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Title of meeting:	Culture, Leisure and Economic Development Decision Meeting
Subject:	Portsmouth Visitor Economy - Update January to June 2022
Date of meeting:	29 July 2022
Report by:	Director of Culture, Leisure and Regulatory Services
Wards affected:	All

1. Requested by

1.1 Cabinet Member for Culture, Leisure and Economic Development.

2. Purpose

2.1 The purpose of the report is to update Members on the Visit Portsmouth team's marketing activity, partnership working and research from January to June 2022.

3. Information Requested

3.1 This report provides an update on activity undertaken by the Visit Portsmouth Team in the first six months of 2022 to increase visits and spend in the destination and so maximise the benefits locally of the visitor economy.

3.2 The report includes updates on domestic and international marketing activity and results, partnership working and recent research results.

3.3 Although we are moving through a period of recovery and many destination partners are seeing good results, there are reports that visitor behaviour has changed with many more late bookings making planning difficult for businesses.

3.4 It is crucial at this time, along with further concerns around the cost-of-living crisis and rising fuel costs, that the Visit Portsmouth team continue to support local tourism businesses through funded marketing activity, advice and information.

3.5 Domestic marketing

Although Portsmouth is now starting to see a return in international visitors, the main

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focus over the last six months has been to continue work to regain the domestic market.

- 3.6 The first major campaign of the year ran over the February half-term period, funded by the Government's Welcome Back Fund, supported by the European Regional Development Fund.
- 3.7 Using Global Media, Visit Portsmouth ran an outdoor digital poster campaign for two weeks, from 14 to 27 February. The campaign was in six key locations in our target areas for the day visit market: Southampton, Brighton, Portsmouth, M3 Tower outbound/inbound, A3 Richmond Park and A3 Royal Kingston.
- 3.8 Building on previous relationships, Visit Portsmouth secured £37,000 worth of advertising for £15,000. Over the campaign the service actually delivered 297,245 plays - an increase of 256.6% on the forecast. This puts impacts at near 1.17 million.
- 3.9 The service also ran a radio campaign with Wave 105. The forecast reach for this campaign was 284,832 people, generating 1,828,782 impacts.
- 3.10 Website analytics data for 14 to 27 February shows an increase in visitors to the Visit Portsmouth website of 11.43% compared with the previous period, an increase of 31.63% month-on-month, and a 255.4% increase year-on-year (albeit comparing different periods of restrictions).
- 3.11 Web visitors who fit within Google's 'Travel Buffs' demographic increased 24.5% during this period, with some of the biggest gains being seen among the shopping-oriented categories.
- 3.12 The second campaign followed swiftly with a focus on English Tourism Week in March, launching this national week with the publication of our new 2022 Events Guide for Portsmouth and the start of a further outdoor and social media campaign.
- 3.13 The outdoor campaign had a London focus at Waterloo and included digital landmark billboards above 3 main escalators, digital escalator panels and six sheet posters, jointly funded by Visit Portsmouth and South Western Railway. This campaign again over-delivered with 3,360,601 delivered plays, way over the 1,169,000 booked plays. The total number of impacts generated from these poster sites was 8,166,220, with a frequency of x 14.7.
- 3.14 Throughout English Tourism Week a series of social posts were published to promote the week itself, whilst also shining a light on some of the biggest, best and most popular tourist attractions around the city. The campaign included a suite of

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images designed with #ETW2022 branding provided by Visit England, used with hero images of city attractions and beauty spots.

