

# 1 Gloucester Tourism and Destination Marketing Strategic Plan 2021

## Gloucester Tourism and Destination Marketing Strategic Plan 2021

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### **1. Introduction**

The Tourism and Destination Marketing Plan for Gloucester outlines the objectives and Key Performance Indicators (KPIs) for the Tourism and Destination Marketing Team in 2021. The Destination Team will use this plan to develop marketing tactics and monitor and evaluate all marketing activity against KPIs. It is reviewed by the Destination Team four times a year and feeds into the Team's working action plan, which outlines the actions and associated workflows to deliver the Marketing Plan over the next 12 months. Its overall aims and objectives correspond to those outlined in the document created in 2020 by Steve Brown entitled 'The Future Marketing of Gloucester' and Gloucester City Council's priorities.

#### **Goal Setting – Mission**

This strategy is developed as a destination marketing plan aimed at attracting visitors to Gloucester in 2021. The plan will also look to build relationships with our partners and stakeholders by providing exemplary support for them in 2021. We want our partners and stakeholders to feel that the best scenario for tourism marketing is to be delivered by the Tourism and Destination Marketing Team in Gloucester City Council.

### **2. Situational Analysis**

In February 2020 Marketing Gloucester LTD, a Destination Management Organisation (DMO) folded following several months of financial difficulties. To ensure continuity for the tourism marketing in the city, Gloucester City Council brought two members of staff from Marketing Gloucester into the city council to deliver the tourism marketing for the city including updating [visitgloucester.co.uk](http://visitgloucester.co.uk), [meetgloucester.co.uk](http://meetgloucester.co.uk), [filmgloucester.co.uk](http://filmgloucester.co.uk) and social media. In March, the COVID19 crisis saw a national lockdown start which lasted 4 months and the disruptions of COVID19 have been felt throughout 2020 and continue to be felt. In December, the new Tourism and Destination Marketing Manager was appointed to develop and lead on the strategies for tourism in the city.

#### **The Destination Marketing Team**

The Marketing Team currently consists of 3 full-time posts:

- Rebecca Clay –Tourism and Destination Marketing Manager
- Ellie Birch –Tourism and Destination Digital Marketing Officer
- Ben Hau – Tourism and Destination Senior Marketing Officer

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The Marketing Team is also responsible for the marketing and promotion of all facets of the tourist offer for the City and provides a support role when required for the activities of the Guildhall, the Museum of Gloucester and the City Council's Festivals and Events team. Ellie Birch and Ben Hau are on fixed-term contracts until March 2021 so the roles of Tourism and Destination Marketing Officer and Tourism and Destination Digital Marketing Officer are currently being advertised externally and will be appointed in March.

#### **Market Conditions**

There have been many dramatic changes in the tourism industry over the past couple of years which will continue to have an impact in 2021.

#### **The COVID-19 Pandemic**

The last decade has seen the UK tourism industry become one of the fastest-growing sectors, with previous value forecasts predicting that it would reach £257bn by 2025 however since March and the onset of the COVID-19 pandemic that figure has fallen dramatically. From mid-March to mid-July, COVID-19 triggered a near-total shutdown in international tourism to and from the UK with a few specific exceptions. Since then, there was a slight increase in visitor numbers from this low point, although a fraction of their usual level and they dipped again in November. The UK is set to lose up to £22bn in tourism revenues this year because of the coronavirus pandemic. Spending by visitors from overseas fell by much as 78%, equivalent to £60m a day (World Travel & Tourism Council). Small Medium Enterprises (SMEs) in the hospitality and leisure sectors have been the worst affected by this coronavirus, losing over half (54%) of their monthly business income (Aldermore). In Gloucester, the impact of COVID-19 in 2020 is yet to be well documented as most of the staff in the tourism industry have been furloughed making it hard to source data from our partners. The new strain of COVID19 has been detected in the UK. This new strain is a more transmissible variant of the virus. As a reaction to this strain, several countries including 27 EU Countries have closed borders with the UK including France (as of 22/12/2020) causing chaos in Dover and Calais.

#### **World Economy**

The recent vaccine news points to a faster vaccination rollout than we had previously assumed. As a result, Oxford Economics has raised the world GDP growth forecast for 2021 to 5.2% from 4.9%, after an estimated 4.0% decline in 2020, and now judge the risks around our baseline forecast to be more broadly balanced. The global economy ended 2020 on a weak note as a result of many economies, particularly in Europe, re-imposing activity restrictions to contain the pandemic. Nonetheless, the survey data point to a relatively mild downturn at a global level.

Most emerging markets (EMs) are likely to see slower vaccine rollout, suggesting that the near-term lift for these economies will be smaller. Nonetheless, stronger demand and rising commodity prices and the ongoing weakening of the US dollar should all be supportive of the outlook.

The light at the end of the tunnel will allow governments to reverse some of the exceptional policy support measures put in place this year and allow growth to be passed back from the public to the private sector. While this is a necessary part of the recovery process, it will be a difficult transition and there are likely to be bumps in the process. So, although the chances of a stronger recovery have risen, we still see medium-term economic scarring from the pandemic.

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### **2021**

Visit Britain prediction for 2019 is to achieve 16.9 million visits, up 73% on 2020 but only 41% of the 2019 level; and £9.0 billion to be spent by inbound tourists, up 59% on 2020 but only 32% of the 2019 level.

Several other factors are likely to prevent inbound tourism recovering to pre-COVID levels even by the end of 2021. These include the economic situation, with demand hit by unemployment and fiscal tightening; new behavioural habits affecting leisure and business travel, both short and long term and the associated potential loss of supply.

