Overview: VisitEngland

The next decade offers England's tourism industry some significant opportunities, equally matched by a number of challenges.

With the creation of VisitEngland in 2009, the industry now has a dedicated body to provide the leadership to market England, drive forward developments in quality, ease of access and sustainability and to improve data collection and market intelligence.

The Strategic Framework for Tourism 2010-2020, launched in April 2010, identified the headline 5% growth in value, year on year, over the next decade. This figure, identified in the 2010 Deloitte report 'The Economic Contribution of the Visitor Economy: UK and the Nations', is an ambitious target given that we operate in a highly competitive market place and that England is a mature destination compared to the new and emerging destinations around the globe.

Considering this ambitious target, the competitive environment VisitEngland work in and the reduced promotional spend by English destinations, there is a clear need for improved and better coordinated marketing activities in order to achieve the above objective.

If achieved, this would result in an additional £50 billion in expenditure and the creation of 225,000 jobs. This would significantly outstrip the performance of other major sectors of the national economy such as manufacturing. If no growth were achieved the result would be significant job losses and the demise of a wide range of tourism businesses.

The Strategic Framework for England's tourism provides the coordinated approach needed for the public and private sector tourism industry to work together on four key Business Objectives. These key objectives will be the foundation for achieving the collective vision to maximise tourism's contribution to the economy, employment and quality of life in England.

The Business Objectives:

• To increase England's share of global visitor markets

• To offer compelling destinations of distinction

• To champion a successful, thriving tourism industry

• To facilitate greater engagement between the visitor and the experience

1. Context

Domestic tourism

In 2010, the financial climate continued to be challenging, and this impacted tourism activity by UK residents, with both domestic and outbound trip volumes declining by 6% compared to the previous year. Inbound travel to the UK fell by one percentage point during the year, reflecting the financial instability in many other countries around the world.

Domestically, recent years have seen wide variations in performance by trip purpose. Despite a 7% year-on-year decline in holiday trips in 2010, the "staycation" effect persisted for a second year, and the number of domestic holiday trips taken last year (2010) was actually 10% higher than in 2008. By contrast, the number of business trips taken declined for the fourth consecutive year.

It is clear from research that the trend to holidaying at home (or "staycation") is not purely a result of financial hardship – which, by implication, would mean that trip taking would be likely to revert back to pre-2009 levels as the economy stabilises. In fact, the trend to domestic breaks derives from a mix of increased trip taking by some, combined with trips switched from abroad by others – but importantly, in almost all cases, the experience of holidaying at home has been an overwhelmingly positive one.

As a result, consumers expect to maintain (into 2011) or even increase (beyond 2011) the number of domestic holidays they take in future. In other words, as the financial climate improves, though we may well see an uplift in outbound travel, this will not necessarily be at the expense of domestic breaks.

We know that at present, many consumers are worried about their personal financial situation. In the six months between September 2010 and February 2011, the numbers "very concerned" about the economy increased from 64% to 74%, while there was a 6% increase in the proportion worried about job security; now almost two thirds of the population.

For the coming year (2011), much will depend on the extent to which consumer concerns about the economy translate into real hardship, and some may find themselves having to sacrifice breaks (at home and abroad) that they currently hope to take. However, considering the longer term, the domestic holiday experiences of the past two years, and the shift in attitudes that these have caused, there is a real opportunity for domestic tourism beyond the current period of economic uncertainty.

International visits

In 2010, visits to the UK fell by 1% – the third consecutive decline in annual trip volumes – leaving visitor numbers at pre-2004 levels, though spend held steady after two years of marginal growth, a result of the relative weakness of sterling since late 2008. (*Note: England 2010 results have not yet been published, but are almost certain to reflect the same overall trends*)

This contrasts with global travel activity, predicted by UNWTO to have grown by 7% around the world in 2010, and by 3% in Europe, which was affected by a number of one-off factors, including the volcanic ash cloud and severe winter weather.

As in the domestic market, UK inbound trends vary by trip purpose. The number of holiday visits increased by 1% in 2010, following 6% growth the previous year, while visits to friends and relatives fell back for the second successive year. There was moderate growth in business travel over the past twelve months, but business trip activity remains well below pre-recession levels.

