16

9

26

26

26

12

19

11

5

15

25

8

14

17

5

10

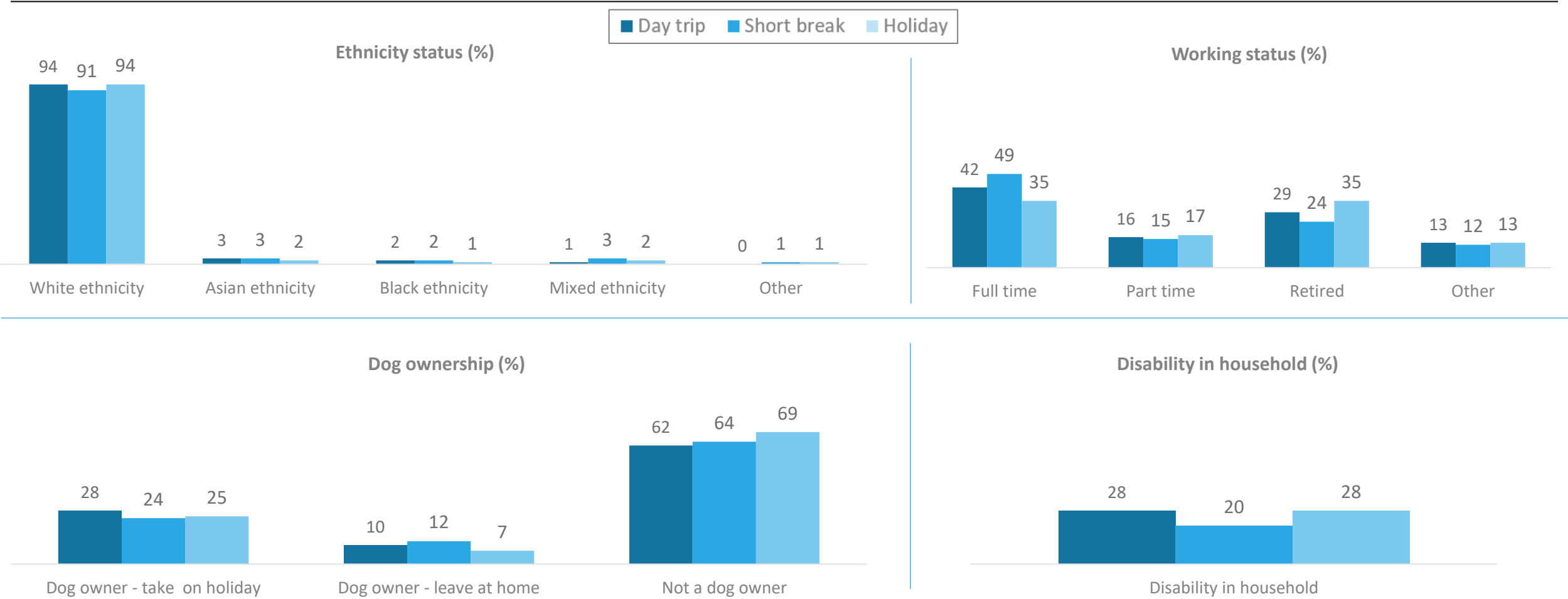
13

Children under 18 years living in household (%)

	Day trip	Short break	Holiday
ANY under 18	31%	33%	30%
ANY Under 6s	12%	11%	9%
ANY 6-11s	16%	16%	12%
ANY 12-17s	15%	17%	18%

Past visitor profile – day vs. stay (2)

Holidays of 4 or more nights are somewhat more likely to attract people who have retired.