There are several assumptions behind this forecast. The most crucial drivers will be the progression of COVID-19 and vaccinations, both in the UK and key inbound markets. It is assumed that in most advanced markets vaccinations will begin in early 2021 and that the majority within the most vulnerable groups will be able to be vaccinated between January and March. It that it will take several months before most of the population is vaccinated. It is assumed that by the end of 2021 COVID-19 will be endemic and controlled rather than a pandemic.

### **Brexit**

The uncertainty surrounding Brexit continues to have a significant impact on the tourism industry. Despite the Brexit Deal announced by the UK and EU in late December 2020 a great deal of uncertainty remains for the services sector which was not covered in the agreement.

The value of the pound remains volatile. The pound is currently close to historic lows against European, Asian and North America currencies which is likely to be highly supportive of travel while it remains close to these levels.

There is still a lack of clarity around visa-free travel for EU citizens and the threat of a harder immigration policy which will impact EU visitor numbers negatively. There is growing concern among industry leaders around ensuring “frictionless borders for our visitors post-Brexit and continued strong promotion of the UK as a welcoming destination”. Brexit has negatively influenced travel and perception in the European market. In VisitBritain’s latest Brexit consumer sentiment research (September 2019), 45% of European international travellers expressed some degree of concern about the uncertainty around travel arrangements (up from 38% in September 2019). Around 35-50% expressed some worry about various potential practicalities or policy changes e.g., needing a visa, flight disruptions or mobile roaming charges. In 2019 there was a noticeable decline in visits from previously strong markets to the UK such as Germany and France. There was also a fall in tour groups from Europe; fewer enquiries from high-end groups about London; negative media coverage of the UK, Parliament and Brexit process across Europe and especially in Germany. In 2020 Germany overtook France as the most declining market; 12% further decline in Germany, 8% decline from France.

### **Air Travel Post COVID-19**

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The airline industry has been one of the hardest-hit industries in 2020 and is likely to continue to experience bankruptcies, downsizing and merger and acquisition during 2021. The result of this is likely to be lower airfares initially followed by an increase in airfares when travellers return to above pre-COVID levels due to decreased competition. This is likely to act against international travel through 2021 and beyond. The trade-off between the perception of value caused by any sustained reduction in the value of the pound and the increased cost of air travel will, together with perceived safety, dictate the number of visitors we receive from abroad and our marketing strategy must dynamically follow these indicators.

### **Technology**

Technology continues to play a fundamental role in the travel and booking process. The tourist industry is increasingly using information technology to try to serve their consumers better and with the COVID-19 pandemic, technology has become critical in ensuring business continuity.

### **Online Travel Agencies**

Most industries have become increasingly digitised over the last decade. The tourism industry has gone to great lengths to cultivate its online presence. The rise of Online Travel Agents in 2020 was staggering due to the pandemic and customers wanting to book with trusted brands with flexible booking and cancellation policies and providing the ability to create an itinerary. In 2019, 66.7% of bookings were made directly on operator websites while online marketplace bookings made up 9.1%. In 2020 Bookings 44% of global travellers booked with an OTA compared. In 2021 as Consumers will still be hesitant of human contact, which will occur in places such as high-street travel agencies and so we can expect a greater number of bookings through online travel agencies. Getting Gloucester's partners online and bookable will be a big challenge in 2021.

### **Accommodation Sector Changes**

Air B&B, Flipkey and other similar organisations have grown the accommodation sector. There are still serious questions of the lack of regulation required for these providers and the impact they have on the rental market for residents. Alongside that, the 'experience' market has expanded with accommodation providers such as Airbnb and Booking.com branching out to offer experience packages alongside other providers TripAdvisor, Klout (Hong Kong company) and GetYourGuide. According to this year's Booking.com trends research, almost half (46%) of global travellers state they will use an app that makes it fast and easy to explore and book activities in real-time while travelling, and a similar number (44%) plan to use an app that allows them to pre-plan activities, so they always have the answers in one place.

### **The Filter Bubble**

Despite the endless resource offered by the internet, future travellers will live in a filter bubble created by personalisation algorithms and homogenous social networks. Algorithms are becoming increasingly sophisticated as artificial intelligence takes the lead offering tailored suggestions of destinations

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to visit, places to stay and things to do based on your current preferences, previous trips, and key contextual factors such as weather and popularity. According to this year's booking.com trends, six in 10 people who say they want tech to offer them a 'wildcard destination' and surprise options that would introduce them to something entirely new in the coming year. This could benefit Gloucester as being presented as the Wildcard for travellers visiting the traditional tourist hotspots nearby such as the Cotswolds and the Forest of Dean. However, on the other hand, it means that less well-known Tourism brands like ours will have to work hard to stay on the traveller's radar.

### **Artificial Intelligence**

The role of Artificial Intelligence is increasingly streamlining customer service. Chatbots are becoming one of the most used tools on websites and messenger apps due to their efficiency. Chatbot technology continues to get more sophisticated with AI and machine learning and is getting better in simulating human-like conversation. Increasingly chatbots will be used as a personalised booking assistant helping tourists make the right decisions based on their preferences and budget. In 2020, 67% of consumers worldwide used a chatbot for customer support. According to Gartner research, by 2025, 85% of customer interactions will take place via these "smart" conversationalists. We will explore the Chatbot option for the visitgloucester website as the technology develops as part of the bigger considerations around the role of the Gloucester Tourist Information Centre. However, at the moment chatbots are not a viable alternative to genuine customer service and are often found to be annoying and inefficient to customers.