Over the coming year, VisitEngland will, in partnership with VisitBritain, continue to focus its activities on the mature markets (near Europe, and English-speaking long-haul markets), which account for the majority of inbound spend to the country, and which are likely to be receptive to messages about travel beyond the capital.

Assuming that 2011 is more "normal" than 2010, UNWTO predicts global growth in arrivals of 4-5% for the coming year, but recognises high unemployment as an ongoing concern, as well as the "tendency towards introducing and increasing taxation on travel".

The impact of the economic stability of individual nations on UK inbound travel is clear from the 2010 trip volumes, which show a growth in trips from Germany, Belgium and Sweden (among others), but double digit declines from Spain, Ireland and Greece, while travel from North America, where the economy remains fragile, also fell back. 2011 performance in England's core inbound markets is therefore likely to be heavily influenced by the speed of, and confidence in, economic recovery across both the Eurozone and the USA.

2. Introduction

This Marketing Plan outlines how VisitEngland will support the All-England Destination Marketing Strategy. VisitEngland will deliver national campaigns with commercial partners that maximise the events opportunities on offer from 2011 to 2015. Through marketing partnerships (both tourism and non-tourism) VisitEngland will drive incremental spend on tourism. Partnership marketing will enable VisitEngland and Destination Management Organisations (DMOs) to deliver the most impact from our respective resources to contribute to achieving the targets set out in the Strategic Framework. Using the marketing platforms below and specific themes VisitEngland will support DMOs to ensure there are benefits across the country for tourism businesses large and small.

VisitEngland Marketing Objectives

1. Increase commitment to England as a holiday destination from 30% to 35%
2. Increase the shallow and committed segment groups from 68% to 75%

Specific activity objectives to support primary objectives:

- Deliver partner campaigns that support seasonal spread across shoulder seasons
- Increase propensity to take short breaks and longer breaks in England
- Increase breaks in family and pre-family life stage segments
- Change perception of England holidays key dimensions including value and variety of experiences
- Align government-funded tourism marketing activities to deliver truly national coordinated activity
- Target consumers at the beginning of the decision-making process, focussing on inspiration rather than information

3. Target Audiences

VisitEngland use a commitment segmentation (covering the most and least emotionally engaged visitors) model as the primary tool to identify people who are more likely to take short and longer breaks in England

3.1 Commitment segmentation

This is derived from our continuous brand tracker in which we interview people who have taken a holiday or short break in the past 12 months (at least one night in paid accommodation, anywhere in the world), and plan to take one in the next 12 months, and are non-rejectors of England – in total 49% of the English population.

Among those who take breaks in England, we can consider three broad groups, differentiated by the degree of engagement they have with the England brand – based on how much they like it and how much they prefer it to other possible destinations.

A. **Committed** visitors (30% of holiday takers or 15% of population: 7.5m adult population) – rate England highly compared to other destinations, and are unlikely to switch away from taking domestic holidays in future.

Committed visitors are already more likely than average to take mid-length breaks (4-7 nights) in England, and are more open than other groups to taking additional breaks of this length. They are also more influenced than others by our recent TV advertising (Enjoy Every Minute). Given their already positive attitudes to England, our communications need to spur them into action by reminding them of what England can offer rather than changing perceptions or providing new information; mass media channels are the ideal route for continuing to do this. Within the Committed segment families are most likely to take extra mid/long breaks. The pre-family group is more likely to take extra short breaks.

Key Life stage targets: Family (long breaks) and pre family and empty nesters (short breaks) – Take additional holidays

B. **Shallow** Visitors (38% of holiday takers or 19% of population: 9.5m of adult population) – like England, but also like other destinations. They will continue to take breaks in England, but are more likely than Committed visitors to take breaks outside the country.