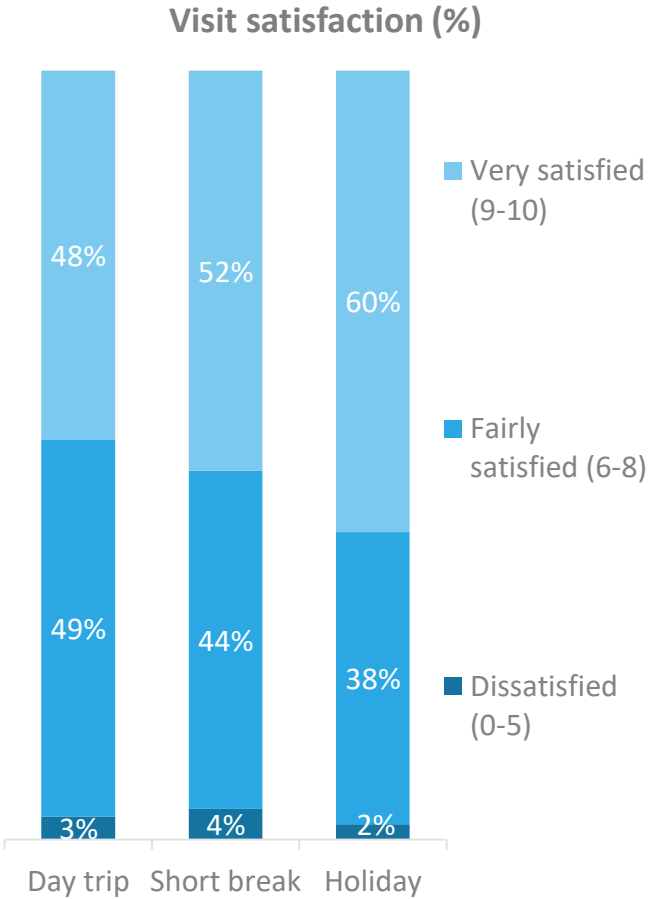
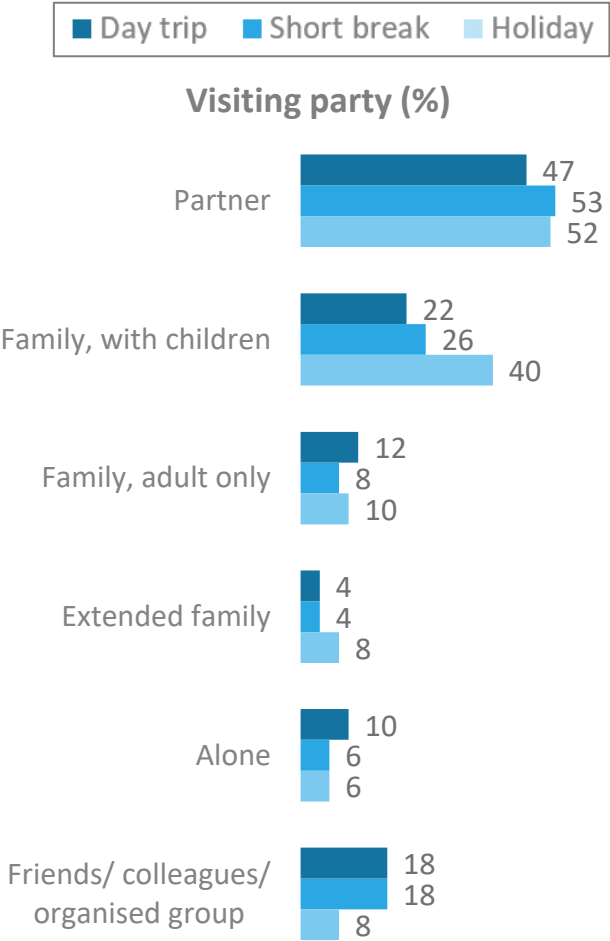


—Last visit purpose/ type – day vs. stay—

Holidays of 4 or more nights are typically taken with partner/ family, often including children, with motivations typically being quality time together and to explore the area. Day trips and short breaks have more varied party types and motivations and offer more opportunity for specialist packages.

Satisfaction is high across all types of visits, but improves the longer visitors stay!

Top motivations for last visit to Dorset (all mentions over 5%)		
Day trip	Short break	Holiday
Quality time with family/friends (28%)	Quality time with family/friends (33%)	Quality time with family/friends (41%)
Explore the area (17%)	Explore the area (16%)	Explore the area (22%)
Rest & relaxation (10%)	Rest & relaxation (16%)	Rest & relaxation (14%)
For fun (8%)	Soak up natural beauty of the area (7%)	Soak up natural beauty of the area (9%)
To visit a specific attraction/ site (7%)	For fun (6%)	
Activity day/ break (7%)	Romantic getaway (5%)	



*Business trip (no leisure time). Convenient place combine work+leisure. Tag leisure onto work trip

03

GROWTH OPPORTUNITY

Understanding the potential for growth in visits to
Dorset

The size of the opportunity

Total opportunity: 15.7 million
...plus their children
...plus repeat visits
...plus visitors from rest of UK and overseas

Consideration of Dorset by region:

- **South West (56%)**
- **South East (55%)**
- West Midlands (46%)
- East Midlands (46%)
- East of England (46%)
- Greater London (33%)

Adult population of Midlands & South*
32 million

Past visitors (39%)
12.5 million

Non visitors (61%)
19.5 million

Would consider Dorset (76%)
9.5 million

Would not consider Dorset (24%)
3 million

Would consider Dorset (32%)
6.2 million

Would not consider Dorset (68%)
13.3 million

Key barriers to visiting:

- Distance (45%)
- Unpredictable weather (23%)
- Too expensive (16%)
- Poor transport links to the area (14%)

Key barriers to visiting:

- Distance (37%)
- Don't know enough about Dorset (23%)
- Unpredictable weather (17%)
- Too expensive (17%)
- Prioritise other types of destination (12%)

04

AUDIENCE SEGMENTATION

Understanding the segments and opportunities
for growth

What segmentation is...

Segmentation provides a structured way of looking at the market, providing clear, granular information about each group to plan from.

Deeper audience understanding

The audience segmentation will help you to decide...

Who to
TARGET

How to
ACCESS them

How to
ATTRACT
them to

How to
ENGAGE them

How to **BUILD**
loyalty

Ultimately, it can help you to build a more engaged audience, that promotes your offer through word of mouth recommendations, and returns.

Align and unify the organisation

Segmentations provide a structured view of the market which helps by...

Providing a **COMMON LANGUAGE** to use across the organisation

More efficient/ effective
MARKETING

Smarter **INVESTMENTS**

This leads to smarter, more joined up thinking and decision making.

