

Meeting:	Overview and Scrutiny Committee	Date:	31 January 2022
	Cabinet		09 February 2022
Subject:	Tourism and Destination Marketing Report		
Report Of:	Cabinet Member for Culture and Leisure		
Wards Affected:	All		
Key Decision:	No	Budget/Policy Framework:	No
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Appendices:	1. Tourism and Destination Marketing Plan 2022		
	2. Market Conditions for Tourism in 2022		
	3. Current Audiences Population and Target Audiences		

FOR GENERAL RELEASE

1.0 Purpose of Report

- 1.1 To present the Tourism and Destination Marketing Plan 2022 (Appendix 1) along with associated research (Appendices 2 and 3) to the cabinet for comment.

2.0 Recommendations

- 2.1 Overview and Scrutiny Committee is asked to consider the information contained in the report and make any recommendations to Cabinet.
- 2.2 Cabinet is asked to **RESOLVE** that
- (1) The Tourism and Marketing Plan 2022 in Appendix 1 is noted, and the recommendations are accepted.

3.0 The Visit Gloucester Tourism and Destination Marketing Plan

- 3.1 The Tourism and Destination Marketing Team were appointed to permanent positions from 1 Jan 2022 following a review of the service which included an options appraisal, stakeholder engagement report, and business case.
- 3.2 A new Visit Gloucester Tourism and Destination Marketing Plan has been written for 2022 (Appendix 1). It follows on from the 2021 Marketing Plan, which was informed by the Future Marketing of Gloucester Report by Steve Brown produced in April 2020.

3.3 The Marketing Plan assessed the **market conditions that the team will be operating in 2022**, including the tourism forecast for 2022 and the rise of technology within the industry (Appendix 2):

- The Visit Britain Inbound Forecast for 2022 predicts that visits will increase to 24 million, and spending to £19.2 billion. These are 59% and 67% respectively of the visits and spend levels seen in 2019.
- By the end of 2022, the forecast is for visits to have recovered to around 68% of pre-COVID levels. It is expected that it will take a few years for visit numbers to return to 2019 levels.
- The rise of technology will continue to be a major factor in 2022 with many businesses looking to technology as a way to address issues caused by the pandemic such as the staffing shortage. The team have a role to play in guiding businesses in 2022 to utilise technology in the best possible way. We will run a series of training courses looking at digital media and how to work with online travel agents.
- The pandemic forced business events and conferences online, and only in 2021 did we see a return of some in-person conferences and events. However, the development of these new ways of working means it is highly unlikely that the MICE (Meetings, Incentives, Conferences and Events) sector will return to the numbers we have seen in the past. With this in mind, we will continue to de-prioritise the MeetGloucester activity in 2022.

3.4 The marketing plan includes a report on **marketing activity undertaken against the 2021 Marketing Plan's priorities**, the highlights of which include (appendix 1, pages 2-5):

- Creation of the new Visit Gloucester website with record-breaking website hits in 2021 - a 5.6% increase on the 2019 figures.
- A round-up of the marketing campaigns delivered in 2021, including the Welcome Back campaign, the Press and PR campaign, and the Autumn and Winter Campaign working with GWR.
- An update on the place branding work, due to launch in March 2022.
- Creation of the new Tourism and Destination Marketing Data Dashboard which provides our partners with access to the research the team have commissioned www.visitgloucester.co.uk/business-support/gloucester-tourism-and-destination-marketing-data-dashboard.

3.5 The plan includes a section on **research into the visitors for Gloucester in 2020 and 2021** (Appendix 3):

- The Great British Tourism Survey conducted by the South West Research Company this year showed that: In 2020, during the height of the pandemic, we saw that Gloucester had 57% fewer domestic overnight stays, 75% fewer inbound overnight stays, and 51% fewer day trips. Accommodation, bringing in £10,217,000,

remained the largest source of income for the city, followed by Food and Drink at £5,498,000, with shopping, travel, and leisure all bringing in roughly £3,000,000.

- Visitation Data from Town and Place AI (which uses mobile phone data to track city visitors showed that October 2021 was the busiest month for the city with 895,710 visitors, which was 2% higher than September, the second busiest month with 871,351 visitors. By comparison in 2020, there were 312,000 visitors in October, showing a huge (65%) increase 2021. Visitors typically spent 00:54:38 (h:m:s) in the city and visited 3.68 times per month. The top postcodes were all GL postcodes from Gloucester and its immediate surroundings. When we look a bit further afield, we can see Hereford, notably Ross on Wye, Swindon, Newport, and West Oxford as key visitor locations for the city. This demonstrates the continued hyperlocal nature of our audience.
- Our online audiences enjoyed huge growth this year. **In 2021, the website achieved 220,000 website users: a 51% increase on 2020 and a 5% increase on 2019.** In 2020, the Visit Gloucester website received 145,452 users. This was a decrease of 30.19% on the 2019 web user figures (208,362 in 2019). The website is accessed mostly on mobile (73%), which is why making the website mobile first was so important. In 2021, we created 108 blog articles and promoted 256 events, compared to 44 events last year, and provided business information for 172 businesses in the city. Most of the traffic to the website was from the UK (95%), followed by the US (4%). The top cities were London, Edinburgh, and Gloucester.