### **Influencers and Social Media**

According to a Nielsen study, over 90% of consumers from various markets trust people in their network—people they know and follow. Influencers are part of this network. An influencer is a user on social media or a blog who has established credibility in a specific industry. The influencer has access to a large audience and can persuade others by their authenticity and reach. There are mixed opinions on the effectiveness of influencers to businesses within the tourism sector however with TripAdvisor placing more emphasis on them it is likely they will become an increasingly important part of the booking process in 2021. A 2019 survey conducted by Skift in US, UK, Australia, China and India showed 45% of travellers aged 16-38 (Millennials and Gen Z) across all countries considered a destination's "Instagram worthiness" when planning a vacation and at least 26% following travel-related accounts or influencers. There is a growing significance of word-of-mouth and social proof marketing of prompting visitors. For Gloucester to remain visible to travellers in 2020, influencer marketing will need to be a key part of the marketing plan for the destination. We will build customer reviews into our online presence.

### **Sustainability, growth of eco-tourism and overtourism**

Sustainability continues to be a key concern in tourism. From managing the ecological impact to waste management, all these concerns are important for the tourism operators. In 2020 the conversation about overtourism was put on the back burner due to COVID-19 however we can expect it to ramp up again in European city hotspots such as Venice, Barcelona, and Edinburgh as the tourism industry begins to recover. There is more scrutiny over the balance between protecting communities and cultural capital. In a recent study carried out by Skift, 60% of travellers would be keen to have access

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to a service (app/website) that recommends destinations where an increase in tourism would have a positive impact on the local community. This presents an opportunity for Gloucester and consideration should be given to undertaking research on the Economic Impact of Tourism in the City and how that improves the resident's way of life.

### **Consumer behaviour: the authentic experience and the rise of 'slow travel'**

Value, for future travellers, will be about more than price. As trips have been limited due to the pandemic tourists will opt for travel that allows them to collect as many unique experiences as possible on their journey, without having to invest considerable time and money in getting about. Travellers are opting to purchase experiences over things. Skift Research's 2019 Affluent Traveller Survey 'found that 67% of affluent travellers would rather spend their money on activities than on a nicer hotel, up 8% from last year.' Choosing experiences is a travel trend that has grown across all generations and demographics.

There is also an emerging trend for "slow travel" – making genuine connections with local people and cultures along the way. There is a huge opportunity here to provide visitors with added value experiences that fulfil more than just the tick-box factor.

According to TripAdvisor's 2020 Experience Trends Report, family-friendly activities, classes and workshops, and health/wellness experiences are the top-growing categories that travellers are booking during their trips. Promoting Gloucester as the City where you can have authentic experiences will be important in positioning in 2021 and will be an important selling point for the city.

### **Political local government impact**

As a council-run department, we will be impacted by the all-council elections in May 2021. This may lead to a new direction for the Council and a new set of priorities to work towards. Relationships with Councillors may need to be re-established.

### **The Competitive Landscape in 2021**

In 2021 the tourism sector will look to recover following the rollout of the vaccine. Destination Management Organisations (DMOs) across the country will all be competing for the domestic market in 2021. This has serious implications for Gloucester's ability to deliver visitors firstly in terms of numbers as the domestic market is a lot smaller than the global market but also because of budget. Gloucester has a small marketing budget of £75,000 to spend on advertising and being a non-membership organisation has only a few areas where it can draw income. Other DMOs in the area have much bigger budgets to work with for example Visit Bath has a marketing budget of over £500,000.

Gloucester is surrounded by other DMO's which we are fortunate to have very good relationships with. The newest of these being Visit Gloucestershire which is a voluntary run organisation. Visit Gloucestershire has recently secured £60,000 from Gloucestershire County Council to create a cohesive Visitor Economy Recovery Plan for the County. Gloucester is fortunate to offer a very different experience and therefore target market from our nearest DMO partners Marketing Cheltenham, Visit Cotswolds, and Forest of Dean & Wye Valley Tourism. In 2021 we will differentiate ourselves from our

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nearby DMO's by positioning ourselves as a vibrant city break destination for GenZ and Millennials focusing on our events and festivals, retail offer and excellent food and drink. We will also use our distinct history and heritage and the stories associated with the city to engage audiences and pique interest.

When you compare the size of the team to other City's DMO's Gloucester's team is much smaller. A recent survey on Visit Britain's slack channel shows that currently, Visit Bristol have 10 Full-Time Equivalent (FTE) staff, Visit Lincoln (which has a similar population to Gloucester) have 6 FTE staff. Being a newly set up Tourism Marketing Team our relationship with Visit Britain needs to be nurtured to ensure that we are considered not just for funding opportunities but as a potential content partner.

### Marketing in 2020

In 2020 the Marketing Team undertook the following marketing campaigns and activity:

- Gloucester From Home - During lockdown, many destinations continue to use virtual experiences to engage consumers, promote product and brand. These experiences also reflect an increasing focus on showcasing natural product, rural experiences, wellness, food and community. The campaign also promoted retail and food and drink businesses operating click and collect and delivery services. Gloucester From Home was amplified through Visit Gloucester's social media channels.
- Gloucester Good to Go Marketing Campaign - a regional marketing campaign aimed at families and couples which was based on the Visit Britain Good to Good accreditation scheme. The campaign looked to rebuild consumer confidence utilising a variety of media including sponsored content, competitions and advertising through Reach PLC's print, website and social media channels; the SoGlos website, e-newsletter and social media channels; and Cotswold Life's magazine and e-newsletter This campaign delivered a reach of 3 million and was widely supported by our partners in the city both financially and through marketing amplification and engagement.
- Gloucester Winter Safety Campaign – a hyper-local marketing campaign that promoted the safety messaging around COVID19 to build consumer confidence for being in the city. This campaign was supported by European Union ERDF funding. It used an authoritative tone of voice to re-enforce the national Hands, Face, Space message created by Public Health. This campaign used Heart Radio Gloucestershire presenter readouts, targeted advertising on podcasts and digital streaming services, digital Adshel advertising in the city centre near to the Transport Hub and on Bus wraps running on arterial routes into the city to target audiences as they entered. This campaign is continuing in 2021 and is due to deliver a reach of 933,368 by the end of February.
- Bright Nights Marketing – We ran a campaign in December in the run-up to Christmas which promoted the Bright Nights event programme and re-enforced the safety messaging listed about as part of the campaign. This campaign used Heart Radio advertising to target families through the decision-making female audiences looking for something to do in the city. The active messaging around go explore, be outdoors was used to encourage families to undertake in some physical exercise this winter. This campaign was supported by Active Gloucester. The photography and imagery captured showed the city in a brand-new way and families interacting with the events in COVID friendly ways. This campaign will continue in 2021 to support the other events planned.

