

Branding the Outdoor Experience

Seminar Proceedings
of the
Countryside Recreation Network

Edited by Helen English
Network Assistant

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Countryside Recreation Network Seminar

'BRANDING THE OUTDOOR EXPERIENCE'

WELCOME AND INTRODUCTION

Marcus Sangster
Research Manager
Forestry Commission

We live in a complex world. Every day we are obliged to make choices; about the clothes we wear, the food we eat, the people and organisations we associate with and don't associate with.

Yet most of us have little spare time to deliberate on these choices. Brands provide us with comfort. Once we have made a few choices that suit us we no longer need to weigh up the pros and cons again, we simply buy those brands.

Modern manufacturing and consumer law means that performance and reliability in mass-market goods and services usually can be taken for granted. So when we buy a product or service our decisions are likely to be not about utility but about the fit between the intangible aspects of the product and our own views on how we want to live our lives and how we want to be seen by others.

Fairtrade goods and green tourism are good examples. Not only do they allow consumers to exercise an altruistic choice, they also provide an opportunity for them to reinforce their views of who they are and the values they subscribe to. And they might also provide an opportunity to signal these to others and even to group together with others who share these values.

So brands are associated with identity, with how we want others to see us and about the tribes that we wish to join. They operate at a personal level and carry undertones of trust and security.

How does this apply to the countryside? Because of this personal dimension we need to understand that the countryside is not an amorphous green space that we can sell passively using some mechanical formula. Our visitors are highly differentiated and we need to offer diverse choices to our diverse customers. We face competition. Others are trying to attract our customers and we need to be intelligent and professional to compete.

This seminar opens with presentations from leading experts in branding, in market research and in forecasting and understanding what drives consumer choices. We have examples of branding in practice and opportunities to discuss how locality can itself be a source of identity and branding, for example through marketing local food or by using a shared sense of place to build social capital.

If I was not chairing the day I would be a delegate. There are some clear messages in the programme about what it means today to be a professional manager in countryside recreation, and the breadth of skills and knowledge that will be required of us in years to come.

Countryside Recreation Network Seminar

'BRANDING THE OUTDOOR EXPERIENCE'

THE CASE FOR BRANDING OUTDOOR RECREATION

Liana Dinghile
Consultant
Dragon Consultancy

Context

Whether there is a case for branding outdoor recreation requires a better understanding of the role of brand itself, not merely the action of branding. Broader thinking can find you in the right space at the right time where you appeal to a state of mind and lifestyle. Attention to societal trends and a good understanding of consumer behaviour across the visitor experience will ensure the marketing mix you select can work for your budget, your brand and your visitor numbers.

'Experience' is king and undoubtedly being outdoors has it's benefits – key is learning *how* to focus on them, target with them and take consumers beyond the thought 'it's a nice idea'.

The parameters

Defining Outdoor Recreation – no one size fits all

The relevance of brand in the promotion of outdoor experiences and recreation will vary according to the nature of your product or service. As proved from attempts to search, there is an endless choice set of activities, locations and products and therefore a one size fits all case is simply not appropriate. However, with choice comes even more demand for differentiation. Why will people choose to partake in one activity or visit one location over another? How can you motivate them, why you and how can you ensure their expectations of you are met through the delivery of the experience itself?

All questions could be answered by embracing the power of brand. Your brand is your reputation; the associations and expectations people have of you and put simply your only real form of differentiation. You may be the best product or service in your field but you need customers to associate that credit with you specifically and therein lies the role of brand. Branding is simply the manifestation of that, the method by which you communicate to customers whether that is via a brochure, website or exhibition for example.

Most importantly, your brand is your unifier as well as differentiator. It provides people with a shared sense of purpose and if managed properly will drive a consistency through your business that will save you money in the long term.

To clarify therefore, branding is a powerful tool; it projects your looks and personality but to go beyond the surface and create a relationship with your desired customers, requires attention to your brand.

This will deliver you:

Clarity – simplicity of who you are, what you do/provide

Relevance – to society, consumers, to your strategy, to your stakeholders

Commitment – from customers, staff, investors, suppliers

Review and critique of different branding approaches

The degree of relevance and management of brands varies greatly in scale, quality and success. This variation can be within sectors e.g. some destinations do it better than others, but also from one sector to another e.g. outdoor fashion brands in the main have longer term relationships with consumers. Put simply, there are varying techniques and styles used in the outdoor market place and focusing on the principles rather than the specifics gives insight to some useful learning and recommendations for your own brands and marketing activities.

Utilising your best assets

This lesson is illustrated to best effect by destinations. Good examples include Wales, England and New Zealand where they have opted to simplify their positioning to focus on their most compelling and core assets i.e. the beautiful outdoors. For all however, the assets of 'unspoiled earth and exhilarating spaces' are not in themselves differentiating but each has found their own unique way of communicating them i.e. 100% Pure New Zealand. The lesson is that a strong brand positioning will provide an even stronger platform to develop and coordinate communications of any scale e.g. advertising campaign or direct mail. In the case of Wales, marketing activity included smaller, targeted activity such as air fresheners in London taxis targeting commuters with the message '2 hours but a million miles away'. Driven from the same positioning, this is a good example of focusing on the benefits to consumers who you identify need it most.

Consistency

Consistency is important for any brand for the sake of consumer trust and also managing the cost of delivery. For example, for brands like McDonalds this is absolute, regardless of location. However, arguably for any form of outdoor activity there should be some degree of relationship with the location to appeal to the customer both on an inspirational and practical level. In either case, it is core to know that the level of standard one can expect from a product in one location can be met in any other. A good example is 'Go Ape' whose promise is 'high wire forest adventure'. The primary customer need as far as Go Ape is concerned is tree-based adventure; the secondary but valuable draw will likely be the location. That forms the order of communication and through its simple brand identity and creative style can appeal to wide variety of customers if required.

Emotional versus rational

Nearly all connections with the consumer will appeal to a mix of emotional and rational needs. In a very competitive marketplace it's important to understand how and when to play to both. This means thinking about your desired customer, identifying what benefits you offer them (ideally the ones more compelling than your nearest competitor) and

importantly how they can access them. Balancing the order in which you tell the customer these should be based on what you think will motivate them to act most.

Examples of this include the 'Walking your way to health' initiative. An obvious emotional benefit to the consumer, locally targeted, socially inclusive and well coordinated walking programme. The practical aspects of this brand are at the fore and one could argue room to turn the volume up on the emotional aspects. Put simply, if you had to measure the success of the brand, it would be based on the 'difference' made to the participant.

Fashion brands are a good example of this balance. They are functional products, appealing to the rational needs of users but have built their brands around the inspiring, exhilarating experiences they allow customers access to. As a result brands such as The North Face, Patagonia and Timberland for example have a credibility and image beyond their original market. Key for them however is to maintain standards and credibility in the face of increased demand and fashion based popularity.

Centre Parcs arguably didn't maintain in this way, having launched onto the market with emphasis on the emotional and inspiring i.e. your oasis in the forest. Over the years and in light of increasing competition, less emphasis was placed on this distinction and the image is now more in line with other famous 'activity park' brands. This may not be the product truth but once you allow distance between your brand positioning and what it should influence e.g. products/services, physical environment, culture and marketing communications, your point of difference is reduced.

Summary and recommendations

Brand at the heart of strategy

- Brand does not just equal marketing. It is the driver for all aspects of your business, driving strategy and consistency across products/services, people culture, physical environment and marketing communications
- In outdoor recreation, marketing will get people's attention. It will sell and therefore prioritising your messages as relevant to whom you want and for the media you are using (e.g. radio/press/outdoor/merchandising etc) is key. The recommendation would be to respect product richness but manage via a simple marketing message.
- Marketing however is one part of the customer experience, the beginning of the journey and engagement with your brand. To go beyond is to ensure the promise is delivered at all touch points of the customer journey and experience. If, for example, your positioning centres on 'anything's possible' then this should translate to the style of service from staff and to the range of activities on offer. In the case of marketing communications, it may well translate to the way in which your brochure or website is structured to allow customers opportunities to 'create their own' etc...

Developing effective communications

- Brand is at the heart but customers are very much at the fore. By this we mean, you should set the ambition and niche for your product or service but it should be based on the needs and wants of your desired customer segments. These will often vary, so how do you communicate to many different customer types with just one brand positioning?

- o The answer is to use your core brand positioning to create a framework. A structure that keeps the brand idea at the heart but which allows for different messages and creative to reach different audiences i.e. different demographics, nationalities, lifestyle groups and capabilities. In simple terms, keep it different but compatible.

Achieving sustainable advantage

- The most effective brands are the ones that stand the test of time. Those which make sure they are relevant to changes in society and therefore have a role in the bigger picture of consumers' lives. In this case, their varying needs for recreation and enriching experiences.
- Maintaining relevance as we would put it, means critically looking at the constant change in the way people look for information, how they react and act upon it and therefore what implications that has for you, how people see you and what you offer. For example, it could be that you were operating in a once niche and specialist area that now has opportunity, appeal and benefit to a wider audience. In the case of outdoor recreation, this is arguably the case so do you need to look again at the way you are positioned and the way you reach your customers? Worth considering.

A summary checklist of broad principles:

1. Take the richness of your offer and make it live with a simple message
2. Make it live and breathe through all aspects of your operation. Shouldn't be hard if its based on a product truth
3. One of the most important ways to do so is to motivate those who deliver. Every touch point can make or break in a service business
4. Prioritise your customers and assess needs in the context of the wider society and lifestyle
5. Attract them via an effective combination of communications, derived from the core positioning
6. Ensure messages are tailored yet compatible, make desirable and convenient
7. Monitor and adapt as necessary - stay relevant

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'BRANDING THE OUTDOOR EXPERIENCE'

SOCIAL MARKETING APPROACH

Melanie Howard
Co-Founder and Director
The Future Foundation

Topics for presentation

- Defining social marketing for the future
- Exploring the role of the outdoors in a modern, urban consumer society
- The key trends shaping the future demand for outdoor experiences
- Pointers for social marketing directions

Social marketing

- Social marketing uses the principles and techniques of marketing in order to encourage people to behave in socially desirable ways
- It has become more fashionable and necessary as a tool to help government achieve often unpopular policy targets
- Arguably it is an increasingly important and effective intervention that can be made by government and in a highly advanced consumer society

Principles for success

- Engaging and empowering stakeholders
- Relevant and dynamic partnerships
- Innovation and imagination
- Sufficient resources and skills
- Demonstrating added value
- Aligning marketing objectives with social realities and aspirations

In depth understanding is critical to successful social marketing

- Successful social marketing works with the current direction of changing values
- It builds on people's underlying values and desires and maximises opportunities for them to 'do the right thing'
- Essential to understand the nature of the drivers, trends and behavioural manifestations that you are working with

Important questions to consider:

What is the role of the outdoors in a modern, urban society?

Who controls the countryside?

Who is allowed to live in it?

What are we allowed to visit?

What can we do there?

The logical outcome of current trends?

What are the specific challenges facing forests and parks?

Key concepts from rural sociology

- Symbolic rurality – an idealised concept of the countryside that we all have
- Counter-urbanisation – long term flows of prosperity from the cities into the countryside
- The differentiated countryside – no single 'reality' of the countryside

Insights from rural futures

- The existence of rural stereotypes
- Interest in the countryside has a very wide constituency
- Rural perspectives need to be bought into the mainstream of policy making
- More attention has to be paid to the importance of urban rural links in policy

Key trends that you need to know about in planning your social marketing (see slides in Appendix D)

1. Leisure Society
2. Experience Economy
3. Longevity
4. Networked Society
5. Complexity and Choice
6. Culture of Immediacy
7. Changing Meaning of Luxury
8. Ethical Consumption
9. Rising Demand for Happiness
10. Assault on Pleasure
11. Multiculturalism

Social marketing countryside recreation in the future

- Key has to be gaining insights into the aspirations and motivations of target audiences
- Working with current direction of change and making the most of underlying values
- Aligning with other agendas and maximising value to the end user – ticking as many boxes as possible
- Creating engaging, involving and participative campaigns that deliver real value within limited budgets

Making it easy for people to do the right thing

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'BRANDING THE OUTDOOR EXPERIENCE'

UNDERSTANDING YOUR MARKET

Tom Costley, Group Director
Duncan Stewart, Managing Consultant
TNS Travel and Tourism

Introduction

TNS Travel and Tourism is a division of TNS, the largest custom market research company in the world. However, whilst this position provides access to global resources and progressive research methodologies, the division also benefits from its development of a research unit specialising in the fields of tourism, leisure and recreation research. This specialism has provided the authors with a great deal of experience working with organisations in these fields, helping to develop their understanding of visitor markets.

Market segmentation is a tool available to managers to aid their understanding of current and potential markets. The following sections provide a description of why and how segmentation may be used in outdoor recreation followed by a number of examples of its application.

Relating branding to market segmentation

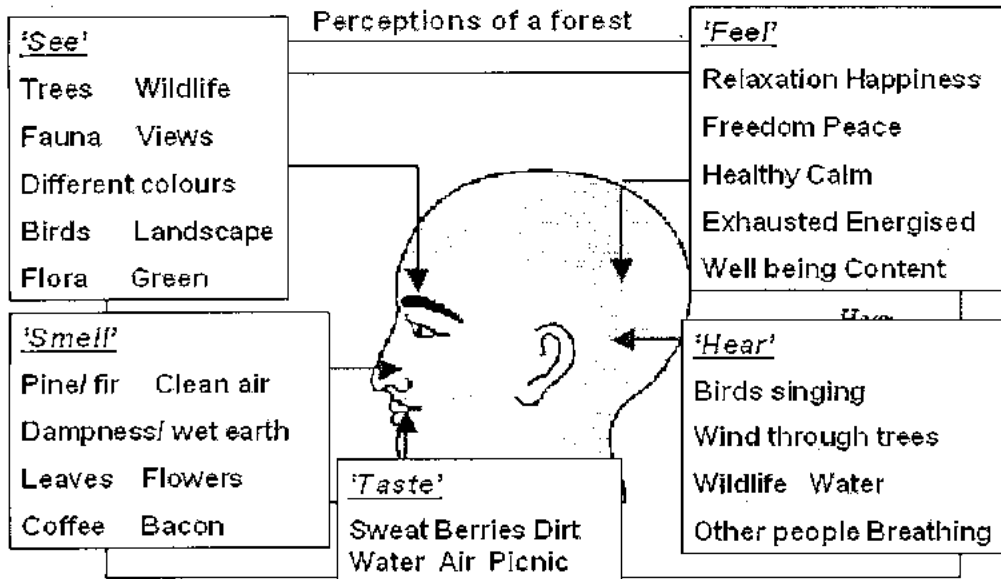
Given the wider topic of the CRN event 'Branding the outdoor experience' it is useful to begin by discussing the relationship between market segmentation and branding. Other presentations and papers within this document define and discuss branding in some detail. However, simply speaking, a brand may be described as a collection of ideas and images representing a product or service. These ideas and images are based upon an accumulation of an individual's experiences and expectations.

In the outdoor recreation context, experiences may include visits to the outdoors within a close-to-home environment, on longer distance day visits or while on holiday. However expectations can be based upon a wider range of communications such as word of mouth recommendations, advertising or press coverage.

To provide an example of the expectations individuals have of an outdoor recreation site, the figure overleaf illustrates some of the key associations with forests provided by respondents spoken to during a series of focus groups which were undertaken on behalf of the Forestry Commission in 2002¹. This study aimed to identify the drivers of quality of experience amongst a number of different types of user group. While associations with the word 'forest' were predominantly positive amongst all of the groups spoken to, the actual responses provided varied greatly. For example, while older couples who took part in walks in forests were likely to associate forests with a feeling of relaxation, seeing wildlife,

¹ Monitoring Quality of Experience in Forests and Woodland in Great Britain, Forestry Commission, 2003 see www.forestry.gov.uk/forestry/INFD-5WWWJPT

smelling leaves and hearing birds singing, mountain bikers were more likely to feel energised, hear breathing and taste dirt!



Why segment?

The example above illustrates that whilst a brand is a collection of ideas and images, what people expect from a 'product' is not always the same. While it would be impossible to identify and cater for the unique expectations of every potential member of a market, segmentation can provide the marketer with an understanding of a manageable number of homogeneous groups within the market.

Market segments are essentially sub-sets of a total market. However to be effective as a tool the members of a segment should have similar needs and should respond in a similar way to changes in the product or service offered, communications regarding this product or how the product is priced. By defining and understanding market segments these aspects of the 'marketing mix' can be tailored to their unique needs, ensuring maximum positive impact and effective use of resources.

Phillip Kotler² stated that to be effective market segments must meet the following five criteria:

- Measurable – it must be possible for the variables used to define a segment to be applied to the wider population.
- Relevant – each segment should be large enough to economically justify marketing activities.

² Marketing Management, Phillip Kotler, 2002

- **Accessible** – it should be possible for each segment to be served by the product and to be communicated to.
- **Distiguishable** – each segment should be sufficiently different from others and show different reactions to different marketing mixes.
- **Feasible** – advantages can be drawn from approaching each segment with a specific marketing programme.

