BLUE SAIL

VISITORS PLACES DESTINATIONS

PORTSMOUTH REVISITED

REPORT FOR PORTSMOUTH CITY COUNCIL

FEBRUARY 2013

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1 THE PROJECT

In 2007 Blue Sail worked with Portsmouth City Council to review its visitor offer, target markets, positioning, marketing, relationships with stakeholders and advise on the priorities for the City Council within a changing strategic context. Our conclusions are summarised in the table here.

In 2013 the City Council asked Blue Sail to review the original report, current visitor data and research and recent marketing activity, and provide a commentary and insights on the best prospect markets and how to reach them, to inform Portsmouth's future marketing strategy.

Our work has been based on a telephone briefing, reports and data supplied by the City Council and desk-based research.

This report sets out our analysis, observations and recommendations. We have produced a separate working paper summarising the visitor data.

The strategic context	Current visitors report	Marketing strategy
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.	▶ 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	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.

2 VISITOR PROFILE

WHO'S COMING?

Portsmouth has good data and information about its visitors in terms of volume, value, type of trip, origin, socio-demographics etc. It also has research into perceptions of Portsmouth among visitors and non-visitors.

In summary visitors to Portsmouth and Southsea are predominantly[1]:

- Adults, mainly in groups of two
- In older rather than younger age groups (32% aged 55 – 74 compared to 16% aged 16 – 34) (Southsea – 33% & 15%)
- From ABC1 households – but predominantly C1
- On a day visit from Hampshire (or from a wide variety of places if they are staying visitor)
- Visiting for holiday/leisure purposes
- Staying an average of 5 hours (day visitors) or 4.2 nights (staying visitors) (4.9 nights for Southsea)
- Travelling by car/van/motorcycle
- Repeat visitors, from the UK
- Most likely to visit the seafront and Gunwharf Quays, as well as the Historic Dockyard/ Historic Ships, Old Portsmouth and the Spinnaker Tower.

[1] Portsmouth and Southsea Visitor Surveys 2011

The data clearly shows the importance of the day visitor market to Portsmouth. 92% of the 8.5million visitors to the city are on a day trip[2]; 94% are on a repeat trip and have been on average 10.2 times. Portsmouth's role as a regional centre for shopping and a day out seems obvious. It also begs the question – given this level of familiarity and repeat - has that market reached saturation?

The international market is significantly less important for Portsmouth at around 120,000 visitors[3] predominantly from Europe.

The table here shows what's happened in terms of numbers and spend since we reported last. The number of day visitors has increased but staying has gone down, as has spend in real terms. The spend figure is less surprising given the economic downturn but the fall in staying visitors is disappointing.

	2005[4]	2010[5]
Day Visitors	6.85M	7.82M
Staying Visitors	731,000	680,000
Spend (current prices)	£372M	£401M
Spend (2010 prices assuming 2% inflation pa)	£411	£401M

In terms of visitor profile there is little difference between our original report, which used 2005 data, and the 2010/2011 data. We are still looking at the same type of visitors coming to Portsmouth, doing the same sorts of things.

WHAT DO VISITORS THINK ABOUT PORTSMOUTH?

The top images/associations about Portsmouth are consistently

- The Royal Navy
- Historical ships
- Ferries

[2] The Economic Impact of Tourism on Portsmouth 2010, Tourism South East
[3] IPS 3 year average
[4] The Economic Impact of Tourism on Portsmouth 2005, Tourism South East
[5] The Economic Impact of Tourism on Portsmouth 2010, Tourism South East

- Spinnaker Tower
- Gunwharf Quays
- And for Southsea – the sea and seafront.

Portsmouth values are seen as **Historic, Traditional and Nostalgic**.[6]

These perceptions are similar among non-visitors.[7] None of the research has shown a strong association of Portsmouth with literature or events.

Most of the motivations are rather functional (plenty to do, good range of restaurants) although the seafront and Gunwharf Quays stand out as particularly notable attractors.

Barriers for the non-visitors do not seem particularly significant. The navy base has some negative associations as does the football club and the built environment, but it would seem that the biggest barrier is that there is simply not a sufficiently compelling reason to visit.

SO WHO SHOULD PORTSMOUTH TARGET?

Our 2007 report recommended that for the following 5 years Portsmouth should focus on the UK market segments shown in the box here.

At the time there was an aspiration to establish Portsmouth as a choice for young, more up-market city breakers. We advised waiting until the product offer had been developed further as it was not yet in a position to compete with other destinations.

2007 Recommended Segments:
Midmarket 'High Street' 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.

These segments 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.
And, depending on resources:

Niche markets - for example Conan Doyle or Dickens fans, naval history enthusiasts, or specialists associated with a specific event - could be researched and targeted with very focused activity, working with product partners and with other destinations where appropriate.

[6] Arkenford 2011
[7] Anne Hahlo Ltd 2011

As we understand it these have been your target markets for the past 5 years – including higher-end pre-family High Streets.

