

Visit Portsmouth Update and Tourism Marketing Communications Plan 2021-22 - Appendix 2

VISIT PORTSMOUTH - TOURISM MARKETING COMMUNICATIONS PLAN 2021-2022

Introduction

The visitor economy in Portsmouth is key to the city, bringing in around £610 million in direct and indirect revenue, providing approximately 12,700 jobs and helping to attract inward investment by showcasing Portsmouth nationally and internationally as a city ready and open to do business.¹

The National Picture

Tourism Day Visits summary of findings

During 2019, GB residents took a total of 1.653 billion Tourism Day Visits, and around £67 billion was spent during these visits. This represents a decrease in volume from 2018 of 3%, although spend increased by 5%. In England, visit levels decreased between 2018 and 2019, from 1.431 billion to 1.390 billion (-3%), but total expenditure on these visits increased by 7% to £56.5 billion.

2019 Domestic Overnight Tourism Performance Summary

In 2019, British residents took 99.1 million overnight trips in England, totalling 290 million nights away from home and expenditure of £19.4 billion, with an average trip length of 3 nights. The number of domestic trips to England was 2% higher than in 2018.

Inbound Tourism 2019 Overview

The number of visits in 2019 increased by 1% (but 1% down on the 2017 record figures) to 40.9 million, based on the Office of National Statistics International Passenger Survey. Inbound visitors spent £28.4 billion in 2019, up 7% on 2018, setting a new record for inbound spending. In total, they spent 289.6 million nights in the UK in 2019, 1% down on the number of nights spent in 2018.

Since 2015, Portsmouth has become (and retained its position as) the 20th most visited destination in England for total trips by GB residents²;

¹ Economic Impact of Tourism 2015, Tourism South East

² Great British Tourism Survey 3 year average 2015- 17/2016-18 Visit England

Visit Portsmouth Update and Tourism Marketing Communications Plan 2021-22 - Appendix 2

something that the city has not previously achieved and of which we should be justly proud. Also, The Guardian featured Portsmouth as one of the top 40 cities in the world to visit in 2019³. Whilst this was due in part to D-Day 75, the official commemorations on the 5th June gave us a global presence, further identifying Portsmouth as a great city to visit; many thousands flocked to the city to be a part of the commemorations, thereby increasing visitor numbers, and more importantly, revenue.

In 2019, HM Government announced a Tourism Sector Deal which marked a seminal moment in the development of the country's tourism industry and moving it to the top table as a leading industry for the government's future economic planning.

Unfortunately, the COVID-19 pandemic brought much of tourism to a grinding halt. Visit Britain's initial forecast for 2020, released in December 2019, was for inbound visits to the UK to grow by 2.9% and for spending by inbound visitors to grow by 6.6%, setting new records in each case.

From mid-March to mid-July, COVID-19 triggered a near-total shutdown in international tourism to/from the UK with a few specific exceptions. Since then, available evidence suggests that there has been an increase in visitor numbers from this low point but they remain at a fraction of their usual level. Visit England/Visit Britain's central scenario forecast for inbound tourism to the UK in 2020, as of October 12th, is for a decline of 74% in visits, to 10.6 million, and a decline of 79% in spending, to £6.1 billion. This would represent a loss vs the pre-COVID forecast of 31.1 million visits and £23.8 billion in spending.

Visit England/Visit Britain's domestic outlook was last updated in July 2020. The forecast is for domestic tourism spending in 2020 to be down 49% compared to 2019, when spending by domestic tourists in Britain was £91.6bn. This comprises £12.6bn from overnight tourism, down from £24.7bn in 2019, and £34.2bn from day trips, down from £67.0bn in 2019.

These forecasts are based on a number of assumptions, including no major second wave of the virus. It is therefore likely the reality may be a worse situation than these figures.⁴

Visit England/Visit Britain have estimated that the earliest we will see domestic tourism to be back at its peak will be 2024 and for inbound (international visits) 2025. The added, as yet not fully known, implications following Brexit are likely to further impact on estimates.

³ <https://www.theguardian.com/travel/ng-interactive/2019/jan/05/where-to-go-on-holiday-in-2019-the-hotlist#UnitedKingdom>

⁴ <https://www.visitbritain.org/2020-tourism-forecast>

Visit Portsmouth Update and Tourism Marketing Communications Plan 2021-22 - Appendix 2

National plans currently on hold and being developed include the creation of a number of Tourism Zones and the Government's Tourism Recovery Plan. The Visit Portsmouth team has met with Tourism Partners in the Solent LEP to discuss a potential Tourism Zone bid. We are also looking to formalise our partnership working to market the central south of England, building on the joint marketing we have carried out to date.