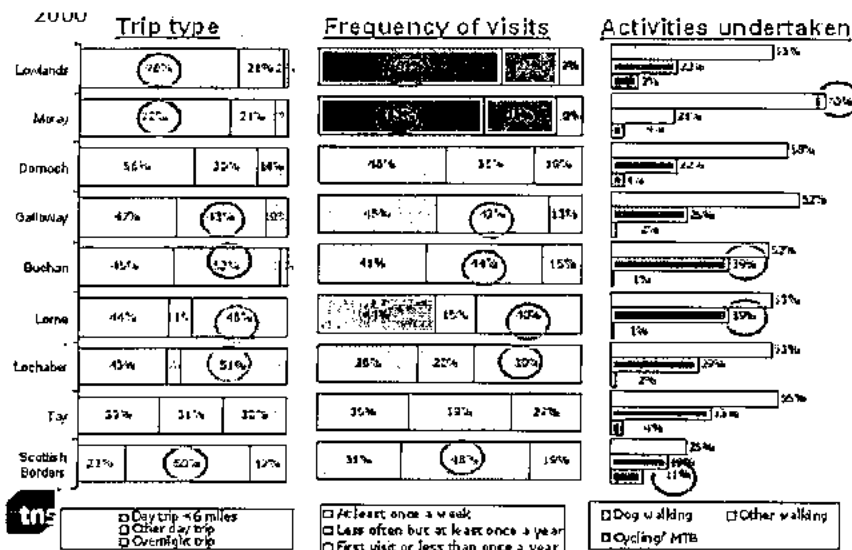
In practice, approaches to segmenting a market can range from the simple and obvious, such as age or sex, to the more subtle and complex such as an understanding of levels of satisfaction or the needs and aspirations of potential customers. Segmentation may also be of a total population, such as all UK residents, or of a specific group, such as the current users of a country park.

The following sections provide some case studies which illustrate the application of market segmentation in tourism and recreation, ranging from the use of simple, descriptive variables to more sophisticated approaches such a multivariate analysis and gaining an understanding of the motivations of members of a market.

Case study 1 – Simple segmentation - All Forests Survey 2004 to 2007

This major survey, undertaken by TNS Travel and Tourism on behalf of the Forestry Commission Scotland (FCS)³, involved face to face interviews with users of forest sites during their visit. The following chart illustrates some of the key characteristics of visitors to sites in nine of the forest districts included in the first two years of surveying.

As highlighted by the circles, the characteristics of visitors in each district varied somewhat in terms of the types of trip visitors were on when they were interviewed (i.e. a local day trip, longer distance day trip or overnight trip/holiday), how often they visited the site and the activity they were undertaking.



³ All Forests Survey 2004-2006, Forestry Commission Scotland see www.forestry.gov.uk/forestry/infd-5wcmr4

For example, in the Lorne area, a rural area in the North West of Scotland, a significant proportion of visitors were tourists, visiting the forest for the first time. A high proportion took part in walking without a dog and the survey also found that, compared to other districts, visitors were likely to spend longer in the forest and spend more money locally.

In contrast, visitors to forests in the Scottish Lowlands area, a more urban area covering the country's main population centres, were more likely to live near the forest, visit the site frequently, spend little or no money during their trip, and take part in dog walking.

The implications of this relatively simple segmentation exercise could be the need to promote awareness of forest sites within the Lorne area through tourist information centres, provide on-site information and develop revenue opportunities such as a café or retail facilities. However, within the Scottish Lowlands the implications could be the need to extend and maintain routes for walking, provide dog waste bins and develop community involvement.

Case study 2 – Multi-variate segmentation. Quality of Experience Surveys 2006.

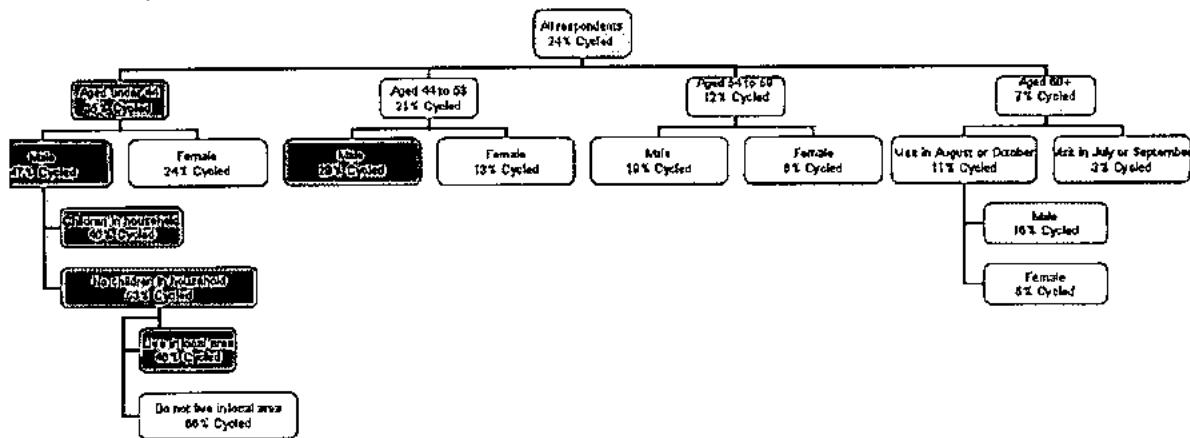
This programme of research, undertaken by TNS Travel and Tourism for the Forestry Commission in England and Wales during 2006⁴ involved face to face interviews with visitors to three Forestry Commission sites in England (Delamere, Hamsterley and Sherwood Pines forests) and two in Wales (Nant Yr Arian and Garwnant forests).

To aid understanding of the results, the survey data was analysed using specialist software⁵ which identified the key visitor groups that were most likely to undertake certain activities within the forest or to hold certain opinions regarding different aspects of the forest 'product'.

Results from this multivariate analysis were presented as a tree-diagram such as that illustrated overleaf. In this example the top cell represents all visitors to the five sites, 24% of whom took part in cycling. This total market is then split by age, with those aged under 44 most likely to have cycled (35%). The market is then split further by other significant variables including sex and place of residence. As such, the group most likely to participate is identified as males aged under 44, without any children in their household, who do not live locally - 66% of whom cycled during their visit.

⁴ Quality of Experience on-site surveys 2006, Forestry Commission England and Forestry Commission Wales.

⁵ SPSS Answer Tree



Other key findings of the multivariate analysis undertaken in this project included the following:

- Female season ticket owners were the most likely to take part in dog walking.
- Women on short duration, repeat visits to the forest were most likely to rate 'feeling safe' in the forest as very important.
- Women aged 66 or over were the most likely to rate 'wildlife' in the forest as very important.
- Members of the DE social classes were the most likely to rate the provision of a shop as very important.

Case study 3 – Geodemographic segmentation.

Geodemographic analysis is a process which connects the results of national surveys, Census data and other data to where people live, usually on the basis of their home postcode. A number of commercial classification systems are available including CACI's ACORN classification and Experian's Mosaic classification.

Using these types of classification it is possible to profile a market on the basis of their postcodes or to profile the residents of a specified geographic area such as a drive time catchment.

An example of the use of geodemographic analysis is contained in the England Leisure Visits Survey 2005⁶ in which respondents were profiled using the ACORN classification system. Using this process allowed the identification of segments of the population more or less likely to take part in outdoor recreation or to visit certain types of location.

⁶ England Leisure Visits Survey 2005, Natural England et al.

As the table below illustrates, the outputs of this analysis suggested that those in the most affluent groups were more likely to have taken part in outdoor recreation than those in the 'hard pressed' group.

	Took any outdoor recreation trips during 2005	Did not take any outdoor recreation trips during 2005
Population	25.1m	15.0m
Wealthy Achievers	19%	15%
Urban Prosperity	10%	8%
Comfortably Off	24%	20%
Moderate Means	11%	10%
Hard Pressed	14%	16%

As classification systems such as ACORN and Mosaic have been in use for many years across numerous business sectors, much information is available on the characteristics of members of the various segments. For example, the Wealthy Achievers group represents 27% of the total UK population and are more likely than the UK norm to live in a house with 7 or more rooms, be educated to degree level or higher, to play golf, to be a member of the National Trust, to use the Internet regularly and to read the Daily Telegraph⁷.

Geodemographic analysis has also been used by TNS Travel and Tourism in surveys of residents who lived within a mile of community forest sites in England⁸. This application has allowed a comparison of the profile of current forest users against the profile of residents of the local area providing managers with information to help them to develop communication and product development strategies.

Case study 4 – Segmentation by satisfaction and loyalty

In the aforementioned programme of surveys undertaken by TNS Travel and Tourism at 5 forest sites for the Forestry Commission in England and Wales during 2006 (case study 2), visitors were also asked to answer the following 4 questions:

- How do you rate your visit to the forest overall?
- Based on your experiences, would you recommend this forest as a place to visit to a friend or relative?
- Based on your experiences, how likely are you to visit this forest again in the next few months?
- How would you rate this forest as a place to visit compared to other forests, parks or outdoor recreation sites you could have done to today instead?

Each question was answered using a five point scale. Using a process developed by TNS called TRI*M analysis (Measuring, Managing and Monitoring) it has been possible to use the responses to these questions to derive a single number score which is an indicator of

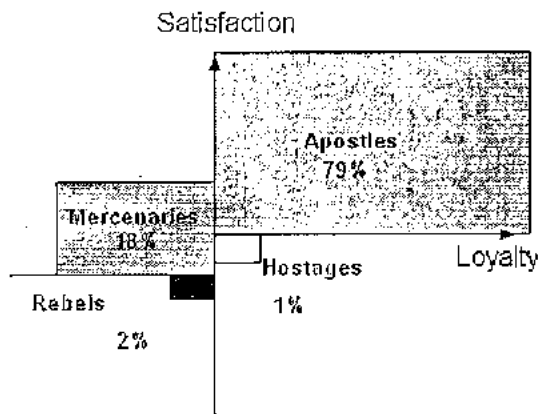
⁷ ACORN User Guide, CACI, 2004.

⁸ Quality of Experience Community Surveys 2006, Forestry Commission England and Forestry Commission Wales.

the visitor's overall quality of experience (the TRI*M index) and to segment visitors according to their levels of satisfaction and loyalty to the forest site (the TRI*M typology).

The TRI*M analysis process has been used extensively in a number of different sectors and industries to measure levels of satisfaction and loyalty with numerous products and services. The process is also increasingly being used in the fields of tourism and recreation making it possible to compare the results from a survey with other benchmarks.

The top-line results of the TRI*M typology analysis undertaken using the responses obtained from visitors to Forestry Commission sites in 2006 is illustrated below.



The market has been split into 4 groups as follows:

Apostles – members of this group are both satisfied and loyal and are likely to generate positive word of mouth communications. Encouragingly most visitors to the forests are in this group (79%).

Mercenaries – members of this group are satisfied but not loyal and represent 18% of visitors to the forests. Members of this group are likely to visit a number of different locations to take part in outdoor recreation rather than habitually visiting the same site(s).

Rebels – members of this group are neither loyal nor satisfied and are likely to generate negative word of mouth communications regarding a product. Encouragingly only 2% of visitors to the forest were in this group.

Hostages – members of this group are loyal but not satisfied. Typically this is likely to occur due to a lack of alternative options or other tie-ins. The challenge for managers is to identify how to make these users more satisfied. Only 1% of the forest visitors were in this group.

As described above, the segmentation of visitors to forests on this basis reveals a very positive profile. As similar questions have been used in other sectors and analysed on the same basis, it is possible to make comparisons across sectors and to set the forest results in context. For example, users of high street banks are much more likely than forest users to be dissatisfied and classified as either rebels (22%) or hostages (9%).

Case study 5 – Segmentation by attitudes and values

Segmenting members of a market by their personal needs, attitudes and aspirations is a specialist area which is increasingly used in the tourism and leisure sectors. Understanding and segmenting members of a market by these values can be a more effective way of predicting likely responses to changes in the marketing mix than some of the more traditional approaches described previously. Companies such as Arkenford⁹ have led the way in the segmentation of tourism markets.

In a study recently undertaken by TNS Travel and Tourism for a city destination within the UK, respondents to a survey of visitors were shown a list of 25 attitude statements and asked to indicate the how much each described themselves. The statements used included the following:

I follow the latest trends and fashions
I have more ability than most people
I like to go on short breaks and learn new things
I like to lead others
I like to have a wild time
I'm very happy with my standard of living
There's a lot to be said for traditional values

The responses to these statements were then analysed using an approach called cluster analysis which identified groupings of respondents who provided similar responses to the 25 statements. These 4 groupings were then given names on the basis of their key characteristics as follows:

- **Segment 1 – Traditional home comfort seekers** – like holidays with organised activities, like traditional values, like to learn new things, would take main holiday in the city.
- **Segment 2 – Sightseeing adventurers** – know what the city has to offer, take at least one short break overseas per year, happy with their standard of living, like traditional values.
- **Segment 3 – Wild timers** – follow the latest trends, use the Internet to plan holidays, like a wild time, make spur of the moment decisions, take numerous short breaks, spend money without thinking.
- **Segment 4 – Independent culture seekers** – use the Internet to plan holidays, like to go on breaks to learn things, like to lead others, take short breaks overseas and on the spur of the moment, unlikely to consider package holidays.

⁹ www.arkenford.co.uk

Case study 6 – Segmentation of non-participants

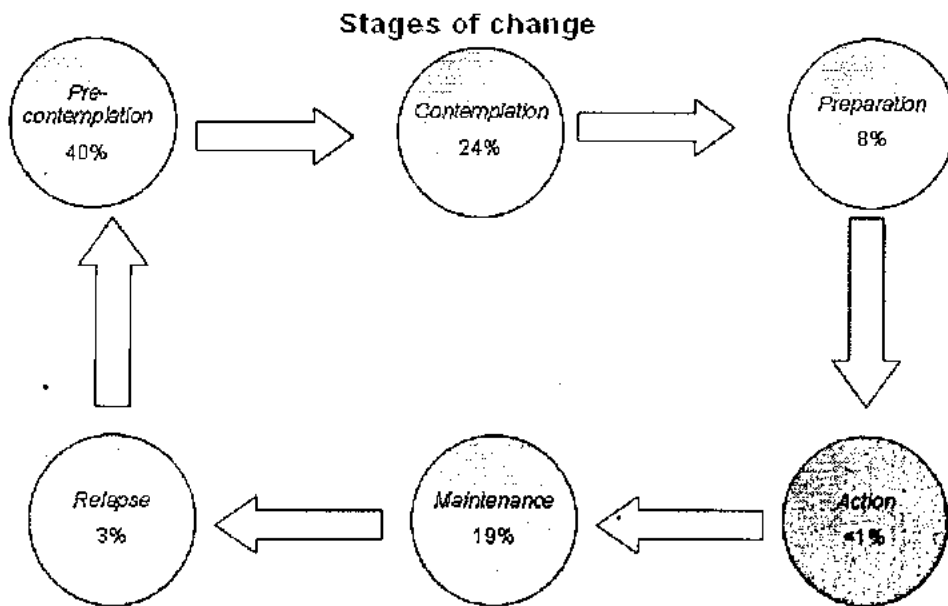
In 2006 TNS Travel and Tourism undertook a survey of a representative sample of the Welsh population, measuring levels and types of participation in outdoor recreation and, amongst non-participants, reasons for not taking part¹⁰. While all respondents were classified using standard demographics, a series of questions was also asked to allow profiling on the basis of levels of physical activity. On this basis each respondent was classified into one of six different stages of change segments. The definitions of these 'stages of change' groupings were adapted from a model used by the Canadian Fitness and Lifestyle Research Institute¹¹ and were as follows:

- *Pre-contemplation* – do not consider themselves to be physically active and do not intend to become more physically active in the next six months;
- *Contemplation* – do not consider themselves to be physically active but intend to become more physically active in the next six months;
- *Preparation* – consider themselves to be physically active but do not engage in the recommended level of physical activity;
- *Action* – consider themselves to be physically active and do the recommended level of physical activity but have not done so for the past six months;
- *Maintenance* – consider themselves to be physically active, do the recommended level of physical activity and have done so for the past six months or longer;
- *Relapse* – do not consider themselves to be physically active but have been at some point in the last six months.

As the chart overleaf illustrates, amongst those respondents who had not taken part in outdoor recreation, the largest proportions were in the pre-contemplation or contemplation segments. Further profiling of those in the contemplation segment suggests that members of this segment were more likely to be female, aged 25 to 44 with children at home and regular smokers.

¹⁰ Pilot of a recreation survey for Wales, 2006. CCW and Forestry Commission Wales.

¹¹ See www.cfiri.ca/pdf/e/pip05.pdf



This case study demonstrates an alternative approach to segmentation which could be used to target appropriate interventions aimed at increasing participation levels to the appropriate members of the wider population.

Conclusions

This paper has aimed to provide the reader with an insight into the reasons why market segmentation may be valuable in an outdoor recreation context, together with a number of recent examples. When deciding upon whether to undertake segmentation and which approaches to use, it is important to be clear about your objectives and how you intend to use the information. Also, as the case studies have illustrated, segmentation may be undertaken across the population of a geographic area as a whole or a more specific group such as users of a particular recreation site.

When defining segments, added insight may be obtained by using more than purely descriptive variables (such as age and sex) to gain an understanding of the values and attitudes of the members of a market segment.

Finally, it is important that the outputs of market segmentation are straightforward to use; the total number of segments should be manageable and it may be necessary to prioritise which to take action on - for example those likely to generate the greatest return on investment. Importantly, segmentation should not just be regarded as an analysis tool - the real benefits will only be realised if, following the analysis, communications are targeted at the various segments and/or products are developed or adapted to address the needs and expectations of the various segments.

