Strategic Priorities for Portsmouth City Council in managing and developing the visitor economy

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Final draft
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PART ONE - SETTING THE SCENE

1 ABOUT THIS PAPER

Portsmouth City Council (PCC) has commissioned destination analysts Blue Sail to make topline recommendations for the city’s strategic priorities for tourism.

This is not a full-blown tourism strategy for Portsmouth, as the city’s public and private sector partners have already done a significant amount of work agreeing the City Growth Strategy, which includes recommendations for developing the city’s visitor economy and improving the city’s image.

This paper is primarily aimed at the key decision makers in Portsmouth City Council, although it will also be of interest to some of PCC’s key stakeholders.

As well as this paper, we have produced for PCC:

► A summary of the main strategies, reports and groups that impact on Portsmouth tourism - “the strategic context”
► A summary of information about current visitors
► A destination marketing strategy and marketing plan.

The main conclusions from these reports are below – see the documents themselves (Appendices 1-4) for much more detail:

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<td>Several city strategies and groups support tourism as a key sector for regeneration. They share aspirations: ► to improve the city’s infrastructure and attractiveness ► to develop the city’s cultural life and assets ► to strengthen the city’s economy ► to improve employment opportunities for local people ► to create a distinctive ‘sense of place’ ► to transform the city’s external image and ► to engender local people’s pride in the city.</td>
<td>► The current visitor market is predominantly UK empty-nesters and families - staying and day visits ► These are generally mid-market, although some attractions and activities appeal to higher socio-economic groups ► There is a strong day visitor market from a wide area for those travelling from home; and for those holidaying in neighbouring areas ► Shopping and range of attractions are key strengths ► The naval image dominates perceptions</td>
<td>3 key recommendations: ► Short term, while the city is developing, strengthen current markets and provide routes to market for your businesses ► ‘Market smarter’ - improving your understanding of customers and potential customers, shifting resources into e-marketing, and working with partners ► As the product / visitor experience develops, your destination marketing should focus increasingly on re-positioning the city and establishing it as the premier destination for your ‘higher-end’ target segments.</td>
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2 PORTSMOUTH’S VISITOR ECONOMY - AN OVERVIEW

The city attracts millions of visitors a year
Every year Portsmouth/Southsea attracts around 7.6 million visits and £373 million visitor spend, supporting much-needed jobs, facilities and services for local people.¹

The city is best known for its maritime history. But visitors also pour into Portsmouth for the new harbourside developments of Gunwharf Quays and the Spinnaker Tower, and to do business in the city.

But competition is fierce
Today’s leisure and business visitors are more affluent, better travelled and have higher quality expectations than ever before. Other destinations in the UK and overseas are investing heavily in product development and marketing to attract visitor spend.

These days, Portsmouth is competing for visitors with the UK’s dynamic, regenerated metropolitan cities. These relative newcomers to the tourism market have hit traditional urban destinations hard.

While its maritime heritage is among the best in Britain, and its waterfront setting is spectacular, Portsmouth’s city experience does not measure up to the UK competition - the cosmopolitan cultural vitality of the larger cities, and the heritage chic of nearby smaller cities such as Chichester and Winchester.

Portsmouth’s ambitions to be a World-class Waterfront City are clearly articulated in the City Growth Strategy and among the partners involved in its visitor economy. The investment that has and is taking place will transform the city.

Parts of the jigsaw are in place, but there is some way to go before Portsmouth/Southsea provides a coherent, quality visitor experience that will shift current negative perceptions and enable the city to compete for visitors with more successful destinations.

Tourism and the economy are interdependent
A place cannot simply be “a great place to visit”. To sustain the businesses, services and experiences that make a successful visitor destination, the city needs to become “a great place to live, work and do business in”. So the city council’s economic development and regeneration work, and its commitment - with its partners - to the City Growth strategy, is vital for the future of the visitor economy.

And, at the same time, a strengthened visitor economy and positive image as a visitor destination will improve the city’s attractiveness as a place for businesses to invest.

¹ From The Economic Impact of Tourism on Portsmouth in 2005, Tourism South East. The statistics quoted here are without the additional visits made for the T200 Celebrations (see Appendix 1 for stats including T200).
3  KEY TRENDS

Key market trends that impact on Portsmouth’s visitor economy are:

**Increasing affluence** - leading to higher quality expectations and a desire for "experiences" rather than “things”, which in turn is fuelling growth in travel.

**“Easy travel”** - increasing numbers of people have the desire and the wherewithall to travel frequently, taking several breaks a year and often booking ‘impulse’ trips at short notice, motivated by special deals and low-cost flights.

**Increasing competition** - for discretionary business travel and for leisure breaks, from regenerated UK cities and “destination hotels” as well as newly accessible and significantly cheaper overseas destinations.

**The explosion of new technology** - used for inspiration, information and to book travel, and as a source of 3rd party recommendations.

See the Portsmouth Destination Marketing Strategy section 4 for more market trends and their impact on destination marketing, and section 5 for more detail on the competition.

4  KEY CHALLENGES

The key challenges for Portsmouth’s economy have been thoroughly explored in the City Growth Strategy work. From the tourism perspective, top of the list are:

**Image** - the perception of Portsmouth as an unattractive and downmarket place with little cultural offer or evening economy.

**Quality** – while there are pockets of quality, the city generally appears to be down-at-heel and difficult to navigate for visitors.

**Congestion** – despite the three mainline stations, including one right next to the main visitor attractions, the majority of visitors will continue to come by car, and both contribute to and suffer from traffic congestion at peak times.

**Cuts** - in PCC’s tourism budget, which weakens their ability to attract events and conference business, to run effective destination marketing and to deliver an effective visitor information service.
PART TWO - OUR RECOMMENDATIONS

1 SUSTAINABILITY

Our recommendations are underpinned by the V.I.C.E. model of sustainable tourism.²

In developing and managing the visitor economy, Portsmouth City Council should aim to satisfy each of the four components of the V.I.C.E. model - Visitors, Industry, Community and Environment:

- **Visitors** - want a satisfying visit that meets their needs and expectations so that they want to repeat and will recommend
- **Industry** - needs profitable visitor business that enables local businesses to thrive and invest
- **Community** - needs visitor spend that supports local facilities, services and jobs, and visitors who have a positive impact on residents’ quality of life
- **Environment** - must be protected from any negative impacts of increased volume of visitors, and any tourism development that diminishes the essential nature and attraction of the place.

² Tourism Management Institute / English Tourism Council
2 THE VISITOR JOURNEY

In developing and delivering its strategic approach, Portsmouth City Council should apply the Visitor Journey model to analyse the visitor experience and ensure customer satisfaction at every step:

- from dreaming and looking …
- through planning and booking …
- to the journey and visit itself …
- to returning home, reminiscing, recommending and repeating³.

This “virtuous circle” - where the satisfied customer repeats and recommends - is even more important since the explosion of user-generated content on online travel sites, where other visitors’ recommendations have become a significant influence on travel decisions.
3 VISITOR ECONOMY PRIORITIES FOR PORTSMOUTH CITY COUNCIL

We recommend that you prioritise these 7 key things:

Know your customers
- Improve the experience
- Differentiate yourself
- Re-position the city
- Invest in reasons to visit

Work at partnerships
- Value tourism

They are set out below, with more detail and suggested key areas for attention under each priority.

Know your customers
- Decide who the city’s key targets are, and make sure this shapes your product development and your marketing in a very real way.
- Research your key targets to understand: what would motivate them to visit, what they expect from a trip, their buying behaviour, ways to reach them, and their perceptions of Portsmouth.
- Share the results with policy makers, industry partners and potential investors.
- Set up a city-wide agreement to collaborate on collecting and sharing market intelligence – including tracking visitor profiles, spend and satisfaction levels.

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4 See the Portsmouth Destination Marketing Strategy for recommended key target market segments
**Improve the experience**

- Use the research into key target markets to identify product gaps and quality gaps in existing product, then share this information with potential investors and current suppliers.

- As part of this, the public agencies may need to commission development and feasibility studies into specific projects and sectors, such as the current Hotel Development Study. There is an urgent need for a study into the potential for additional conference & exhibition facilities, which has been highlighted by the City Growth work and is a key issue for some stakeholders.

- Improve the quality and maintenance of the public realm:
  - A safe, clean environment makes a huge difference to visitor satisfaction, the city’s image and repeat visits. It also contributes significantly to local people’s quality of life and to civic pride.
  - The city’s open spaces and public facilities - from pavements, crossings and squares to lighting and street furniture, loos, promenades and parks - need to be coherently designed, of high quality, and maintained to high standards.
  - Early work towards a Seafront Strategy points rightly to the need for a single management approach to the significant public spaces along the waterfront. We recommend that the city also needs to appoint or nominate someone to take the aesthetic overview: someone with a design background (perhaps the City Council’s landscape architect if it has one) who will instill an aesthetic coherence to the cityscape and visitor experience.

- Prioritise the waterfront area and particularly The Hard to integrate it better with Gunwharf Quays, building on the excellent work already done at GWQ and in creating the Millennium Promenade.

- Aim to spread this quality north into the city centre, so that by the time the Northern Quarter is complete the city will have an integrated, quality visitor experience.