In the short term (2021-2022) the Visit Portsmouth Team will focus primarily on re-building our domestic day visit and staying markets, while ensuring we continue to engage with our international markets, especially Europe where we are likely to see the first inbound recovery. We will work closely with Visit England/Visit Britain and our regional and local partners to aid market recovery, joining national and regional campaigns and bids for nationally funded initiatives.

Digital

Digital marketing has been a major focus for Visit Portsmouth in previous years, and will continue to be in future. Lockdown further reinforced the validity of this approach, with the ability to reach our audience and engage with them even at a time when they're unable to travel. It correlates with the 'always on' approach of offering consumers the content they need when they want to engage - regardless of time of day or geographic location. Our digital presence not only allows us to reach these people, but do so with full control over our messaging, output and style. It enables us to market Portsmouth in the way we want to, using our own understanding of the city, as well as insight gleaned from the latest thinking and research.

Digital marketing also enables us to be reactive, either to local trends or huge nationwide developments. As the pandemic attested, rules and regulations can change quickly - often with little warning. Our digital campaigns enabled us to react to this in real time, which traditional methods such as print and broadcast simply wouldn't allow. For our Portsmouth Is Open campaign, for example, 100% of the budget (and all the effort) was put into digital, knowing that we may have to pull the campaign immediately, if local or national lockdown measures were introduced at a moment's notice. This was not only to keep messaging accurate, but prevent budget wastage.

Elsewhere, work has been undertaken this year to refresh the website, to provide a more modern and comprehensive resource. It is being built to the latest SEO guidelines, to boost organic traffic volumes, and to the latest Accessibility guidelines, to ensure all users can access the content effectively. With good web accessibility now a legal requirement, and organic traffic accounting for around three quarters of our site entries, this is a big project for us to future-proof the Visit Portsmouth web presence.

Visit Portsmouth Update and Tourism Marketing Communications Plan 2021-22 - Appendix 2

We also continue to develop the Visit Portsmouth social media presence, to reach people even when they don't actively come looking for us. Today, almost half the global population is on social media - rising to more than 90% of Millennials⁵. Furthermore, Twitter has found that people are 31% more likely to recall seeing a message on the social media platform than if they'd seen it browsing more generally⁶, and WebEx discovered that more than 50% of people say they have purchased a product they first saw on Twitter⁷. Also, despite recent issues around trust for Facebook's algorithm and business practices, its users have long trusted the messages brands put onto their channels. Adobe discovered that social media is cited by half of those in Generation Z and by 42% of Millennials as being the most relevant advertising channel to them⁸.

Social media covers both earned and paid media - meaning it's free (apart from the time required to create content) to promote the city using its channels. However, the option is also there to boost content for a fee, to reach more people as and when required. With social media advertising providing some of the best cost per metric (CPM) figures around, as well as the opportunity to focus the messaging to very specific demographics, it has been a channel we've relied on in previous years and will continue to in future.

With digital media playing such a central role in Visit Portsmouth marketing going forward, we as a team must ensure we're ahead of the latest developments and are across the most up-to-the-minute ways of thinking and of operating. Doing this doesn't just benefit us but also the destination partners with whom we work on a regular basis - by driving visits to the city and increasing web hits to their VP listings, as well as allowing us to help with advice and suggestions where required. As well as sharing general updates on market trends during our regular DMO meetings, the Visit Portsmouth team has shared digital trends and recommendations, relating specifically to tourism or more general best practice information.

⁵ <https://blog.hubspot.com/blog/tabid/6307/bid/23865/13-mind-bending-social-media-marketing-statistics.aspx>

⁶ https://blog.twitter.com/marketing/en_us/topics/product-news/2018/expanding-in-stream-video-ads-to-more-advertisers-globally.html

⁷ <https://www.webfx.com/data/why-twitter-matters-to-marketing/>

⁸ <https://www.slideshare.net/adobe/adi-state-of-digital-advertising-2018>

Visit Portsmouth Update and Tourism Marketing Communications Plan 2021-22 - Appendix 2

Marketing Communications Plan 2021-22

Target Markets

1. Domestic visitors:
 - a. Empty Nesters (50+)
 - b. Aspiring Homemakers (31-35 single or couples with young families)
 - c. Domestic Success (within 2 hours drive time of Portsmouth)
2. Overseas visitors:
 - a. European markets
 - b. International/emerging BRIC markets