What a segmentation isn't...

Segmentations are effective planning tools but they have limitations.

A segmentation isn't...

A magic bullet

It is a tool to support and focus existing experience and knowledge.

An exact description of every person

It is a stereotype of groups of people with similar characteristics.

A description of every feature of a group of people

The segmentation is driven by attraction visiting and interests. There are other commonalities, but these do not define the segments.

Presenting completely isolated groups

Segments may share similar behaviours and characteristics on certain dimensions – but will be differentiated on others.

The segmentation process

1) Survey of adults living within key regions that take holidays in Dorset region (UK excluding Scotland, Northern Ireland, Wales, North East and locals)



2) Defining the input variables to segment on. We segmented on attitudes as these remain stable and underpin behaviour. 34 statements were used relating to:

- Destination selection & holiday booking
- Types of holidays/ activities
- Accommodation
- Dining preferences
- Wellness
- Sustainability



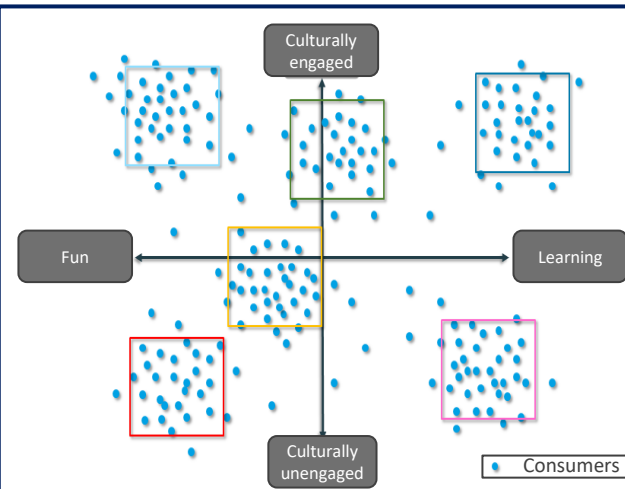
3) Segmentation analysis used to group people based on patterns in their answers.

Several different solutions were considered. We selected the solution that had stable segments (consistent across solutions), was intuitive, and allowed us to identify opportunities for BCP council and businesses.



4) Fresh research for Dorset, based on adults living in the South and Midlands.

Research included questions that allowed us to replicate the BCP segments, as well as specific questions about the perceptions, sights and attractions of Dorset.



HOW DOES SEGMENTATION ANALYSIS WORK?

- Segmentation analysis identifies the way that people naturally cluster based on specified variables.
- There is a 'centre of gravity' for each cluster, with the people at the centre of the cluster being most typical of the segment.
- Others will be further away from this centre of gravity and may have characteristics of two or more segments.
- People are assigned to the segment they most closely match.
- An example of how people might cluster is shown to the left.

Introducing your leisure segments

The research identified five core segments in the days out/ holiday market:



Comfort & Convenience



Active & Mindful



Nature & Culture



Luxury & Learning



Fun & Relaxation

Introducing 'Comfort & Convenience'

19%
of target
market

6.1m
adults



A caring segment with wholesome values. They take life at a fairly slow pace and are undemanding and fairly habitual by nature, preferring easy, domestic holidays where they can relax, often returning to places they know.

Key words

HOME BODIES

UNDEMANDING

CARING

FAMILY-FOCUSED

POTTERING

EASY LIFE

PEACEFUL

ECO AWARE

Distinct hobbies/ interests

GARDENING

COOKING

ANIMAL WELFARE

	AGE: Under 35	AGE: 35-54	AGE: 55+	GENDER: Male	GENDER: Female	Working	Retired	Children in household	SOCIAL GRADE: ABC1	SOCIAL GRADE: C2DE	Average Hhold income	Any disability in household	Dog owner	Black, Asian, Mixed ethnicity
Comfort & Convenience	14%	29%	<u>56%</u>	48%	51%	49%	<u>30%</u>	26%	45%	55%	£33k	<u>34%</u>	30%	10%
Total	27%	35%	38%	49%	51%	65%	20%	36%	58%	42%	£42k	24%	36%	16%

Distinguishing features

Comfort & Convenience Past visitor*



Comfort & Convenience Potential visitor

"Nice beach"

"Nice countryside"

"Clean accommodation"

"Not too expensive"

"Pub nearby"

"Convenient car parking"

Distinguishing features of the segment

1. My holidays are more about relaxing than 'doing' and they aren't ones to look for a physical challenge
2. Most are happy to return to the same holiday destination again and again
3. Prefer 'home from home' type accommodation and enjoy spending time around the holiday resort/ accommodation
4. Have cut down on overseas holidays as a response to global warming
5. Don't consider themselves to be well travelled
6. Prefer cheap and cheerful holidays

Targeting

Come and experience...