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### 3. Current Audiences

#### Visitor Figures

Gloucester suffers significantly from a lack of coordinated audience research and data around the visitor economy. The last Economic Impact Study was undertaken in 2019. There is a lot of work to do to capture the effect of COVID and sourcing and disseminating citywide data will be a priority for the team in 2021.

#### 2019 Data

Marketing Gloucester commissioned the South West Tourism Research Company to undertake an Economic Impact Study for the Visitor Economy of Gloucester which showed in 2019 Gloucester:

- attracted 313,000 domestic visitors to the city spending £50m in the city
- had 50,000 inbound visitors to the city spending £23m in the city
- 76% of visitors were visiting for a holiday
- 11% were visiting for business
- 12% were visiting friends and relatives
- A total of 3,438,000m day visits to Gloucester were taken attracting £140,722,000 spend in the city
- May was the busiest month for both overnight stays and day visits and spend 194,000 trips were taken with a spend of £13.3m.

#### Audience Research

It is hard to pinpoint a particular demographic of an audience for Gloucester because of a lack of data. The data below provides a useful starting point for understanding the current visitors. However, there are significant gaps, which makes close analysis in this area difficult. In particular, the lack of substantial consistent qualitative information means that insight into the motivations, needs and barriers to visiting must be drawn from small pockets of information.

#### Gloucester's population

Gloucester has a population of 150,000 people. The city centre has more young people living there making it feel like a young city. Research undertaken by Gloucester Culture Trust and Flying Geese consultants showed that:

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- People in Gloucester are more highly educated
- They have fewer dependent children living at home
- They are more employed and economically secure
- They hold more senior job titles
- They read more broadsheet national papers
- There are more retired people
- They are of a higher social grade
- They are less ethnically diverse but are comparable to the South West.

### **Online and Website**

In 2020 the visitgloucester website received 145,452 users. This was a decrease of -30.19% on the 2019 web user figures. (208,362 in 2019)

We promoted over 44 events and provided business information for 172 businesses in the city.

### **Our most popular web pages in 2020 were:**

1. Homepage
- 2. Things-to-do/robinswood-hill-country-park
- 3. Things-to-do
- 4. Food-and-drink/eat-out-to-help-out
- 5. Shopping
- 6. What's-on
- 7. Things-to-do/history-and-heritage
- 8. Explore/Bourton-on-the-water
- 9. Explore/Bourton-on-the-water
- 10. Shopping/Gloucester-quays

### **The top countries our web users were from in 2020 were:**

- UK
- USA
- Australia
- Germany
- France

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- Canada

Examining Facebook Insights, we can see that the top age ranges of our Facebook followers are 25-34 (27%) and 35-44-year-olds (25%). The gender divide is 64% female fans and 36% male fans. For 2020 our page reach was 1,345,609 users and total post engagements were 96,729. The top follower countries are:

The top countries are Facebook followers are from in 2020 were:

- UK
- US
- Australia

Top cities:

- Gloucester
- Cheltenham
- Stroud

### 4. Target Audiences

The uncertainty around COVID19 recovery and Brexit means we plan to target mainly domestic audiences in 2021:

#### **Domestic couples aged 24-35**

The appetite for domestic leisure experiences is increasing, partly driven by the self-presentation society trend, and the appetite for staycations is likely to be maintained until the uncertainty around Brexit has been resolved and that the vaccine has been rolled out to most of the population by 2022. Nurturing this audience will pay dividends as they are the group most likely to socially share their experiences and grow word of mouth. This audience is one of our biggest age ranges not just for visiting Gloucester but also in our resident population. Initiatives with Podcasters and Social Influencers will be used to raise the profile of the city and its associated events amongst this age range. In 2021 we will work hard to position Gloucester as a popular city break destination with younger people from London and the South West. They are also an audience that is easy to reach through digital media such as social media advertising, display and PPC advertising.

#### **Domestic Solo Traveller**

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It used to be the case that in most consumers' lives periods of solo living were concentrated in young adulthood and later life. As life stages become more flexible and traditional milestones like marriage get shuffled, postponed and even repeated, consumers are experiencing life on one's own across any number of points in their life; this brings with them all the related consequences of single living into their leisure activities. The 2019 Traverse study 'Future of Millennial Travel' report said that 25% of Millennials plan to travel solo in the next 12 to 24 months. Solo travellers want memory-making experiences. Our festival programme and vibrant urban setting will be appealing to the solo traveller if they are firmly positioned as enriching opportunities for self-discovery.

### **Domestic Family audiences**

Growth in family bookings has outpaced non-family sales since summer 2012, with the sector now accounting for almost 40% of summer bookings compared with 20% of winter sales. With the dominance of the Staycation market, the domestic family audience will remain an important audience for Gloucester in 2021. However, 2021 is the year where domestic families will feel the pinch as prices for goods are predicted to rise well ahead of wages due to Brexit and the economic downturn caused by the COVID19 pandemic, so messaging around value for money will be important. The relatively low cost of accommodation and food and drink in the city will provide good low-cost options for families concerned about money management. The city is also full of attractions that appeal to families such as the Jet Age Museum, Museum of Gloucester, Ninja Warrior, The Escape Rooms, and the Ski Slope.