- 3.15 More than 55,000 people were reached through these social posts (all organic), driving 670 actions. Alongside the organic posts we ran a separate advertisement to promote the local-only deals (covered in more detail below). Facebook Adverts were chosen for this part of the campaign so we could more effectively limit the geographic target area, to only reach people within Portsmouth with the offers open to them. For £200 of ad spend we generated almost 65,000 impressions, reaching almost 22,000 people.
- 3.16 A designated landing page was created on the Visit Portsmouth website, featuring all the information on the event itself, some statistics on the importance of tourism to the UK, and promoting the city specifically. It too utilised the English Tourism Week branding from Visit England, but with recognisable Portsmouth landmarks included within.
- 3.17 The landing page also detailed some special limited-time discounts for local residents offered by attractions including Portsmouth Guildhall, the Spinnaker Tower, Portsmouth Historic Dockyard, The D-Day Story, Exploria and Hovertravel. The page was viewed some 2,327 times, with an Average Time on Page of almost three times the site average.
- 3.18 During English Tourism Week, the Visit Portsmouth website saw a: 32.6% increase in Users 33% increase in Sessions 23% increase in Page Views and 2.6% increase in Average Time on Page. Some of the biggest increases were seen on the Events pages, as people sought out things to see and do during a future visit, or to discover what was on imminently if they were already in the city.
- 3.19 The team also ran smaller campaigns and marketing activity around holiday periods and anniversaries e.g., New Year, Easter, Jubilee Weekend.
- 3.20 On social media the Facebook page has reached over 914,000 so far this year, whilst on Twitter it's 182,000. The Facebook and Instagram posts have enjoyed a total reach of 1.7 million - the biggest successes coming from a post promoting Visit Britain's 'Welcome to Another Side of Britain' campaign (387,000) and the 100-year anniversary of HMS Victory's move to dry dock (110,000). Other locally focused posts that did well include the re-opening of the Splash Pools and the announcement of Southsea Food Festival's return.
- 3.21 The Facebook and Instagram posts have generated over 11,500 reactions and driven almost 35,000 clicks through to our website. On Facebook, women account for 57% of our page likes. The 25-34 age range is the largest for page likes, followed by

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those aged 35-44. The Visit Portsmouth Facebook page now has 37,300 likes, putting Visit Portsmouth above Visit Brighton (29,600) and Visit Bournemouth (6,400).

- 3.22 Working with major destination partners (Portsmouth Historic Dockyard, Gunwharf Quays, Spinnaker Tower) and South Western Railway a main season campaign will launch in London and online in early July and be repeated in early September. This will include outdoor landmark digital billboards at Waterloo, across the London Underground and a social media campaign promoting different versions of a destination film using Facebook, YouTube and Sky platforms.
- 3.23 Press and PR is also a key marketing tool and our SLA with Tourism South East provides us with a dedicated PR resource. In the last full year 55 items were pitched achieving a 20% take-up including, in the last six months, the Guardian, Daily Mirror and Daily Express.
- 3.24 In addition, the service partnered with Govia Thameslink to be included in their paid blog series on Guardian Travel: 'Leisure Like a Local'. Portsmouth got a mention in three of the blogs, promoting independent places to eat, the abseil experience down Spinnaker Tower, and the Love Southsea Markets. Visit Portsmouth team have also arranged a further press visit from The Guardian to the Village Hotel for an upcoming piece on Eco Hotels (to be published) and submitted imagery to TransWilts and GWR for poster sites on the network.
- 3.25 As part of a Visit England campaign UniLAD shared a short video on their recent experiential press visit to Portsmouth (focusing on city foraging, Portsmouth Distillery and Hideout Coffee). This was amplified it on Visit Portsmouth social channels and the service worked with the UniLAD team on providing their City Guide with added exposure with physical posters and print outs installed across the city.
- 3.26 The team have also been working with partners to attract the **group market**, with a Visit Portsmouth presence at both the virtual Excursions trade show in January and the in person show at Twickenham Stadium in March. There was good interest in Portsmouth and as a direct result of a meeting at the show AGTO - the Association of Group Travel Organisers - are running a familiarisation visit for their members to Portsmouth in July.
- 3.27 International Marketing
In March Visit Portsmouth attended Explore GB, the Visit Britain flagship international marketing event - held virtually again this year. 60 meetings were held over four days with a range of international buyers, including tour operators and online travel agents. Although most expected some recovery this year, they are looking at 2023 as the main year for recovery to start, with 2024 being the year things return to around 90% of previous sales. A range of challenges were reported including the pandemic (some

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countries are still requiring negative test for return or not allowing international travel at all), Brexit, the war in Ukraine and the rise in living costs and fuel costs. However, Portsmouth was warmly received with many wanting more information to look to feature the city in future itineraries.