Shallow Visitors are more likely than others to take short breaks (1-3 nights) in England – and are the group most likely to say that they can be persuaded into taking more short breaks, whether in addition to their current holiday repertoire or in place of a break which might otherwise be taken abroad. Activity targeted at this group needs to inspire and provide reasons to take additional breaks; the channels used should reflect the need to change perceptions. This group are likely to need more information and/or new ideas before deciding to take additional England breaks. Critically, it is this segment that provides VisitEngland the greatest opportunity to increase share of domestic verses overseas holidays. Within the Shallow committed segment families are more likely to switch from overseas to England for mid/long holidays. Again the pre-family group in this segment is more likely to switch overseas short breaks to breaks in England

Key Life stage targets: Family (long breaks) and pre family and empty nesters (short breaks) – Switch from overseas

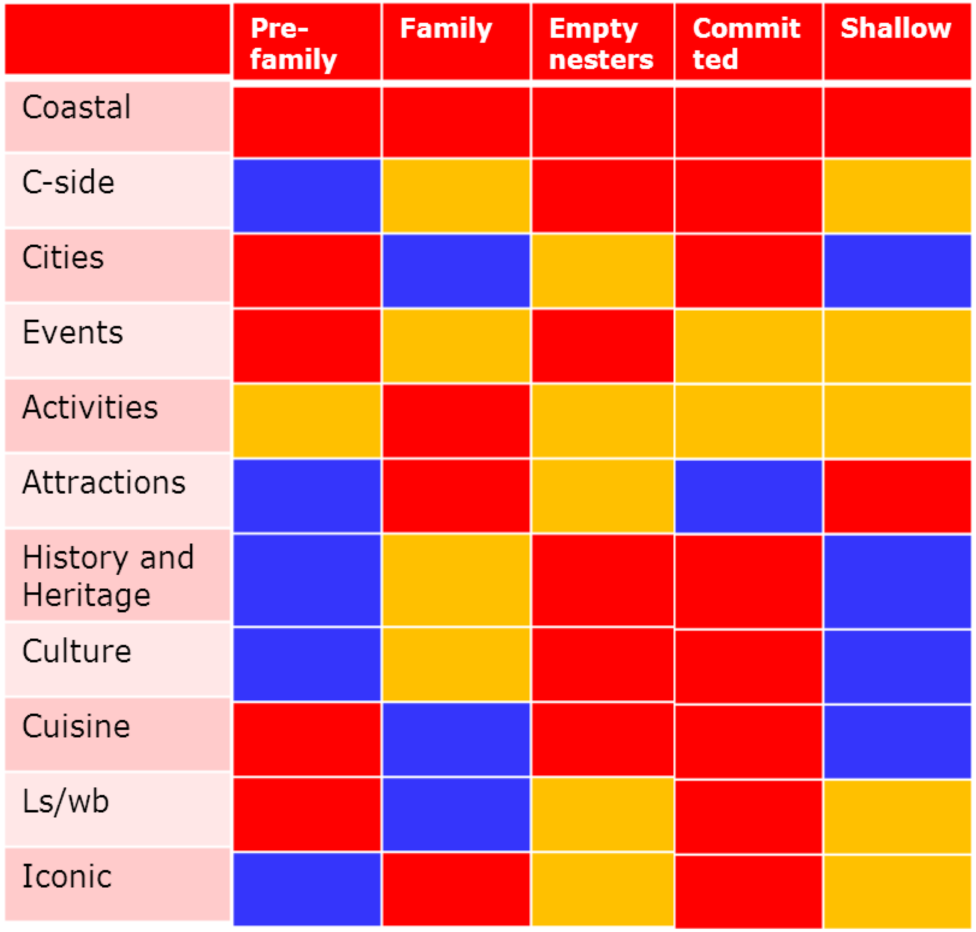
C. **Convertible** Visitors (24% of holiday takers or 12% of population: 6m of adult population) – take breaks in England, but actually prefer other destinations.

Clearly, the first two groups are open to persuasion to take more breaks in England, whilst, not surprisingly, the third group are far less persuadable. Our campaign activities will therefore focus on Committed and Shallow visitors (in total 34% of population: 16.5m of adult population), taking into account the differing profiles of the two groups.