The simple pleasures
of Dorset's warm
hospitality and
gentle beauty

Size of opportunity: LOW

Ease of attracting: MODERATE

Accommodation	<ul style="list-style-type: none"> • Home from home style self-catering accommodation preferred, in a quiet location close to local amenities • Will also use mid-tier/ budget hotels for convenience, or holiday parks/ camping if visiting with family • Friendly welcome and recommendations e.g. good walks and parking advice when visiting attractions • Free activity suggestions/ money off vouchers • Basic creature comforts included as standard (e.g. tea making facilities in room) • 34% have a disability in their household, so nearby parking and certain accommodations may be needed (e.g. ground floor bedroom)
Sights & Activities	<ul style="list-style-type: none"> • This segment doesn't like to cram in too much and tends to opt for free options • Half days rather than full days out, with one activity a day • Promote coastal and rural walks (gentle routes) that take in points of interest (e.g. Jurassic Coast, Poole harbour/ quay, Portland Bill) • Also interested in visits to parks/ gardens and wildlife watching (e.g. nature reserves). • Shopping in local markets or stores, looking for bargains
Food & Drink	<ul style="list-style-type: none"> • Likely to buy meals out during a visit to Dorset, but less often and lower spend than other segments. • Mix of take out (e.g. supermarket meal deal, fish and chips) and eating out (e.g. cream tea, pub lunch) • Easy, budget friendly options (e.g. lunchtime specials)
Events & Festivals	<ul style="list-style-type: none"> • Limited interest relative to other segments, and they are likely to be put off by costs and crowds. • However, a third (32%) are interested in the Dorset County Show and free, local events could also draw interest.
Marketing & Digital	<ul style="list-style-type: none"> • Good match between expectations of Dorset and what they would want to do • Get them on your mailing list as they are open to returning to the same destination again and again • Opportunity to target directly to save on OTA fees • Recommendation important, so consider refer a friend schemes (e.g. discount code to share with friends) • Encourage off-peak travel (especially Autumn) by offering deals/ packages

Introducing 'Active & Mindful'

20%
of target
market

6.4m
adults



A physically active segment that likes a challenge, and enjoys new experiences. They are self-aware and carefully manage their physical and mental health. Holidays need to deliver a combination of physical, mental and social stimulation, as well as opportunities to relax, so a diverse offer is likely to appeal.

Key words

SOCIABLE PHYSICALLY ACTIVE ECO-CONSCIOUS WELL TRAVELLED
SELF-IMPROVERS LUXURY/ PAMPERING CHALLENGE SEEKERS DIGITAL

Distinct hobbies/ interests

RUNNING HEALTHY EATING FASHION/ BEAUTY GAMING
KEEPING FIT SELF-IMPROVEMENT SPIRITUALITY/ MEDITATION DRAWING/ PAINTING

	AGE: Under 35	AGE: 35-54	AGE: 55+	GENDER: Male	GENDER: Female	Working	Retired	Children in household	SOCIAL GRADE: ABC1	SOCIAL GRADE: C2DE	Average Hhold income	Any disability in household	Dog owner	Black, Asian, Mixed ethnicity
Active & Mindful	48%	43%	9%	57%	43%	83%	4%	53%	62%	38%	£49k	20%	50%	30%
Total	27%	35%	38%	49%	51%	65%	20%	36%	58%	42%	£42k	24%	36%	16%

Distinguishing features

Active & Mindful Past visitor



Active & Mindful Potential visitor



Distinguishing features of the segment

1. I often choose holidays where I can challenge myself physically
2. I would happily spend every day at the beach when on holiday
3. The nightlife at the destination is as important than what there is to do during the day
4. I am more well-travelled than most people
5. It's important I can meet like-minded travellers on my holidays
6. More likely to seek out pampering options than other segments
7. I am attracted to accommodation and activity providers that support and encourage environmentally friendly behaviour in their guests
8. Willing to pay out to get the most out of their holidays
9. I am one of the first to share my holiday experiences on social media

Targeting

Come and experience...
**Dorset: see, do,
indulge, breathe.**

Size of opportunity: HIGH

Ease of attracting: DIFFICULT

Accommodation	<ul style="list-style-type: none"> A stay based in Bournemouth may be better suited to adult only parties in this segment due to their interest in nightlife. However, there could be an opportunity to service families (53% have children in household) with hotels (3* or above), especially those located close to the beach. All inclusive options could also be a draw. A third have a dog that they take on holiday (half are dog owners in total), which is also likely to influence choice of accommodation and may drive self-catering/ B&B selection. Wellness retreat packages in mid-tier/ luxury/ eco hotels may appeal for adult only parties. Eco-conscious, so important to reflect this in your offer. Tend to book via intermediaries, often fairly last minute and attracted by deals. So could be a useful target to fill any unsold bed spaces during Apr-Aug when they tend to visit.
Sights & Activities	<ul style="list-style-type: none"> Most likely segment to engage in paid for activities and shopping. Should be a core target for businesses offering physical activities & sport (e.g. SUPs, cycling, horse riding) Beach-based activities, especially swimming in the sea, are likely to be a key draw. Opportunity for 'mindful' activities e.g. spa access, yoga/ relaxation classes.
Food & Drink	<ul style="list-style-type: none"> Breakfast – ideally included within their accommodation booking Lunch – grab and go options that easily fit into busy/ active days – fish and chips, bakeries. Dinner – seen as more of an activity. Interested in a range of restaurant types, including fine dining Family friendly opening times (early opening for dinner) and popular chains for those visiting with kids. 'Instagramable' worthy restaurants.
Events & Festivals	<ul style="list-style-type: none"> A good marketing tool to encourage the segment to 'book now'. Interested in a range of events, but this segment will be a key audience for sporty, music based, youthful and vibey type events e.g. Camp Bestival (35%). Also drawn to Weymouth Seafood Festival (45%) and Dorset County Show (44%).
Marketing & Digital	<ul style="list-style-type: none"> Promote on SM platforms and via travel trade/ press (e.g. travel agents, travel podcasts), featuring pristine beaches, a variety of physical activities, fun and wellness cues). Families - promote on beach activities and indoor family activity options for rainy days. Offer events and activities that promote family togetherness Encourage visitors to write Google and Trip Advisor Reviews and to post holiday pictures on social media.