- Apply “legible city” principles – managing/helping visitors to find their way around the city. For example:
  - “zone” the city for visitors, to help them orientate themselves and tempt them to explore further afield (as the product develops)
  - design and adopt an integrated and visitor-friendly scheme of signs, maps, information boards and trails
  - avoid “off-the-shelf” systems for signs and street furniture: this is a key opportunity for Portsmouth to differentiate itself, already shown in the high-quality of the Millennium Promenade.

- Depending on target markets’ requirements, the public sector should use its powers to support and nurture quality independent businesses. Work with and showcase the best.
Make sure that visitors’ specific transport and parking needs – which are quite different from the needs of locals and commuters - are taken into account when making transport planning and traffic management decisions.

To tackle congestion, develop reasons for people to visit outside peak times, and work with rail operators to promote train travel to potential visitors, and to target people most likely to travel by train.

Ensure there are visitor-friendly alternatives to the private car to travel around the city - especially along the Waterfront, into Southsea, and eventually linking the Waterfront to the Northern Quarter - even if most visitors do arrive by car.

**Differentiate yourself**

- The city’s stunning waterfront setting is its key differentiator from competitors.
- So “go big” on the waterfront setting – first with product development to make sure that every visitor to Portsmouth can find, access and enjoy the waterfront and the water – whatever the weather - and (only then) in marketing.
- The idea of water, the Waterfront, and sea-faring should be incorporated into the public realm – from signs and seating to public art.
- Investment in (quality) water and sea-related product should be encouraged and nurtured – from seafood stalls and fish restaurants to water taxis, water sculptures and water-based events.
- The Waterfront experience should be easy to access, easy to “navigate” – both alongside and on the water - and of a consistently high quality. (The Spinnaker Tower is an extreme example of product development that differentiates the city and exploits the Waterfront setting.)

**Re-position the city**

- City Growth is developing a branding strategy, so all we will say here is that the city needs a careful re-positioning plan that doesn’t overpromise to consumers. The key targets (for now) are local people and investors.
- It should include a professionally devised and delivered “internal” programme within the city to instill pride of place and local support for re-positioning.
- PCC should commit to creating a positive environment for investment, and its members and officers should demonstrate this commitment consistently and unambiguously.
- There needs to be high-profile public-funded “seedcorn” investment to show the city’s commitment to regeneration.
- The city’s opinion formers and decision makers – in the public, private and voluntary sectors - should agree a set of key messages that they use at every opportunity.
Invest in reasons to visit

- **Events**: Public investment should be in developing or attracting events that particularly appeal to the target market segments. The city has fantastic open spaces for events. Events are a great way to stimulate visits and spread business outside peak times, but also - just as importantly in Portsmouth's case - to build an image of a place as dynamic and “on the up”. There is a key role for PCC in leading, coordinating and facilitating events, and in bringing private sector partners together to provide the supporting infrastructure such as hotel rooms at the right price.

- **Culture**: Culture-led regeneration has seen competitors flourish – but Portsmouth has a long way to go before it could be described as a “cultural destination”. A cultural destination is more than its arts venues; it provides the visitor with:
  - cultural venues - galleries, museums, performance spaces
  - cultural experiences - events, markets, shows, exhibitions
  - cultural streetscape - performers, public art, stalls
  - cultural businesses - independent shops, local food retailers, designer fashion, arts & crafts, cafes, bars, restaurants, boutique hotels.

Work at partnerships

- More than any other sector, tourism needs effective partnerships. That's because:
  - Visitors consume a product (the visitor experience) that is provided by many different suppliers – usually in both the public and the private sectors.
  - The public sector has a significant role as either supplier, influencer or regulator of much of the visitor experience.
  - Visitors do not see administrative boundaries, so partnership work with neighbouring areas beyond the city is essential.

- Partnerships are made, not born: they need concerted investment - of time and resources.

- Portsmouth’s City Growth work has brought public and private sector partners together in a very positive way.

- The city council now needs to take a lead in coordinating the city’s visitor industry, particularly when it comes to developing market focus, providing businesses with market intelligence and marketing opportunities.

- Having established the target markets, the city should look for “affiliate” destinations, transport gateways and operators, and consumer brands targeting the same segment(s) to develop joint marketing activities.
PCC’s tourism service is part of a national network of public-funded tourism agencies – from the national tourist board VisitBritain, to SEEDA (which has strategic responsibility for tourism) and its regional delivery arm Tourism South East, to the sub-regional Hampshire Tourism Committee. All of these partners offer the city the opportunity to work collaboratively and cost-effectively to research and reach potential visitors, without losing the city’s own unique identity and positioning.

**Value tourism**

- Understand and recognise the value of visitor spend to the economy and to the quality of local people’s lives.
- Share this information with local decision makers and the local community.
- Take visitors into account when making policy and investment decisions.
- Improve the fact and the profile of jobs and careers in the tourism industry through initiatives that
  - encourage employers to invest in staff retention and development, and that
  - bring employers and education providers closer together.
- Make visitors feel welcome:
  - identify the “gateways” where visits begin and provide appropriate information and facilities
  - make sure that frontline staff in visitor-facing places are familiar with the whole product so that they can guide visitors and “cross sell”, and
  - improve local people’s pride of place.
- Show corporate commitment to these priorities:
  - These priorities are not and cannot be the sole responsibility of the tourism team. PCC should form a senior-level cross-departmental corporate Visitor Economy Group to take responsibility for delivery of these priorities across the council.
4 THE LEAD ROLE OF PORTSMOUTH CITY COUNCIL

Tourism makes a major contribution to the life of the city, and Portsmouth City Council has a lead role in developing and managing the visitor economy.

The City Council has a huge influence on the visitor experience, on visitor businesses and on potential investors:

► providing and maintaining a significant part of the infrastructure - from cultural assets and open spaces to lighting and public toilets
► creating and promoting the vision for the city, and
► facilitating the implementation of that vision through its decisions and policies.

PCC also has the responsibility for presenting Portsmouth to the outside world. The image which it promotes will influence perceptions and attitudes for years to come. And, at a very practical level, it provides a focus for the visitor industry to work together in the promotion of the city as well as providing routes to market - especially for smaller independent businesses.

This is not to say that PCC sits alone. The City Growth Board is an important forum where public and private sector work together to agree a strategic approach to developing the city’s economy. Two City Growth sub groups - City Image and Retail, Tourism & Leisure - have a particular responsibility for the direction the visitor economy will take. PCC must play a central role in both these groups to make sure that marketing and investment efforts are aligned.

One of the features of those cities which have regenerated themselves is the strong, dynamic and visionary leadership shown by their public authorities. They take the visitor economy seriously: it is at the heart of their regeneration plans and is backed by the public agencies at a high level.

Tourism and the visitor economy have a key contribution to make in the transformation of Portsmouth, and the City Council is ultimately responsible for making sure this contribution is realised.
Please see separate attachment for the background research documents ...

Appendix 1
Strategic Context Summary

Appendix 2
Current Visitors: Market Information Summary

... and overleaf for Appendices 3-6
Appendix 3
Portsmouth City Council: Destination Marketing Strategy 2008-2010

This is a Destination Marketing Strategy for Portsmouth City Council, to guide your marketing of Portsmouth/Southsea to attract more visitors and visitor spend to the city.

In a nutshell, our recommendations are:

- In the short term, while the city is developing, your marketing should strengthen your current markets and provide routes to market for your businesses.

- You should ‘market smarter’ - improving your understanding of customers and potential customers, shifting resources into online marketing, and working with partners where it is effective to do so.

- In the medium to longer term, as the product/visitor experience develops, your destination marketing should focus increasingly on re-positioning the city and establishing it as the premier destination for your ‘higher-end’ target segments.

A Marketing Plan has been developed to accompany this Strategy (Appendix 4).
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1 MARKETING VISION

By working with partners to encourage visitors to come and spend more time and money in the city, Portsmouth City Council will contribute to the City Growth Strategy Vision of making Portsmouth a more prosperous, vibrant and successful city for the benefit of all.

2 MARKETING OBJECTIVES

▶ Build the Portsmouth brand by presenting a consistent and positive image of Portsmouth to target visitor markets based on the Waterfront City branding.

▶ Stimulate target markets’ awareness and interest in visiting Portsmouth through high impact marketing activity, including PR; and capitalising on others’ marketing activity - in particular VisitBritain/Enjoy England, Tourism South East, and any future Hampshire sub-regional marketing programmes.

▶ Work with partners in Portsmouth to provide a focus for collaboration and joint activity in promoting the city to visitors.

▶ Provide a coordinated approach and routes to market for Portsmouth’s visitor industry.

▶ Ensure the marketing of Portsmouth supports sustainable development by:
  ▶ focusing on spend rather than numbers of visitors, particularly for peak times
  ▶ encouraging seasonal spread
  ▶ helping to spread the benefits of tourism across the city.
3 MARKETING PRINCIPLES

You need a systematic and robust approach:
- Understand markets and market needs
- Decide who you will target
- Develop products and experiences that will appeal to your target markets
- Raise awareness of and interest in the area among potential visitors
- Convert interest into bookings
- Encourage visitors to stay longer and spend more
- Encourage visitors to repeat and recommend

Be focused:
- Prioritise marketing that will have the best impact and high ROI (return on investment)
- Use an effective brand proposition, used by partners across the city
- Rationalise marketing communications activities so that they are fewer but more high profile and more powerful.

Achieve differentiation:
- Move away from ‘something for everybody’ to a clear and targeted proposition for each market segment which is different from your competitors
- Ensure the city delivers on ‘the brand promise’ - do not raise expectations you cannot meet.