Countryside Recreation Network Seminar

'BRANDING THE OUTDOOR EXPERIENCE'

BRANDING PLACES: ACTIVE EXMOOR

Mike Bishop
Project Manager
Active Exmoor

Project overview

Active Exmoor was formed in 2003 as a three year community sports development project. The focus was to increase participation in local sports and outdoor activities.

The project focused on raising the awareness through a website with a comprehensive what's on directory, regular e-mail service and newsletters to the general public.

The project set up a number of innovations including a surf bus, the eX-Men Club, Exmoor Canoe Club and OPTIC training scheme.

The project was so successful that it gained funding for a further three years to branch out into Active Tourism development.

The underlying principle was that if so many local people where not aware of just how much there is to do on Exmoor then potential from the regional and national population would be significant.

The new project started in September 2006 and is now staffed by two project workers full time. Early successes have included securing the Tour of Britain Cycle Race and UK IRONMAN 70.3 triathlon for Exmoor. A new website has been commissioned and the project now has over 3000 people on its mailing list.

The project focuses on Product (gathering together outdoor active opportunities), Preparation (training, networking, QA etc) and Promotion (marketing through websites, brochures, events, email etc).

The project has showcased Exmoor at the OS Outdoor Show at Birmingham NEC, sponsored local events to raise their profile, started a network of outdoor activity suppliers and has recently acquired a promotional van to attend events and festivals to showcase Exmoor to a younger audience.

The project aims to raise the awareness of where Exmoor is, what there is to do and inspire people to get out and enjoy the wide variety of outdoor activities on offer.

For more information contact Mike Bishop on 01398 324 599 / mike@activeexmoor.com or visit www.activeexmoor.com

Countryside Recreation Network Seminar

'BRANDING THE OUTDOOR EXPERIENCE'

PROVENANCE AND PLACE: CONNECTING WITH CUSTOMERS

Simon Michaels

Director

f3

Summary

The local food and drink sector in Britain has been developing quickly over the last decade. From the first farmers' market in Bath in 1997, we now see hundreds of farmers markets all round the country, matched by vegetable box delivery schemes and a host of small enterprises involved in direct selling. Even the supermarket chains have caught on to the idea of provenance as an important marketing idea. We are now seeing the branding of produce either as local, or as produce linked to the landscape from which it derives. There is increasing interest from consumers in the traceability of food products, and in their environmental and ethical credentials. A number of food scares in the last decade have made us all more aware of the need to trust food sources. A greatly expanding sector in relation to this trend, has been in organic, fair trade, and other ethically and environmentally accredited food products.

Increasingly the trend in food marketing is leaning towards being more people orientated. We are seeing photos of producers on supermarket packaging, people getting to know the people who grow and process their food, and the establishment of shorter or direct links between producers and consumers.

Context

There is something of an 'ethical revolution' happening in food and farming. It is part of a counter-culture that is moving away from industrial-scale, global food business and towards systems in which ethical values are becoming more important.

Global warming has strongly influenced consumer awareness of the environmental credentials of their shopping choices and eating habits. A recent Carbon Trust study shows that nearly two thirds of UK consumers are more likely to buy from a business they think is taking action to tackle climate change.

This change in consciousness is making a difference in many areas of our life. Whilst price continues to be a highly motivating factor in the choices we make, we are reading the label more closely, and bringing other considerations into play.

There is a fast growing niche market for produce which people trust. Sales in organic and fair trade products rose by 62% in the past four years. It is a market where people matter most, where those who can win the hearts of their customers do well. In this sense branding is about making a promise and delivering, and much less about packaging and clever words.

As an indicator of how change is happening, two thirds of UK consumers are now more likely to buy from a business they think is taking action to tackle climate change. 59% of consumers are apparently extremely interested in local food. There has been a 40% growth in fair trade and in the organic sector over the last few years. Marks & Spencer's now only offers fair trade tea and coffee, and some major institutional buyers such as

KPMG, Defra, DFID and ARUP now only serve fair trade beverages in their in-house catering. This is reflected in more than just the food sector, for example investment in Europe in social and ethical funds has grown by more than 58% in only 18 months. So what does this mean for rural businesses and the countryside? What is the branding opportunity? If branding means making a promise, then the promise may be something like:

'This food has been produced by someone you can trust, in a natural way, from a landscape which is free from pollution and managed with the environment in mind.'

So how is this promise being delivered?

The first evidence is the growth in farmers' markets, organic vegetable box delivery schemes, and the renewal of interest in independent shops. We are also seeing some innovative mechanisms creating shorter supply chains and closer links between producers and consumers. One such innovation, which is well-established in other countries, particularly Japan and the USA, is called community supported agriculture. This is a system whereby a community of consumers contract with one or several growers to produce much of the food that they require.

About one in ten consumers shop at farmers' markets, and one quarter of us still use local shops. Village shops too are undergoing a revival and now comprise the fastest growing sector in rural social enterprise. There is also a strong link with tourism – with many places now making local food and drink a major component in marketing local distinctiveness. Local food, which is often interpreted as food produced and traded within a 30 miles radius, has been a growing sector for several years. For many people, local means trusted, low food miles, and high quality. It may be that none of these are true, but the perception, the brand, is strong. Increasingly we are seeing products on supermarket shelves with a photo of the producer, or products which are branded by their place of origin.

Provenance, which simply means branding a product by its geographical origin, is another strong component in this trend. Again, we are beginning to see products on supermarket shelves branded in this way, mainly for primary produce such as meat and dairy, but for processed goods like cakes and biscuits too. Walk into any major supermarket and one can find cheese for example, branded by, and adding value, due to its association with the landscape from which it derives.

Product marketing based on provenance is about building trust in two ways: it is about building on perceptions and associations (clean air, green grass etc), and about support for and a connection with real people and local businesses.

So there appeared to be two ways in which branding in relation to locality is developing. The first is about localness, by which we simply mean that the food has been grown or processed within a certain distance from the consumer or retail outlet, or within a defined and recognizable local geographical area. The second is by making associations with the place of production.

What changes can we expect?

Whilst this niche market is developing fast, it still represents a very small percentage of the total marketplace for food & drink. There is still a lot of awareness-raising to be done about

how food systems work, and the impacts that they have on the environment, communities, and on local economies. There is still a huge gap in the connection of consumers with farming and food systems. A pilot project by f3 for the Countryside Agency in 2006 (Food, People and Place) found widely varying success in encouraging rural communities to engage directly with farmers and other producers.

Farmers' markets, box schemes and a plethora of other local food projects indicate that connections can be made, and it's interesting to see how tourism marketing now makes connections between food and landscape. But we have moved so far into a materialist, strawberries-in-winter culture, that it needs tremendous effort to re-educate ourselves and re-establish the connection between consumers, food and landscape.

Increasingly, we are likely to see the use and perhaps abuse of localness and provenance as marketing tools. The larger players have jumped on the bandwagon and are working hard at integrating the unlikely bedfellows of local produce and centralised distribution systems. The niche sector struggles with low marketing budgets, poor integration and a lack of infrastructure, and often fails to communicate to its best advantage its genuine credentials. We will see more emphasis being made to put a human face on products which have clearly derived from highly intensive food systems, and will see a growing periphery of niche market players taking advantage of the gaps in credibility of the multinationals.

Food in this sense, is just another indicator of how we live and our cultural values. If change is to happen in a significant way, it will come on the back of real lifestyle choices. Threats such as global warming may be the only kind of catalyst which will set this in motion.

Countryside Recreation Network Seminar

'BRANDING THE OUTDOOR EXPERIENCE'

BRANDING FOR SPECIFIC AUDIENCES: NATIONAL TRUST PROGRESS ON MARKET SEGMENTATION

Berry D'Arcy
Head of Membership
National Trust

Introduction

The National Trust embarked on its own segmentation project a year ago, the results of which will start to influence how its sites and marketing communications are developed from this summer. This work is still very much in the early stages of development, but what follows is a summary of the learning to date, and an insight into some of the challenges still to be resolved.

Why did NT choose to develop a segmentation ?

This is the first of a three year strategy which places at its heart a commitment to 'increase engagement with core supporter groups'. The first step towards this goal was to understand more about who the visitors to the National Trust are, and what they are looking for from their day out. This was achieved by clustering segments of visitors with similar needs and motivations.

This project will:

1. Improve all aspects of the visit experience
 - Facilities
 - Interpretation
 - Events
 - Retail
 - Catering
2. Provide the framework for developing the member benefits package
3. Integrate communications and orientate them around the customer rather than internal silos
4. Provide properties with a framework that allows them release their own creativity and make decisions about how to deploy resources to maximum effect

The process

The segmentation was initiated by the Central team in order to provide a coherent framework that could be used across the Trust. However, it was evident from the beginning that implementation would need to harness the local knowledge and passion of property teams in order to be widely adopted and for the best ideas to emerge.

Central team - development

1. *Hypothetical segmentation* developed based on staff knowledge
 - This was behaviourally based and included segments ranging from dog walkers to people who used NT sites as a local park
2. The hypothesis was used as the basis for the recruitment criteria for *qualitative focus groups* which were split by motivation
 - Intellectual / Local / Family / Social / Specialist
3. A *quantitative survey* was then conducted to provide empirical data to confirm the existence of the segments and their size in the national population
 - Conducted via a telephone questionnaire to nationally representative sample

During the development process it became clear that wouldn't be possible to base the segmentation on behaviour, as had been hoped. The problem with this was that the same person could be in several segments simultaneously, since an art lover might also be a garden enthusiast and a keen walker. Whilst a segmentation can manage people moving between segments it's more difficult to use if someone is in more than one segment at the same time.

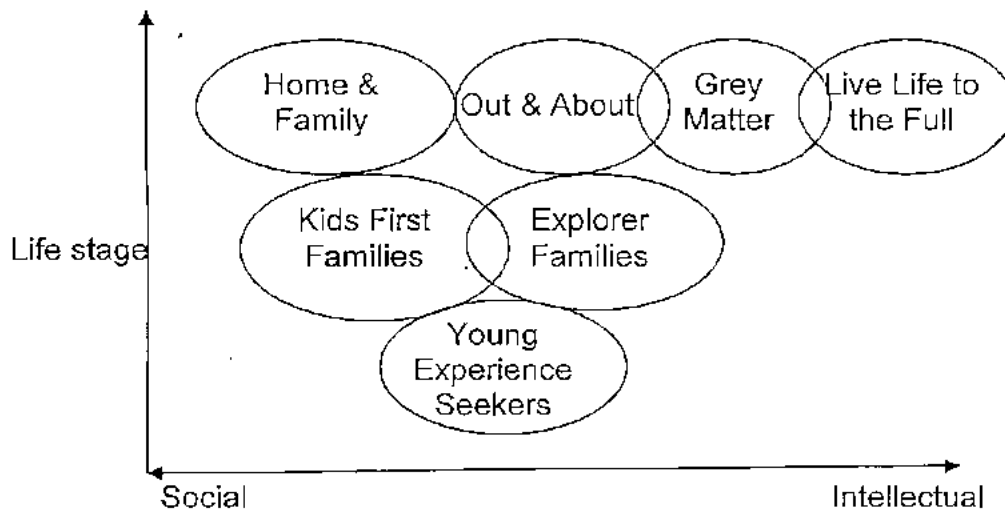
Property teams - implementation

NT has committed to delivering segmentation at 50 properties this year and rolling out across all sites by 2009/10.

- Property team will carry out surveys to gather numerical data on the size and split of the segments at their sites
- Property will then formally review the existing provision against the needs of the two largest segments with the aim of dropping or evolving facilities/activities/offers to better meet the needs of the key segments identified
- The review process should allow properties to create the space to implement new ideas that are generated during a facilitated brainstorm
- Properties will then prioritise all of the ideas generated and develop an action plan for implementation

The seven segments and their interrelationships

Cluster analysis was used to drive out the segments from the quantitative data. The most differentiated segmentation was achieved by splitting the data by visit motivation combined with lifestage, this meant that the basis for the segmentation was attitudinal, see below. Several different bases for the segmentation were tested, the final one showed most similarity within a segment and most difference between segments which was the objective.



Linking brand and segmentation

At the start of the process the Trust was very clear about its mission 'to look after special places forever, for everyone'. This explained 'what' NT does, but not the benefit that visitors gain from a visit. To answer this question a project ran in parallel with the segmentation. The conclusion of this brand work can be paraphrased as the Trust providing 'enriching experiences' for its visitors. This acknowledges that an enriching experience may look very different to different people.

The key insight for each of the segments was then used to determine what 'proposition' the Trust should offer each of the segments in line with the branding. Prior to the segmentation we would have treated our families the same. With the benefit of the increased insight, we now know that we need to offer the 'Kids First Family' an 'entertaining experience'. Whereas encouraging the family to 'discover together' is the key to satisfying the needs of the 'Explorer Family'.

Some of the challenges

Inevitably, segmentation has its flaws, but we have found that if implications are thought through they can usually be answered or worked around. The main challenges were:

Different segments on different days

Certainly this is true that people will move between the segments, but arguably they still occupy a segment within the framework and thus their choices and actions on a particular day will reflect the segment they have adopted.

Need for flexibility

Adopting a national segmentation need not homogenize the output. The Trust was anxious to ensure that the central advertising 'promise' married a visitors experience on the ground. To do this, 3 strategically important segments were selected for central campaigns and properties were asked to adopt the most appropriate one from these. This wasn't too limiting since size had been a consideration and most properties are finding that these

segments are amongst their largest. The flexibility to choose a second segment allows properties to reflect the most important audience at the particular site.

Developing new or existing audiences

Undoubtedly, it would be possible to use the segmentation to identify the groups most prevalent at a site, and then to choose to target the segments who visit least, as part of a new audience development plan. If this is the strategy for a site, this is an entirely appropriate use of the methodology. However, we have found that where the strategy is a commercial one, it's best to 'fish where the fish are', in other words to seek new visitors who are like those already visiting, since these people are most likely to already be pre-disposed to the offer and so easiest to recruit.

As the Trust based its segmentation on attitudes we will expect to find people of different ethnicities, social classes, physical abilities and sexual orientation within each of the segments.

Some golden rules

- Start with clarity about which market is being segmented.
 - The Trust would've ended up with a very different conclusion if it had aimed to segment the motivations for supporting the Trust as a cause, rather than by needs from a visit.
- There's not one 'right' way to segment
 - There are many ways a population can be segmented. The critical decision is to find the most efficient for the objectives (that could include non financial goals)
- Use less than ten segments
 - Any more and people don't remember them, so they become difficult to work with
- Naming the segments can become obsessive!
 - Naming has been important as it's a short hand for the key insight about the segment, but it could easily have eaten up management time debating nuances. As people become more familiar with the insights about the segments the name itself has mattered less
- Beware the limits of a segmentation
 - The approach taken to the NT segmentation has been established to meet specific objectives. The segmentation will be used to meet several different objectives for example developing retail products as well as interpretation and facilities. But there are limits to the extent that it can be stretched, and at this point a new segmentation may be needed.

Some challenges ahead

A two system segmentation for the Trust sites?

As the Trust has adopted an attitudinal segmentation it should allow for countryside sites to tailor their offer in the same way as pay-for-entry properties. However, only practical

experience will tell us whether this is the 'best' segmentation system for open spaces. We may find that a behaviourally based segmentation looking at the needs of different user groups eg dog walkers, horse riders, strollers could provide Countryside Managers with a more practical framework for developing their sites. Should we find this is the case, the challenge will be to determine whether the overall benefit is greatest from working with one segmentation, or from two systems managed concurrently.

And/or,

One customer from two perspectives

Similarly, as well as seeking to understand our visitors from the perspective of their needs from a visit, we also want to understand the degree to which they are interested in the Trust's work. At the outset we defined the boundaries of the segmentation as the 'days out' market. This allowed us to acknowledge the existence of non-visit/altruistic motivations, but to choose to manage these externally to the segmentation. Work is currently underway to determine whether the visiting segmentation can also be linked to a more altruistically motivated support, or whether a totally different approach is needed to engage supporters on that basis. This could mean running two different segmentations with individuals adopting a different position in each.

Conclusions

Segmentation isn't a perfect solution and had we treated it as a panacea it would've been likely to fail. It's a way of taking a complex problem, (which for the National Trust was improving the experience during the 13million visits that happen in a year!) and turning it into a framework that provides the insight needed for creativity and the structure needed for decision making.

We've also found that it's also not an end point. The segmentation system that has been researched and adopted at the Trust is just the start. In some respects the things that it doesn't include are as interesting as what it does. A wider view will be need to understand its limits and how it can be combined with other approaches to meet the many and varied objectives of the National Trust.

Countryside Recreation Network Seminar

'BRANDING THE OUTDOOR EXPERIENCE'

**ACTIVE PLACES: EMERGING IDENTITIES IN THE NATIONAL FOREST
(SOCIAL SCIENTIFIC RESEARCH PROJECT)**

Jake Morris
Social and Economics Research Group
Forest Research

Introduction

This paper reports some findings of a social science research project carried out in National Forest (NF). I will use these findings to explore the concept of place and, in particular, to develop a definition of place that will hopefully have some interesting implications for thinking about branding. By way of an introduction, when I use the word 'place' I am talking about more than just a physical entity; I am referring also to the values and meanings that emerge through human experiences of the world. So, with the word 'place' I am trying to capture the interactions between human beings and their environments.