Introducing 'Nature & Culture'

22%
of target
market

7.0m
adults



Nature lovers with a practical approach to life. They spend their free time exploring beauty spots and historical treasures. Holidays are driven by the destination and activities available and well researched prior to booking.

Key words

ACTIVE
PLANNERS

PRACTICAL
DOWN TO EARTH

NATURE LOVERS
CULTURE SEEKERS

Distinct hobbies/ interests

HISTORY

HIKING

VISITOR ATTRACTIONS

MARKETS

POLITICS/ ECONOMICS

NATURE &
ENVIRONMENT

FESTIVALS/
EVENTS

CRAFTING

	AGE: Under 35	AGE: 35-54	AGE: 55+	GENDER: Male	GENDER: Female	Working	Retired	Children in household	SOCIAL GRADE: ABC1	SOCIAL GRADE: C2DE	Average Hhold income	Any disability in household	Dog owner	Black, Asian, Mixed ethnicity
Nature & Culture	21%	33%	<u>46%</u>	48%	52%	62%	<u>25%</u>	29%	66%	34%	£41k	23%	34%	10%
Total	27%	35%	38%	49%	51%	65%	20%	36%	58%	42%	£42k	24%	36%	16%

Distinguishing features

Nature & Culture Past visitor



Nature & Culture Potential visitor



Distinguishing features of the segment

1. I do a lot of research in advance of my holidays
2. The first thing I usually look for when planning a trip away is a destination that is rich in culture
3. I go out of my way to learn about local culture on a holiday
4. I usually try to do something that I've never done before on my holidays
5. It's important that my holidays involve lots of excursions or day trips
6. The accommodation is not that important – it's just a base to explore the destination
7. High-end, luxury, accommodation and pampering is NOT a priority
8. I always look for locally sourced food

Targeting

Come and experience...

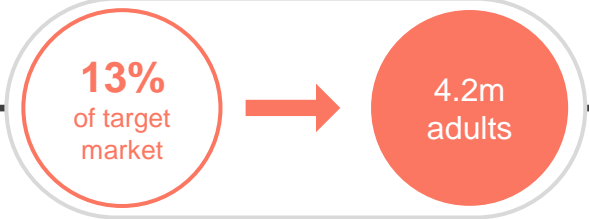
The quiet beauty
of nature's
playground

Size of opportunity: HIGH
(Off peak potential)

Ease of attracting: EASY

Accommodation	<ul style="list-style-type: none"> Unfussy about accommodation rating and facilities, and are likely to book based on its location to good walks/ attractions of interest. However, B&Bs are often popular – with character/ heritage properties likely to draw interest... ... and eco credentials could add to the appeal No frills needed – just a comfortable room.
Sights & Activities	<ul style="list-style-type: none"> Drawn to Dorset for its natural landscapes and wildlife, which they explore though self-guided sightseeing (often through walks) and organised boat trips. They are more attracted by nature-based activities than other segments (e.g. fossil hunting & star gazing). Cultural attractions also capture their interest (historic properties, harbour/quays, museums) – in particular Poole Harbour & Corfe Castle.
Food & Drink	<ul style="list-style-type: none"> Fine dining isn't important... ... but they will opt for locally sourced food where available. Fresh, natural cues important, but relaxed rather than stylish – not pretentious. Likely to eat out, rather than in a hotel restaurant, and to prefer independent businesses over chains.
Events & Festivals	<ul style="list-style-type: none"> Festivals are valued as a way of appreciating culture outdoors, and learning about local culture. Dorset County Show (38%) and Weymouth Seafood Festival (35%) both hold appeal for this segment, and they are the most likely to express interest in attending a local music/ arts festival or event.
Marketing & Digital	<ul style="list-style-type: none"> Above average awareness of Dorset's selling points, but far from universal. Advertise AONB, 7 miles of beautiful coastline to walk, the variety of wildlife that can be seen, and Dorset's local culture/ history (including fossil hunting). 22% have visited in the past 3 years, and this segment likes to do/ see something new when on holiday, so promote hidden gems to provide reasons to keep coming back. Opportunity to target for off-peak visits by promoting any festivals held during the shoulder months and the opportunity to see different types of wildlife. Many research holidays via Google, so use Search Engine Optimisation (SEO). Consider promotion through National Trust magazine or Ramblers.