Use sound market intelligence:
- All activities, from product development to promotion, must be market-focused and based on as thorough an understanding as possible of market trends and what your target segments want.

Adopt ‘smart’ new marketing methods:
- Establish excellent Customer Relationship Management, to achieve a continuous cycle of building a customer database and using it for communication
- Produce professional, polished and innovative marketing
- Develop a website with seamless motivating content, practical information and on-line booking
- Use proactive e-marketing
- Don’t do it yourselves if you can find a partner with better skills and resources to do it for you.
4 THE CONTEXT

Market trends

Portsmouth’s destination marketing must be based on an understanding of markets and market trends. The following UK market trends give food for thought:

► People are increasingly better-off. Over half the population is now classified ABC1 i.e. ‘middle class and above’. Real disposable income is double what it was in the 1980s.

► People are much better travelled. It is not uncommon to take two or three overseas trips as well as three or more short breaks in the UK in a year.

► People’s expectations of quality are much higher than in the past – and they are prepared to demand it

► Increasing affluence means consumers are looking for “experiences” - they want trips to offer stimulation, well-being, and even status and personal development

► People expect to find the right information when they want it; last-minute impulse trips are common and late booking is very much the norm.

► Holidays and short breaks in the UK are most likely to be taken by families with young children or by empty-nesters

► More people are waiting until well into their 30s before having children, so many parents with young children are better-off and are used to higher-quality products and experiences.

► The population is ageing - and older people are more active than previous generations, and have a high propensity to travel

► People are increasingly making what they believe to be ‘green’ or ‘ethical’ consumer choices.

Trends in destination marketing

Destination marketing is changing:

► Technology is facilitating radically new marketing techniques

► Consumers are less likely to fit stereotypes of class and age, making segmentation more difficult

► Promotional activity has to be targeted and relevant to cut through the plethora of communications

► People are looking for tailored breaks which suit their needs so need the right kind of information and choices that are easy to book

► Personal recommendation is more powerful than any marketing - so meeting and exceeding customer expectations is essential.

► Media is increasingly unpredictable, with
  • A transformation in the use of media for entertainment, information and booking
• A proliferation of TV channels and lifestyle and specialist publications
• Radically different new uses of the web, with users driving content
• A rise in strongly branded independent commercial guidebooks
• Increasingly clever use of outdoor media and sponsorship.

Destinations need to make an impact in a crowded, noisy and competitive marketplace. They need:
• Professional destination marketers, not generalists
• To be a strong tourism brand – or ally with one that is strong
• To bring together resources to fund specialist skills and new marketing approaches
• To work with partners who are targeting the same consumers and have money, influence and skills.

National and regional destination marketing

National tourist board VisitBritain (VB) is now responsible for marketing England to the domestic market. VB is spending £2.5m on the Enjoy England marketing programme in 07-08, targeting people aged 25-45 with and without kids in the ArkLeisure segments High Streets, Cosmopolitans and Discoverers. It is also marketing England in the near European markets of Ireland, Netherlands, France and Germany. Its current England campaigns which are most relevant to Portsmouth are City Breaks and Family Fun.

Regional tourist board Tourism South East (TSE) carries out market research and offers destinations the opportunity to buy into marketing campaigns. Recent TSE market research identified Portsmouth as a key destination brand in the region, and summarised Portsmouth’s current visitors using both CAMEO and ArkLeisure segmentation. Portsmouth was firmly identified as a place attractive to ArkLeisure’s ‘High Street’ and ‘Follower’ segments.

TSE’s current campaign targeting ‘High Streets’ is Kids Country/Family Fun - which focuses on the strength of the South East as a family friendly destination. Its primary targets are staying visitors: both long staying (4 nights plus) and short break (1 - 4 nights). Their secondary target market is day visitors from London. The campaign has an estimated reach of over 3 million people.

TSE delivers some of its service through the sub-regional public-private partnership the Hampshire Tourism Committee (HTC). HTC is currently reviewing its priorities and operations, and PCC is playing a key role in these discussions. It is likely that partners could pool resources to enable them to access marketing support services and skills (eg research, e-marketing etc) that they could not afford alone.
5 MARKET ANALYSIS

Current visitors to Portsmouth

Some headlines:\(^5\)

- Portsmouth attracts 731,000 *staying* trips spending some £150 million
- as well as 6.85 million *day* trips spending £222 million.
- Holidays make up 59% of visitor nights
- with a further 17% visiting friends and relatives
- 15% of visitor nights are business trips
- The majority of Portsmouth’s staying visitors are from the UK
- with just less than 14% of staying trips coming from overseas
- Almost a third of Portsmouth’s day visitors are holiday-makers staying elsewhere in the south east and visiting Portsmouth for the day.\(^6\)

Drawing on a number of sources - in particular the visitor profiling commissioned by Tourism South East and the visitor surveys undertaken by Portsmouth’s major attractions - Portsmouth’s *leisure* visitor profile is:

- Largely domestic
- Staying visitors come from London, the South East and the West Midlands
- Day visits are important
- Families are well represented for staying and day visits
- Mid-age group and mid-market
- Attracted by shopping and maritime heritage

Segments are:

- High Streets (ArkLeisure)
- From ‘Affluent home-owning couples & families in larger homes’, ‘Suburban homeowners in smaller private family homes’, ‘Comfortable Mixed Tenure Neighbourhoods’ and ‘Less Affluent Family Neighbourhoods’ (CAMEO)
- Populists (TSE segmentation).

There is much less information from which to profile business visitors and there is a need for more research to understand the nature of the city’s business tourism and needs of business tourism suppliers (hotels, venues etc) in the city. See Section 6 for more on business tourism and public intervention.

\(^5\) From *The Economic Impact of Tourism on Portsmouth in 2005*, Tourism South East. Statistics quoted here are minus Trafalgar 200 visits

\(^6\) *Portsmouth Visitor Survey 2004*, Tourism South East
Competitors

Competition for visitors is growing.

With the proliferation of cheap flights, favourable exchange rates and the British love of travel, destinations in England are competing with European cities for short-breaks and for some discretionary meetings business.

Within the UK, the metropolitan cities have transformed themselves and their image over the last decade into attractive shortbreak, cultural and shopping destinations. London is booming, with new areas promoting themselves as visitor destinations.

Since the regional development agencies took on strategic responsibility for tourism 5 years ago, visitor destinations in London, the Midlands and the North have benefited from greatly increased public spending on tourism development and marketing.

Closer to home, Portsmouth is competing:

- for short breaks, shopping and heritage - with Chichester, Winchester, Salisbury, Oxford, Windsor, Brighton
- for naval heritage - with Chatham Historic Dockyards (now with Dickens World), Greenwich and Bristol
- for family activities - with Thorpe Park, Legoland, Chessington, the New Forest, smaller seaside resorts
- for waterfront city breaks - with Brighton (and Bournemouth)
- for discretionary business tourism - with more accessible locations inland, and with long-established meetings destinations such as Brighton and Bournemouth
- for the developing independent, quirkier offer of Southsea - with small upmarket towns such as Arundel, Midhurst, Lewes, Rye and Whitstable
- for day trips out of London by overseas visitors - with the ‘honeypots’ of Bath, Bristol, Brighton, Oxford, Cambridge, York
- for relaxing short breaks - with ‘destination businesses’: i.e. hotels, spas and restaurants that have become a reason to travel in themselves, regardless of the surrounding city, town or area
- for urban day trips by visitors staying in the surrounding area - with Winchester, Southampton and Chichester.
Perceptions

There has been significant work for the City Growth project analysing and describing the city’s strengths and weaknesses, realities and image, based on the views of key decision makers and opinion formers - mainly inside the city but including some external views - and on expert analysis by branding specialists Harrison:Fraser.

Surveys of leisure day and staying visitors to Portsmouth in 2004 found that the historic dockyard, historic ships, the Royal Navy and the seafront were the dominant images that visitors associated with Portsmouth. Key reasons to visit were: plenty of things to see and do; the attractive scenic environment; interesting historic ships/sites; the range of places to eat out. Compared to a ‘benchmark’ group of other UK urban destinations, the feeling of welcome and overall enjoyment was above average. 90% said they would be likely to recommend Portsmouth.

But there has been no specific research to find out what non-visitors think about Portsmouth as a destination, and what would motivate them to visit.

In independent travel guides (see Appendix 5) - despite some positive mentions of the atmosphere of Old Portsmouth, Southsea’s independent restaurants and B&Bs, and of new attractions such as Gunwharf Quays and the Spinnaker Tower - Portsmouth is pre-dominantly presented in terms of its impressive naval heritage. The urban environment is often described as marred by ugly post-war urban re-development. It is presented as a day destination, rather than a place for short breaks and holidays, with historic cities such as Winchester, Salisbury and Chichester described as being far more interesting places to stay. There is no sense of it being a cosmopolitan or cultural destination.

Portsmouth has a low profile on the popular travel websites with user-generated content (i.e. those people go to for 3rd party endorsements and advice, which is increasingly important) - see Appendix 5.

