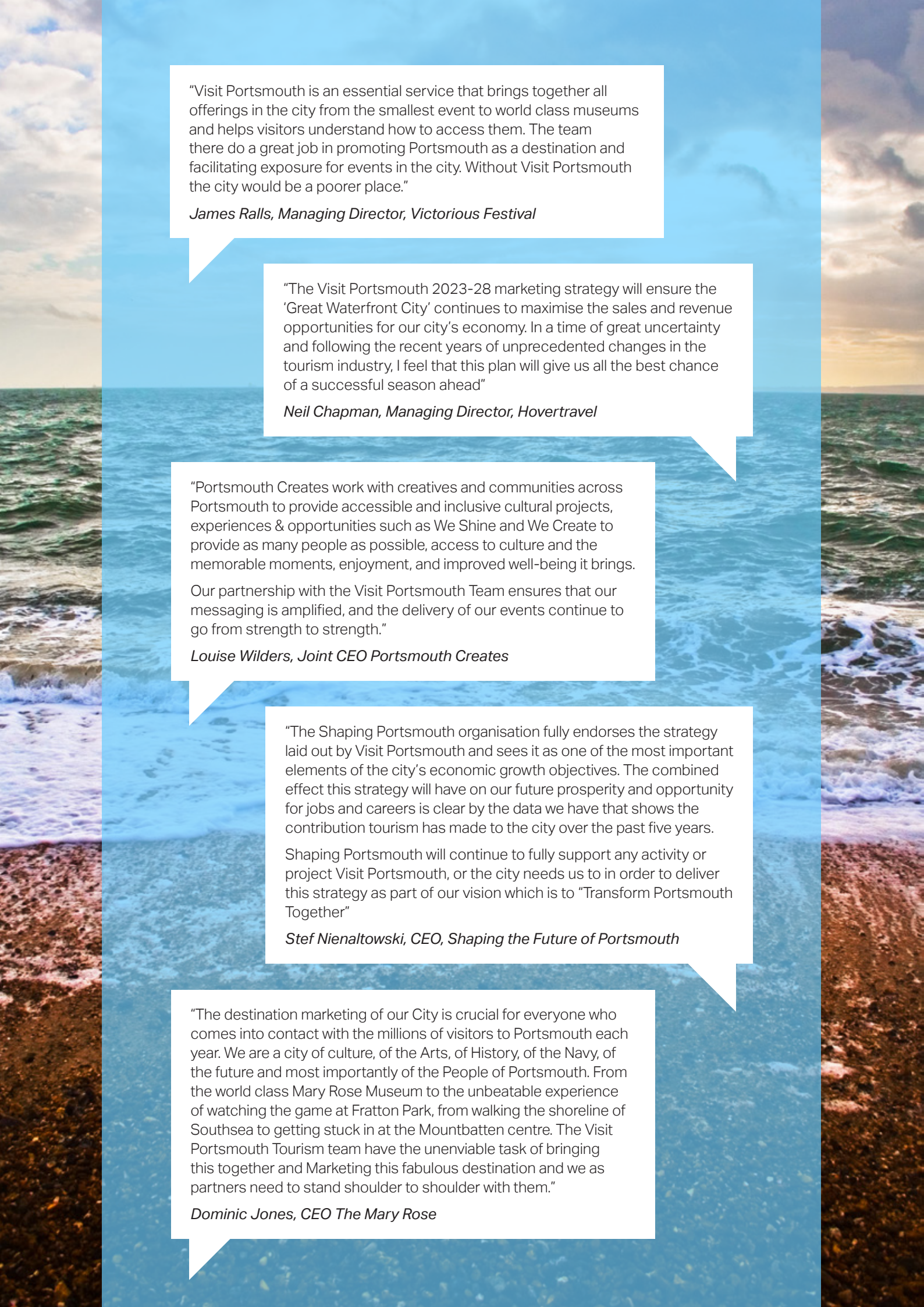


Visit Portsmouth

Tourism and Visitor Economy Strategy 2023-2028





“Visit Portsmouth is an essential service that brings together all offerings in the city from the smallest event to world class museums and helps visitors understand how to access them. The team there do a great job in promoting Portsmouth as a destination and facilitating exposure for events in the city. Without Visit Portsmouth the city would be a poorer place.”