Introducing 'Luxury & Learning'



Lovers of the finer things in life – 5 star accommodation, good food, travel and high culture. They avoid tourist hotspots, but enjoy the prospect of rest and recuperation by the sea.

Key words

CULTURED

REFINED

WELL TRAVELLED

FOODIES

BALANCED

PLANNERS

LUXURY SEEKERS

Distinct hobbies/ interests

FINE DINING

VISITING PARKS/ GARDENS

HERITAGE/ HISTORY

MUSEUMS/ GALLERIES

COOKING

GARDENING

POLITICS/ ECONOMICS

PERFORMANCE ART

	AGE: Under 35	AGE: 35-54	AGE: 55+	GENDER: Male	GENDER: Female	Working	Retired	Children in household	SOCIAL GRADE: ABC1	SOCIAL GRADE: C2DE	Average Hhold income	Any disability in household	Dog owner	Black, Asian, Mixed ethnicity
Luxury & Learning	16%	28%	<u>56%</u>	53%	47%	59%	<u>31%</u>	26%	67%	33%	<u>£50k</u>	22%	33%	15%
Total	27%	35%	38%	49%	51%	65%	20%	36%	58%	42%	£42k	24%	36%	16%

64 Segment in line with market average for region.

Distinguishing features

Luxury & Learning Past visitor



Luxury & Learning Past visitor



Distinguishing features of the segment

1. I do a lot of research in advance of my holidays
2. High-end, luxury accommodation is a priority for me on my holiday
3. I always look for locally sourced food
4. Many say it's important to have the option of fine dining on a holiday
5. When it comes to holidays, I will pay whatever it takes to get the best experience
6. The first thing I usually look for when planning a trip away is a destination that is rich in culture
7. I go out of my way to learn about local culture on a holiday
8. I am more well-travelled than most people

Targeting

Come and experience...

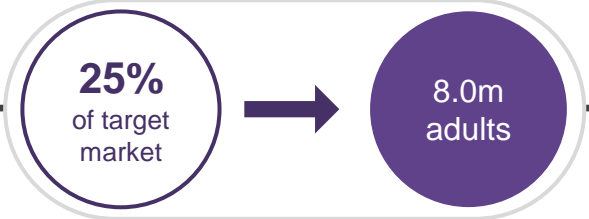
A luxury retreat,
and cultural
refreshment

Size of opportunity: LOW
(but off peak potential)

Ease of attracting: EASY

Accommodation	<ul style="list-style-type: none"> With a higher than average no. of stays each year and a preference for luxury or mid-tier hotels, it is likely they will use hotel loyalty schemes, which may restrict the providers considered... ...but there is still an opportunity to attract to (any) premium hotels, or self-catering that meet their requirements – typically quiet locations preferred with good dining options nearby. Likely to look for scenic views, privacy, and good amenities e.g. a pool, restaurant (not so important to have a gym), and parking. Free newspapers for guests (broadsheets)
Sights & Activities	<ul style="list-style-type: none"> Dorset's heritage features high on their list of things to do/see in Dorset. Corfe Castle is popular, as are historic harbours/quays, but this segment could also be attracted to Thomas Hardy Country. Foodie and artisan related activities also attract interest – local/ farmers markets, and quality restaurants.
Food & Drink	<ul style="list-style-type: none"> Mostly eat out when on holiday Important to have the option of fine dining. Attracted to fresh, locally sourced food e.g. seafood – today's catch. Wine recommendations to pair with food Restaurant views and/or ambiance likely to be important
Events & Festivals	<ul style="list-style-type: none"> Interested in Food Festivals – artisan offerings – so Weymouth Seafood Festival (39%) appeals. Dorset County Show (45%) also attracts interest. Cultural events, particularly those based in historic properties are also likely to appeal e.g. open air theatre or concerts at a historic property, historical re-enactments. As an older segment, availability of comfortable seating is likely to be important (e.g. deck chair rather than picnic mats for open air events)
Marketing & Digital	<ul style="list-style-type: none"> Most likely to associate Dorset with its nature attractions, but are more drawn to its local/ heritage attractions/activities, so ensure these are highlighted in targeted marketing. Research will often use official channels (e.g. Tourist Information Centres, such as VisitDorset) and Trip Advisor for reassurance of a quality experience. Luxury magazines, newspapers Potential to attract during shoulder months – from Mar until Nov.

Introducing 'Fun & Relaxation'



Bargain hunters who tend to stick to popular leisure options and holiday destinations. Holidays are about letting go and finding a way to relax, so all-inclusive offers are popular.