In particular I want to demonstrate in this paper how places themselves are active by presenting evidence of ways in which they shape the lives of people who spend time in them.

The research presented in this paper was carried out by the Sociology Department at Lancaster University. The project was funded by Forestry Commission (FC) and supported by The National Forest Company (NFC). Set within a context of a FC that is increasingly interested in using forestry to deliver a range of social, economic and environmental benefits, the research was commissioned with the prime objective of exploring the socio-economic 'spin-offs' of the NF project - a large-scale landscape restoration project, with a focus on forest creation, but with the wider aim of stimulating regional development. As such, the FC set the following key research question: 'What is the relationship between environmental change and socio-economic change in the NF?' The full report of the research findings is downloadable from the FR website:

www.forestresearch.gov.uk/peopleandtrees

The National Forest comprises a 200 sq. mile area in the midlands. It encompasses the former Leicestershire and Derbyshire coal field regions, which have experienced high levels of deprivation since the pit closures during the 1980s. The overarching aim of the NF is to create a new forested landscape for the nation. Since 1991, woodland cover has increased to 16% and over 6 million trees have been planted.

The project is run by NFC, working in partnership with a wide range of partners from the public and private sectors. The principle deliver mechanism is The Tender Scheme, a unique woodland incentive scheme for landowners wishing to diversify their landholding and business interests, to create commercial or amenity woodland and to enhance or create opportunities for recreation, access and tourism. The NFC's catchphrase is 'It's

about more than trees', and the Company sees the Forest as a way of driving regional development. As such, the Forest has the following objectives:

- To create a major new resource for recreation and tourism;
- To create new wildlife habitats;
- To restore damaged landscapes;
- To offer attractive, productive uses of farmland;
- To stimulate the local economy.

The Forest has enjoyed significant success: Property prices are rising, people are moving into the area, unemployment levels are falling, visitor numbers are on the up, there are healthy levels of inward investment, and local support for the project is strong.

Main research findings

As discussed above, the research focused on the social impacts of the NF and some of the main findings are outlined in this section.

The research points to some new meanings that are being attached to the growing Forest. In contrast with its past, the region is now associated with an improving environment (less pollution / more biodiversity), improving economic conditions, and people are starting to make positive associations between the physical Forest and the institutions driving the project forward. As such, there is a growing trust and confidence in the NFC and many of its partners.

The Forest is also providing the setting for the emergence of new social networks that are forming around forest-related activities and initiatives. Examples are new volunteer groups, new public partnerships, private companies working with local communities, tourism providers working together to cross-sell services and to create a consistent visitor story for the region, and tender scheme winning farmers forming support groups offering advice to others considering the move into forestry. Furthermore, the Forest seems to be changing relations within communities and, indeed, within some farming families. In sum, the research findings demonstrate that not only trees, but also new communities are growing in the Forest.

The 'active' Forest

The research findings highlight the interactive nature of peoples' relationships with places in the NF. It seems that the Forest is not only influenced by people, but itself has a real influence over them. In this sense we might think of places in the NF not just as passive, physical spaces being altered and manipulated by active people. Rather, the processes and experiences of altering the environment seem to feed back and shape the lives of individuals and groups.

These findings resonate with the writings of Tim Ingold (2000) who problematises Western thinking, which is predicated on a clear conceptual separation of nature from society. As an alternative model of human / nature relations, Ingold elaborates his 'dwelling perspective' which he uses to demonstrate the connections and dynamic synergies that characterise the relationship between human beings and their environment. He goes on to argue that people both shape and are shaped by their environments, with the implication that places

themselves are active players in shaping lives of human beings that come into contact with them.

The research conducted in the NF provides evidence of ways in which human lives are being influenced by this changing place. This is particularly evident amongst Tender Scheme winning farmers. For example, changes to the farm environment brought about by a decision to convert land to forestry seems to lead to the re-appraisal of the fundamental meanings and values that underpin conventional approaches to farming. An interview with one farmer's wife, for example, provided a telling description of the way her husband's core values have changed since trees were planted on the farm:

'He used to hate trees... he's a real conventional farmer at heart... you know, trees and hedgerows meant things that got in the way of machinery, something that got in the way of the combine... or a tree in the middle of a field was something that birds would roost in, dropping seeds and causing weeds. And he used to be a terrible one for spraying... Chemical Ali we call him! Now the trees are here he loves them... I can see him getting really used to tinkering about amongst the trees, doing a bit of pruning and mowing... looking after them, really.'

On some farms there has not only been a shift in attitudes towards the environment, but also to general public. During interviews many farmers confessed to having held the conventional view that people on the farm spell trouble. However, the conversion of farmland to forestry, opening up land for public access and the creation of new farm business oriented towards bringing customers directly to the farm (by offering livery services, farm shops, sports / recreation facilities) has often resulted in a dramatic shift in attitudes towards access and the public. In the words of one farmer:

'We're going to farm people now!'

There also seem to be connections between changes to a farm's physical environment and changes in the dynamic relations between members of the farming family unit. The research indicates that the conversion of land to forestry may sometimes be accompanied by changes to conventional, patriarchal farming family structures. On two of the farms where fieldwork was conducted, the difficult decision to shift away from conventional farming practices, to diversify the farm business, and to radically alter the farm environment, involved a collective decision between farmer and wife, which then set the tone for on-going farm management. Furthermore, the decision often involves an appraisal of ways in which opportunities provided by new farm environment can be maximised not just by the farmer operating on his own, but through a partnership involving the whole family. The quotation from an interview with one farmer who has built a strong livery business with his wife and daughter show how new farm and new family have co-evolved: *'My wife always said 'marry me, marry my horses'... and now the farm is perfect for her and we've got a great little business that's a real partnership for us. And our daughter works here, too.'*

I hinted earlier at changing relations between farmers and the wider community brought about by changes in the Forest. The research findings highlight the ways in which new opportunities for access (provided by farmland converted for forestry and public amenity) are really bringing these two groups closer together, resulting in a shift in the conventional

public view of farmers as grumpy land-owners for whom public access is a nuisance that must be constantly monitored. The following excerpt is from a conversation I was involved in whilst out walking with a farmer, when we met someone walking in a newly planted site:

'Are you the farmer?' (Walker)

'I used to be, but I got better!' (Farmer)

'Well, this place is a credit to you... thank you!' (Walker)

I illustrated earlier how the growing Forest is influencing farmers' attitudes to the environment. This is also true of the wider community, for whom physical interaction with forested spaces seems to be distilling a sense of care for the environment. Interestingly, however, there is evidence that environmental attitudes also translate into thinking about the moral values that structure social life in the Forest. It seems that the Forest is not only creating good environmental citizens, but also good social citizens. In this sense, you could say that the Forest is actively shaping Forest society – there are changes not only to the Forest landscape, but also to the Forest 'valuescape'. The following quotations from interviews provide some examples of this:

'It's nice to see people walking footpaths properly because we [farmers] create the landscape... and it's nice to see people enjoying it...it's rewarding to see people appreciate what we've done... it's the people who don't respect the countryside that we don't want.' (Tender Scheme winner)

'Seeing these trees they've planted restores my faith in humanity... it's amazing that people can be so selfless as to plant a tree that is clearly for future generations.' (Walker)

'It's these bloody kids... they've got no respect... they've got this beautiful place to use and all they want to do is destroy it.' (Volunteer)

The growing Forest is also creating new local identities. This is not a simple and unilateral imposition of new meanings, however. Rather, identity shifts happen through a process of ongoing experiences of place where a range of social and environmental influences jostle for position – new identities are not received, but negotiated. This interactive model of identity formation is illustrated by the unsettled and sometimes unresolved quality of the meanings that some research participants attach to the growing Forest. In particular, members of the ex-mining community expressed very complex and often conflicting views about the Forest. For example, many are excited by the changes in the Forest and the new opportunities it offers, but at the same time they feel as though the trees are covering over and erasing evidence of their past existence and identities. The following quotations reveal a mixture of excitement and anticipation, but also nostalgia and sadness:

'Mining is still a part of us... we'll never lose it. It's great that the Forest is bringing so many improvements to the area, but sometimes I wonder whether the trees will replace that for the young people.'

'They wouldn't go back to it, but many felt resentment when the pits began to be all covered over with trees, especially as many know that there is a lot of coal still down there.'

The research evidence presented shows that places are more than just an assemblage of physical entities in a particular location. They are inseparable from the people who interact with them and whose lives are changed through these interactions. But how do people and places exert the influences on one another? What are the actual processes of mutual influence that connect people to places? There are two characteristics that are common to all the examples of 'active' places I have given so far, whether we think of changing attitudes amongst farmers, changing family relations, changing community relations, the changing NF valuescape, or changing identities. Firstly, there is some form of physical engagement with the Forest (this might be farm work, planting trees, walking in or driving past planted sites). Secondly there is some form of collective, social experience of the Forest involving, crucially, conversations and discussions about the Forest. These social experiences might be shared between family members, friends out on a walk, or members of a volunteer group. Places, it seems, are created through both physical and social experiences of the world around us.

Now the million dollar question – what has any of this got to do with branding the countryside? Branding is all about communicating a message to potential consumers of the countryside, often through the use of imagery. All too often, attempts to brand the countryside either focus on the simple physical attributes of places, or try to convey institutional priorities and agendas, and so miss the ways in which real people and real places interact. For example, the NF logo, a simple, eye-catching outline of a deciduous tree suggests a narrow focus on forestry when considered alongside the array of new meanings and values that are developing through people / place interactions that I have illustrated in this paper.

In the introduction I drew attention to the catchphrase often coined by the NFC when talking about their work: 'It's about more than trees'. I then went on to provide many illustrations of ways in which the NF is changing the lives of people who live, work and spend their leisure time there – illustrations of mutual influence which can be summed up by a central conclusion of the research: 'Not only trees, but also communities are growing in the Forest'. This, I feel, should be the central message communicated by attempts to brand and market the NF. How can this be done? Given that there are many people involved in ongoing process of place creation, it seems sensible to suggest that they should be involved in branding exercises. In other words, I am suggesting that branding should be a participatory, collaborative enterprise involving those people who are involved in the very processes of place creation highlighted in this paper.

APPENDIX A

Branding the Outdoor Experience Seminar
29th March 2007
PROGRAMME

- 09.30 *Registration and refreshments*
- 10.00 **Welcome by Chair**
Marcus Sangster, Forestry Commission
- 10.05 **The Case for Branding Outdoor Recreation**
Liana Dinghile, Dragon Consultancy
- 10.40 **Social Marketing Approach**
Melanie Howard, Future Foundation
- 11.10 *Refreshments*
- 11.35 **Understanding Your Market**
Tom Costley/Duncan Stewart, TNS
- 12.00 **Question and Answer Panel Session**
- 12.30 *Lunch*
- 13.30 **Branding Places: Active Exmoor**
Mike Bishop, Activity Exmoor
- 13.55 **Provenance and Place: Connecting with Consumers.**
Simon Michaels, Director, f3
- 14.15 *Discussion on Branding Places, Locality and Identity*
- 14.30 *Refreshments*
- 14.50 **Branding for specific audiences - National Trust: Progress on Market Segmentation**
Berry D'Arcy, National Trust
- 15:10 **Active Places: Emerging Identities in the National Forest (Social Scientific Research Project)**
Jake Morris, Forest Research
- 15.30 *Discussion on Branding for specific audiences and social research plus any further questions.*
- 15.55 **Summary (Chair)**
- 16.00 **CLOSE**

APPENDIX B

BIOGRAPHIES OF SPEAKERS

**Branding the Outdoor Experience
The Priory Rooms, Birmingham
Thursday 29th March 2007**

CHAIR

**Marcus Sangster
Research Manager
Forestry Commission**

Marcus Sangster is a research manager and adviser on land use in the Forestry Commission. He has a particular interest in the influence of consumerism on the way that people and institutions understand and interact with the natural world.

SPEAKERS

Liana Dinghile Consultant Dragon

Liana joined Dragon in 2006 and works on corporate and service brand strategy and development. Her background is in Travel/Leisure and Tourism, formerly a Brand Manager at Thomson, Thomas Cook, British Airways and more recently Visit London, where she gained valuable insight and experience of public sector and destination dynamics. Over the years Liana has helped these businesses define and deliver their unique brand promise and ensure they remain relevant to a constantly changing environment. Since working at Dragon, she has been involved with some of their key projects including developing strategies for Staffordshire, National Trust and the RHS.

Melanie Howard Co-Founder and Director The Future Foundation

Melanie Howard co-founded the Future Foundation, now a leading international consumer think-tank, in 1996 with Michael Willmott. Since then, as well as growing the business and supporting the launch of nVision – an on-line consumer insight service - she has pursued a wide range of research interests including: the impact of the network society; changing gender roles and the growth of ethical consumption.

She is a visiting Professor at Henley Management College in the School of Reputation and Relationships, is a longstanding associate of Demos and sits on the Information Tribunal for the Lord Chancellor's Department. One of Melanie's current areas of interest is helping organisations to develop strategic innovation programmes with the future consumer at the centre. To that end Melanie is a Visiting Business Fellow at the Innovation RCA at the Royal College of Art and is leading an internal project creating more effective means of communicating complex ideas about the future and social trends.

Having completed two major strategic futures projects for Defra , one on Rural Futures to 2050 and the other predicting the volume and composition of Household Waste, Melanie is now a member of the Chartered Institute of Marketing's Sustainability Task Force and sits on a Defra Advisory Group looking at Innovative Approaches to Sustainable Consumption, with the Social Marketing Practice.

Melanie is a frequent platform speaker and provider of media comment. She has published widely in the context of the Future Foundation's work.

**Tom Costley
Director
TNS**

Tom Costley has been a Director of the company since 1988. He has overall responsibility for TNS UK's involvement in the fields of leisure and tourism research. Prior to joining the company in 1986, Tom had been Research Manager at the Scottish Tourist Board for four years. After graduation from the University of Glasgow in Geography in 1976 (MA Hons.), Tom spent almost three years at the Centre for Urban and Regional Studies, University of Birmingham undertaking postgraduate research on leisure studies. He joined the Research Division of the Scottish Tourist Board in 1979.

Tom has successfully developed the company's experience in the conduct of leisure-related market research surveys to its current position as one of the leading agencies in this field in the United Kingdom. In addition, he is regularly invited to act as an adviser or consultant to tourism and leisure organisations who are considering their information requirements and the most effective means of addressing these requirements.

Duncan Stewart
TNS

Duncan Stewart graduated from Napier University, Edinburgh with an Honours degree in Tourism Management in 1997. He joined TNS in the summer of 1998 from the research department of Yorkshire Tourist Board and is now a Managing Consultant.

Since joining the company, Duncan has undertaken a great deal of quantitative and qualitative research. He has managed numerous of the outdoor recreation studies undertaken by TNS Travel and Tourism, including all of the studies undertaken on behalf of the Forestry Commission since 2002, projects for SNH, British Waterways, the Scottish Executive and the Woodland Trust.

Mike Bishop
Project Manager
Active Exmoor

Mike Bishop studied Leisure Management before working as an outdoor activity instructor for several years. He then joined Keycamp Holidays in France before moving to their head office where he was responsible for overseas staff recruitment. In 1998 he joined Thomas Cook for 5 years where he became head of the Overseas Dept. In 2003 he started Active Exmoor which ran as a community project before breaking into Active Tourism in late 2006.

Simon Michaels
Director
f3

Simon is the director f3, a CIC which advises on and enables local and sustainable food enterprise. Simon's background is in environmental planning, before focusing on the food & farming sector in 1999. He is also a director of a social enterprise running food and health projects, and director of a niche micro-bakery.

Berry D'Arcy
Head of Membership
National Trust

Berry has a degree in Environmental Studies. Her early career was spent gaining experience of the corporate world within Direct Marketing agencies, including big names like Saatchi & Saatchi and OgilvyOne. She made the leap into the Not-for-Profit sector by joining Unicef in Australia, where she worked for 18 months. She is now responsible for the recruitment of over 450,000 members to the National Trust each year and retention of its 3.4m members, as Head of Membership.

Jake Morris
Social and Economics Research Group
Forest Research

Jake has a Sociology PhD from Lancaster University. He is particularly interested in the issue of local participation in natural resource management and has worked on a number of research projects in the UK and abroad. He is currently working as a project leader in the Social and Economics Research Group of Forest research, the research agency of the Forestry Commission. He is involved in a number of projects providing targeted social scientific research, informing natural resource policy, management and decision-making for the Forestry Commission and the European Commission.