Families are changing in size, shape, and composition, and are far removed from the traditional 'nuclear' family. In 2021 we will make capturing these new family units through filming and photography a priority to promote inclusivity. CNN recently reported that single-parent families now make up almost 30% of families worldwide. We will also encourage our attractions in the city to consider introducing a single parent/guardian family ticket.

## **5. Developmental Audiences**

Marketing to bring online new audiences especially inbound visitors can take up to two years before you can expect them to visit. It involves a lot of promotion through travel trade events and through working closely with Visit Britain. In a 'normal' year these types of relationships could be made through physical events such as 'Destination Britain' sales missions, however, with COVID19 meaning face to face interactions with the trade aren't likely to happen in 2021 the marketing team will have to work hard to find new initiatives to capture the imagination of these audiences. We will employ a mixture of B2B and B2C marketing to target visitors to the UK. This means that in 2021 we need to build on our existing relationships with trade and tourism bodies to allow us to promote the City meaningfully to these new target audiences. The information below is all based on 2019 figures as the data Visit Britain sourced is from the International Passenger Data survey. The International Passenger Survey (IPS) interviewing was suspended on 16 March 2020 because of the coronavirus (COVID-19). It is not certain when it will resume so we can only draw on market data from 2019.

### **Domestic Travel Trade**

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Organised Domestic Group Travel is likely to come online before international groups do. These operators are a Key market for heritage attractions and tours, and also for bringing people into the city for festivals such as Tall Ships Festival. This market has been severely hit by COVID due to age of audience and lack of social distancing available on coaches. We will need to reconnect with Group Travel Operators when confidence returns (and probably before).

### **The Nordic Market**

The Nordic market provides a great opportunity to grow our inbound market when Inbound travel comes back online. Although the numbers visiting seem modest at 647,461 the spend that they generate is high (£674 per stay) as their average length of stay is high at 4.7 nights. 46% of all visitor spending comes courtesy of visiting for a holiday and the Nordic market are known for their repeat visitation of England meaning if you can win them over once it is likely they will visit time and time again. They also feel welcome in England with 99% of departing visitors say they were made to feel either 'welcome' or 'very welcome' in Britain (<https://www.visitbritain.org/markets/norway>)

The Nordic market is known for their love of shopping often visiting London to undertake clothes shopping maximising on the strength of their currency compared to the relatively low value of the pound. Engaging with this market through the Travel Trade to position Gloucester as the ideal city break shopping destination for young people in Sweden, Denmark and Norway will be undertaken towards the end of 2020.

They are also the market which is most likely to come back online soonest after the COVID19 pandemic having had a relaxed attitude toward lockdowns and social distancing.

### **North American independent travellers**

The US market remains an attractive market for growth with many Americans using the low pound as an opportunity to make that once in a lifetime trip to the UK. America is the second biggest market for inbound visits (450m) to the UK and the 1<sup>st</sup> in terms of spend (£4.8bn). In 2019 the average US visitor spend was £930 on leisure in the UK. They are also a market which is more likely to travel offseason with 69% of their travel taking place between October and June.

Americans have a positive perception of Britain as they ranked Britain 3rd overall among 50 nations to visit. They rate Britain highly for sport, contemporary culture, and vibrant city life all things that Gloucester has a strong offering in. We already have a good starting point for a strong relationship with the US as we are a key member of the Visit Britain Discover England Fund (DEF) US Connections project which looks to develop the relationship between certain locations and the US. An outcome of the project was the creation of a new, bookable guided tour experience highlighting Gloucester's links with the American national anthem and the origins of faith and religion in the US. The tour begins with an organ performance of the Star-Spangled Banner and tour of Gloucester Cathedral (the composer John Stafford Smith was born at the cathedral and was the son of the organist), followed by a tour of the city and St Mary de Crypt Church telling the stories of Gloucester-born religious pioneers George Whitefield (a Methodist and Evangelical minister who preached in the early American colonies) and Robert Raikes (one of the founders of the Sunday School Movement). The

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Connections project was extended by six months in September 2020 and will look to maintain dialogue with the US group travel market and develop new product ready for when confidence returns to the inbound market. Visit Britain has highlighted America as a key market for growth in the next five years which will help to amplify any marketing to this audience we undertake.

### Canada

The UK was the 3rd most visited European destination by Canadians in 2019 although the numbers are modest at 874,061 visitors to the UK in 2019. Top activities featuring visits from Canada to the UK include dining in restaurants, shopping and going to a pub. Culture and history are strong pulls to the UK. Canadians have a higher-than-average propensity to visit museums and art galleries, and over 4 in 10 visit historic houses and castles so Gloucester's rich history and heritage will appeal to this audience. Canadians are positive about Great Britain: the nation is ranked 2nd among 50 nations. Like the US Market Gloucester has an advantageous position in marketing to Canada through the US Connections project. Ancestry and family history are big draws for the Canadian market and Gloucester is fortunate enough to have a fantastic archive and local history centre that can help this audience discover more about their links to Gloucester. Like the Nordic market, they are repeat visitors to England delivering a good ROI (return on investment) on marketing spend.

## 6. Strategic Objectives

The Future Marketing of Gloucester document has set out several key objectives for the Destination Marketing Team. The objectives listed below all relate to the objectives outlined but give a greater level of detail into the specific actions that the team will undertake to ensure these objectives are met. Unlike many marketing plans this one does not set out 'Quick, Medium and Long term' goals as many of the actions are required immediately and the future of the tourism marketing for the city remains uncertain.