There has been some positive national media coverage in recent months, particularly associated with new waterfront residential developments and Aspex Gallery - although negative allusions to Portsmouth continue as well.
6 DESTINATION MARKETING: THE OPTIONS

The strategic options

Destination marketers have various strategic options. They can:

- Take a leading role in breaking new territory
  - or play a co-ordinating role in responding to the wants of the industry and aligning marketing effort

- Focus on a few things in depth (eg providing a first class website; focusing effort on one or two segments)
  - or operate ‘lightly’ across the spectrum of activity to make sure all bases are covered to an extent (eg address all types of leisure and business tourism; provide a full range of print and information services)

- Focus on raising awareness and interest in new markets
  - or build relationships with existing customers to encourage repeat visits

- Provide a route to market for small and medium businesses, assuming larger businesses can finance their own or are part of chains/consortia
  - or work primarily with the ‘best’ businesses to showcase what the best the area has to offer.

We have presented these as “either/or” choices. That is because few destination marketers have the resources to do all these things well - although many are tempted or pressured by their stakeholders into trying to cover as many aspects as possible.

The choice depends in part on the scale of resource (money and skills) available and in part on the particular local circumstances (industry, politics, product etc).

The circumstances for Portsmouth

Portsmouth is in transition. Its ambitions to be a world-class waterfront city are clearly articulated in the City Growth Strategy and among the partners involved in the visitor economy. The investment that has and is taking place will transform the city.

Parts of the jigsaw are in place, but there is some way to go before Portsmouth/Southsea provide a coherent quality visitor experience that will shift current perceptions and enable the city to compete for visitors with more successful destinations.

Word-of-mouth is by far the most powerful marketing tool (for both leisure and discretionary business tourism), and third-party recommendations are increasingly important in destination-choice. So, the key to successful marketing is to provide a satisfying visitor experience that will encourage people to recommend and to repeat.
You must meet customers’ expectations, or word-of-mouth will undermine your efforts to re-position and strengthen the destination.

This means that, during this transition phase, you should not over promise or pursue new target markets who will be disappointed by the city’s current offer.

**Timescales**

We recommend that Portsmouth City Council’s destination marketing should focus on:

**Short-term**

- Collecting and providing excellent market intelligence to inform product development, and supporting market-focused product development
- Providing routes to market for the industry, especially for small and medium businesses, and shifting resources towards smarter marketing - in particular e-marketing and customer relationship management.

**Longer-term**

- Supporting the City’s brand building, working with the City’s best quality product to move Portsmouth’s image to become the premier destination for your higher-end segments.
7 TARGET MARKETS

Choosing one or two markets to focus on for Portsmouth as a whole does not mean that you do not want others to visit, or that they won’t come. It simply means you focus your limited resources on those markets you believe will have most potential and where you can make most difference.

Short term - UK leisure

The data we have seen suggests that Portsmouth’s current appeal as a leisure visitor destination is predominantly to mid-age, mid-market families, and that a number of attractions also appeal to, and attract, more upmarket mature people.

In the short-term, you must be realistic about what the city can deliver. Over the next 5 years the city’s visitor experience should improve dramatically: but for now, you should focus on consolidating and strengthening current markets. Based on this reality Portsmouth has two core domestic leisure market targets for the short-term:

- **Midmarket ‘High Street’ or ‘Populist’ families** for short breaks and day visits
- **‘Better-off High Street Empty Nesters’** (over 45s) with a very specific quality offer for short breaks and days visits year round. This will provide an opportunity to profile the cultural and more niche elements of Portsmouth.

These segments can be further segmented into:

- **Staying visitors** living within 2-3 hours’ travel time: London and the rest of the South East, as well as the urban centres to the west, and along motorway routes to the north
- **Day visitors** living within 90 minutes’ travel time
- **Day visitors** staying in the neighbouring areas.

Also, depending on resources:

- **Niche markets** - for example Conan Doyle or Dickens fans, naval history enthusiasts, specialists associated with a specific event, younger live music fans, football fans - could be researched and targeted with very focused activity, working with product partners and with other destinations where appropriate. However, it is important that the destination marketing team’s resources are not spread too thinly, and are focused on markets with the best potential ROI.

When it comes to deciding between domestic and overseas markets:

- The majority of effort and resource should be spent on the UK market, which is where the greatest opportunity lies.
Longer term - UK leisure

Portsmouth’s visitor-facing stakeholders aspire to attract more upmarket, younger segments for higher-spend short breaks to the city. The most upmarket segments - such as the Ark Leisure Cosmopolitans and the Cameo Groups A and B - are well-travelled, very discerning in their choices and have very high quality expectations. The competition is fierce – many destinations in the UK and overseas are targeting these segments.

At present, the city’s current visitor experience only delivers “pockets” of quality for more upmarket segments, so it is too early to shift marketing resources wholesale into tactical marketing to target them.

But - as the city is doing so well attracting the Ark Leisure High Streets already, and as this segment stretches across the lifestages and across the higher socio economic groups - we recommend that you aim to become the High Streets’ destination ‘par excellence’, shifting marketing upmarket, and adding in pre-family adults, as the product quality improves. So you should:

► Start to research the higher-end High Streets and Cameo Group 3 market segments now, to understand their characteristics and values, their trip-taking behaviour including motivations to travel, and their current perceptions of Portsmouth.

► Then use this market intelligence to inform and attract public and private sector investment in the visitor experience.

► When there has been enough improvement to the visitor experience to meet quality expectations, shift marketing resources so that you can re-position Portsmouth as a more upmarket, aspirational High Streets/Cameo Group 3 experience.

Overseas leisure markets

When it comes to overseas leisure markets, both in the short and longer term, we recommend that Portsmouth works with the rail operators, with the travel trade, with VisitBritain and with Visit London (in its “gateway” role), to position itself as an ideal day-trip destination for overseas visitors to London - already a huge market and now set to rise in the years running-up to and following the Olympic Games in 2012.

The over-riding appeal for overseas visitors is likely to be:

► the heritage offer - the naval history, the fortifications, the Old Town, the literary heritage, and the Victorian seaside resort

► and Portsmouth’s unique setting for this history/heritage offer: the vantage point of the Spinnaker Tower, and the other fantastic views from the waterfront restaurants and cafes at Gunwharf Quays, from the pubs on The Point, and from the ferries and pleasure boats.
Travel trade and groups

Some of the above key markets and niche markets may well travel independently, but book through a third party - so travel trade work could be part of the marketing activities to attract them - see Appendix 4 Marketing Plan “Visitor Communications”.

Other visitors will come in groups - from upmarket international coach tours and specialist associations on field trips to social clubs, hobby groups and school trips.

This is important business for Portsmouth's largest attractions and some hotels, and we recommend that the providers themselves take the lead on group travel marketing activities.

However, PCC should support this activity by developing a specialist section on the new destination website aimed at the travel trade and group organisers - see Appendix 4 Marketing Plan “Underpinning Activity”.

Business tourism and public-funded support

One of the key factors in business tourism is the extent to which it is discretionary or non-discretionary. Understanding this will guide the case - if there is one - for public-funded intervention and support.

Staying business visitors are extremely valuable: they bring spend into destinations throughout the year, outside peak leisure times. They are also significantly higher spending than leisure visitors.

Anecdotally, Portsmouth's hotel occupancy suggests that the city is well served with overnight business visitors during the week. We assume that most of this business is non-discretionary (e.g. an independent business traveller coming for a meeting with a client or supplier based in the area) rather than discretionary (i.e. a meeting or event which could take place in a choice of different locations, for which a venue and/or destination can compete).

Non-discretionary business tourism thrives when the local economy is doing well, so Portsmouth’s City Growth work and its regeneration plans should continue to maintain and strengthen this market.

Discretionary business tourism can be helped by specific public-funded intervention and support. Meetings buyers say that the critical success factors for destinations to win their business are:

- Location – including accessible geographic location and, for some, destination image
- Facilities – including venue capacity and quality
- Price and value for money.
So, the public-funded agencies can support discretionary business tourism by:

- providing the right investment environment to achieve the right facilities
- branding and re-positioning the destination
- providing marketing support for suppliers.

In some cases, public funding is used to develop major new meetings spaces, and then to subsidise running costs - sometimes offering free or discounted meeting space facilities and other incentives to business events that will have a significant economic impact. These cases are increasingly rare in the UK, as cash-strapped local authorities struggle to justify such subsidies. Some of PCC’s stakeholders are lobbying for new public-funded conference facilities: this was mentioned in the City Growth strategy work and in our discussions with stakeholders. To deal with this question, a feasibility study is needed to look at the potential for this - and to make the case either for or against public investment.

For destinations with the potential (i.e. the right meetings facilities, accommodation quality, range and price, location and image) to attract significant discretionary business tourism, a properly resourced conference desk can play a vital role servicing the industry, strengthening industry partnerships (formal and informal), providing expert first-hand authoritative and impartial advice for buyers, organising the support infrastructure for large events, presenting and marketing the destination as a coherent whole, and hosting buyers on familiarisation visits.

But running a conference desk is a significant investment. Further research is needed into the nature of Portsmouth’s business tourism, the needs of suppliers, and the feasibility for developing the city’s facilities, in order to establish what level of intervention and support – if any - PCC should provide.
8 EVALUATION PRINCIPLES

PCC needs to evaluate its marketing systematically, to ensure effectiveness, to justify public funding, and to keep other funding partners on board.

We recommend you adopt the following principles:

▶ Ensure targets (both outputs and outcomes) are clearly defined.

▶ Campaign outcome targets should be realistic and related to the strategic aims of the campaign. An ROI (return on investment) of around 1:10 for new acquisition and 1:20 for repeat business is reasonable.

