Worcester BID

Marketing and Brand Strategy
Executive Summary

March 2011

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By launching Worcester as a Business Improvement District (BID) extra funding has been generated over a five year period to invest in projects, promotions and services that will enhance trading conditions for the collective retail, leisure and office economies.

One of the key pillars of the BID's business plan is a commitment to Spreading the Word. This project focuses on marketing and promoting Worcester to the benefit of all levy-paying businesses within the BID area and, at the heart of the BID's Spreading the Word project, is the commitment to create a structured, city-centric marketing strategy which informs all ongoing communications activity.

The BID has subsequently commissioned a marketing strategy to clearly quantify the size, scope and potential of the overall market, examine existing customers' attitudes to Worcester, identify potential barriers to sale and agree a strategy for growth. In addition, the BID has undertaken the creation of a brand strategy to effectively and clearly communicate the Worcester offer to both existing and new users.

Whilst the BID exists to support a range of business sectors, the marketing and brand strategy focuses predominantly on the retail and leisure sectors: this is quite simply because, unlike the consumer offer, no one single marketing or brand strategy can underpin the communication of office sector businesses as no common denominator exists. However, the office sector is not excluded from the Spreading the Word project – many other promotional activities have already been undertaken to support this sector – and, ultimately, it is agreed that creating consumer understanding of and engagement in the Worcester offer will ultimately benefit the office sector.

Having undertaken significant desk research the BID has identified the following:

- That there is a potential £1.4bn market gap between the actual city centre non food retail spend of £197million and the estimated total available spend for the catchment of £1.6bn
- The regular shopper population of c170,000 represents just 37% penetration against a total population of 458,000
- With the potential estimated available non-food spend per person, per annum of £3,500 Worcester's regular shoppers only actually spend £1,200 per person, per annum.

This presents the Worcester BID with two clear opportunities:

1. To encourage the 288,000 non-users to consider using Worcester as a retail/ leisure destination
2. To encourage existing city users to spend a larger proportion of their available disposable income in the city

In addition, the BID has also undertaken significant research to better understand its current and potential audiences. Notably more affluent and older than the UK as a whole, the largely ABC1 catchment population features a predominance of post-family life-stagers and future activities and communications should be (largely) shaped to appeal to the needs of this audience which offers the biggest potential for growth in terms of visitor numbers and spend.

Primary research has also enhanced the Worcester BID's understanding of audience attitudes: this identified that people decide where to shop based on selection of shops, proximity to home, ease of parking and the presence of independent stores, whilst leisure activity is dictated by venue, proximity, selection of facilities, ease of parking and feeling safe.

In addition, this research also identified some significant barriers to sale. Worcester appears to fail to a degree on key parameters for both shopping and leisure in terms of the perceived selection of facilities/retailers, parking and feeling safe. This knowledge should be used to inform specific choice of tactics, as well as to inform the tactical messaging that underpins the wider brand building communications.

Following the key research period the BID has also created a brand strategy to underpin all future marketing activities across all sectors. Based on the premise that the retail and leisure districts of Worcester city should ultimately be perceived as a total "experience" rather than just a physical location if audiences are to be re-engaged in the proposition, the stylistically contemporary brand position, **shop, eat, play | live Worcester!** has been chosen to underpin ongoing communication of the Worcester offer.

Having so clearly defined its audiences, and created a robust brand strategy, the Worcester BID now has an informed framework against which to select and implement the most appropriate and effective ongoing communications tactics which deliver best results and value for money for all levy-paying BID members.

Your brand position: at a glance

shop, eat, play | live Worcester!

In five words we create emotional engagement and provide a springboard from which a fresh brand personality can be launched.

At once, every aspect of the unified consumer offer is communicated – the 'shop' representing retail, the 'eat' and 'play' representing the leisure economy in all its guises and the 'live' at once encapsulating both lifestyle and communicating the message that Worcester's offer is holistic, it has everything you need to live your life. Bridging the functional and emotional to communicate the sense of experience, at once Worcester becomes the stage or setting for your lifestyle.

Contemporary in style, this modern application of the brand statement is deliberately free of conventional Worcester iconography – the cathedral, the river, pear trees etc – which is so heavily used elsewhere especially in the realms of tourism and visitor communications. We are confident that the educated target audience will comprehend the assurance that the statement offers.

Our primary research tells us...

- People decide where to shop based on selection of shops, proximity to home, ease of parking and presence of independent stores.
- Worcester is perceived by almost 60% to have a reasonable range of shops, but over a third neither agree nor disagree. Only 21% agree that it is an exciting place to shop, while 53.2% neither agree nor disagree, indicating a degree of ignorance or apathy. 53% similarly seem to have no opinion on whether Worcester is a good place to shop for fashion.
- It is not perceived as being upmarket or sophisticated from a shopping point of view. There is a perceived lack of up market shops, though Worcester has a high proportion of wealthier people.
- People decide where to spend leisure time based on venue, proximity, selection of facilities, ease of parking, feeling safe. Around half the sample agree that Worcester has some good restaurants, but 42% have no opinion. A similar proportion have no opinion on whether Worcester is a good place for a night out, while a quarter believe it is not.

Live = The fun, your lifestyle, the "play" aspect of your life

- Lifestyle element
- Bridges the functional and emotional to communicate the sense of experience
- Worcester is the stage for your **LIFESTYLE**

63% of the catchment population prefers to shop elsewhere

shop eat play | live worcester

Because...

- Famous multiples and lots of independents
- Big brands and niche/designer
- Plenty of reasonably priced parking
  - Range
  - Choice
  - Sophistication

Because...

- Plenty of culturally diverse places to eat and drink
- From fine dining to a quick snack
  - Range
  - Choice
  - Sophistication

Because...

- Vibrant, diverse, lively and safe night time leisure destination

Because...

- It's yours, close to where you live!
- Engenders ownership and loyalty

Desired customer response...

"I didn't know that, I'll give it a try"

Desired customer outcome...

To engender participation in the city centre experience by day and by night and ultimately engender customer loyalty by including Worcester in the shopping and leisure repertoire more frequently

AWARENESS • UNDERSTANDING • ENGAGEMENT • INVOLVEMENT • COMMITMENT