APPENDIX C



Countryside Recreation Network

Branding the Outdoor Experience Delegate List

Sarah	Arden	Shropshire County Council
Carl	Atkinson	Countryside Council for Wales
Katie	Birks	Moors Valley Country Park
Richard	Bonner	Derbyshire County Council
Ian	Bough	Kent County Council
Jacky	Budd	Stockport Council
Graham	Burton	RSPB
Jo	Bussey	Northumberland Wildlife Trust
Alan	Chalmers	Forestry Commission Scotland
Jo	Danson	Cheshire County Council
Beth	Davies	Sports Council for Wales
Des	de Moor	The Ramblers' Association
Matthew	Eastlake	The Camping and Caravanning Club
Kim	Etherton	Hampshire County Council
Tracey	Evans	North West Wales Outdoor Partnership
Sharon	Fraser	Scottish Natural Heritage
Chris	Gordon	Natural England
Jim	Hardcastle	Mendip Hills AONB Service
Richard	Harry	Sports Council for Wales
Rhian	Howells	City and County of Swansea
Charlotte	Howie	Dragon Brands Consulting
Rachel	Hughes	Sports Council for Wales
Manny	Idowu	Sports Council for Wales
Katrina	Jeffreys	Forest Enterprise England



Countryside Recreation Network

Branding the Outdoor Experience Delegate List

Jenny	King	Bath & North East Somerset Council
Ted	Liddle	Northumberland Joint LAF
Tim	Lidstone-	Peddars Way and Norfolk Coast Path National Trail
Jane	Lorimer	Sports Council for Wales
Becca	Mattingley	Sports Council for Wales
Fiona	Milligan	Cairngorms National Park Authority
Fiona	Mills	National Waymarked Ways Advisory Committee
Caroline	Nolan	Strangford Lough Management Advisory Committee
Rachel	Parry	Countryside Council for Wales
Cathy	Preston	Field Studies Council
John	Price	Milton Keynes Council
Katie	Read	Natural Economy (North West)
Bill	Renshaw	British Mountaineering Council
Hannah	Richards	Sports Council for Wales
Steve	Roberts	Natural England
Kairen	Southwell	Bedfordshire County Council
Valerie	Staley	Woodland Trust
Chris	Stanley	British Waterways
Christopher	Tomlin	Heritage Lottery Fund
Michelle	Turnbull	Sustrans
Jane	Wain	Natural England
Joe	Wainwright	Cheshire County Council
Jonathan	Woods	Bedfordshire County Council

APPENDIX D

dragon

Do we have a case?

Liana Dinghile
29 March 2007




Introduction to Dragon

We define, create and deliver brands that transform organisations


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Opening statement



The case

- 'Outdoor Recreation' - what do we mean, is scale a factor?
- 'Brand v Branding' - what should it mean, do you see a role?
- 'The mix' - is it really just about marketing, how can we create and communicate more relevance for outdoor experiences?
- 'The customer' - have we thought enough about what really makes them tick and their relationship with brands?



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Apparently

Recreation is the use of time in a non-profitable way, in many ways also a therapeutic refreshment of one's body or mind

While leisure is more likely a form of entertainment or rest, recreation is active for the participant but in a refreshing and diverting manner

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Or could I say...

...therapeutic refreshment of one's body and mind...

...active but in a refreshing and diverting manner...

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A case for brand?

The reputation, the associations, the behaviours and the expectations people have of you

The heart of your organisation, driving strategy and providing people with a shared sense of understanding and purpose

The truth

More than a logo, more than a brochure. Consider these elements branding - the way you dress - important but simply not enough on their own to inspire, drive action or to challenge and shape perceptions

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We think so...

Clarity
Relevance
Commitment

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Evidence?



"I'd like a really good experience in the outdoors?"

Google

with Google Assistant, you can use voice search to find what you're looking for. You can also use voice search to find what you're looking for. You can also use voice search to find what you're looking for.

Google

with Google Assistant, you can use voice search to find what you're looking for. You can also use voice search to find what you're looking for. You can also use voice search to find what you're looking for.

Closer but too broad to brand?

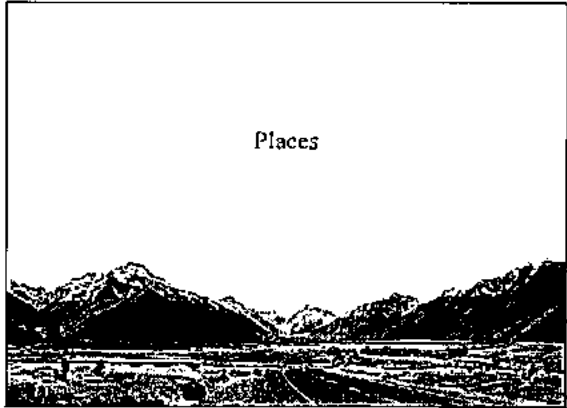
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LEISURE
 What are you up to today? ...
 Being sporty? ...
 The UK ...
 The UK ...
 The UK ...

FACTS
 ...
 ...
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THE WEEK'S BEST
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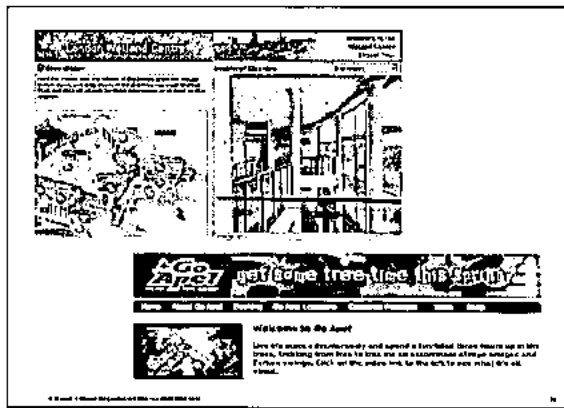
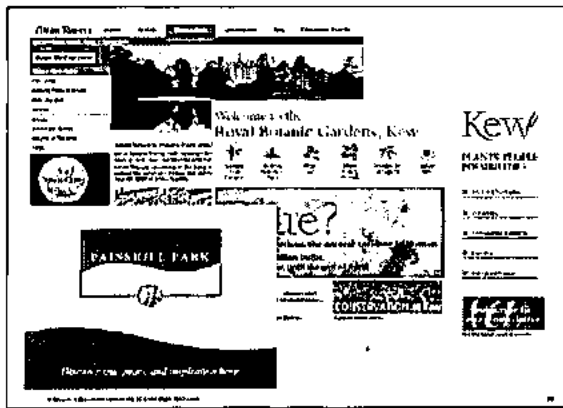
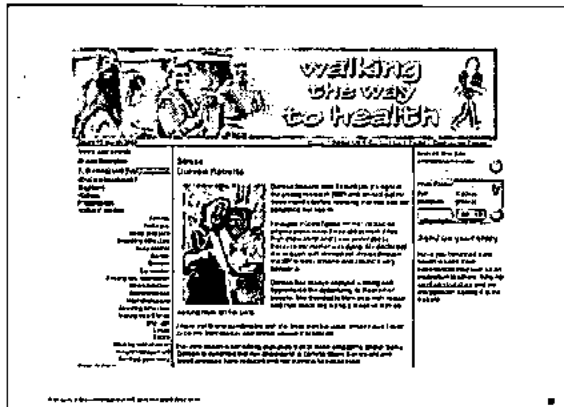
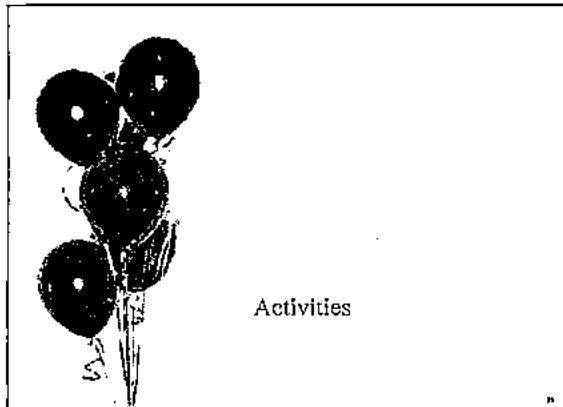
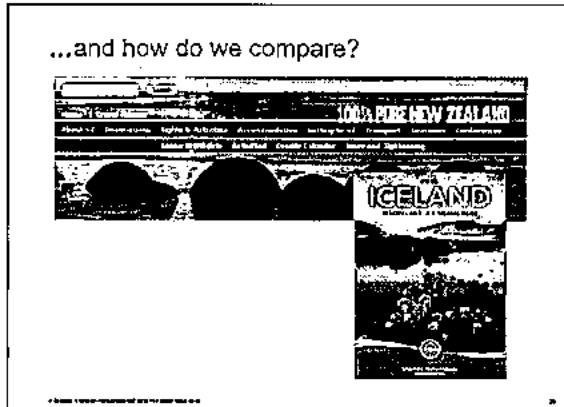
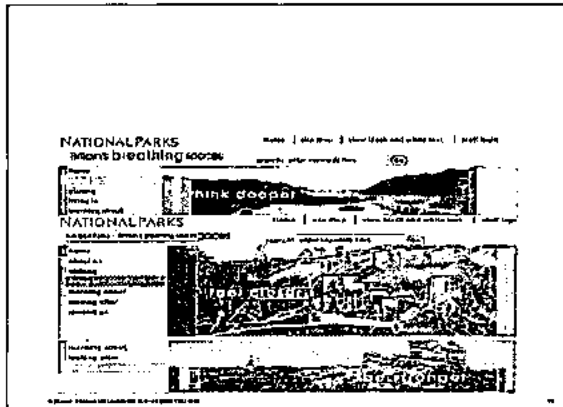
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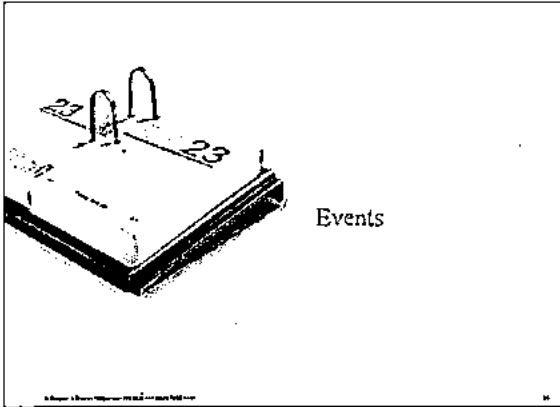
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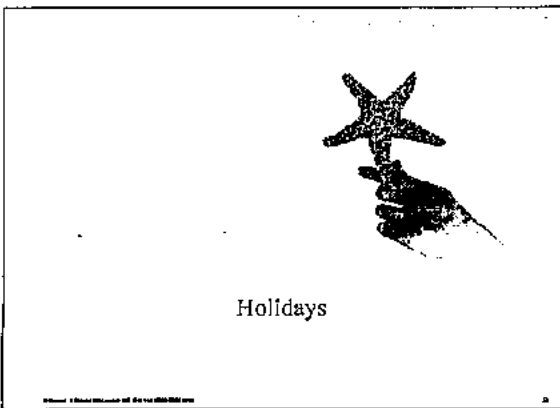
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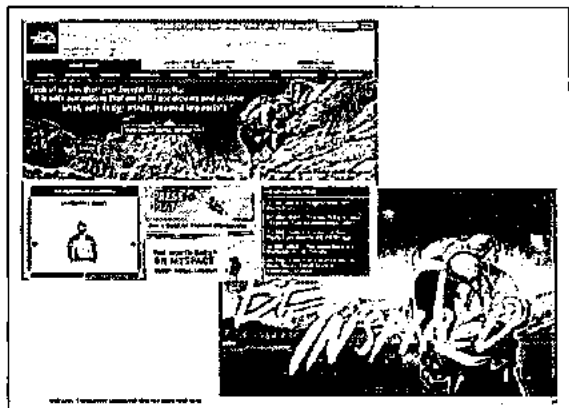
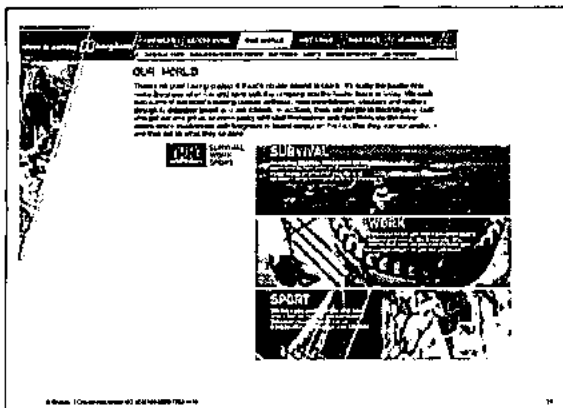
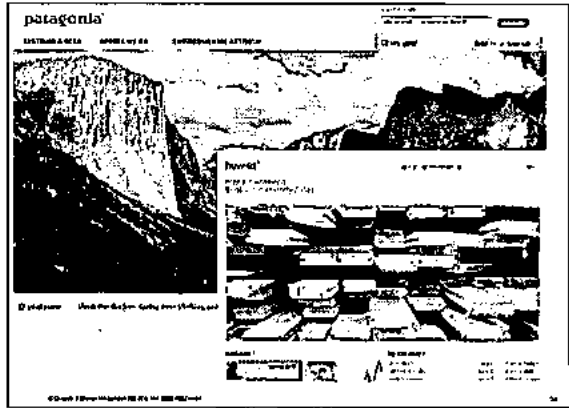
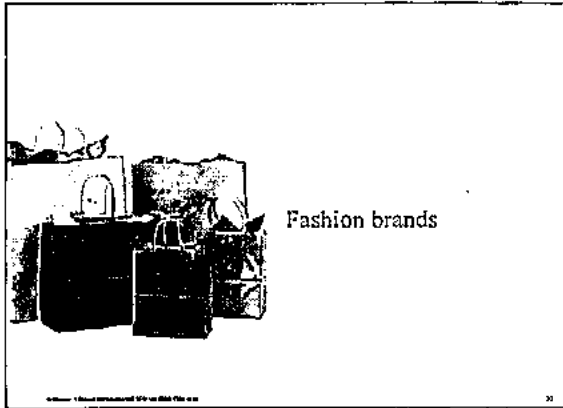
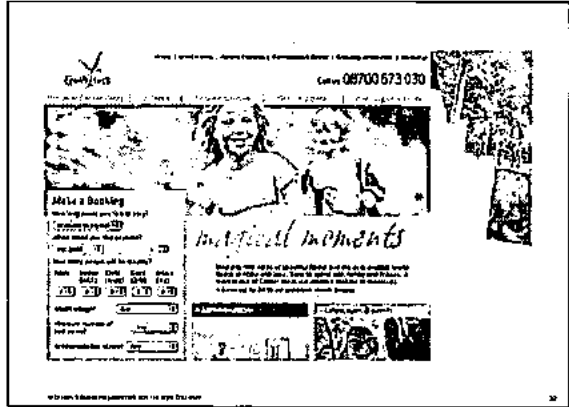
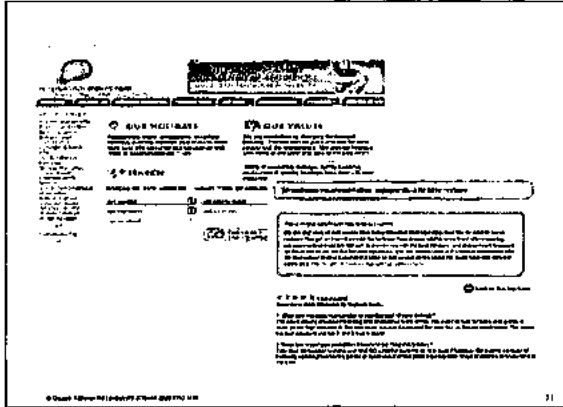




Events



Holidays

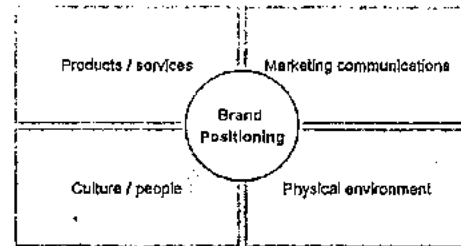


Cross examination



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Putting brand at heart of strategy



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Cornwall?



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Example: building a brand for Cornwall

- How do you 'control' a brand like Cornwall?
- One brand, many representations
- There must be more than just pretty pictures
- 'How can the brand help you in your every day business?'

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A state of magnifisense

For most people, life is getting tougher, more predictable and less engaging. That's because most people are working and living in an environment that numbs, rather than stimulates. So they continually under-achieve and are unfulfilled.

But it's the opposite in Cornwall. People are made more aware, feel more inspired, reach for more and achieve much more. The effect is powerful, because as individuals we grow, as communities we thrive, and as businesses we excel.

How? It all comes from the unique connection between Cornwall's environment and people. It appeals to our senses, awakes and magnifies them - creating a truly unique state of mind and purpose.

In Cornwall, there is a unique connection between environment and people, which appeals to our senses, awakes and magnifies them - creating a truly unique state of mind and purpose.

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Relevance?

Food: appeals to our sense of purity. Our natural environment and climate give us a unique depth of quality.....

Manufacturing: the sense of enterprise has been the key to our survival. We have unique resourcefulness and invention.....

Education: People realise a different sense of stimulation as individuals in Cornwall. They respond to our unique way of exploring life....

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Developing effective communications



- Consistent but flexible
 - Emotional + tangible
 - Respects product richness via a simple message
 - All differences compatible e.g. domestic, international, beginner, advanced...