Key words

BEACH LOVERS

UNDEMANDING

FAMILY/ FRIENDS

BUDGET AWARE

EASY LIFE

ECO IGNORERS

Distinct hobbies/ interests

NO DISTINGUISHING THEMES – IN LINE WITH MARKET AVERAGE

	AGE: Under 35	AGE: 35-54	AGE: 55+	GENDER: Male	GENDER: Female	Working	Retired	Children in household	SOCIAL GRADE: ABC1	SOCIAL GRADE: C2DE	Average Hhold income	Any disability in household	Dog owner	Black, Asian, Mixed ethnicity
Fun & Relaxation	29%	39%	31%	43%	<u>57%</u>	66%	15%	42%	54%	<u>46%</u>	£41k	22%	33%	15%
Total	27%	35%	38%	49%	51%	65%	20%	36%	58%	42%	£42k	24%	36%	16%

74 Segment in line with market average for region.

Distinguishing features

Fun & Relaxation Past visitor



Fun & Relaxation Potential visitor



Distinguishing features of the segment

1. My holidays are more about relaxing than 'doing'
2. I am happy to return to the same destination again and again
3. All-inclusive food and drink are a big selling point for me when I book a holiday
4. I don't want to think about sustainability or the environment on my holidays
5. I am more than happy to stick to tourist hot spots on my holidays
6. I would happily spend every day at the beach when on holiday
7. Many are happy to spend the majority of their holiday in or around the resort/ accommodation

Targeting

Come and experience...
World class beach holidays at affordable prices

Size of opportunity: MODERATE

Ease of attracting: MODERATE

Accommodation	<ul style="list-style-type: none"> For adults, all-inclusive hotel/ resort packages (décor less important than facilities)... Families (42% in segment) are most likely to opt for self-catering options (holiday parks, camping, self-catering) On site facilities desirable – but unlikely to use hotel restaurant Location close to beach/ attractions is important.
Sights & Activities	<ul style="list-style-type: none"> Many are happy to spend the majority of their holiday in/around their resort/ accommodation (depending on the facilities available or at the beach). Attracted to free and easy leisure activities in particular sunbathing, swimming in the sea, walking and shopping/ bargain hunting. The fine sand and family friendly activities/ facilities available at Weymouth and Bournemouth Beaches make these popular with this segment. The most appealing paid activities are visiting an animal/ farm park (e.g. Monkey World Farmer Palmer's), boat trips and spas/ pampering.
Food & Drink	<ul style="list-style-type: none"> Opportunities limited as they tend to opt for self-catering or all inclusive... ... but they might indulge in cheap and cheerful options close to the beach or accommodation e.g. fish and chips, fast food, cafes, ice creams..
Events & Festivals	<ul style="list-style-type: none"> Limited interest overall and this is unlikely to drive holiday visits.
Marketing & Digital	<ul style="list-style-type: none"> Dorset's beaches are likely to be the key selling point – promote Weymouth's soft sands and facilities, along with cheap and easy indoor/ poor weather options (e.g. shopping, Farmer Palmer's) Get them on your mailing list as they are open to returning to the same destination again and again Search Engine Optimisation so Dorset comes up top for searches of UK seaside resorts. Encourage visitors to write Google and Trip Advisor Reviews and to promote the area on social media (e.g. by setting up photo opportunities). Offer deals/ packages

06

SEGMENT TARGETING



Deciding who to target

1. Consider who you might want to target

How big is the segment?
(Volume of people)

How active is the segment?
(Share of all day trips/holidays)

2. Consider how easy it would be to attract them

Are they already visiting?

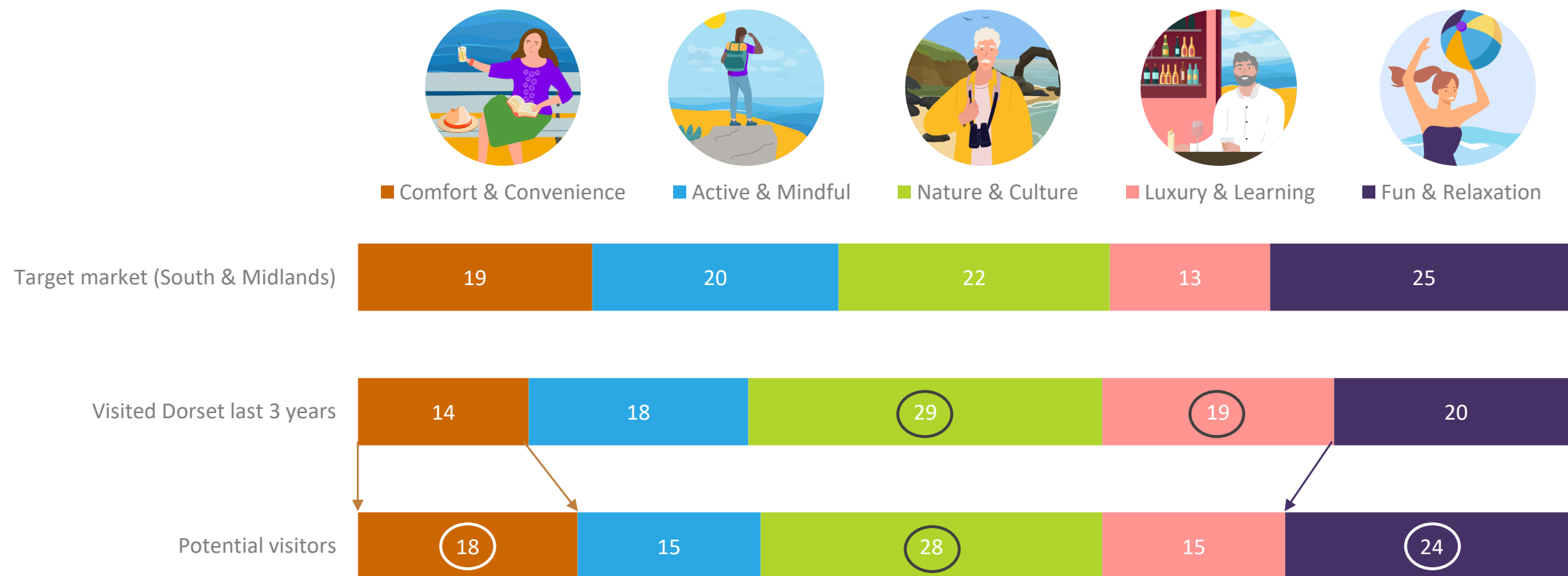
Can Dorset meet their needs?
(Fit with offer)