James Ralls, Managing Director, Victorious Festival

“The Visit Portsmouth 2023-28 marketing strategy will ensure the ‘Great Waterfront City’ continues to maximise the sales and revenue opportunities for our city’s economy. In a time of great uncertainty and following the recent years of unprecedented changes in the tourism industry, I feel that this plan will give us all the best chance of a successful season ahead”

Neil Chapman, Managing Director, Hovertravel

“Portsmouth Creates work with creatives and communities across Portsmouth to provide accessible and inclusive cultural projects, experiences & opportunities such as We Shine and We Create to provide as many people as possible, access to culture and the memorable moments, enjoyment, and improved well-being it brings.

Our partnership with the Visit Portsmouth Team ensures that our messaging is amplified, and the delivery of our events continue to go from strength to strength.”

Louise Wilders, Joint CEO Portsmouth Creates

“The Shaping Portsmouth organisation fully endorses the strategy laid out by Visit Portsmouth and sees it as one of the most important elements of the city’s economic growth objectives. The combined effect this strategy will have on our future prosperity and opportunity for jobs and careers is clear by the data we have that shows the contribution tourism has made to the city over the past five years.

Shaping Portsmouth will continue to fully support any activity or project Visit Portsmouth, or the city needs us to in order to deliver this strategy as part of our vision which is to “Transform Portsmouth Together”

Stef Nienaltowski, CEO, Shaping the Future of Portsmouth

“The destination marketing of our City is crucial for everyone who comes into contact with the millions of visitors to Portsmouth each year. We are a city of culture, of the Arts, of History, of the Navy, of the future and most importantly of the People of Portsmouth. From the world class Mary Rose Museum to the unbeatable experience of watching the game at Fratton Park, from walking the shoreline of Southsea to getting stuck in at the Mountbatten centre. The Visit Portsmouth Tourism team have the unenviable task of bringing this together and Marketing this fabulous destination and we as partners need to stand shoulder to shoulder with them.”

Dominic Jones, CEO The Mary Rose



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Introduction

Tourism is key to Portsmouth's local economy, with pre-pandemic figures valuing it at around £600million annually and supporting around 12,000 jobs in the city.

This strategy covers a five-year period of recovery, and then growth, with three key objectives:

- **Grow the profile of Portsmouth as a national brand**
- **Increase the value of the visitor economy in Portsmouth**
- **Work with partners to manage and develop the destination offer**

It has been informed by an appraisal of the wider context of tourism in England, considering changes in trends and potential markets. A review of current marketing activity has taken place and meetings held with the key visitor economy partners to help inform this strategy.

We will achieve our key objectives through dynamic and measurable annual marketing and communications plans, which will enable the Visit Portsmouth team to adapt to changes in, for example: national trends; visitor sentiment and behaviours; and best routes to market. We will embrace advances in technology throughout.

The strategy outlines how we will market Portsmouth as we continue through a period of recovery and on-going national economic challenges. We will work smartly with partners, both local and national, to both recover and grow Portsmouth's market share of the visitor economy.

Our objectives align with local priorities and plans, including the **Portsmouth City Council Corporate Aims and Priorities**, specifically:

- **Creating opportunities for employment**
- **Encouraging clean growth and culture-led regeneration**
- **Supporting the local economy to recover from the pandemic**

As well as the aspirations of the **City Vision 2040**, specifically:

- **A city rich in culture and creativity**
- **A city with a thriving economy**

This document will paint the current picture of the visitor economy; the opportunities and challenges over the next five years; and how the strategy will work, alongside destination partners, to achieve the three principal objectives.

The National Picture

It is difficult to get a true estimate of the national situation and forecast due to the many external influences that continue or are likely to have an impact, most notably the Covid-19 Pandemic, the war in Ukraine, Brexit and the Cost-of-Living Crisis.

The Government's Tourism Recovery Plan of June 2021¹ outlined how hard hit the industry had been across all areas. There was an estimation for domestic tourism to be back at pre-pandemic levels by the end of 2022 and international tourism by the end of 2023.