Key Messages - under the umbrella theme: Portsmouth - Put the Wind in Your Sails

1. Stay longer, discover more
2. A modern city with tales to tell
3. Over 800 years of maritime heritage
4. Fabulous shopping, dining and culture on the water's edge
5. Ever-changing sea views and amazing open spaces
6. A city of creativity with world-class events on land and sea

Marketing campaigns will be driven by specific events or key periods in the marketing calendar and, where appropriate, will be run in conjunction with our major destination partners to maximise spend and reach. These will be flexible to adapt to the evolving situation. The Visit Portsmouth digital channels will be key to delivery, with a refreshed website launched and city tourism providers offered free promotion.

Visit Portsmouth Update and Tourism Marketing Communications Plan 2021-22 - Appendix 2

Marketing Communications Planner- Domestic Campaigns

Activity	Date	Objective	Product Offerings/Themes	Communication Channels	Success Metrics
Staying Visitors	As relevant and to include school holidays.	Give consumers an experiential experience of what they can expect from the city which delights and engages them in order to push them along the funnel to decide to visit.	Experiential campaigns Videos	Digital Social Media Publications	Page visits Reach on social media Brochure distribution and feedback Increased overnight visitors (from 2020 baseline)
Main season campaigns with major destination partners	Easter June - Aug Sept/Oct	Awareness of the wide and varied attractions and things to see and do in Portsmouth to drive up day visitors.	Open Spaces Attractions Shopping Culture Waterfront Museums	TBC but could include: Out of Home advertising Partner offers (SWR) Online campaigns	As above
Attraction-specific campaigns	All Year	Drive up visitors to specific events or attractions - where pertinent include offers (with partner attractions/transport)	Evening Entertainment Christmas in the City Food and Drink Family Fun	Digital - free and paid for & social media Publications Out of home advertising e.g. rail network/London underground	Page visits Reach on social media Brochure distribution and feedback Engagement with social media and online sites (VP and destination partners)
Localisation of national campaigns and anniversaries	Across the year	Leverage national campaigns and special dates by localising marketing messages to Portsmouth-specific	Visit Britain: Escape the Everyday and England's Coast Heritage Open Days Armed Forces Day English Tourism Week	Website/PR Social Media E-newsletters	Page visits Media coverage Engagement with social media and through online sites (VP and destination partners)
Portsmouth Creates		Highlighting creativity to drive new and repeat visits to the city	TBC	TBC	TBC

Visit Portsmouth Update and Tourism Marketing Communications Plan 2021-22 - Appendix 2

Marketing Communications Planner: International, Group, Business and Conference Markets

Target Market	Activities/Events/Communication Channels	Lead Partner	Key Themes
Europe	International Port and Cruise Group	Tourism South East	Great Waterfront city Heritage v Modern Authentic English city Great welcome! Culture
	Near Europe and Destination Nordics campaigns	Coastal Tourism Academy	
	England's Coast - Discover England Funded Campaign (VE/VB)		
	Press Trips/ PR - VE/VB press enquiries		
	Normandy campaign including Caen		
	Sales Missions and marketing events including Explore GB virtual event		
BRIC (Brazil, Russia India, China)	Explore GB virtual event - meetings with trade	Tourism South East	Great Waterfront city Iconic shopping brands Heritage v Modern Culture
	Marketing events including World Travel Market		
	Visit Britain - charter mark		
North America	Explore GB virtual event - meetings with trade	Tourism South East	Great Waterfront city Maritime Heritage Culture
	PR - VE/VB press enquiries		
	Press trips/bloggers		
	World Travel Market/Sales Mission		

Visit Portsmouth Update and Tourism Marketing Communications Plan 2021-22 - Appendix 2

Marketing Communications Planner: International, Group, Business and Conference Markets cont.

Target Market	Activities/Events/Communication Channels	Lead Partner/s	Marketing Messages
Group Travel	Marketing events such as World Travel Market, Explore GB, Britain and Ireland Marketplace	Destination partners/ Regional partners	Strength of varied offer Themed visits Accessible location Range of accommodation and cultural offer
	Digital familiarisation tours and meetings		
	Targeted paid advertising		
Business and Conference Market VE/VB	Website - Venues in Portsmouth (VIP) pages	Portsmouth Convention Bureau	Portsmouth is open - for business Unique locations Accessible location
	Familiarisation visits and hosted events		
	Marketing events such as Meet GB		