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Example - Staffordshire

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Putting consumers at the fore

- True:
 - *"evidence to support the view that exposure to green spaces can have wide ranging social, economic, environmental and health benefits"*
- So what? What's in it for me?
 - Provide safe haven from city life
 - Heighten social interaction
 - Improve peace of mind and positive thought
 - Restore, reconnect, add cultural meaning, appeal to the senses

All things to all people or everything to our target markets

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Thinking differently

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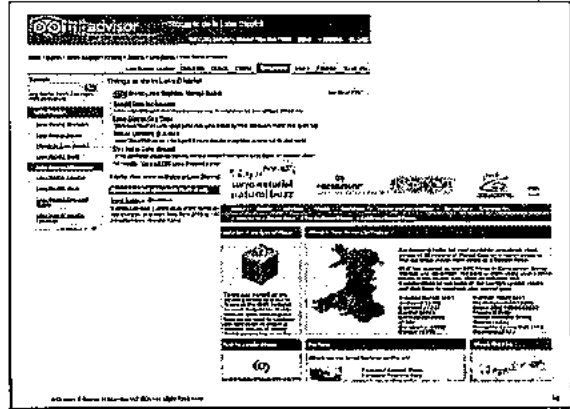
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Let consumers be the judge

- "Consumer Is King", verdict lies with them
- Find ways to manage and monitor them
- Popularity may not mean longevity
- The cheapest and most effective form of marketing

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17



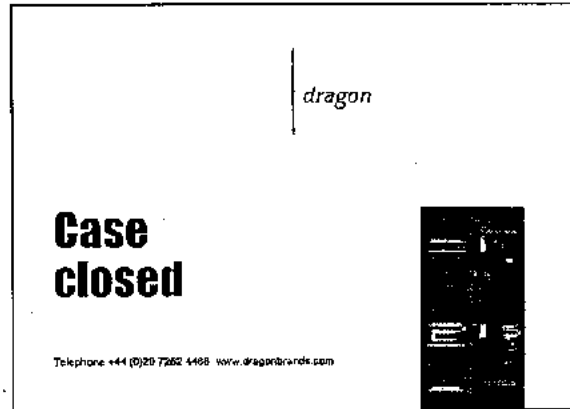
In summary

- Engage the right people and perspectives
- Identify your unique strengths and aspirations
- Clarify on where you want to take yourselves, your product, your service
- Outline how this motivates people
- Build foundations for a simple brand story
- Consider what this would mean in practice and identify priority action
- Tell your story creatively and consistently
- Monitor and challenge your ongoing relevance to consumers and society
- Celebrate success
- Embrace change

Future perspective

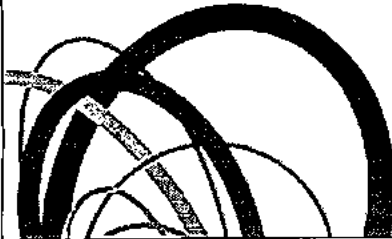
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Social marketing: the outdoor experience and its role in society

Presentation to the Countryside Recreation Network
by Melania Howard, Co-founder



future foundation

Topics for presentation

- Defining social marketing for the future
- Exploring the role of the outdoors in a modern, urban consumer society
- The key trends shaping the future demand for outdoor experiences
- Pointers for social marketing directions

future foundation

Social marketing

- Social marketing uses the principles and techniques of marketing in order to encourage people to behave in socially desirable ways
- It has become more fashionable and necessary as a tool to help government achieve often unpopular policy targets
- Arguably it is an increasingly important and effective intervention that can be made by government and in a highly advanced consumer society



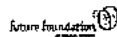
Principles for success

- Engaging and empowering stakeholders
- Relevant and dynamic partnerships
- Innovation and imagination
- Sufficient resources and skills
- Demonstrating added value
- Aligning marketing objectives with social realities and aspirations

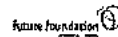


In depth understanding is critical to successful social marketing

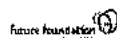
- Successful social marketing works with the current direction of changing values
- It builds on people's underlying values and desires and maximises opportunities for them to 'do the right thing'
- Essential to understand the nature of the drivers, trends and behavioural manifestations that you are working with



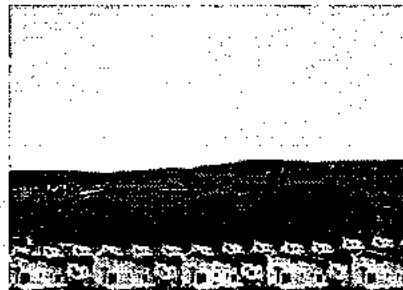
What is the role of the outdoors in a modern, urban society?



Who controls the countryside?



Who is allowed to live in it?



What are we allowed to visit?



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What can we do there?



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The logical outcome of current trends?



What are the specific challenges facing forests and parks?

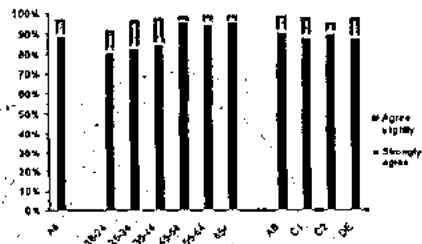


Key concepts from rural sociology

- Symbolic rurality – an idealised concept of the countryside that we all have
- Counter-urbanisation – long term flows of prosperity from the cities into the countryside
- The differentiated countryside – no single 'reality' of the countryside

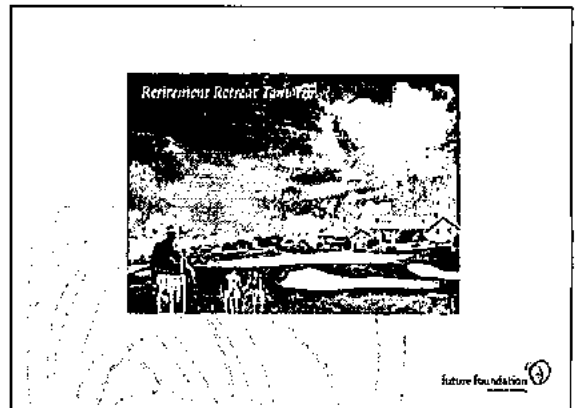
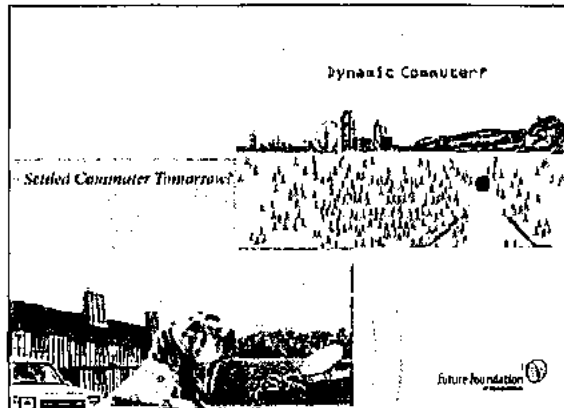
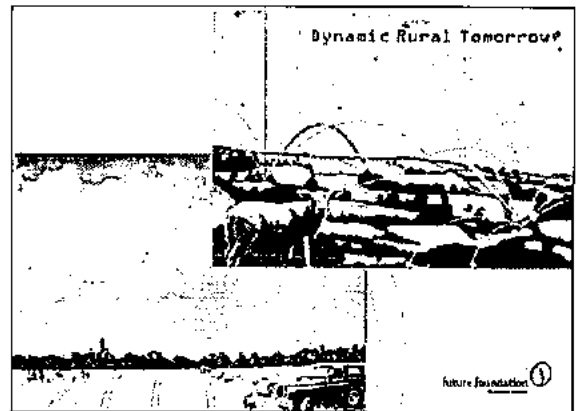
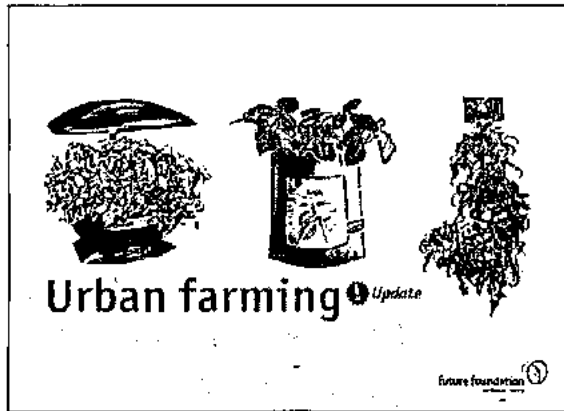
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Nature is a vital part of all our lives Proportion who agree strongly or slightly



Source: 'Quality of Life Survey', 1999/2000
Data: 1000 ad. 16-94, 16-94, 2004

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Insights from rural futures

- The existence of rural stereotypes
- Interest in the countryside has a very wide constituency
- Rural perspectives need to be brought into the mainstream of policy making
- More attention has to be paid to the importance of urban rural links in policy

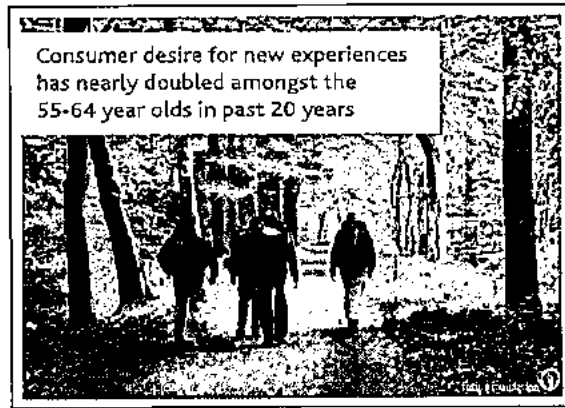
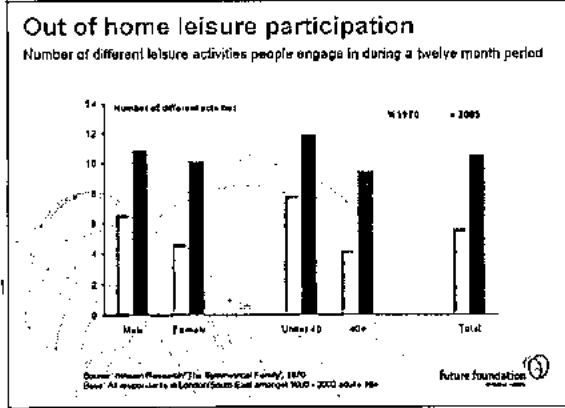
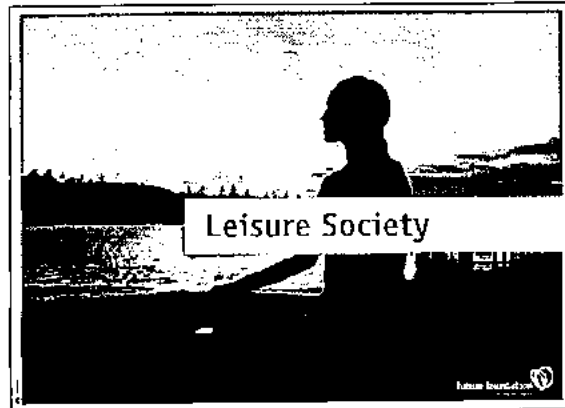
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This slide contains a bulleted list of insights from rural futures. The text is centered, and the 'future foundation' logo is in the bottom right corner.



At least 10 trends that you need to know about in planning your social marketing

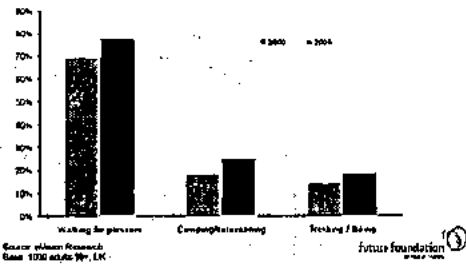
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Participation in various outdoor leisure activities at least once a year

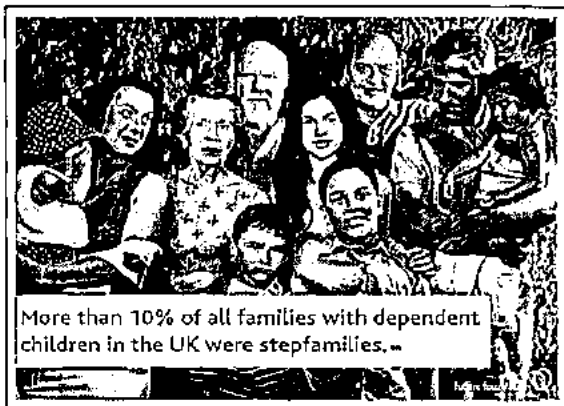
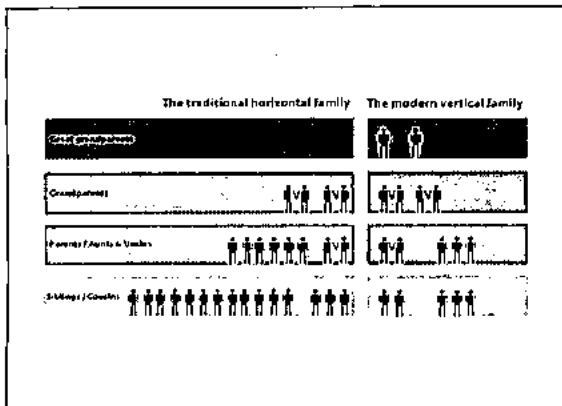
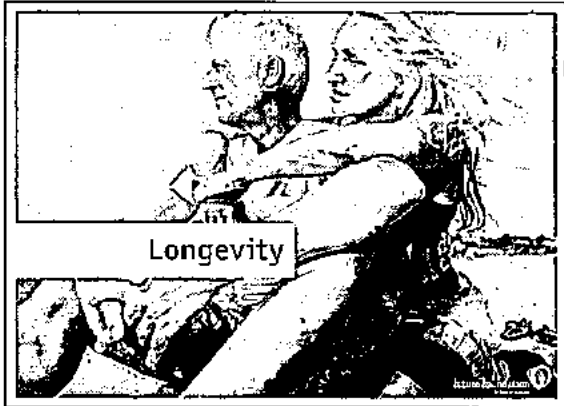
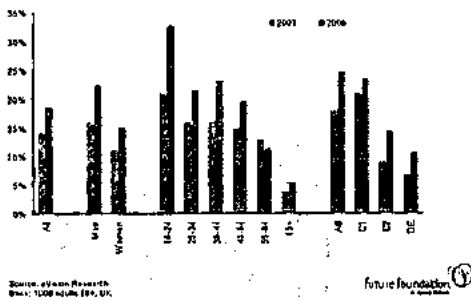
Proportion of people who take a long walk for pleasure / go camping/caravanning / go trekking, or cross country mountain biking once a year

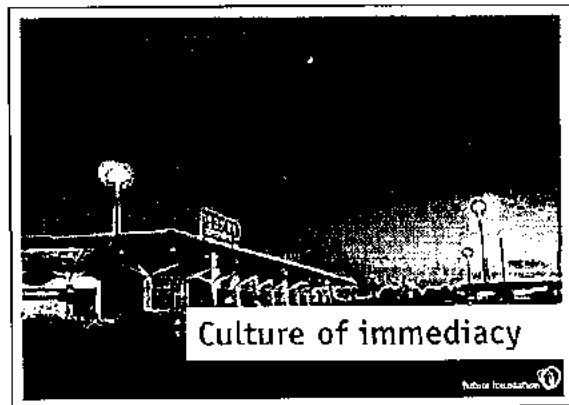
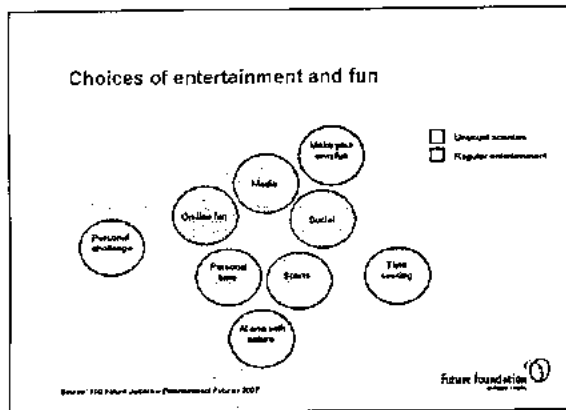
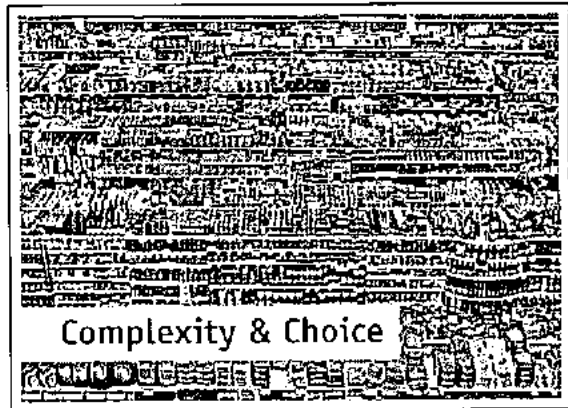
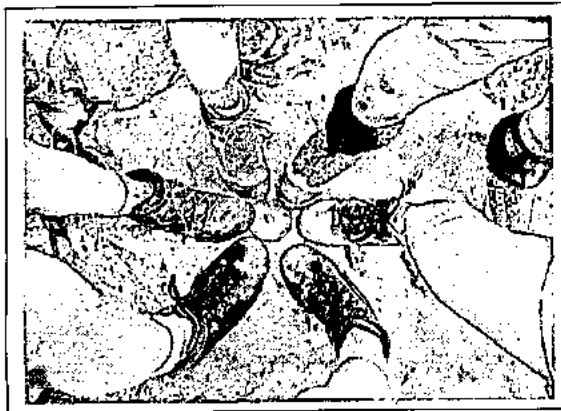
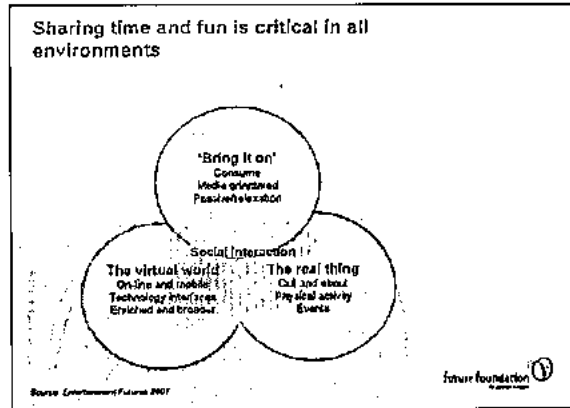
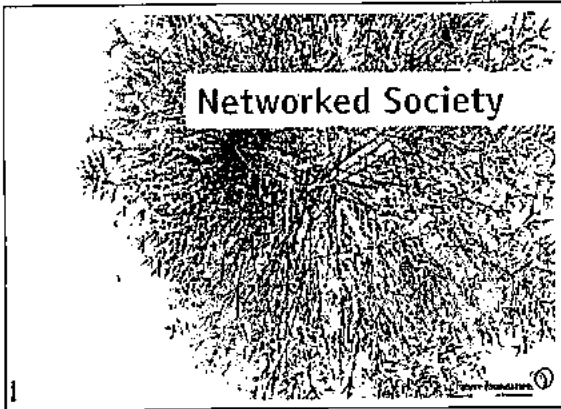
"Which of these best describes how often you do each of the following activities...take a long walk for pleasure / go camping/caravanning / go trekking, or cross country mountain biking?"