The most recent indication we have for the domestic market is from Visit England's Survey of Visits to Visitor Attractions 2021, published 6 September 2022. This shows that although visits to visitor attractions in England increased by 30% overall in 2021 when compared with 2020, visitor numbers were still down 55% on 2019.

For the international market Visit Britain's forecast for 2022 is for 26.7 million inbound visits, with total spend of £21.6 billion. This is a big increase on 2021 but still 65% and 76% respectively of the visits and spend levels seen in 2019.

<https://visitbritain.org/2022-tourism-forecast>



¹ <https://www.gov.uk/government/publications/tourism-recovery-plan>

² Portsmouth Economic Impact research, March 2022, interim report, Tourism South East.



Portsmouth – key facts and figures

The latest research from Tourism South East indicates that we are seeing a recovery in visits and spend, but not back to the levels of 2019.²

2020 saw a large number of visits to the city but with a much lower value, as people were visiting during periods of lockdown when lots of attractions, accommodation, food and drink etc. were not able to open fully.

The 2021 figures are still an estimate as we await the final report.

There is also some uncertainty over comparisons of data year-on-year as a number of changes have been made to the way data is collected nationally.

Total visits day and staying

2019	14.8m
2020	11.4m
2021	11.4m (estimated)

Total direct value of these visits

2019	£596m
2020	£199m
2021	£535m (estimated)

Target markets

We will continue to use our existing target audiences informed by Visit England/Visit Britain but appraise them and evolve where necessary based upon market trends, developments, and external influences.

Primary Target Markets

Two Hours from Portsmouth – Day Visitors including Domestic Group visits

Most day visitors come from within a two-hour drive time of the city – north along the A3 corridor towards London, east to Brighton and west to Bournemouth. Within this geographical location we can segment our target markets more precisely using Mosaic profiling as follows:

- Empty Nesters (50+)
- Aspiring Homemakers (31-35 single or couples with young families)
- Domestic Success (AB1s, single or couples with older families)

Overnight/Short-Break Market – Staying Visitors

Looking at similar demographics for potential staying visitors, likely markets are the West



Midlands and the Northern Home Counties, which have a high disposable income.

International and domestic cruise passengers

Cruise is a key growth area for the local visitor economy, both with the increase in cruise business in Portsmouth and cruises into Southampton.

International – Europe and North America

These will be the initial target areas, seen as the most likely to return in the short term as the international market recovers and other influences on travel such as Brexit become more apparent.

Secondary Markets

Visiting Friends and Relatives (VFR)

Visiting friends and relatives is a strong sector for Portsmouth, particularly as the University of Portsmouth grows in size and status; it falls both in the day visitor and overnight target market group but requires separate consideration because of the drivers to visit the city. However, VFR does not increase visitor spend as much as other target markets, hence it falls into the secondary markets category. We would look to continue to push our marketing through residents and the student community and out to friends and family.

Business and Conference Market

We will continue to support local venues and accommodation as the MICE (meetings, incentives, conferences, events) market recovers, lead on marketing through the Venues in Portsmouth pages on Visit Portsmouth and with activity with regional and national partners.

International Markets – rest of world

As we move through the timeline of the strategy, we will target other international markets that research and trends show as being a good match for the Portsmouth offer.

OBJECTIVE 1 – GROW THE PROFILE OF PORTSMOUTH AS A NATIONAL BRAND

Marketing activity carried out under the Visit Portsmouth brand along with major international events such as D-Day 75, America's Cup sailing events and Victorious Festival have all helped establish Portsmouth as a national brand and raise awareness of the city as a destination with the international audience.

Meetings with international tour operators, online travel agents and suppliers show an increase in awareness of Portsmouth as a key location on the south coast. Portsmouth has also had several recent successes in national press including:

- Nomads Nation – 10 Coolest Places to Live in the UK – Portsmouth listed as number two.³
- Which? Best City Breaks in the UK 2022, Portsmouth listed at number 10.⁴
- YouGov poll of most popular cities, Portsmouth listed at number 10.⁵
- The 10 British Cities with the best rated cultural attractions in 2022, Portsmouth at number 2.⁶

It is important that we work to maintain and build on this momentum with:

Impactful, targeted, and measurable year-round marketing campaigns showcasing the range of the destination, using great imagery and selling great experiences

We will continue to lead with our main destination brand: 'Portsmouth, the Great Waterfront City' and encourage further take up across Portsmouth.