▶ Evaluate outcomes on channel-based research (as opposed to the Cambridge model or UKTS/IPS, which are used to assess the overall economic impact of tourism). This means assessing response and conversion to the media channels used, asking questions to accurately measure the impact of the activity on decision taking and behaviour.

▶ Conversion research - on both brochures and websites - needs to focus on assessing additionality. It should be asking questions about:
  • Intentions to visit
  • Whether they have visited before, and how many times (preferably within a defined period such as 5 or 10 years)
  • Whether visitors had already planned to visit before receiving a brochure / visiting a website
  • Did the brochure /website influence their decision to visit
  • Whether they had used any other marketing material.

▶ Output targets should ideally be SMART (specific, measureable, achievable, realistic and time-limited) and linked to strategic aspirations. For example potential output measures could include:
  • Brochures distributed – broken down by a number of categories such as in response to advertising, by direct mail, through TICs (in Portsmouth, in region, out of region).
  • Databases – number of new contacts (by segment), proportions receiving different brochures
  • PR activity – number and value of articles, broken down in relation to target segments.
  • Webhits – broken down by unique visitors over an annual period, browse times
  • Web bookings.

▶ Do web-based research on how consumers are using the website.
9 RESEARCH RECOMMENDATIONS

Research is now needed to inform product development and marketing priorities.

Research of leisure visitors - non-visitors as well as visitors - should explore:
- The image of Portsmouth and its destinations among target segment(s)
- The motivation and buying behaviour of those segment(s)
- The most-effective ways to reach those segments
- The most-effective images and words to use
- Their expectations and the product development needs arising.

Business tourism research should establish:
- The current profile of business tourism to Portsmouth
- Assessment of discretionary/non-discretionary
- Its potential - including return on investment of any public-funded intervention
- A ‘gap analysis’ of venues, accommodation and other services and facilities
- A feasibility study for new conference facilities (see page 29).
Appendix 4
Portsmouth City Council: Destination Marketing Plan 2008-2010

1 INTRODUCTION

This Plan is to guide the destination marketing activity of Portsmouth City Council over the next 3 years, targeting leisure visitors.

The Marketing Strategy presents a number of options for the role that PCC could take with its stakeholders. We recommend that PCC:

- Focuses its resources on doing a few things exceptionally well in those areas where they can make most difference.
- Takes a co-ordinating role with its industry, aligning marketing efforts.
- Provides a channel to market for all businesses through a Destination Management System (DMS).
- Provides the infrastructure via the DMS for businesses to build relationships with customers and encourage repeat business.
- Undertakes targeted marketing activity to attract new visitors to the city.

To deliver this we have identified actions in 3 areas:

- **Underpinning activity** (pages 3-4)
- **Visitor communications** (pages 5-10)
- **Stakeholder engagement** (pages 11-12).

* See the Marketing Strategy and Strategic Priorities documents for guidance on PCC’s approach to business tourism.
### 2. **THE PLAN ‘AT A GLANCE’**

#### UNDERPINNING ACTIVITY

<table>
<thead>
<tr>
<th>Activity</th>
<th>Measures</th>
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<td>Research</td>
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<td>E-business</td>
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#### VISITOR COMMUNICATIONS

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<td>Web&lt;br&gt;E-marketing&lt;br&gt;Kids’ club&lt;br&gt;Viral marketing&lt;br&gt;Attractions print&lt;br&gt;Events print</td>
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<tr>
<td>High Street Empty Nesters</td>
<td>Portsmouth – The Waterfront City</td>
<td>PR&lt;br&gt;Direct Mail&lt;br&gt;E-marketing</td>
<td>Seasonal print&lt;br&gt;Web&lt;br&gt;E-zines</td>
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<tr>
<td>Overseas visitors to London</td>
<td>History by the sea</td>
<td>Joint promotions with key partners&lt;br&gt;Fam trips&lt;br&gt;PR</td>
<td>Partners’ collateral&lt;br&gt;Microsites</td>
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#### STAKEHOLDER ENGAGEMENT

<table>
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<tr>
<th>Activity</th>
<th>Tactics</th>
<th>Outputs</th>
<th>Measures</th>
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<tr>
<td>Key players</td>
<td>Marketing Forum</td>
<td>Meetings - focusing on marketing planning E-communications</td>
<td>Support&lt;br&gt;Buy-in to campaigns&lt;br&gt;Alignment of marketing</td>
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<tr>
<td>Tourism businesses</td>
<td>Communications programme</td>
<td>Annual conference&lt;br&gt;Networking events&lt;br&gt;Annual report&lt;br&gt;Quarterly newsletter&lt;br&gt;Regular e-bulletins&lt;br&gt;Industry website</td>
<td>Buy-in to campaigns&lt;br&gt;Alignment of marketing</td>
</tr>
</tbody>
</table>
3 UNDERPINNING ACTIVITY

PCC should lead on:

- Commissioning, analysis, interpretation and dissemination of **visitor and market research** to partners and stakeholders:
  - Extensive research has been, and will continue to be, undertaken by VisitBritain, Tourism South East and the Hampshire sub-regional partnership. This provides valuable market insights for tourism businesses. PCC should interpret and present this to its businesses, highlighting the most relevant points for Portsmouth.
  - Where appropriate, commission Portsmouth-specific research - alone or with partners (see Section 9 of the Marketing Strategy).

- Getting under the skin of **target markets** - and sharing insights with the local visitor industry:
  - In tandem with the above market research programme, PCC marketers need to ‘live and breathe’ the target markets - eg observing focus groups, reading/watching/consuming the media used by the target market, attending marketing conferences and courses specialising in the target markets, understanding the extent that they use new technology for travel inspiration and information, looking at how other products and brands position themselves to the targets, learning from industry partners in the city and the region who specialise in these markets. This is particularly true for marketing to ‘tweenies’ (see Section 4 - High Street families).

- Establishing the **new technology platform** to provide an online channel to market for Portsmouth’s tourism businesses:
  - There are new opportunities to benefit from existing destination management systems at a relatively low cost, via Tourism South East and/or via the sub-regional partnership
  - The technology platform should enable PCC to develop the website, and to improve e-marketing capabilities. This includes incentivised online registration to collect customer information, and building customer email databases
  - And it should enable Portsmouth suppliers (attractions, accommodation, events etc) to enter and update their own information and availability
  - The destination marketing team needs to keep up with potential visitors’ use of new technology and develop its knowhow and use of new media including SMS alerts, mobile marketing, social networks (Web 2.0), e-newsletters and viral marketing.

- Production and dissemination of **branding guidelines**: 

To align the branding of Portsmouth requires consistent use of the key messages/images and Waterfront City branding by all partners. PCC should produce and promote a brand toolkit for the tourism sector with logos, colours, fonts etc as well as suggested styles for look, feel and copy.

Establishing an **image and copy bank**:

- Building on the high quality images and copy in the current holiday brochure, PCC should produce a bank of top-quality images of Portsmouth which will appeal to the priority segments and are available with low or no usage fees for tourism businesses.
- A copy bank should also be produced, again with the target segments in mind, for use by all businesses in selling what Portsmouth has to offer in their promotional activity.
4 VISITOR COMMUNICATIONS

We recommend that PCC focuses on two major UK leisure campaigns for the city – one promoting to families and the other to empty-nester couples. We have also included recommendations for an overseas campaign - targeting day visitors from London - but only if resources allow. NB the two UK campaigns will have a significantly higher ROI and should take priority when it comes to resources.

UK leisure targets

Visitor research by Tourism South East shows that Portsmouth is outstandingly successful as a destination for High Streets (one of the ArkLeisure values-based segments developed for VisitBritain - see Appendix 6). High Streets comprise 18% of the UK population, yet 47% of Portsmouth’s leisure visitors fall into this segment. We recommend High Streets as the priority segment for Portsmouth because:

- There is an excellent product/market fit
- High Streets are over-represented in the Greater London area, in ideal proximity to Portsmouth
- High Streets are influenceable
- They have a high propensity to take breaks
- They are willing to spend and are not particularly price-sensitive
- They are an active segment, willing to try new things and moderately interested in arts and culture
- Most other destinations are not concentrating on High Streets, so there is an opportunity for Portsmouth to become “the High Streets’ favourite destination”
- High Streets are one of the three key segments for the Enjoy England campaigns (VisitBritain’s campaigns promoting leisure breaks in England to the British).

We have also drawn on TSE’s Cameo geo-demographic profiling. This will help in geographic targeting and media choice. The Cameo system divides households into groups from 1-10, with 1 the highest and 10 the lowest socio-economic group. We recommend targeting groups 3 and 4, which are relatively upmarket groups and where Portsmouth indexes well. Certain categories of groups 5 and 6, which are less affluent, are also worth attention as secondary markets.