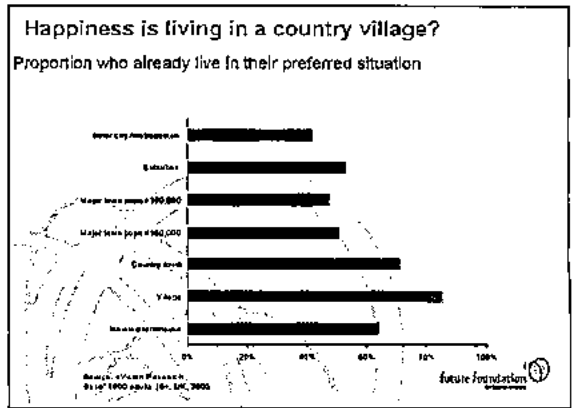
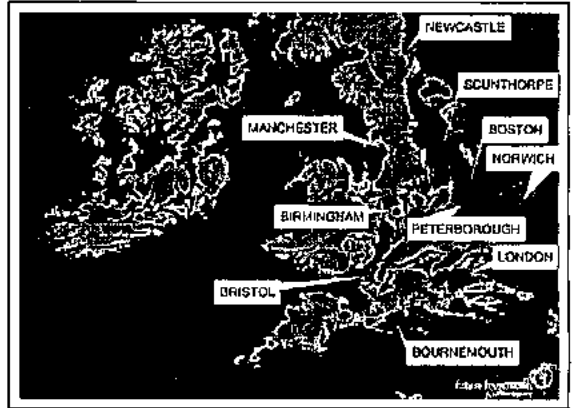
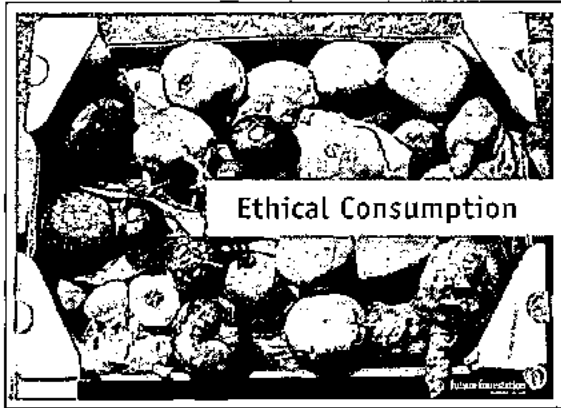
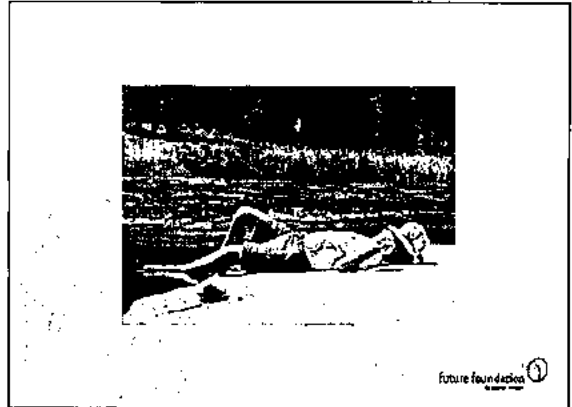
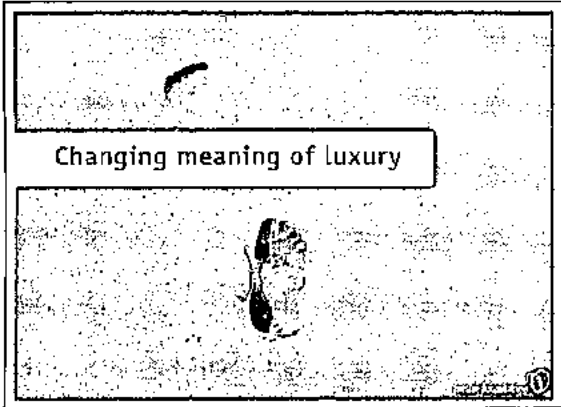


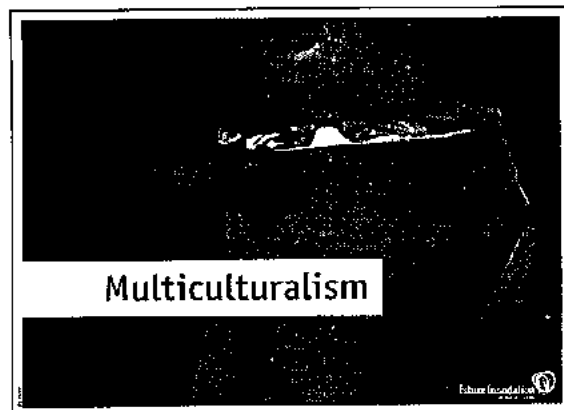
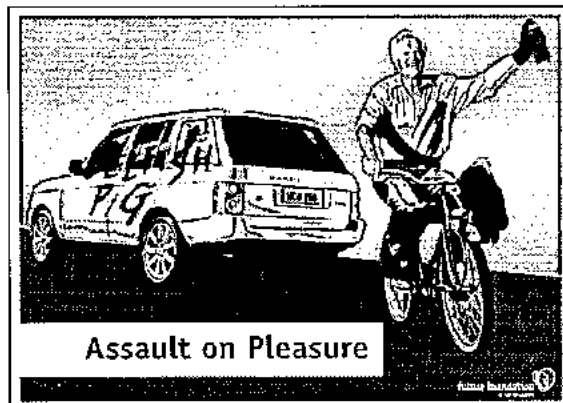
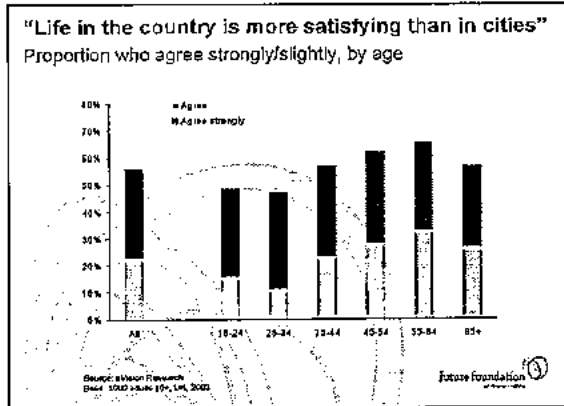
Doing outdoor pursuits, by gender, age and social grade

Proportion of adults who go trekking or cross-country mountain biking at least once a year









- Social marketing countryside recreation in the future**
- Key has to be gaining insights into the aspirations and motivations of target audiences
 - Working with current direction of change and making the most of underlying values
 - Aligning with other agendas and maximising value to the end user -- ticking as many boxes as possible
 - Creating engaging, involving and participative campaigns that deliver real value within limited budgets
 - Making it easy for people to do the right thing
- future foundation

Branding the outdoor experience

Understanding your market
- the role of segmentation

29th March 2007

Tom Costley
Duncan Stewart

TNS Travel and Tourism

tns

- Agenda**
- Why segment?
 - The theory
 - The practice
 - Some case studies
 - Conclusions
- tns

Why segment?

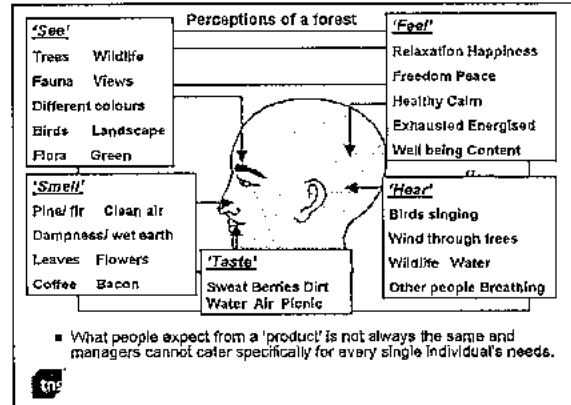
- How does segmentation relate to branding?
- Simply speaking, a brand is 'a collection of ideas and images representing a product or service'
- These ideas and images are based upon an accumulation of individual experiences and expectations



Experiences... visits to the outdoors locally, on day visits, on holidays.



Expectations... word of mouth, advertising, news, television, press... conventional wisdom.



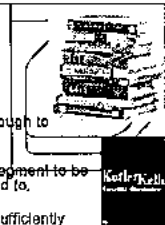
Why segment?

- Market segments are sub-sets of a total market.
- Members of a segment have similar needs and are likely to respond in a similar way to a change in the product offered, communications or pricing.
- If you define and understand market segments, the marketing mix can be tailored to their needs - ensuring maximum positive impact and effective use of resources.



Defining segments - the theory

- To be effective market segments must meet five criteria (Kotler):
- Measurable** - it must be possible for the variables used in the definition to be applied to the wider population.
 - Relevant** - each segment should be large enough to economically justify marketing activities.
 - Accessible** - it should be possible for each segment to be served by the product and to be communicated to.
 - Distinguishable** - each segment should be sufficiently different from others and show different reactions to different marketing mixes.
 - Feasible** - advantages can be drawn from approaching each segment with a specific marketing programme (e.g. a higher quality of experience, greater spend in the café).

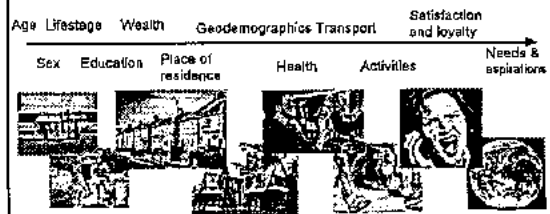


Defining segments - in practice

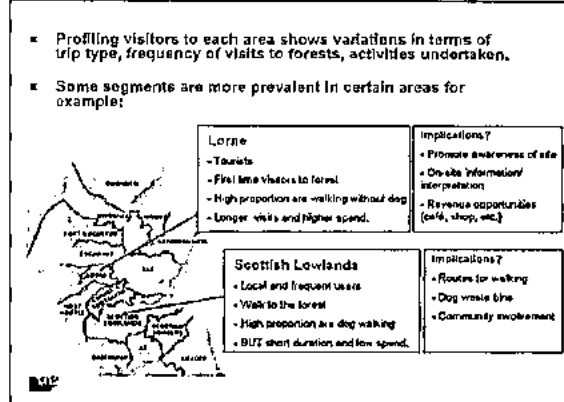
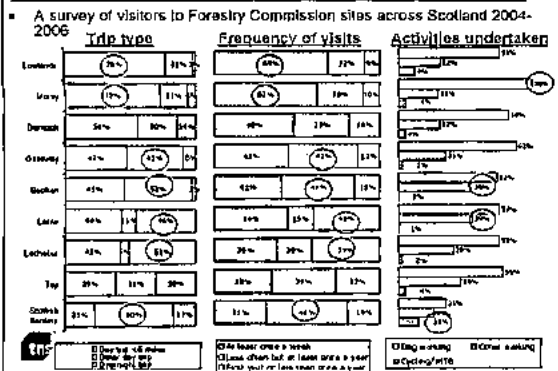
- Approaches to segmenting a market range from the simple and obvious to the more subtle and complex.
- May be on the basis of descriptive variables (age, sex) or causal variables (purpose of visit).
- Determining attitudes and values of respondents can be especially useful.
- Segmentation may be of total population (all UK Population) or a specific group (current visitors to FC sites, a country park).



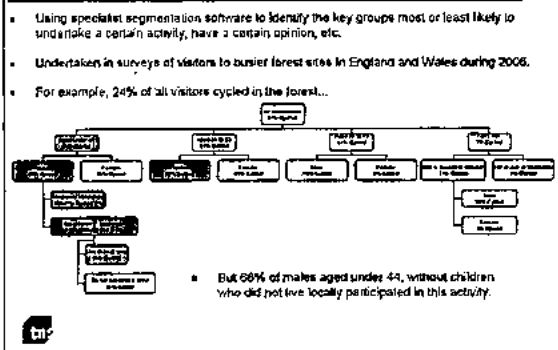
Defining segments - in practice



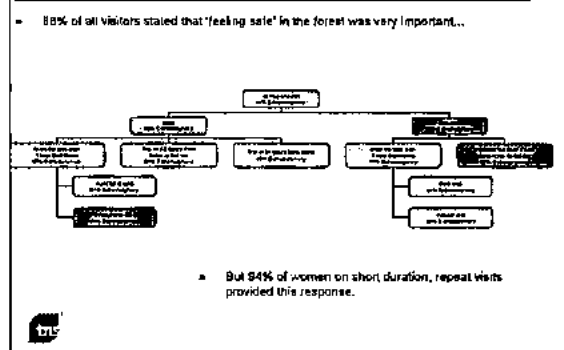
Case study 1 – simple segmentation



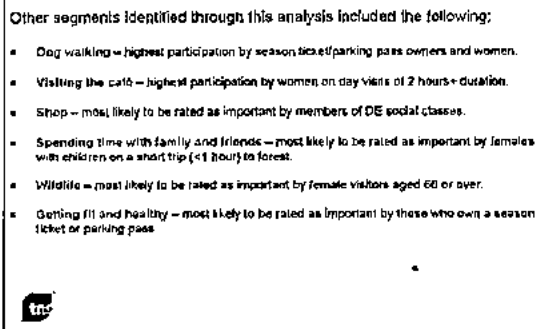
Case study 2 – 'Multi-variate' segmentation



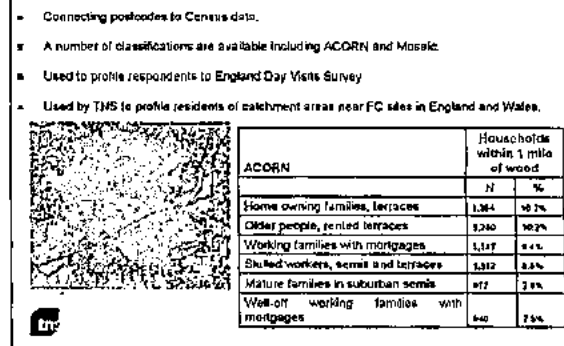
Case study 2 – 'Multi-variate' segmentation



Case study 2 – 'Multi-variate' segmentation




Case study 3 – Segmentation by geodemographics

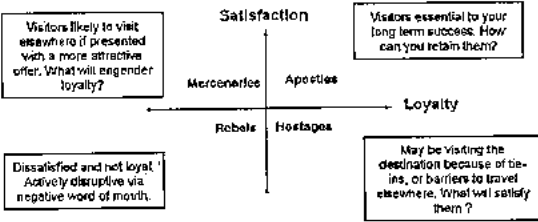


Case study 4 – segmentation by satisfaction and loyalty


- Surveys of visitors to busier forest sites in England and Wales during 2006.
- All respondents asked a series of 4 questions regarding the forest they were visiting:
 - How do you rate your visit to the forest overall?
 - Based on your experience, would you recommend this forest as a place to visit to a friend or relative?
 - Based on your experiences on this trip, would how likely are you to visit this forest again in the next few months?
 - How would you rate this forest as a place to visit compared to the other forests, parks or outdoor recreation sites you could have gone to today instead?
- Results of these questions are analysed to obtain an overall score which is an indicator of the visitor's satisfaction and loyalty levels. The market can then be segmented according to levels of satisfaction and loyalty.



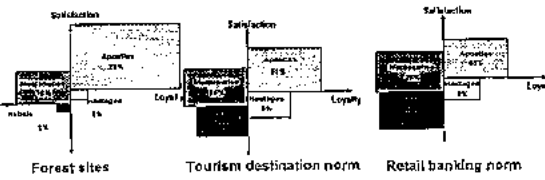
Case study 4 – segmentation by satisfaction and loyalty




- Visitors likely to visit elsewhere if presented with a more attractive offer. What will engender loyalty?
- Visitors essential to your long term success. How can you retain them?
- Dissatisfied and not loyal. Actively disruptive via negative word of mouth.
- May be visiting the destination because of ties, or barriers to travel elsewhere. What will satisfy them?



Case study 4 – segmentation by satisfaction and loyalty

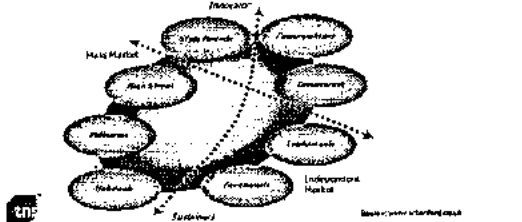



- Widely used approach so possible to benchmark against other sectors.