For relevant campaigns we will also use the successful 'Portsmouth, Put the Wind in Your Sails' messaging and develop campaign branding with partners as we move through the strategy timeline.

An annual marketing and communications plan will be produced each year detailing activity.

Activity to maximise the benefit of major events, new developments in product and new openings

Events and newsworthy items such as new hotels, improvements to existing attractions etc are key to both raising the profile of the city and encouraging new and repeat visits.

Along with profile raising, larger events in the city generate a great economic boost, for example:

Bluegrass Research reported that the 2021 Victorious Festival had an economic impact of £15,525,675. This represents an impressive 24 per cent increase on the 2019 figure of £12.5m (the festival did not take place in 2020).

The KPMG 'Great Britain, Flying High – Economic impact study of Land Rover BAR and the Louis Vuitton America's Cup World Series Portsmouth 2016' report estimated that over the two years the events had a direct GVA (gross value added) of £13.5m for Portsmouth.

Improved and co-ordinated PR activity and press visits

We will continue to work with a Press and PR specialist to promote Portsmouth nationally. There is great PR activity taking place across the city and our aim is to have a more co-ordinated approach to maximise the benefit of the whole.

An increase in international marketing working with regional and national partners

Portsmouth as a national brand is still less known in some markets, although the wider regional brand of England's south coast is easier to communicate and include the city as part of. We will look to work with partners to increase joint marketing that is achievable within budget and to aim for the most likely markets to recover over the next five years.

3 <https://nomadsnation.com/best-places-to-live-in-the-uk/>

4 <https://www.which.co.uk/reviews/uk-destinations/article/best-city-breaks-in-the-uk-a1WQr6P7b1Gx>

5 <https://yougov.co.uk/ratings/travel/popularity/cities/all>

6 <https://www.holidu.co.uk/magazine/cultural-cities-uk-2022>

OBJECTIVE 2 – INCREASE THE VALUE OF THE VISITOR ECONOMY IN PORTSMOUTH

Increase visits to Portsmouth, both day/evening trips and staying visits from the domestic market

It is key that local tourism businesses receive continued support as we move through recovery from the pandemic and face new challenges and opportunities. The Visit Portsmouth team believes that it is crucial to have a vehicle to showcase the great variety of offer in the city while also continuing to offer free 'entry level' marketing support to all local tourism businesses. To this end we will continue to offer a free online listing on the Visit Portsmouth website for relevant businesses and produce printed publications – while these remain cost-effective and relevant – showcasing the depth and variety of the city's offer.

An annual marketing and communications plan will be produced to detail targeted and measurable activity promoting Portsmouth. Much of this will be in partnership with local and regional partners with target markets varying to fit the requirements for each campaign. The lead routes to market will be digital via the Visit Portsmouth website and other channels including social media, YouTube, Google ad networks etc. Digital marketing is the best tool to reach our target audiences in a way that is scalable, affordable, and measurable.

Digital Marketing

The digital world is immediate and always-on, enabling us to target potential visitors 24 hours a day, via their own preferred channels. It's flexible, allowing us to change messaging, audiences and content at a moment's notice, and react to developments at speed.

Digital marketing offers an affordable route to market, with customisable budgets allowing for campaigns of all sizes – including micro-targeting to make budgets work harder still.

Tracking and analytical tools allow us to measure the success of our campaigns in real terms, with

empirical data providing real, tangible results. These also inform future campaigns to provide true benchmarks of success.

Although most campaigns with main destination partners will focus on the lucrative day visit market that Portsmouth is great at attracting, there will also be more activity focussed on the staying markets and evening economy offer to grow our share of the market in these areas.

Additional resources

We will work to maximise our domestic marketing by leveraging in partner contributions to campaigns to add an additional £100,000 annually to the marketing budget.

Grow Portsmouth's share of the international market – day and staying visits – working with local and regional partners (including Visit Britain, Tourism South East, Portsmouth International Port, Brittany Ferries, Southampton Airport).