1. Deliver marketing campaigns that foster strong brand saliency regionally and nationally to raise awareness of Gloucester as a city break destination
2. Review our brand and communications to position ourselves as one of the UK's leading visitor destinations for the domestic market in 2021
3. Develop our online presence to a mixture of digital marketing campaigns and 'always on' activity
4. To cultivate and grow our inbound audiences in 2021

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5. Set up a city-wide data project that sources and collects data on the city and from our partners and disseminates it to stakeholders
6. Review print and digital spend and look to a revised print and digital strategy in 2021 to support sustainability and evolving audience trends
7. Strengthen audience development and community engagement initiatives to diversify audiences and address brand perceptual barriers
8. Build a robust network of partners in the city from a variety of businesses operating to serve the visitor economy
9. Leverage £30,000 worth of investment into the tourism marketing for the city
10. Lead the tourism recovery in the city by supporting partners in their activity
11. To consider the ethical impact of all marketing activities.

### 7. Marketing Plan

The Marketing Plan provides a high-level plan that forms the basis of the Tourism and Destination Marketing team's action plan. The team action plan is reviewed weekly and the Marketing Plan is reviewed monthly. KPI's will also be fed into the Gloucester City Service Plan for 2021-22.

#### Key

TDMM – Tourism and Destination Marketing Manager

TDMO – Tourism and Destination Marketing Officer

TDDMO – Tourism and Destination Digital Marketing Officer

All – all of the above

Aim/objective	Campaign/Action	Channels	Timescales	Who	Evaluation
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<p>1. Deliver marketing campaigns that foster strong brand saliency regionally and nationally to raise awareness of Gloucester as a city break destination</p>	<p>Implement highly targeted marketing campaigns that promote the festival programme in Gloucester to London, Birmingham, and the South West.</p>	<p>Outdoor Media Influencer marketing Facebook Display, remarketing advertising.</p>	<p>Artwork commission March/April  Campaign live 1 June – 31 August</p>	<p>All &amp; Festivals Team</p>	<p>Increased ticket sales and website visitors from London and the Birmingham, South West.  Social Media engagement increases from London and Birmingham, South West.</p>
<p>Deliver marketing campaigns that foster strong brand saliency regionally and nationally to raise awareness of Gloucester as a city break destination</p>	<p>Create communication channels that promote the programme of the festival to residents in Gloucester and Cheltenham.</p>	<p>Radio Advertising  Facebook Campaigns  Local influencer network  Cross-promotion with city partners</p>	<p>Book media January  Write briefs and artwork sign off April</p>	<p>All &amp; Festivals Team</p>	<p>Strong attendance from residents as evidenced through postcode data through ticket sales. (We cannot expect increased attendance on 2019 probably not possible due to the COVID 19 Pandemic)  Social shares increase from city partners  Increased engagement rating on social media</p>
<p>Deliver marketing campaigns that foster strong brand saliency regionally and nationally to raise awareness of Gloucester as a city break destination</p>	<p>Develop and deliver an Autumn campaign which positions Gloucester as the perfect break to shop at Christmas present. Target millennial couples in Birmingham and Cardiff.</p>	<p>Outdoor Media in high footfall areas and arterial routes into the city</p>	<p>Media booked April  Creative sign off August</p>	<p>All</p>	<p>Increased hotel occupancy levels in November and December  Increased footfall to the city in November and December from Birmingham and Cardiff.</p>

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		Blog and website content created to boost SEO  Google AdWords & Display advertising	Campaign live November and December  PPC planned September		Increase in website visitors from PPC advertising.
Deliver marketing campaigns that foster strong brand saliency regionally and nationally to raise awareness of Gloucester as a city break destination	Develop and deliver a campaign around the Cheltenham Festival to promote Gloucester to racegoers as a city with great nightlife to enjoy and well-priced accommodation.	Blog content  Social Media Advertising  Google AdWords advertising	The blog is written and shared 1 March  Social Media posts from mid-February	All	Increased hotel occupancy levels from 16-19 March  Increased footfall to the city 19-19 March  Blog views increased by 5% (Ellie can you put Xmas gift blog views in here)
<b>Aim/objective</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
2. Review our brand and communications to position ourselves as one of the UK's leading visitor destinations for the domestic market in 2021	Formalise the relationship between the Visit Gloucester brand and the Gloucester City Council brand to ensure the City Council is being correctly acknowledged for the Tourism Marketing.	Brand Guidelines	January 2021	TDMM	Co-branding guidelines signed off  All artwork uses the correct logo dominance
Review our brand and communications to position ourselves as one of the UK's leading visitor destinations for the domestic market in 2021	Work with a local designer to create a new logo and colour palette to remove the association of Visit Gloucester to Marketing Gloucester. To be used whilst the	To be used across all channels until the new brand is introduced.	January 2021	TDMM	New logo used on all digital and physical collateral from January 2021.

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	large-scale branding project is being carried out.				
Review our brand and communications to position ourselves as one of the UK's leading visitor destinations for the domestic market in 2021	Write a brief and Invitation to tender for creating a new brand identity for Visit Gloucester. To include stakeholder consultation, tone of voice, brand pillars, colour palette and comprehensive manual of guidelines.	To be used across all channels from June 2021	Project manage the branding campaign from March 2021	TDMM	New brand guidelines signed off by Marketing steering board and rolled out across all Channels.  Survey sent out to partners to gauge reaction to the new brand.
<b>Aim/objective</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
3. Develop our online presence through a mixture of digital marketing campaigns and 'always on' activity.	Create a social influencer strategy for the city which looks to formulate influencer campaigns and encourage social influencers to experience various products in the city and share their content.	Social Media	Strategy created by March 2021 ready for the start of the season	TDDMO	Social Media engagement grows  5 high profile social influencers creating a minimum of 10 posts are hosted in the city throughout the year.
Develop our online presence through a mixture of digital marketing campaigns and 'always on' activity.	Launch the new visitgloucester website in February 2021	Website	February 2021	TDDMO	Stakeholders asked to feedback on the website in March.  The monthly digital report shows increases in website users.
Develop our online presence through a mixture of digital marketing	Assess the capability to deliver Google AdWords, Display and YouTube campaigns in house and	Google network and website	An assessment made and agency appointed in	TDMM & TDDMO	The monthly digital report shows increases in website users.