Given your visitor profile, the economic situation, and the competitive environment, our advice is that **your best prospect markets remain mid-market High Street families and empty-nesters. These markets will deliver the greatest numbers and biggest spend to Portsmouth**.

We also think that the City Council should consider **focusing on staying visitors and day visitors staying on holiday nearby**, rather than day visitors coming from home. The resident day visitor market appears healthy and the private sector members of your Destination Marketing Partnership should be capable of targeting this market either individually or collectively. The City Council's job could perhaps be seen as taking on the challenge of growing new markets.

Our view is that the better off empty-nester High Streets is a difficult market to penetrate with your current product and the destination choices available to them. Portsmouth's current market is only 23% from socio-economic groups AB compared to 38% for GB as a whole.

The opportunity around **niche markets** still applies.

We also believe that **groups** are a fruitful market for Portsmouth, although one that your partners and attractions are again well capable of targeting.

3 MARKETING

HOW IS PORTSMOUTH MARKETED?

Destination marketing of Portsmouth is delivered through advertising campaigns, primarily in collaboration with local, regional or national partners.

2012 saw Portsmouth on the London Underground, day trip campaigns with Portsmouth attractions and a family campaign with Tourism South East. In 2013 campaign activity with TSE and VisitEngland (cultural cities and English seaside) is planned, as well as a support for a major campaign around the opening of the Mary Rose Museum, which will include TV advertising in the region and in London.

These campaigns are supported by self-financing visitor guides and the visitportsmouth website which was refreshed in 2012. Digital marketing activity includes the production of a smart phone app and occasional emails to a database compiled by the Visitor Information Service and sign-ups for further information such as events.

Other activity includes attendance at travel trade shows, consumer shows and work on the ferry link to Caen.

Portsmouth’s brand is ‘Great Waterfront City’ and marketing themes appear to be

- Waterfront and seaside (Southsea)
- Shopping – mainstream and independent
- Heritage – attractions in particular
- Culture – arts, museums, theatres, literature & writing and events
- Activity – primarily watersports

The marketing budget is £250-£300K and is resourced by one member of staff. From our brief ‘at a distance’ review it seems to us that Portsmouth City Council is making its limited resource work well for it. Marketing activity is based on a coherent strategy focusing in the main on clear target markets and majoring on the strengths Portsmouth has in its waterfront, its retail offer and its range of attractions.

REVIEW OF OUR 2007 RECOMMENDATIONS

We gave seven strategic recommendations in our 2007 report. These are listed in the table below with a commentary on how these have been taken on board and whether they are still relevant.

Recommendation	Delivered?	Still relevant?
Know your customer – research and disseminate	You have undertaken a range of visitor and non-visitor research	Customer research is always relevant – keep an eye on gaps but there don't appear to be any immediate needs.
Improve the experience	Beyond the remit of this project	Yes
Differentiate yourself using the waterfront	Yes – 'Great Waterfront City' appears consistently associated with Portsmouth in web searches	Yes
Reposition the city	This recommendation referred to the city brand work which we understand was not completed.	Research indicates that Portsmouth still has limited awareness among potential visitors – and it operates in a competitive marketplace. So yes, there is an ongoing need to reposition the city in the minds of potential visitors creating interest and reasons to visit.
Invest in reasons to visit – events and culture in particular	This was largely around product development – again beyond this project. However it does not appear to us that Portsmouth has a particularly strong events and cultural offer.	Yes – your events and festivals offer is poor compared to many of your competitors. Your cultural offer, beyond heritage, is still limited and is a significant barrier to your aspiration as a cultural destination. Our recommendations to invest in the following still hold good: • 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 partnership	Clearly you are delivering campaign activity with your attractions but the Destination Marketing Partnership does not appear as active as it could be.	Yes. With tightening public sector resources, the private sector will have to contribute more if destination marketing is to continue.
Value tourism – within all the departments of the council	Beyond the remit of this project	

4 REFINEMENTS

We think that in the main you are doing exactly the right thing and we do not recommend any major strategic shift. There is however some gaps in your current activity and some opportunities you might want to consider and we talk about these here.

We are recommending you focus your marketing more tightly on **mid-market High Streets** – families with kids aged up 15 and empty-nester 45+. We think this is where Portsmouth has a particular strength and most chance of attracting new visitors.

It is worth then reconsidering what High Streets need and respond to. They look for **reassurance, information, validation and ideas**. They like to know what they are going to get – and they want to know it will be good. So think about … what (tourism and non-tourism) brands you could work with; what celebrities you could use to endorse the city; providing recommendations from informed people; top 5s; best ofs; itineraries (a day, 24 hours, 48 hours); 'packaging' of experiences; feature businesses/business people with awards (from Michelin Guide to Visit England); quotes (Lonely Planet and other guide books); links to TripAdvisor – and so on.