We will continue to join regional activity to promote Portsmouth to international markets. Initially we will target Europe and North America as these are the most likely to recover quickest and be interested in England's south coast as a destination. During what remains a period of uncertainty, we will ensure annual plans are dynamic so that we can take advantage of any changes in travel intentions due to global trends.

Activity will include regional campaigns, press visits, attendance at international marketing events and trade fairs. City and county boundaries are not overly relevant to the international traveller and as such we will join with regional partners where possible to maximise our investment under an England's south coast brand.

Where possible we will bid for additional funds for international marketing, for example Visit Portsmouth is part of a regional bid led by

Brittany Ferries and Visit Plymouth to the Visit Britain Gateway Innovation Fund. The bid looks to increase visits through south coast ports from northern France.

Maximise benefit of increased cruise calls in Portsmouth (and cruise calls into Southampton)

The growth of the Portsmouth cruise market is also key to the local visitor economy, offering the potential for an increase in both domestic and international visits. Next year the Port has 12 maiden calls from cruise ships, seven of these brand-new to the city. A total of 82 cruise calls are currently booked with an expectation this will increase. The future target is to welcome 180,000 cruise passengers to Portsmouth by 2030. Each cruise call generates an estimated £1.5 million for the city, with a passenger spend of around £329 per head.

The team will continue to work with the International Port and Shaping Portsmouth on the Cruise Passenger Programme which aims to increase the number of passengers visiting and spending money at local tourism businesses. Working with the shore excursion companies is a key part of this cruise programme and also enables local businesses to access and benefit from the larger Southampton cruise market. This programme will also look at further developments in the pre-cruise offer, working with local accommodation providers and other tourism businesses to see how growth can be achieved in this area with a Sleep/Park/Cruise strand of activity.

Support destination partners to grow Travel Trade and MICE (meetings, conferences, incentives, events) business locally.

The domestic group market is showing signs of recovery and support will continue for partners with combined attendance at relevant marketing events such as Excursions Trade Show and will



commit to working with relevant organisations to facilitate a minimum of one familiarisation visit each year for group organisers to explore more of the city. Through our international marketing, especially at events such as Visit Britain's Explore GB, we will also market the city and region direct to these international groups.

Support for the MICE market will continue via Visit Portsmouth and the VIP – Venues in Portsmouth – pages, again at no cost. We will continue to work closely with Visit Britain and their Business Events Team to make sure that Portsmouth businesses are kept up to date with trends and opportunities for both additional training and to bid for funding support. Where opportunities arise to market Portsmouth to this market, for example as part of the 'Meet Beyond London' brand we will ensure partners are informed and assist with co-ordinated activity when relevant.





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Opportunities

The recovery and growth of the Portsmouth events programme is a crucial part of the visitor economy. Events can be instrumental in raising the profile of the city, give visitors a reason to visit or return and generate good income. The **Victorious Festival** is a key example of this, and its growth will continue to provide real economic benefits and employment opportunities.

The event team's success in bidding for and securing in Portsmouth new international events such as the **2023 Formula Kite European Championship** and the continuation of other large events such as The **Great South Run** is also key.

Southsea Coastal Scheme is the UK's largest local authority led coastal defences project, worth more than £130million. The scheme will cause some disruption during the timeline of this strategy and the team will work to mitigate against this with more targeted marketing for the Southsea area. In the long term the scheme will provide a real benefit in the terms of a world-class seafront experience along with, of course, the improved defences the city requires.

Levelling Up Funding – the Transforming the Visitor Economy bid was awarded £20m, £8.75m towards the Linear Park project to create a new urban park in the UK including the redevelopment of Hilsea Lido. £11.25m is towards the International Terminal Transformation at the Port to provide

improved facilities and additional capacity to support the growing cruise market.

Both of these projects will enhance the visitor product in the city and have a positive impact on the visitor economy.

Other developments such as the plans for a five-star hotel at the former Royal Marines Museum site and the boutique-style hotel offer planned as part of the Southsea John Lewis store redevelopment are also important for the visitor economy along with the proposed plans for City Centre North.