Case study 5 – segmentation by attitudes and values

- A specialist area, developed in the tourism and leisure sector by companies such as Arkanford for VisitBritain.
- UK residents segmented on basis of their motivations for holidays and values and aspirations in life more generally. Seen as a more effective way of predicting likely responses to marketing.


Case study 5 – segmentation by attitudes and values

- Smaller study undertaken by TNS for a major city destination.
- Market divided into segments based upon reactions to a series of statements:
 - I follow the latest trends and fashions
 - I generally use the internet to gather information on holidays
 - I have more ability than most people
 - I like to go on holidays with organised activities
 - I like to go on short breaks to see and learn new things
 - I like to have a wild time on holiday
 - I like to lead others
 - I often decide to take a short break on the spur of the moment
 - I tend to spend money without thinking
 - I'd rather take a short break in Britain than abroad
 - I'm unlikely to consider a package holiday
 - I'm very happy with my standard of living
 - There's a lot to be said for traditional values



Case study 5 – segmentation by attitudes and values

- Group 1 – like holidays with organised activities, like traditional values, like to learn new things, would take main holiday in the city. Traditional home comfort seekers
- Group 2 – know what the city has to offer, take at least one short break overseas per year, happy with their standard of living, like traditional values, sightseeing adventurers.
- Group 3 – follow the latest trends, use the internet to plan holidays, like organised activities, like a wild time, make spur of the moment decisions, take numerous short breaks, spend money without thinking. Wild timers
- Group 4 – use the internet to plan holidays, more ability than most, like to go on breaks to learn new things, like to lead others, take short breaks overseas and on the spur of the moment, unlikely to consider package trip. Independent culture seekers



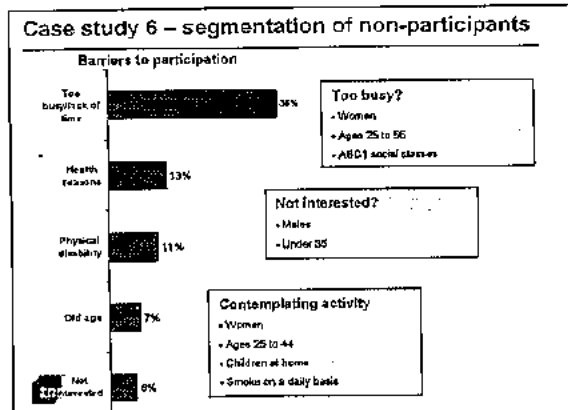
Case study 6 – segmentation of non-participants

Pilot survey of Welsh population undertaken for CCW and Forestry Commission.

Analysis of the responses of people who do not take part in outdoor recreation allows segmentation by a number of variables.

Stages of change

TNS



Conclusions

- Before undertaking segmentation it is important to be clear about your objectives and how do you intend to use the information?
- The population as a whole or current/potential participants in activity or visitors to a site?
- Added insight and understanding when able to use causal variables for analysis and especially useful if attitudes and values can be identified
- Aim for a manageable number of segments.
- After segmenting, prioritise which you take action on – those easiest to reach and/or those which are likely to provide the greatest returns?

TNS

Branding the outdoor experience

Understanding your market - the role of segmentation

29th March 2007

Tom Cosley
Duncan Stewart

TNS Travel and Tourism

TNS

Sports
Tourism
Project

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Mission:

- To support & develop Exmoor's outdoor activity industry.

Resources:

- 2 staff / £90k pa.

Timescale:

- 3 years.

126

Active Exmoor

Funded by ...

- Sport England
- Somerset Rural Renaissance
- ENPA SDF
- Somerset & Devon County Councils
- West Somerset District Council
- Hosted by Somerset Activity & Sports Partnership

127

Active Exmoor

What we do:

- Product - Develop existing & attract new events, activities and facilities
TOB, IRONMAN, IRONKIDs, Perambulation, Explorer, Coleridge Way, ECC, Wimbleball lake, Walking Festival, Giant play scheme, 2012, etc.
- Promotion - Attracting the visitors to Exmoor
10,000 target over 3 years, website, e-marketing, newsletter, brochure, Outdoor Show.
- Preparation - Infrastructure development
EQAN, OPTIC, AT found degree, Jobs, commercial

128

Active Exmoor

Service:

To provide a variety of services to a variety of audiences

Corporate	Accommodation Providers	TICs & marketing events	Local Suppliers	Individuals
<ul style="list-style-type: none"> • Finance • Insurance • Legal • HR • IT • Security • Cleaning 	<ul style="list-style-type: none"> • B&B • Self catering • Youth hostels / B&B • Bed and breakfast 	<ul style="list-style-type: none"> • Visit Exmoor • Exmoor Festival • Exmoor Mountain Centre • Exmoor National Park • Exmoor National Park • Exmoor National Park 	<ul style="list-style-type: none"> • Local suppliers • Local suppliers • Local suppliers • Local suppliers • Local suppliers 	<ul style="list-style-type: none"> • Individual • Individual • Individual • Individual • Individual

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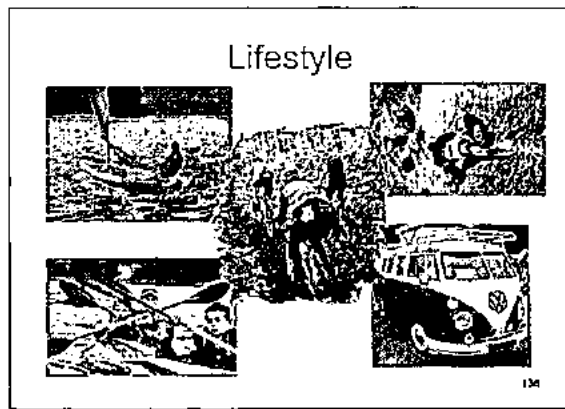
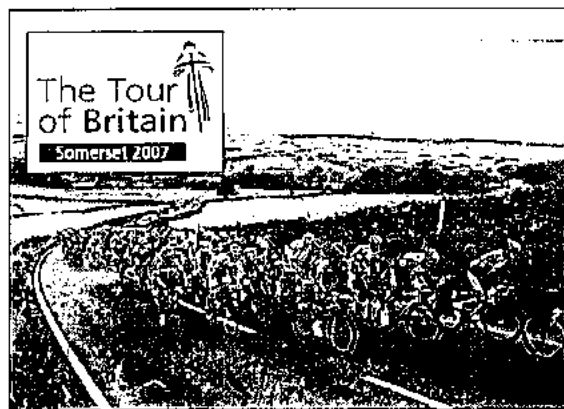
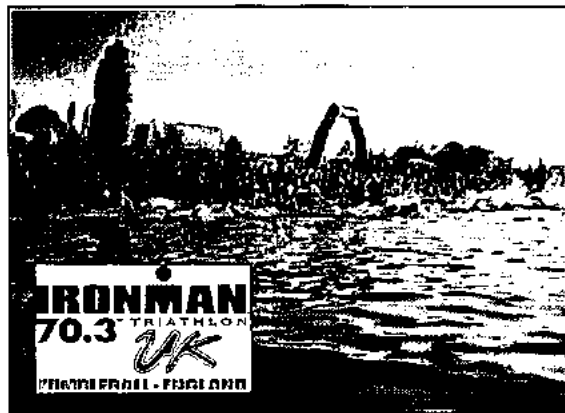
Exmoor Perception:

130

More on offer!

Branding Active Exmoor

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Simon Michaels

B research, training and consultancy on local and sustainable food systems

B – making local and sustainable food happen



An ethical revolution?



B – making local and sustainable food happen



Ethical branding



B – making local and sustainable food happen



New market opportunities

- 2/3 consumers more likely to buy from a business they think is taking action to tackle climate change (Source: Greenpeace)
- growing consumer market in ethical, fair trade and organic products (eg 40% growth in fair trade from 2007-2008) eg all hot beverages served within the offices of CFS, KPMG, Defra, DFID and ARUP are Fairtrade-only
- niche markets for quality food we can trust! (62% increase in last 2 years in UK) and local food (59% consumers extremely interested in)
- In Europe, social and ethical funds have grown by more than 56% in only 18 months (Source: Ethical Investment)

B – making local and sustainable food happen



Branding – what's the promise?

'This food has been produced by someone you can trust, in a natural way, from a landscape which is free from pollution and managed with the environment in mind.'



B – making local and sustainable food happen



Is local the new ethical?




B – making local and sustainable food happen





Provenance and Place: Connecting with Consumers

Landscape or people?




13 – making local and sustainable food happen

Segmentation – The journey so far

Berry D'Arcy
Head of Membership
The National Trust

146



The plan

- Why ?
- What we did – the steps
- How we plan to use it
- Some of the pitfalls

147



Why Segment


Understand our supporters to

1. Improve the product (the visit experience)
2. Develop the member benefits package
3. Integrate our communications

↓

Deepen Engagement

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The steps

Central team

- Internally generated hypothesis
 - Behaviourally based
- Focus groups
 - split - Intellectual / Local / Family / Social / Specialist
- Quantitative survey
 - Telephone questionnaire to national sample


Property teams

- Property surveys to determine priority segments
- Property brainstorming around priority segments to improve all aspects of the visit


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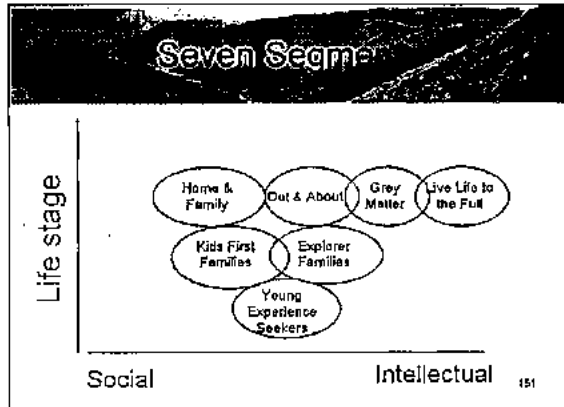
Provenance and Place: Connecting with Consumers

Provenance: local or locality?



13 – making local and sustainable food happen





- ### Making sense of segments and benefits
- 'Looking after special places forever for everyone' is what NT does
 - What *benefit* does this offer?
 - Enriching experiences
 - Insight
 - Different for each of the segments
 - Propositions
 - What NT will offer them
- 152

- ### Live life to the full
- Intellectual - likely to have at least one specialist interest
 - Independent minded
 - Busy
- We can satisfy their thirst for knowledge and quest for escapism
- 153

- ### Kids First Families
- If the kids are happy, we're happy
 - Packaged experiences → likely to attend key events
 - Low risk - want to be certain they will have a good time
- They want their kids to be entertained
- 154

- ### Young Experience Seekers
- Under 30. No children
 - Diverse group
 - Iconic destinations and challenges
- They want to see fascinating and awe-inspiring things
- 155

- ### Home and Family
- Spending family together
 - Know what they like and like what they know
 - Shopping
- We are a special treat for high days and holidays
- 156

Grey Matt

- Curious, active minds
- Most likely to be members and to give to appeals
- 65+

We provide a source of mental stimulation to stretch their active minds

157

Out and About

- Moochers
- The Trust is a backdrop
- Low involvement visits

We offer interesting places for socialising with friends and family

158

Explorer Families

- Negotiation between parents and children
- Self sufficient – make their own fun
- Believe learning can be fun

They want a fun, active and stimulating experience *as a family*

159



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How we will use it

- Decision making framework
 - Too many choices / initiative-itis
 - Deployment of resources
- Visit experience
 - Facilities
 - Interpretation
 - Events
 - Retail
 - Catering
- Member benefits package
- Different ways of communication

161

The Naysay

- People are in different segments on different days
- Need for flexibility
 - meeting local conditions vs national offer
- 'For everyone'
 - Use to drive new audience agenda

It's a tool. It's not perfect. It's a lot better than thinking everyone is the same or totally different

162

The Mantra

- Which market are you segmenting ?
- There's not one 'right' way to segment
 - Choose the most efficient for your purposes
- Less than ten segments
- Everyone will become obsessed by what you call the segments
- Beware the limits of your segmentation

163

Puzzles we still have

- Will this segmentation work well in a countryside setting
- Does the visiting motivation tie in to a deeper support for the charity as a cause

164

Active Places: Emerging Identities in The National Forest

Jake Morris
 Social and Economic Research Group
 Forest Research, UK


Background to the research:

Lancaster University's Sociology Department, the UK Forestry Commission (FC), and The National Forest Company (NFC)

Pioneering model of social forestry: 'It's about more than trees'

Explore the links between environmental change and social change

Full report can be downloaded at:
www.forestresearch.gov.uk/peopleandtrees



The National Forest:

200 sq. miles spanning parts of Staffordshire, Derbyshire and Leicestershire


Former Leicestershire and South Derbyshire Coalfield

A vast new forested landscape for the nation

Importance of partnerships

The Tender Scheme

'It's about more than trees'




Main research findings:

Social Impacts of The National Forest:

- Emerging place meanings and values
- New forms of social capital
- Changing social relations and identities in response to changing places

'Not only trees, but also communities are growing in the Forest'

Q: What do we mean by the word 'place'?



169

How are places (re)created?

Are (passive) places created by (active) people?

Does our physical environment have a role to play in shaping people and communities and the meanings and values they attach to places?

Tim Ingold's 'dwelling perspective'

Places themselves are active in processes of shaping meanings, values and identities



169

Evidence of 'active' places:

Changing attitudes on the farm:

'He used to hate trees... he's a real conventional farmer at heart... you know, trees and hedgerows meant things that got in the way of machinery, something that got in the way of the combine... or a tree in the middle of a field was something that birds would roost in, dropping seeds and causing weeds. And he used to be a terrible one for spraying... Chemical All we call him! Now the trees are here he loves them...'

'We're going to farm people now!'



170

Evidence of 'active' places:

Changing relations on the farm:

'My wife always said 'marry me, marry my horses'... and now the farm is perfect for her and we've got a great little business that's a real partnership for us. And our daughter works here, too.'



171

Evidence of 'active' places:

Changing community relations:

Walker: *'Are you the farmer?'*

Farmer: *'I used to be, but I got better!'*

Walker: *'Well, this place is a credit to you... thank you!'*



172

Evidence of 'active' places:

Changes to the National Forest's 'valuescape':

Forest → sense of care → normative code → appropriate behaviour

'It's nice to see people walking footpaths properly, because we (farmers) create the landscape... and it's nice to see people enjoying it... it's rewarding to see people appreciate what we've done... it's the people who don't respect the countryside that we don't want.' [Tender Scheme winner]

'Seeing these trees they've planted restores my faith in humanity... it's amazing that people can be so selfless as to plant a tree that's clearly for future generations.' [Walker]

'It's these bloody kids... they've got no respect... they've got this beautiful place to use and all they want to do is destroy it.' [Volunteer]

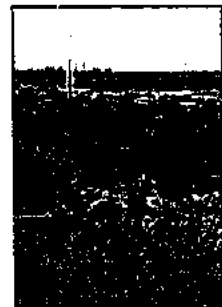
173

Evidence of 'active' places:

Meanings 'negotiated' between people and place:

'They wouldn't go back to it, but many felt resentment when the pits began to be all covered over with trees, especially as many know that there is a lot of coal still down there.' [Community leader]

'Mining is still a part of us... we'll never lose it. It's great that the Forest is bringing so many improvements to the area, but sometimes I wonder whether the trees will replace that for the young people.' [Ex-miner]



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How do people and places interact?

Processes of mutual influence:

Physical interaction with places

Social interaction in places



175

What lessons can be learnt for branding?

Should branding be:

The unilateral projection of meanings which focus on the essential physical qualities of place and reflect institutional agendas and priorities?

Or,

The multilateral negotiation of meanings which reflect ongoing processes of mutual influence and communicative exchange between people and place?

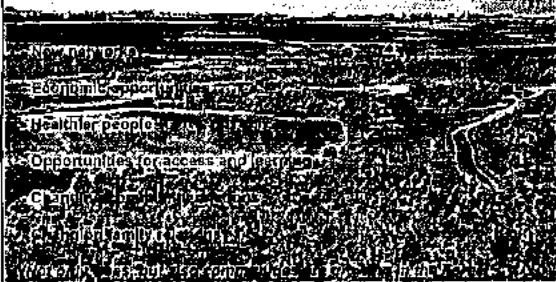


THE NATIONAL
FOREST

176

'It's about more than trees'

- New meanings



- New meanings

- Economic opportunities

- Healthier people

- Opportunities for access and inclusion

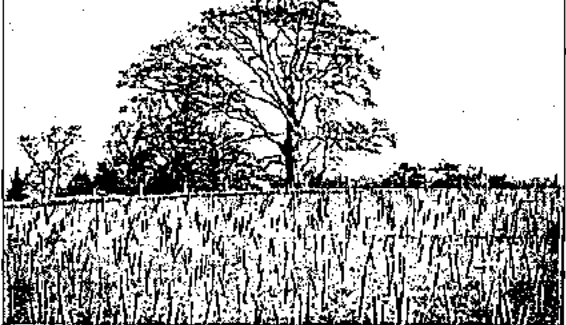
- Clean

- Healthier family

- More opportunities for people to live in the country

177

Thank you for listening!



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