<table>
<thead>
<tr>
<th>Cameo Group</th>
<th>% of UK population</th>
<th>% of Portsmouth’s visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 3 (Affluent home-owning couples &amp; families in large houses)</td>
<td>10.14</td>
<td>14</td>
</tr>
<tr>
<td>Group 4 (Suburban homeowners in smaller private family homes)</td>
<td>13.88</td>
<td>15</td>
</tr>
<tr>
<td>Group 5 (Comfortable mixed tenure neighbourhoods)</td>
<td>8.7</td>
<td>10</td>
</tr>
<tr>
<td>Group 6 (Less affluent family neighbourhoods)</td>
<td>14.14</td>
<td>18</td>
</tr>
</tbody>
</table>
Campaign 1: Portsmouth – The Waterfront City for families

Target Market:
- High Street Families with children aged 5 -14
- Cameo Groups 3 (B,C,D); 4 (A,B,C,E); 5 (A,B,D,F); 6 (D,F)
- living within 2 hour drive time of Portsmouth

Positioning:
“There is so much to do in Portsmouth to keep the whole family entertained. Scale the dizzy heights of the Spinnaker Tower and test your courage on the glass floor; ‘set sail’ on the Mary Rose and the Victory – or take a real sail around the harbour; dive into the Blue Reef Aquarium; and play on the beach. And for those who enjoy a bit of retail entertainment – visit Gunwharf Quays designer outlet or the independent shops in Southsea. If you’re into football, a visit to Fratton Park to see Pompey at home might be just the thing to arouse passions. Or come for a special event like the Kite Festival in August or the Christmas Festival.”

Offer:
- Day visits – weekend and holidays
- Weekend breaks – all year

Tactics:
Activity will depend on resources but ideally would include a 2-pronged approach - marketing to adults with kids, and marketing direct to tweenies (8-14 year olds)^

To adults with kids:
- PR & press trips. The bulk of resource should go to PR - using both online and traditional media. A dedicated PR agency should be appointed with a brief to target High Street families via mid-market newspaper and women’s magazine titles (profiled against target Cameo groups). PCC to focus on establishing relationships with product partners to host and provide in-kind support; and follow-up.
- Press advertising (profiled against target Cameo groups). Small-space ‘clever” ads to achieve cut-through showing Portsmouth as a fun, fashionable place for families with lots to do.
- Radio advertising with local commercial radio stations in target areas running at same time as press advertising to reinforce the message and increase impact
- Joint Family campaigns with Enjoy England and Tourism South East
- E-campaign to previous enquirers and those signing up on the web site
- Use a specialist agency for Web 2.0 and mobile marketing work as appropriate with this market.

Direct to tweenies:
- If resources allow, use a specialist agency
- Set up a tweenies’ panel to generate and test marketing and product development ideas
- Product placement online and on kids’ TV

^
PCC marketers need to familiarise themselves with the ethical issues around marketing to children to ensure responsible marketing to these current and future consumers, who are highly influential on family leisure spend
Joint marketing with tweenie-targeting partners - both in the city and appropriate brands.

Tweenie-focused events, with appropriate themes and celebrities - both to attract visitors on the day, and to generate PR in tweenie media.

**Partners:**
- Branded hotels providing inclusive family offers (3 nights for the price of 2 mid-week in holidays; value weekend breaks in the off-peak months)
- Attractions
- Restaurants
- Gun Wharf Quays
- Family-oriented attractions within and beyond the city
- Rail operators
- Destination partners - work with other destinations that appeal to High Streets to joint promote, share resources and tactics
- Brand partners - specific consumer brands that appeal strongly to the target segments

**Fulfilment:**
- Web. Dedicated, clearly signposted pages for the 'sell' to families, giving ideas, special offers and information for families (facilities, opening hours, restaurants, attractions etc). Regular up-dating.
- Develop ‘48 hours’ idea (used in current print) but focused on families and use on the web, PR and other communications. Develop ‘24 hours’, ‘12 hours’ and ‘6 hours’ too. Also separate for young children (under 8s) and older (8-14s). Include side suggestions for parents/grandparents; and rainy-day options.
- E-newsletter/e-bulletins
- Information print supplied by attractions available at Visitor Information Centre
- Events programme available on-line and printed versions at VIC

**Direct to tweenies:**
- Focus on new media: specialist microsite with a kids’ club, e-comic/e-zine, blogs, competitions, online scrapbook, viral marketing, mobile marketing

**Timing:**
- Annual campaigns running each year 2008, 2009 and 2010
- PR activity year round
- Advertising 1 month prior to school holidays
- E-marketing activity:
  - 1 month prior to school holidays/bank holidays - continuing into long summer holiday (first 2 weeks)
  - 1 month prior to events
- Offer related
- Event related

**Measurement:**
- Track visits to web site and match against advertising/PR activity
- Conversion research among visitors to web sites
- Profiling of converters (ArkLeisure and Cameo) to measure impact of targeting
- Evaluation undertaken by Enjoy England and TSE of their campaigns
- Increase in business tracked by partners
Campaign 2: Portsmouth – The Waterfront City

Target Market:
- High Street Empty Nesters - couples and friends
- Cameo groups 3 (A,B,C,D); 4 (C,D,F); 5 (C,G); 6 (B,E)
- living within 2-hour drive time of Portsmouth
- or taking holidays or breaks within 1-hour drive of Portsmouth

Positioning:
“Come and find out what’s been happening in Portsmouth – the UK’s only island city. You can see for miles from the top of the elegant Spinnaker Tower. Down below are the wide promenades of Gunwharf Quays, the cobbled streets of Old Portsmouth, and the fascinating history of the Mary Rose, the HMS Victory and the HMS Warrior. Aspex, Portsmouth’s new art gallery on the waterfront, specialist shopping in Southsea, a wander along the Millenium Promenade by the sea, out to The Point for a pint at the harbour entrance, and on to our 12th century Cathedral and our 19th century Gothic Cathedral, a ferry trip across the harbour, then shopping and supper on the waterfront as the sun goes down, and some theatre or live music in the evening - there’s more than enough to happily fill a day or two.”
- We suggest there is an opportunity to make more of Portsmouth being an island city as a unique feature.

Offer:
- Day visits from home, or when staying elsewhere but within 1 hour’s drive – weekends and weekdays
- Weekend breaks – all year
- Mid-week breaks off-season

Tactics:
Activity will depend on resources but ideally would include:
- PR & press trips. Again the bulk of resource should go to PR with a brief to the dedicated PR agency. Focus should be on independent guide books and mid-market newspapers. Similarly PCC focus is on establishing relationships with product partners to host and provide in-kind support; and follow-up.
- Direct mail. Mail pieces to previous enquirers/responders. Additional lists bought against post code profile.
- E-marketing.
- Joint campaigns with TSE and Hampshire sub-region.

Partners:
- Hotels and quality guest houses
- Attractions
- Gunwharf Quays
- Historic Dockyard and other museums
- Independent retailers
- Collaboration with New Forest, Chichester and Winchester to tap into their staying visitor markets, offering Portsmouth as a day out to enhance their offer (and vice versa)
Fulfilment:
- Website clearly signposted “for the grown-ups” with appropriate images, copy and ideas
- Web - use ‘6 hour’, ‘24 hour’ and ‘48 hour’ approaches for tailored suggestions to these segments
- E-zines
- Seasonal print – autumn/winter and spring. Short focused guides available as e-brochure to download and as printed brochure in response to advertising and direct mail.

Timing:
- Seasonal campaigns running spring/autumn 2008, 2009 and 2010
- PR activity year round
- Advertising and e-marketing early spring and late summer

Measurement:
- Track visits to website and match against advertising/PR activity
- Requests for print
- Responses to direct mailing
- Conversion research among visitors to web sites and requesters for print
- Profiling of converters (ArkLeisure and Cameo) to measure impact of targeting
- Evaluation undertaken by TSE of their campaigns
- Increase in business tracked by partners
Campaign 3: History by the sea

Target Market:
Overseas visitors to London

Positioning:
“Less than a couple of hours from central London by rail, you’ll find a waterfront city steeped in history, with views to take your breath away. By Portsmouth’s historic harbour, there are cobbled streets with traditional pubs and tea shops, waterfront restaurants and contemporary shopping, a 12th century Cathedral, and great walks along the harbour walls. Here you can visit England’s most fascinating maritime history - King Henry VIII’s Tudor warship the Mary Rose, and Admiral Nelson’s famous flagship the Victory. Here too is the birthplace of Charles Dickens, and where Conan Doyle created the world’s most famous detective Sherlock Holmes. For stunning views, go up the elegant sail-like Spinnaker Tower - the tallest publicly accessible structure in the UK - or take a ferry across the Harbour. A day trip couldn’t be simpler: step on the train at Waterloo (direct services every half hour), and off at Portsmouth Harbour - right on the quayside - and breathe in the sea air.”

Offer:
Day visits from London, year-round, but especially spring to autumn

Tactics:
Activity will depend on resources and partners’ plans, but ideally would include:
- Familiarisation trips for VisitBritain staff: Britain & London Visitor Centre frontline staff, overseas on-territory staff and the Enjoy England (Europe Marketing) team
- Hosted PR visits for overseas journalists and independent guidebook writers, especially London guidebooks (for the ‘day out of London’ sections) - mainly via VisitBritain and TSE
- Joint promotions in London with South West Trains, including tube posters
- Joint promotions with BritRail Pass
- Promotion to inbound tour operators and ground handlers - via VisitBritain and UKInbound (formerly BITOA)
- Inclusion in VisitLondon’s online marketing as a day trip destination
- Tactical use of online social networks.

Fulfilment:
- Partners’ collateral
- Microsites specific to overseas visitors and in a range of languages - linked to South West Trains, BritRail Pass, VisitBritain and Visit London websites

Timing:
- Spring to Autumn

Measurement:
- Positive press and guide book coverage
- Portsmouth included in tour operators’ programmes
- Track visits to specialist microsites for overseas visitors
- Trend of percentage of overseas visitors to VICs and attractions.
5 STAKEHOLDER ENGAGEMENT

PCC needs a step change in its relationship with the tourism industry, and running an effective destination marketing programme with opportunities for industry buy-in is an ideal way to do this.