Other funding opportunities

The team will continue to lead on or join bids for funded projects that can increase marketing or enhance the destination offer.

Visit Britain Innovation Gateway Fund a bid led by Brittany Ferries and including the ports of Portsmouth, Plymouth and Poole will enable – if successful – more marketing to the northern France markets and an increase of ferry passengers from France in to Portsmouth and the region.

A Visit Portsmouth project using **Safer Streets** funding will enable us to enhance the Millennium Promenade with an **Interactive Trail** that will also include safety messaging and highlight more of the famous women of Portsmouth. Local children will be involved in the creation of community art to support the trail.

OBJECTIVE 3 – WORK WITH CITY PARTNERS TO MANAGE AND DEVELOP THE DESTINATION OFFER

- **Continue to hold regular Destination Network Meetings (minimum 6 per year) to inform tourism partners of marketing activity and city developments, share best practice and provide networking opportunities**

These networking meetings are well attended and appreciated and are a great opportunity to keep partners informed with activity. They also take place at different city venues each time to enable the diverse locations to showcase their offer. Notes are circulated after the meeting to make sure those who cannot find the time to attend in person are kept up to date.

- **Provide comprehensive support for local tourism businesses, to include improvements in quality, accessibility, sustainability, and skills**

Visit Portsmouth will act as a signpost to make sure that tourism businesses know how to access

the support they need around these areas, both locally working with internal colleagues in the Regeneration Directorate for example, and with local partners such as Shaping Portsmouth. We will also make sure that regional and national training and learning opportunities are shared with the wider group and look to develop local working groups where relevant – for example we are looking to work with Hovertravel on plans to raise the profile of Portsmouth as an accessible destination.

- **Create a destination management advisory group to focus on improvements and enhancements to the city – group detail to be agreed and members appointed in first year of the strategy**

This is an ambition to form a relevant group in the first year of the strategy. Details of terms of reference, scope etc will be agreed in conjunction with partners during 2023-24.

Partnership working

Partnerships are key to all the activity carried out by Visit Portsmouth. The team has good relationships with tourism partners across the city and will build on these, working more smartly on PR for example but also packaging up offers to present a stronger and broader Portsmouth offer.

The University of Portsmouth is a key partner, both for the VFR market and also the students themselves who help keep some of the smaller businesses afloat, especially in the quieter season. The University also has key assets for visitors such as the summer accommodation and the new sports centre.

Regional partnerships are also key, especially when targeting the international market. Tourism South East and England's Coast both provide options to join larger international campaigns with regional partners at an affordable level.

Partnership work also takes place with for example Visit Hampshire, Visit Isle of Wight and Discover Gosport when looking to develop broader itineraries or to share best practice and investigate joint initiatives to grow visits and spend.

The team will continue to work with Visit England/Visit Britain and share business insights, marketing opportunities and other information with destination partners. The implementation of the Visit England led national DMO review will be monitored and work with partners towards the creation of a regional LVEP (Local Visitor Economic Partnership) will take place as relevant. The work of the Solent LEP and specifically the 'Solent 2050, An Economic Strategy for the Solent, April 2022' which has as a key target 'A thriving visitor, creative and cultural economy' is a further key regional strategy to monitor and feed into as required.

Visitor Information and Tourist Guides

A warm welcome and pre-visit assistance is a key requirement for a quality tourism destination. The Portsmouth Visitor Information Service will continue to be provided as part of the Visit Portsmouth activity with the stand-alone Hard Information Point in the Interchange Building and visitor information also being offered at key points in the city including Gunwharf Quays, Portsmouth Museum and Art Gallery and The D-Day Story. The Portsmouth Tourism Guiding Service will offer the addition of an in-depth tour to group visits and be included in packaged day experiences where relevant.



Thank you to our destination partners in informing this strategy

The Visit Portsmouth Destination Network Group ◦ Shaping the Future of Portsmouth
International Port and Brittany Ferries ◦ Portsmouth Historic Dockyard
Portsmouth Guildhall ◦ Hovertravel ◦ South Western Railway ◦ Tourism South East
Spinnaker Tower ◦ Gunwharf Quays ◦ University of Portsmouth ◦ Victorious Festival