PR will be a particularly important route to market for this audience who view travel pieces and travel sections as an invaluable resource. It would be worth investing more in attracting **press trips** from offline and online writers

We think your **Portsmouth Greeters** are a great idea – and yet they are not very visible in your promotion. More could be made of them as personalities and ambassadors of Portsmouth – personal profiles online and in print, blogs on your website, articles in your print, their recommendations and insider tips, hosting journalists etc.

Reminder of High Sts:

- Like to take their information from other sources rather than discover things for themselves
- Keen to follow along when a fashion has been established
- Brand and style are more important than functionality or individuality
- Not the first to adopt new products but they will be ahead of the majority of the market
- An active segment that is moderately interested in intellectual pursuits, arts and culture
- Prepared to spend money on luxury - which tends to mean more things
- Very interested in city breaks and city experiences
- Big TV watchers –standard profile of TV stations
- Big magazine readers – esp. women's mags
- Standard profile of radio
- Big newspaper readers.

Your **visitor and mini-guide** would benefit from a **review of content, style and tone of voice**. It is very much standard, tourist fare. It does not really differentiate Portsmouth and its approach of 'something for absolutely everyone' which runs through it, is not particularly appealing (we all like to think we are getting something special and different that says something about us as individuals). It also does not segment your audience into family and post-family. Those without children are easily put-off by 'fun for the family' messages and images, so you need to think of ways to separate out what you feature, keeping your two distinct segments in mind. While their values and attitudes may be similar, what they respond to and what they want to do will be very different.

Your guides also make a big feature of culture, which is not substantiated. If it can be strengthened do so, but the claim for Portsmouth as a 'cultural destination' may need reconsidered as there are a number of cities marketing themselves on very strong cultural and events credentials, and we wonder if Portsmouth can compete.

You may also want to consider a **different copy approach** moving away from the 'typical tourist board' style. This could include a different tone of voice, focus on stories, people – and bearing in mind High Streets – celebrities, endorsements etc too.

We recommend you have a look at other destinations' brochures – certainly your nearby competitors but it is also worth looking at other waterfront cities – Liverpool, Bristol, Brighton and Plymouth. Manchester too, takes an interesting approach. These might inspire new thoughts and approaches for Portsmouth.

Your website has been recently refreshed but you will want to keep updating it and we recommend that you think about the **copy and style** there too. In places it is a little heavy around 'there is so much to do…' or 'has a wealth of…'. Apart from feeling a little formulaic, it can feel as if you are trying too hard.

The website shares the issue of being generic to all segments – you could consider allowing users to **tailor** more closely to their needs. It is easy to give a choice up front and apply filters so people can select. Have a look at the 'customise your visit' tool on VisitCornwall for a particularly good example of this. You might also split into '*here for the day*?' and '*here to stay*'? And think about having a kids section to engage them and show how family focused you are.

Your website is not optimised for use on **mobile devices**, so this is worth thinking about for future given the growing use of smart phones and tablets for pre-planning and seeking in-destination information (according to IMRG e-digital Research 56% of the UK population own a smart phone and 21% own a tablet device).

Again it is worth spending some time looking at what your competitors are doing on their websites, and we suggest also looking at some best in class destination and other leisure sites.

- The Lake District's site Golakes for its clarity, quality feel, its navigation and options
- VisitManchester – for its funkiness
- Rural Warwickshire –simplicity and strength of branding and positioning
- Visit Northumberland – clean, clear, modern
- Visit Yorkshire – good use of themes and navigation
- National Trust – see how they deal with kids and yet still target their 'Curious Minds' (older, well-off) priority segment
- Creative Tourist – to see how cultural tourism is being promoted in Manchester, Liverpool and Cumbria

In terms of social media Portsmouth measures up well against comparable cities on Twitter, Facebook and YouTube. You might want to consider expanding this to Flickr and thinking about increasing interaction using social media on your website. It would be nice to introduce blogs on your website too – by others around the city as well as directly.

We think a big omission on your website is the chance to sign-up to receive more information or an e-newsletter. Which brings us on to **Customer Relationship Management (CRM)** where we think your biggest opportunity may lie.

We understand you have a limited database at the moment and we recommend you prioritise CRM for the future, starting by integrating your current databases and building it through sign-ups on your website. There are many ways to optimise sign-up – for example, make sure it is prominent on your home page and incentivise it through competitions promoted through social media, You should also be asking a number of short questions (keep it very short or people won't sign-up) which will allow you to profile people (at a minimum ask for their email, postcode, age range) and their interests. You can then communicate with them regularly (we would recommend monthly or bimonthly) with what's on, news, special offers, focus on particular themes in an e-newsletter. Again you might try signing up to competitors' newsletters to see how they do it.

In conclusion – we do believe you are on the right course and no major changes are needed. Refinements and tweaks should help targeting, response and impact. Getting a believable and appealing message over to those most likely to visit remains the touchstone.