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<p>campaigns and 'always on' activity.</p>	<p>appoint an agency if deemed necessary.</p>		<p>March if required.</p>		<p>Website appears in the top 3 Google hits for several keyword searches including:  Visit Gloucester Things to do in Gloucester What's on in Gloucester Food and Drink Gloucester</p>
<p>Develop our online presence through a mixture of digital marketing campaigns and 'always on' activity.</p>	<p>Review our online customer journey and content to assess where we are experiencing low traffic and optimise content to ensure it fits with SEO traffic.</p>	<p>Website</p>	<p>Bi-monthly throughout 2021</p>	<p>All</p>	<p>The monthly digital report shows increases in website users.  Website appears in the top 3 Google hits for several keyword searches including:  Visit Gloucester Things to do in Gloucester What's on in Gloucester Food and Drink Gloucester</p>
<p>Develop our online presence through a mixture of digital marketing campaigns and 'always on' activity.</p>	<p>Develop a content plan which focuses on a different theme each month. Create blogs and social media posts around the theme based on partners events and products.</p>	<p>Website and social media</p>	<p>January 2021</p>	<p>All</p>	<p>Social shares and engagement from our city partners.  Social media engagement grows  The monthly digital report shows increases in website users.</p>

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Develop our online presence through a mixture of digital marketing campaigns and 'always on' activity.	Issue a monthly 'What's On in Gloucester' newsletter to our residents and subscribers.	e-newsletter. GovDelivery	February 2021	TDDMO	Subscribers to the newsletter increase Open rate increases
<b>Aim/objective</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
4. To cultivate and grow our inbound audiences in 2021	Attend Visit Britain VIBE events to keep the national tourist board informed of the new developments.	VIBE Event	March and October 2021	TDMM	Increased coverage and Fam trips from Visit England
To cultivate and grow our inbound audiences in 2021	Compile a list of events and new developments in 2021 and feed to tourist press.	PR	January 2021	TDMO	AVE from press coverage
To cultivate and grow our inbound audiences in 2021	Work with the Travel Trade in 2021 to raise awareness of Gloucester Including joining UKInbound and attending Explore GB and Britain and Ireland Marketplace. Create Virtual Fam Trip experiences.	Travel Trade	Throughout 2021	TDMM	A well-developed network of travel trade contacts created and a bi-monthly e-newsletter
To cultivate and grow our inbound audiences in 2021	Research and keep up to date with the latest US, Canada and Nordic outbound information	Visit Britain, Oxford Economics, Forbes	Throughout 2021	TDMM	Feeds into the action plan, marketing reports and marketing plan for 2022

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To cultivate and grow our inbound audiences in 2021	Conduct a US PPC or Display or Social Media campaign to encourage summer breaks in 2022	Google AdWords and Display	August 2021	TDMMO	Increased website visitors from the US in September and October.
<b>Aim/objective and Audience</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
5. Set up a city-wide data project that sources and collects data on the city and from our partners and disseminates it to stakeholders	Write tender for city-wide data project and incorporate footfall counter tender outcomes	Supplyingthewest.org.uk	February ITT sent  Appointed in March	TDMM	City-wide data in place by March for the start of the season.
Set up a city-wide data project that sources and collects data on the city and from our partners and disseminates it to stakeholders	Create a dashboard that can be issued to all city partners once a month	e-newsletter	March 2021	TDDMO	An increased open rate of partner newsletters.

<b>Aim/Objective and Audience</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
6. Review print and digital spend and look to a revised print and digital strategy in 2021 to support	Review digital Outdoor Media opportunities and consider integrating into campaigns	Outdoor media	January –March 2021	TDMM	Report from media buyer to feed into decision-making.

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sustainability and evolving audience trends.					Increased digital OOH home spend.
Review print and digital spend and look to a revised print and digital strategy in 2021 to support sustainability and evolving audience trends.	Review current brochure requirement following consultation with Marketing Steering Group and stakeholders and consider the need for a brochure in 2021	Leaflets, print publications	February 2021	TDMO	Brochure decision made and if brochure required, created by March for the start of the season
<b>Aim/objective and Audience</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
7. Strengthen audience development and community engagement initiatives to diversify current domestic audiences and address brand perceptual barriers.	Recruit community organisation to Marketing Steering Group	Community networks – speak to Ruth and Gupti	January 2021	TDMM	A board that is representative of Gloucester’s demographic make-up.
Strengthen audience development and community engagement initiatives to diversify current domestic audiences and address brand perceptual barriers.	New branding project to consult with community and residents’ associations so that the brand is representative of the Civic pride our residents have for the city.	Branding document	Spring 2021	TDMM	Increased social media engagement from residents.  A tone of voice document is created that is authentic and representative of Gloucester’s residents.  Work with Gloucester Community Building Collective

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					for a closer involvement with local communities and projects
Strengthen audience development and community engagement initiatives to diversify current domestic audiences and address brand perceptual barriers.	Curate high quality guest content for video and social media from local personalities and media professionals talking about 'My Gloucester'  Creates authentic content for millennial and Gen Z audience and could be used in conjunction with the University of Gloucestershire to attract and welcome new students	Website, blog, and social media Instagram takeovers with local key photographers, video content with local personalities including town crier, a rugby player, food heroes, quirky and interesting professions	February 2021	TDDMO	Increased social media engagement from residents.
<b>Aim/objective</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
8. Build a robust network of partners in the city from a variety of businesses operating to serve the visitor economy	Create a CRM of stakeholders/partners contacts in the city to allow us to issue tailor-made communications to them.	CRM and e-newsletter software	Implement CRM and input contacts from the list in February 2021	All	Comprehensive and up to date CRM database of local, regional and national contacts.