How easy are they to access?
Marketing channels)

Segment size within your markets

Comparing the overall market with those who have visited in the last 3 years we can see that Dorset has particularly attracted more Nature & Culture and Luxury & Learning.

There is potential to continue attracting these segments, and also to grow visitors from Comfort & Convenience and Fun & Relaxation. Dorset is less immediately attractive to Active & Mindful adults.



Sizing the opportunity

The segment size, coupled with a high share of all day trips and holidays makes both Nature & Culture and Active & Mindful segments attractive from a volume perspective.

There is also a good size of opportunity for holiday visits with Fun & Relaxation, and Luxury & Learning could be valuable segment to target during Dorset's off-peak season.



	Comfort & Convenience	Active & Mindful	Nature & Culture	Luxury & Learning	Fun & Relaxation
Size of segment in target regions* (millions)	6.1	6.4	7.0	4.2	8.0
Adult only size* (millions)	4.5	3.0	5.0	3.1	4.6
Family size* (millions)	1.6	3.4	2.0	1.1	3.4
Share of day trips	13%	28%	27%	14%	18%
Average no. of day trips per annum	5.3	10.5	9.2	8.1	5.6
Share of UK holiday visits	14%	27%	22%	14%	23%
Average no. of UK holidays per annum	2.1	3.7	2.7	2.9	2.5
% of past/ potential visitors who have/ would visit Dorset off-peak (Sept-Apr)	21%	15%	27%	25%	16%
POTENTIAL SIZE OF OPPORTUNITY	LOW	HIGH	HIGH (and off peak potential)	LOW (But off peak potential)	MODERATE (More for holiday visits)

Opportunity sizing based on the number of people likely to visit, from each segment.

Ease of attracting



	Comfort & Convenience	Active & Mindful	Nature & Culture	Luxury & Learning	Fun & Relaxation
Size of segment in market	19%	20%	22%	13%	25%
% visited in past 3 years	13%	15%	22%	24%	13%
% who would consider Dorset	45%	34%	60%	54%	44%
Ease of attracting	MODERATE	DIFFICULT	EASY	EASY	MODERATE
Challenges/ barriers to visiting	<ul style="list-style-type: none"> Travel may be more of a barrier for this segment, with higher levels of disability in household (34%) Cost may be a barrier for some. 	<ul style="list-style-type: none"> Not enough to do in poor weather Poor transport links to/ around Dorset Lack of knowledge about the county 			<ul style="list-style-type: none"> Lack of knowledge about the county Not enough to do in poor weather Cost may be a barrier for some.

—Targeting: Accommodation preferences



Potential target for...	Comfort & Convenience	Active & Mindful	Nature & Culture	Luxury & Learning	Fun & Relaxation
% booking accommodation during last visit to Dorset (all past visitors)	63%	66%	69%	69%	62%
Camping/ caravanning (in own tent/ caravan)	Yes	Yes (family visits)	Yes		Yes (family visits)
Holiday park (in on-site caravan/ cabin/ tent)					Yes↑
Self-service house/ apartment	Yes↑		Yes	Yes↑	
B&Bs/ Guest houses			Yes↑		
Hostels & budget hotels	Yes		Yes		Yes
Mid-tier hotels	Yes	Yes	Yes	Yes	Yes
Premium hotels		Yes↑		Yes↑	

It is of course possible to target other segments as well, but it is likely to take more effort and reap less reward.

Targeting: Daytime preferences

All segments contribute to the local economy by spending while they are in Dorset, but the Active & Mindful segment tends to engage in the most paid activities across the board – from events/festivals, to spas and tourism/ physical activities.



Potential target for...	Comfort & Convenience	Active & Mindful	Nature & Culture	Luxury & Learning	Fun & Relaxation
% paying to visit an attraction on last visit to Dorset (base: all past visitors)	24%	27%	35%	32%	30%
% paying for an activity (e.g. boat trip) on last visit to Dorset (base: all past visitors)	16%	37%↑	26%	19%	24%
% paying to visit a spa on their last visit to Dorset (base: all past visitors)	1%	10%↑	2%	3%	1%
% eating out on last visit to Dorset (base: all past visitors)	80%	89%	84%	90%	84%
% that would be interested in attending one of Dorset’s main events/ festivals (base: all)	53%	78%↑	70%↑	66%	53%



Thank you!

Your Contact ☆



Katie Vosper

Tourism & Leisure Director

Katie.vosper@bva-bdrc.com