- 3.28 The team have been working closely with the International Port and Shaping the Future of Portsmouth as regards the Cruise market. Ambassadors have been greeting some of the cruise calls to provide information on Portsmouth to visitors and meetings have taken place with two of the principal Ground Handler companies (who create and sell most of the off-cruise excursions) to encourage more local excursions. Visit Portsmouth will host a Cruise Business Event with Shaping in November to which all relevant tourism businesses will be invited, to meet with the ground handler companies in person and find out more about working with the cruise industry.
- 3.29 Further plans for international marketing will be finalised this summer with activity taking place in the November to March period, hopefully with trade fairs open in person.
- 3.30 MICE marketing (meetings, incentives, conferences, events).
Visit Portsmouth attended Meet GB for the first time in February - Visit Britain's virtual international marketing event for the MICE market. This was a useful event with some good interest in Portsmouth and one confirmed lead.
- 3.31 The team also attended the PA Show/Confex in London in March as part of the Tourism South East 'Meet Beyond London' stand. Again, there was some good interest in the city and especially enquiries for away days and team building exercises as businesses start to bring staff back to the workplace. The service attended both these events as 'VIP - Venues in Portsmouth' as Visit Portsmouth supports partners during the recovery period for this market.
- 3.32 Partnership working
As ever partnership working is key to all activity carried out by the Visit Portsmouth team. This includes national and regional partnerships such as Visit England/Visit Britain, England's Coast, Tourism South East and South Western Railway. Working with these partners enables Portsmouth to have greater reach both domestically and nationally and join activity that the service could not afford to carry out on a stand-alone basis.
- 3.33 England's Coast promote the whole of the country's coastline to both a domestic audience and to Dutch, German, French, Spanish and Italian visitors. Portsmouth has coverage both on the website, in social media posts and in international marketing activity. In March this group launched '2023 Year of the Coast' at Explore GB. This initiative, running next year, will include the launch of England' Coast Path which when fully open will be the longest coastal path in the world.

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- 3.34 Local partnerships are also key of course. In recent times this has been more about supporting local businesses as they recover, than businesses buying into activity.
- 3.35 It is heartening though to see ongoing financial commitment to the main season campaign. The team have also started sales for new destination publications for 2023, this is likely to be more challenging than in the past, as businesses are still recovering with some potentially troubling times ahead.
- 3.36 Regular Visit Portsmouth Destination Network meetings are held at least six times a year to update partners on marketing activity and relevant city information. The meetings are also an opportunity to get a feel for how businesses are faring, sharing best practice and networking.
- 3.37 Research
Two pieces of research were published in the last six months, an interim 'Portsmouth Economic Impact Research' report and our Visit Portsmouth in-house online survey report.
- 3.38 The economic impact research was commissioned by Tourism South East and includes Cambridge economic impacts data 2016 to 2020, an accommodation study and Visitor estimates for 2021. This is an ongoing piece of research to be revised later this year.
- 3.39 As the report runs the Cambridge model data for 2016 to 2019 as well as the pandemic years this gives an update on pre-pandemic numbers which peaked at just over 14 million visits in 2019.
- 3.40 Visits for 2020 were estimated at just over 11 million but spend was of course massively down by an estimated 67% as visitors were more local and taking part in free outdoor activities when allowed for much of this year.
- 3.41 2021 figures are estimated using an alternate method to the Cambridge model as national data was not available and a new model is currently in development. Full details of the methodology are in the attached report. This interim report estimates 11.4 million visits in 2021, but the final report may revise this figure.
- 3.42 2021 saw the Visit Portsmouth team run its Visitor Survey once more. Though the survey is typically completed annually, this was the first iteration since 2019, owing to the huge changes brought about as a result of the pandemic. As in previous years, many questions were kept identical, so like-for-like responses could be collected and

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then analysed. Additionally, a number of new questions were added for 2021, to assess the impact of the pandemic on people's travel habits and general views.

3.43 Respondents were asked how much they enjoyed their visit to Portsmouth on a scale of 1-5, with 5 being the best. In 2021, 92.2% respondents ranked their visit as four or five stars. At the other end of the scale, just 0.4% and 0.8% gave one and two

stars respectively. Full details available in the appendix.

3.44 Future Plans

The Visit Portsmouth team will continue to work to the current marketing and communications plan through to March 2023. A new plan will be created and presented along with a report in the final quarter of the current financial year.

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Signed by

Stephen Baily

Director of Culture, Leisure and Regulatory Services

Appendices:

Appendix 1: Visit Portsmouth Survey Results 2021.

Background list of documents: Section 100D of the Local Government Act 1972

The following documents disclose facts or matters, which have been relied upon to a material extent by the author in preparing this report:

Title of document	Location
Portsmouth Economic Impact research, Tourism South East, March 2022	Tourism South East, registered office 40 Chamberlayne Road, Eastleigh, Hampshire