This will mean shifting resources - especially staff time - into stakeholder engagement. It is vital that this is done professionally and consistently: this should be a new era of real partnership between the council and the city’s visitor-facing businesses.

We recommend two planks to engaging stakeholders in destination marketing:

- Marketing Forum of key players
- Communications programme with all Portsmouth tourism businesses

The impact and success of the stakeholder engagement programme should be measured through:

- Buy-in to PCC visitor campaign activity
- Adoption of branding guidelines
- Business perception and satisfaction levels measured through a bi-annual survey.

Activity 1: Visitor Marketing Forum

PCC should bring together the key tourism players with marketing clout - ie the major attractions and hospitality businesses - to form the Portsmouth Visitor Marketing Forum. Representatives on the new Visitor Marketing Forum should be sufficiently senior to speak with authority on behalf of their organisations, to influence the strategic marketing direction of their organisations, and to commit budget. The Forum should be coordinated and facilitated by PCC.

The aim of the Forum is to:

- Input to and inform the visitor marketing campaigns run by PCC
- Ensure visitor marketing is aligned with the City Growth Strategy
- Explore and establish marketing collaboration among private sector partners and between private sector partners and PCC
- Identify potential niche marketing opportunities - likely to be mainly resourced by partners, possibly with seedcorn funding from PCC if resources allow.

Meetings should be organised and run by PCC - although the Forum could be chaired by a private sector champion. To keep industry stakeholders engaged, the meetings need to be very focused and facilitated in a lively and professional way to get maximum input from all the partners. Some initial team-building work may be appropriate.
The Visitor Marketing Forum should support PCC in designing and selling marketing opportunities for businesses to buy into PCC’s campaigns. (This will replace the Visitor Guide, which is currently the only opportunity businesses have to invest in Portsmouth’s destination marketing.)

**Activity 2: Stakeholder Communications Programme**

To secure alignment of branding and marketing communications, PCC must engage with tourism businesses. To achieve this we recommend a communications programme which will:

- Provide advice and guidance to tourism businesses on market trends, product development needs and marketing opportunities
- Inform the industry about PCC campaigns and activity
- Disseminate appropriate visitor and market research
- Encourage participation in visitor marketing campaigns and the website
- Influence investment in product development
- Promote use of brand guidelines and branding communications

The programme should include:

- An annual conference to present on PCC activity and marketing opportunities, topical subjects and a range of speakers and presentations
- Networking events (up to four per year) with a focus on specific topics
- An annual report to stakeholders
- A quarterly e-newsletter
- Regular e-bulletins
- An industry section on the website with research results, image and copy bank, marketing opportunities and other information.
Appendix 5: Some Perceptions of Portsmouth

WHAT THE INDEPENDENT GUIDE BOOKS SAY

LONELY PLANET ENGLAND, 2007

- Introduction to The Southeast Coast has a panel of 7 highlights which includes: “Clambering aboard mighty warships in the historic naval dockyard of Portsmouth”

- Introduction to Hampshire includes: “… The coastline is rich in maritime history, not least at Portsmouth, home of the once-mighty Royal Navy …”

- 5 pages devoted to Portsmouth, including a large street map.

- Sights & Activities: Spinnaker Tower, PHD (Victory, Mary Rose, HMS Warrior, Royal Naval Museum, Trafalgar Sail Exhibition, Action Stations), Gosport (Royal Navy Submarine Museum, Explosion), the Point, the Cathedral, Blue Reef, D-Day Museum, Southsea Castle, Royal Marines Museum, Charles Dickens’ Birthplace.

- Intro: “Be sure to swash those buckles and practice your salty sea-dog arrs before arriving at this brawny harbour city … its historic dockyard ranks alongside Greenwich as England’s most fascinating centre of maritime history.”

- “… Portsmouth is by no means a city noted for its beauty … soulless postwar architecture and surprisingly deserted waterfront promenades can leave a melancholy impression. An array of museums justify an overnight stay for naval nuts … the suburb of Southseas boasts some fair beaches, bars and good restaurants.”

- Gunwharf Quays: “Regeneration at the nearby GWQ has added new glitz to its scurvy-riddled waterfront …”

- Spinnaker: “A spectacular millennium-inspired structure, the Spinnaker Tower … with views to knock the wind from its critics’ sails … Portsmouth’s unmistakeable new seamark and symbol of the city’s newfound razzle-dazzle … the tallest publicly accessible structure in the UK … some truly extraordinary views … below … wide people-watching patios and promenade dotted with palm trees.”

- PHD: “… a real bobby-dazzler … three stunning ships … a full day’s outing, though you may spend much of your time swimming through a tide of school children …” HMS Victory “as resplendent as she is venerable”; Mary Rose “equally thrilling …a ghostly image that could teach Hollywood a few tricks”
Old Portsmouth: “… a cluster of sea-worn, atmospheric buildings around the old
harbour … a world apart [from GWQ] in atmosphere …the characterful cobbled
streets of Old Portsmouth, populated by salty-dog pubs with outdoor seating
ideally positioned …”

Blue Reef: “unusually hands-on …”

Charles Dickens’ Birthplace “where the author drew his first breath … and
breathed his last …”

Southsea is recommended for B&Bs and for eating out, and for entertainment
“Southsea is thick with nightclubs and live-music venues”. GWQ for bars/cafes.

ROUGH GUIDE TO ENGLAND, 2006

Introduction to Hampshire, Dorset & Wiltshire: “… Its towns are generally
modest and slow-paced, with the notable exceptions of the two great maritime
bases of Portsmouth and, to a lesser extent, Southampton, a fair proportion of
whose visitors are simply passing through on their way to the more genteel
pleasures of the Isle of Wight. This is something of an injustice, though neither
place can compete with the two more interesting cities in this part of England -
Salisbury and Winchester.”

Then 6 pages devoted to Portsmouth, including city centre map, >1 page re the
Royal Naval Base, and full-page photograph of HMS Victory. The impression is
plenty of heritage along the waterfront, and a city with an impressive history
going back to Roman times (re Portchester Castle - “the finest surviving Roman
walls in northern Europe”).

“… nowadays Portsmouth is a large industrialized city, its harbour clogged with
naval frigates, ferries bound for the continent or the Isle of Wight, and swarms of
dredgers and tugs … bland tower blocks … now give the city an ugly profile.
Only Old Portsmouth … preserves some Georgian and a little Tudor character…
Southsea, a residential suburb of terraces with a half-hearted resort strewn
along its shingle beach, where a mass of B&Bs face stoic naval monuments and
tawdry seaside amusements.

“Finding a bed for the night presents few problems in Portsmouth …”

“For most visitors, a trip to Portsmouth begins and ends at the Historic Ships in
the Royal Naval Base … “

Complementary about Spinnaker Tower “the elegant sail-like structure …
offering stunning vistas for up to 20 miles over land and sea” and “the sleek
Gunwharf Quays development’ and Old Portsmouth “a maze of cobbled
Georgian streets huddling behind a 15th-century wall protecting the old port.”

“Portsmouth has a small and fairly unremarkable range of restaurants …”
FROMMER’S ENGLAND 2006 (US)

- 16 pages listing “The best of England” - no mention of Portsmouth
- Planning your trip: “Portsmouth and Southampton loom large in naval heritage ...”
- 9 pages listing Suggested England Itineraries - no mention of Portsmouth
- Introduction to “Hampshire & Dorset: Austen and Hardy Country” - “If you’re interested in things maritime, opt for Portsmouth, the premier port of the south ...”
- 4 pages on Portsmouth & Southsea: “… German bombers leveled the city, hitting about nine-tenths of its buildings. But the seaport was rebuilt admirably and now aggressively promotes its military attractions. It draws visitors interested in the nautical history of England as well as WWII buffs. Its maritime associations are known around the world ...”
- “Southsea … a popular seaside resort with fine sands, lush gardens, bright lights, and a host of vacation attractions.”

FODOR’S GREAT BRITAIN 2006 (US)

- Opens with “What’s Where” summary - Under “The South” (as opposed to “The South East” and “The West Country”: “The only cities of any size - Portsmouth and Southampton - are largely uninspiring except for some great museums such as the PHD, so don’t come here if you’re looking for an urban scene.”
- Great Itineraries - no mention of Portsmouth
- “Exploring the South” chapter intro “… the self-important bustle of Southampton and Portsmouth. You may not want to spend much time in these two ports; instead, spend your nights in the more compelling towns of Salisbury and Winchester.”
- Suggests a 3-day itinerary (no Portsmouth) or a 7-day itinerary “Portsmouth … to take in its historic ships and the Royal Naval Museum ...”
- Portsmouth - 2.5 pages
- “This industrial, largely charmless city ... has an extraordinary collection of maritime memorabilia ... Bear in mind that much of the city is not particularly pleasant ... Still the newly developed GWQ and the soaring Stower are indiciations that better days may lie ahead for this weary old coastal town.”
PHD: “an unrivaled collection of historic ships …”

ST: “thrilling all-round views”

ONLINE TRAVEL SITES WITH USER-GENERATED CONTENT

WIKITRAVEL

‘Wikitravel’ is the travel part of Wikipedia, the on-line encyclopaedia with content entirely generated by users. This is what it has to say about Portsmouth:

“Portsmouth (pronounced “ports-muth”, and nick-named "Pompey") is a city that is well worth a visit for those interested in British Naval history or British history in general.