3.6 **Our main target audiences for 2022** are as follows (appendix 1 pages 12-15):

- Gen Z audiences (under 24-year-olds), especially young people from the county, will remain a key audience for Gloucester. They are increasingly spending more on travel and leisure and are interested in slow and eco-conscious activities, which fits with our ethos. In 2022, we will work with the community rail partnership to increase awareness of the connectivity between the county and Gloucester. We will also continue to work with GWR, weaving their messaging into our content.
- Intergenerational family travel: As the restrictions for the pandemic lift, families are looking to get back together and holiday together. The city can be positioned as a destination that offers activities for all generations; history and heritage for older generations, and activities such as skiing and paddle boarding for younger generations.
- Domestic solo travellers: Covid has seen solo travellers looking for the sense of freedom and independence, not having to consult with people on where to stay, what to eat, and what to do. These travellers are looking to escape the grind, mixing things up, setting challenges, and pushing their comfort zones. They are less likely to want to do the mainstream things, and are looking for unique added value experiences that are life-enriching.
- Domestic Travel Trade: Organised Domestic Group Travel is likely to come online in larger numbers 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. As 2022 is a Tall Ships year, it is imperative we work closely with these groups to draw in the biggest audience for this festival as possible.

- Our developmental audiences have not changed from the ones identified in the 2021 plan, as the continued disruption from the pandemic meant that targeting inbound audiences was harder this year. In 2022, we will continue to attend travel trade events and target organisations working with Nordic, US, and Canadian visitors to the UK.

3.7 The final section outlines the **priorities and action plan for 2022**. The priorities were identified and weighted according to their importance in partnership with our stakeholders through discussions at meetings, through communication in our newsletter, and through a survey (appendix 15-25). The priorities established were:

- Ensuring diversity of promotion across tourism businesses of all sizes within our geographical area.
- Promote all relevant festivals and events and engagement activities across the city.
- Embody and promote the Gloucester brand, support our partners to use the new Gloucester narrative and brand assets.
- Support our tourism businesses in the city to grow the visitor economy through networking, seminars, and our Business-to-Business newsletters.
- Promote Sustainable Travel to tourists (initiatives such as visit like a local, green credentials, and promoting green travel options).
- Audience Development for our digital marketing channels, concentrating in particular on Instagram and TikTok in 2022.
- Deliver seasonal marketing campaigns that raise awareness of Gloucester as a destination for a city-break.

4.0 Social Value Considerations

4.1 The total value added created by tourism, total employment in tourism, cost savings of potential unemployment, quality of life of residents generated by tourism, and environmental infrastructure of tourism cannot be underplayed. Also, the role the team have in promoting cultural activities to the local and regional community is increasing in importance as we continue to feel the effects of the pandemic. Tourism contributes to the appreciation of the built and natural environment by highlighting the importance of our architecture and green spaces, and we can encourage our residents to consume their local leisure facilities and care more deeply about preserving them for the future. Tourism can be a catalyst for strengthening a local community. Events and festivals of which local residents have been the primary participants and spectators are often rejuvenated and developed in response to tourist interest.

5.0 Environmental Implications

5.1 The team promote all aspects of the city's cultural offer as well as encouraging green forms of travel. There will be some limited impact on the environment, however, as increased tourism and movement of people will increase emissions. This year, the team will play an active role in promoting sustainable travel and working with businesses such as Green Tourism and the Community Rail Partnership to support our businesses in becoming more environmentally friendly.

6.0 Alternative Options Considered

6.1 The priorities outlined in the Marketing Plan have been agreed in conjunction with our partners (visitor economy businesses in the city), and as such, we would not be able to change with them without consulting them again.

7.0 Reasons for Recommendations

7.1 The report shows the team's recommendations for promoting the city and supporting our visitor economy businesses in 2022.

8.0 Future Work and Conclusions

8.1 It is likely that a Destination Management Plan will be created for the county in the next few years. We will work closely with Visit Gloucestershire to help steer this. In the longer to medium term, we will assess the impact of the DMO Review and what this may mean for the team.

9.0 Financial Implications

9.1 None directly arising from this report.

10.0 Legal Implications

10.1 None directly arising from this report.

11.0 Risk & Opportunity Management Implications

11.1 The risk by the report not being adopted is that the team are delayed in starting the actions laid out on the plan. As the plan lays out quite a demanding set of actions, any delay would impact the ability of the team to deliver against all the actions outlined.

11.2 As the priorities were created in partnership with our key stakeholders, we would have to talk to our stakeholders to let them know about any suggested changes and delays that may be incurred by the report not being adopted. This may erode the excellent relationship the team have built with the tourism businesses in the city.

12.0 People Impact Assessment (PIA) and Safeguarding:

12.1 The PIA Screening Stage was completed and did not identify any potential or actual negative impact. Therefore, a full PIA was not required.

13.0 Community Safety Implications

13.1 None

14.0 Staffing & Trade Union Implications

14.1 None

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