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Build a robust network of partners in the city from a variety of businesses operating to serve the visitor economy	Recruit members onto the Marketing Steering Group from a range of organisations and to act as a critical friend and advisory channel for all Tourism Marketing	Meetings 4 times a year. Using MS Teams or Zoom	Initial meeting February 2021	TDMM and Head of Culture	Attendance at meetings and feedback recorded and reported on in each session.
Build a robust network of partners in the city from a variety of businesses operating to serve the visitor economy	Create a tourism clinic function where members can join in on sessions given by the team or industry experts about a range of topics including working with the trade.	Bi-monthly tourism clinic sessions	The first session in February 2021	All	Increased satisfaction in tourism marketing evidenced through the annual survey sent out in December.  Attendance and feedback from sessions.
Build a robust network of partners in the city from a variety of businesses operating to serve the visitor economy	Each Tourism marketing member to dedicate one day a week to carry out face to face meetings with partners.	Meetings during pandemic undertaken through MS Teams or in outdoor locations	Schedule to be agreed with the team in January 2021	All	Increased satisfaction in tourism marketing evidenced through the annual survey sent out in December.
<b>Aim/objective</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
9. Leverage £30,000 worth of investment into the tourism marketing for the city	Create co-branding/sponsorship opportunities for marketing campaigns with Gloucester Quays, Gloucester Rugby, Gloucester BID, Canal & River Trust	Outdoor media Radio	May for Tall Ships festival	TDMM and TDMO	£10,000 in-kind support achieved to support the Tall Ships marketing campaign  Reach of campaign communicated to stakeholders
Leverage £30,000 worth of investment into the tourism marketing for the city	Successful use of Visit Britain's TXGB platform which generates a booking commission of 2.5% on	Website	In place and selling partner tickets through	TDDMO	First-year £500 achieved.

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	ticket sales booked through the visitgloucester website.		the website by March 2021		
Leverage £30,000 worth of investment into the tourism marketing for the city	Sign up a range of advertisers to use the city centre roundabout outdoor media to advertise their businesses.	Roundabout Outdoor Media	Source report on the value of the roundabout location from Media Buyer. Promotion to partners through e-newsletter channel February 2021.	TDMM	£10,000 income generated in 2021 from roundabout advertisers.
Leverage £30,000 worth of investment into the tourism marketing for the city	Sell an enhanced homepage presence on the new website to partners in the city.	Website	Create a price point plan for website advertising. Promote the opportunity from May 2021	TDDMO and TDMO	£600 generated in 2021 based on selling 6 months' worth of homepage advertising at £100 each. Consider working with a company who sells advertising on our behalf for example Ignyte.
Leverage £30,000 worth of investment into the tourism marketing for the city	Offer partners the opportunity to buy a bespoke report from Visit Gloucester on their audience through the data-mapping service	City-wide data-mapping project reports	March 2021 when the data project is live	TDMM	£2000 generated through report sales to retail partners.
<b>Aim/objective</b>	<b>Campaign/Action</b>	<b>Channels</b>	<b>Timescales</b>	<b>Who</b>	<b>Evaluation</b>
10. Lead the tourism recovery in the city by supporting partners in their activity.	Create a COVID19 Recovery Plan for the city	All	March 2019	TDMM	A plan is written and signed off by Head of Culture

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Lead the tourism recovery in the city by supporting partners in their activity.	Ensure partners have the latest advice and access to the team if they want any further clarification on the latest COVID19 restrictions.	Partner e-newsletter	February 2021	TDMO and TDDMO	The open rate of e-newsletters.
Lead the tourism recovery in the city by supporting partners in their activity.	Gather intelligence on the impact to the sector including which audiences are still visiting and why as this will inform the recovery plan.	Citywide data project T-stats data gathering project	February 2021	TDMM	Research gathered and fed into the COVID-19 Recovery Plan.
Lead the tourism recovery in the city by supporting partners in their activity.	Publicise and support local initiatives, businesses adapting their offer. Use support local messaging.	Social media	Throughout 2021	TDDMO	Use of the #supportlocal hashtag increase.  Increased social media engagement,
<b>Aim/objective and Audience</b>	<b>Campaign/Action</b>				<b>Timescales</b>
11. To consider the ethical impact of all marketing activities.	The tourism and destination marketing team will no longer host or place advertisements or source PR from the following 'hate' publications, The Sun, The Daily Express, The Daily Mirror and The Daily Mail.				Ongoing
10. To consider the ethical impact of all marketing activities.	The Marketing team will source items locally wherever possible as part of the Council's 'Think Local' policy.				Ongoing
10. To consider the ethical impact of all marketing activities.	Where reasonably possible promotional printed material will be printed on 100% recycled paper in line with the City Council's sustainability policy and interactive PDF's will be offered as standard.				Ongoing

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<p>10. To consider the ethical impact of all marketing activities.</p>	<p>To make inclusiveness in photography (for example a range of ethnicities, young and old, disabled people) the standard and for each to be represented in promotional material.</p>	<p>Ongoing</p>
<p>10. To consider the ethical impact of all marketing activities.</p>	<p>Adhere to the Data Protection Act 2018</p> <p>When using images of children, young people and adults, we will:</p> <p>seek written consent from the parent/guardian or carer for children and young people under the age of 18 BEFORE taking photographs</p> <p>ensure that this consent is recorded on the standard form</p> <p>Be clear what the publication is about and how the image will be used. Time duration is useful e.g., for the 2020/2021 social media marketing campaigns;</p> <p>Never publish the full names or addresses of children or young people;</p> <p>Never publish the email addresses of children or young people;</p> <p>not publish any images that could be used inappropriately e.g. people wearing swimming costumes; images which could be damaging to Gloucester's reputation.</p>	<p>Ongoing</p>