See:
The Historic Dockyard,
Spinnaker Tower,
Southsea Castle,
Southsea Sea Front,
Royal Marines Museum
The Cathedral
D Day Museum
Sea Life Centre (southsea seafront)
Southsea model village (seafront)
Southsea Rose garden
Charles Dickens Birthplace (museum, Charles Dickens ward, near the city centre)
Cumberland House Museum
City Museum

Experience:
Clarence Pier - A small fairground close to the Hoverport with some rides and amusement arcades, if you like the classic English tat.
Relax on Southsea Common

If you like a bit of night life there are three parts of town you should visit;
The Gunwharf is a great upscale place to eat and drink but can be a little pricey- but the clubs are becoming more dodgy whilst still being expensive
Albert Road is the student part of town where adventures and Indian restaurants abound.
The lesser known but nicer is Palmerston Road by the Commons (grassy areas) in south Portsmouth has some nice bars and restaurants. Some nice restaurants, but the bars/pubs and Chicago Rock aren't the best.

As with most other large English cities, there is a problem with violence around the city-centre and sea-front around pub and club closing times (i.e., around 11pm and 1.30/2am), although with a little common sense the risk is minor.”

**THE THORN TREE FORUM - LONELY PLANET**

Travel websites with user forums have very little discussion about Portsmouth, if any at all. The Thorn Tree Forum on the Lonely Planet website has more than most (and the content is consistent with Frommers, Virtual Tourist and others). The Thorn Tree reveals the following – good and bad about Portsmouth:

*We will be travelling over from Spain in a few months time to get a boat from Southampton. My husband would love to see the area of Cornwall which seems to have beautiful countryside, but we only have one day and one night.*

“There’s lots to do in Southampton if you like boats - titanic museums and walks, tall ships at the Portsmouth dockyards, boat trips to the Isle of Wight - but honestly I don’t think you’d regret missing them unless you are a nautical nutcase.”

“Personally I would fly into Southampton and spend the day seeing the New Forest or the Isle of Wight.”

“If you’re stuck in Southampton looking for something to do - go to Winchester.”

Does anyone have any ideas for weekend days out from Surrey in the winter?

“Boats in Portsmouth are open all year round I believe. Go for a drink in old Portsmouth afterwards and pick up some fresh fish from the harbour fish stall to take home”.

“Yesterday we went to the Historic Dockyards at Portsmouth. What a fantastic and underrated destination.”

“The Historic Dockyards are indeed fantastic, I think they don’t get much publicity cos Portsmouth itself is not seen as a tourist destination. The boat trip around the harbour is also very interesting.”

*We're visiting the UK for the first time in September and have heard so much about the beautiful Devon & Cornwall coast as well as Somerset and other south coast areas we thought we would spend maybe 6 days there.*

All suggested…”Charmouth, NewForest, Wimborne Minster, Dorchester, Lyme Regis, Lulworth Cove, Glastonbury, Ilminster…”
“I'd avoid Southampton and push on to Portsmouth ..... You get quick access to the IOW plus you get Portsmouth to experience. Albert Rd has some great pubs & curry houses, it has a fair on the beach, the commons are great and then there's Gunwharf for all of your designer shopping.”

“I wouldn't bother too much with either Southampton or Portsmouth, maybe a day in each max. (Though some of the towns in the area are nice, Chichester being one)”

“But Portsmouth's naval Museum is a DO NOT MISS. The Mary Rose and Nelsons ship Victory are stunning. Allow at least half a day if not more there.”
Appendix 6: ArkLeisure and Cameo

ArkLeisure High Streets

ArkLeisure segmentation was developed for VisitBritain’s domestic leisure marketing work and is being used by Tourism South East to segment the market to destinations in the region. It classifies people in the UK into 8 segments according to their values and attitudes, ‘plotting’ them on two axes according to the degree to which they are internally or externally referenced, and the degree to which they like to try new things or are more conservative.
This is a summary of the Arkleisure High Street segment provided by the system’s originators, Arkenford. NB Since this summary was published, we understand that the segment size has been adjusted to 18%.

High Street Segment

The High Street segment are generally externally referenced. They are interested in fashion brands. Style is more important than functionality or individuality. 
This is born out by the fact that they care what others think, which may hold their choice back a little. They will not be the first to adopt but are keen to follow along when a fashion has been established.
They will adopt products and services earlier than most, and are prepared to spend money on getting a good service. They are prepared to try new and different things, although these are likely to have been tested by others and are therefore experience that are new to them as individuals as opposed to new to the market.
They are an active segment moderately interested in intellectual pursuits, arts and culture.

Source: UKTS Recontact Survey 2002/2003
Cameo segments

Cameo has been developing its segmentation systems since 1991 and is used by hundreds of global companies as an integral part of their marketing planning. Cameo uses postcode analysis to segment the UK population into 57 categories, clustered under 10 main groups. These go from 1 (highest socio economic group) to 10 (lowest). The Cameo system gives us information on:

**Demographics:**
- Adult Age & Child Age
- Marital Status
- Family Composition
- Ethnic Origin
- Social Group

**Economic Activity:**
- Employment Status
- Occupation & Sector
- Qualifications
- Shareholdings
- Directorships
- County Court Judgements

**Housing:**
- Housing Tenure
- Housing Type & Size
- Length of Residency
- Geographical Area
- Council Tax Band
- House Price
- Population Density

**Lifestyle:**
- Newspaper Readership
- Internet Usage
- Mail Order Responsiveness
- Car Ownership
- Transport to Work
TSE uses Cameo segmentation and has given some guidance on current Cameo segments visiting Portsmouth.

We are recommending that Portsmouth chooses segments from the following 4 Cameo Groups (see UK campaigns descriptions in Section 4 of this report for the individual categories):

**CAMEO GROUP 3: AFFLUENT HOME-OWNING COUPLES & FAMILIES IN LARGE HOUSES**

**Overview:**
- Couples and families reaching the pinnacle of their careers
- Most live in mortgaged or owned large detached and semi-detached properties in rural areas
- Children of all ages at home
- Most households have at least 2 or 3 cars
- From professional and white collar through to senior positions in blue collar and rural trades
- Tend to be low risk and receptive to appropriate direct mail and mail order services Internet usage is high
- Regional newspapers are frequently read alongside quality titles.

There are four categories in this group:

3A: Wealthy Older Families In Spacious Suburban & Rural Detached & Semis
3B: Young & Mature Couples & Families In Large Rural Dwellings
3C: Well-Off Older Couples & Families In Large Detached & Semis
3D: Wealthy Mixed Households Living In Rural Communities

**CAMEO GROUP 4: SUBURBAN HOME OWNERS IN SMALLER PRIVATE FAMILY HOMES**

**Overview:**
- Live in (mainly mortgaged) smaller less expensive semi and detached properties in small towns and pleasant suburbs
- A mix of couples, singles and families.
- Most are in professional, white and blue collar employment
- Car ownership is high
- They read a mix of newspapers.

There are six categories in this group:

4A: Executive Households In Suburban Terraces & Semi’s
4B: Professional Home Owners In Detached & Semi Suburbia
4C: White Collar Home Owners In Outer Suburbs & Coastal Areas
4D: Mature Owner Occupiers In Rural & Coastal Neighbourhoods
4E: Couples & Families In Modern Rural & Suburban Developments
4F: Mature Couples & Families In Mortgaged Detached & Semi’s
CAMEO GROUP 5:
COMFORTABLE MIXED TENURE NEIGHBOURHOODS

Overview:
- Mainly homeowners in lower quality smaller detached and semi-detached properties or flats
- Dominated by couples and singles with some retired elements and family groups
- Rural neighbourhoods, small towns and suburbs
- Work in white collar and manual trades, with some rising up the professional ladder.

There are seven categories in this group:
5A: Singles, Couples & School Age Families In Mixed Housing
5B: Young & Older Single Mortgagees & Renters In Terraces & Flats
5C: Mature & Retired Singles In Areas Of Small Mixed Housing
5D: Young & Older Households In Coastal, Rural & Suburban Areas
5E: Mature Households In Scottish Industrial Suburbs & Rural Communities
5F: Young & Older Households In Areas Of Mixed Tenure
5G: Older Couples & Singles In Suburban Family Semi's

CAMEO GROUP 6:
LESS AFFLUENT FAMILY NEIGHBOURHOODS

Overview:
- Live in moderately priced semi-detached and terraced properties in small towns and suburbs
- Typically family areas - although some co-habiting and singles
- Less affluent and less educated than those in Group 5
- Either starting out in their careers, bringing in a single income to support a family or working in lower paid positions
- Frequent users of the internet
- Purchase from catalogues.

There are seven categories in this group:
6A: Less Affluent Communities In Areas Of Mixed Tenure
6B: Older & Mature Households In Suburban Semi's & Terraces
6C: Mixed Households In Mostly Welsh Suburban Communities & Rural Areas
6D: Couples & Families With School Age & Older Children In Spacious Semi's
6E: Mature Households In Less Affluent Suburban & Rural Areas
6F: Less Affluent Couples In Suburban Family Neighbourhoods
6G: Young Single & Family Communities In Small Terraces & Rented Flats