	Total (3282)	Committed (1019)	Shallows (1284)	Average Spend Per Trip (UKTS Holiday Non VFR)
Taken England Break P12M	86%	95%	91%	
Short (1-3 nights)	89%	83%	92%	£167
Mid (4-7 nights)	56%	63%	55%	£263
Long (8+ nights)	17%	17%	16%	£348

TNS 'Deep dive' 2010

The below chart illustrates the themes that motivate each target segment the most. Using this chart will help VisitEngland partnerships to ensure that marketing activity focuses on themes or product that will motivate the various life stages (pre-family, family and empty nesters) and the commitment segments (Committed and Shallow) to take a short or medium long break.

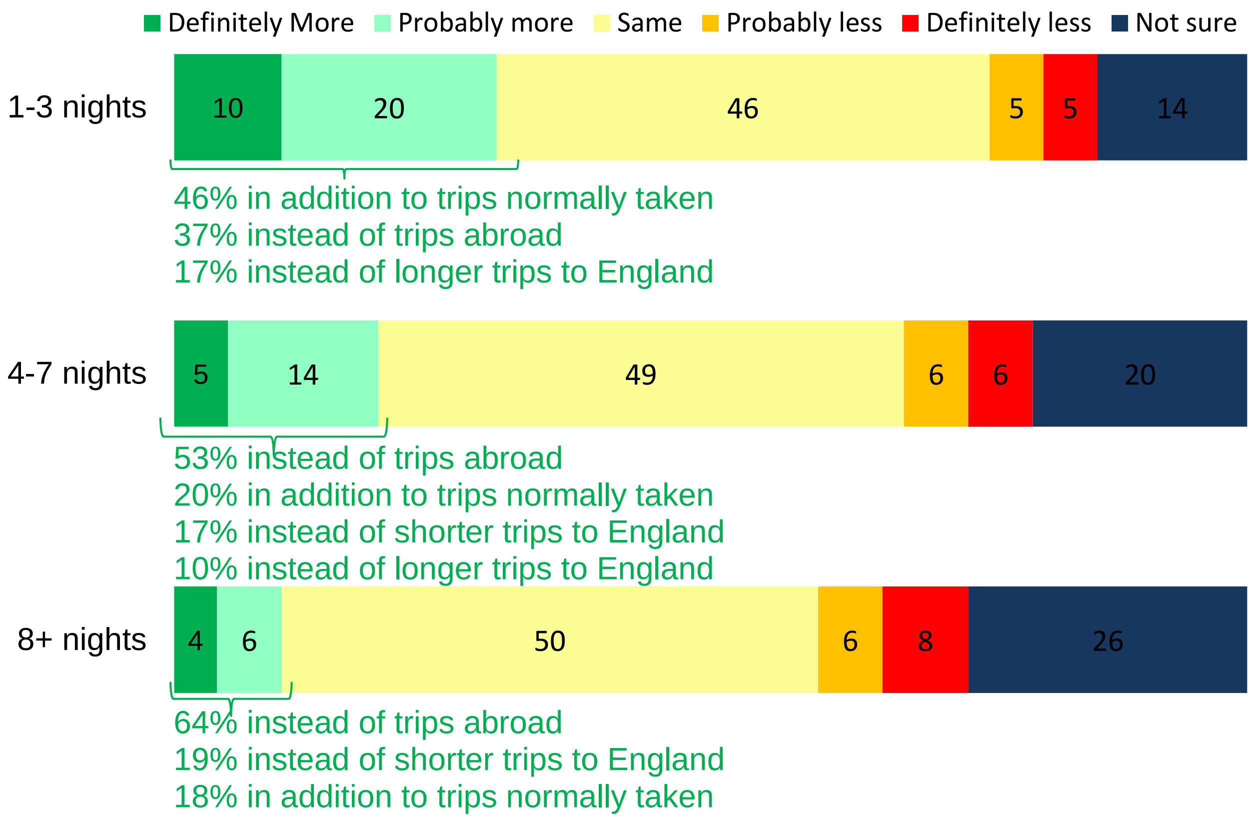


Hot Warm Cold

Brand research Olive – The consumer perspective March 2011

3.2. The economy and the impact on consumer holiday trends

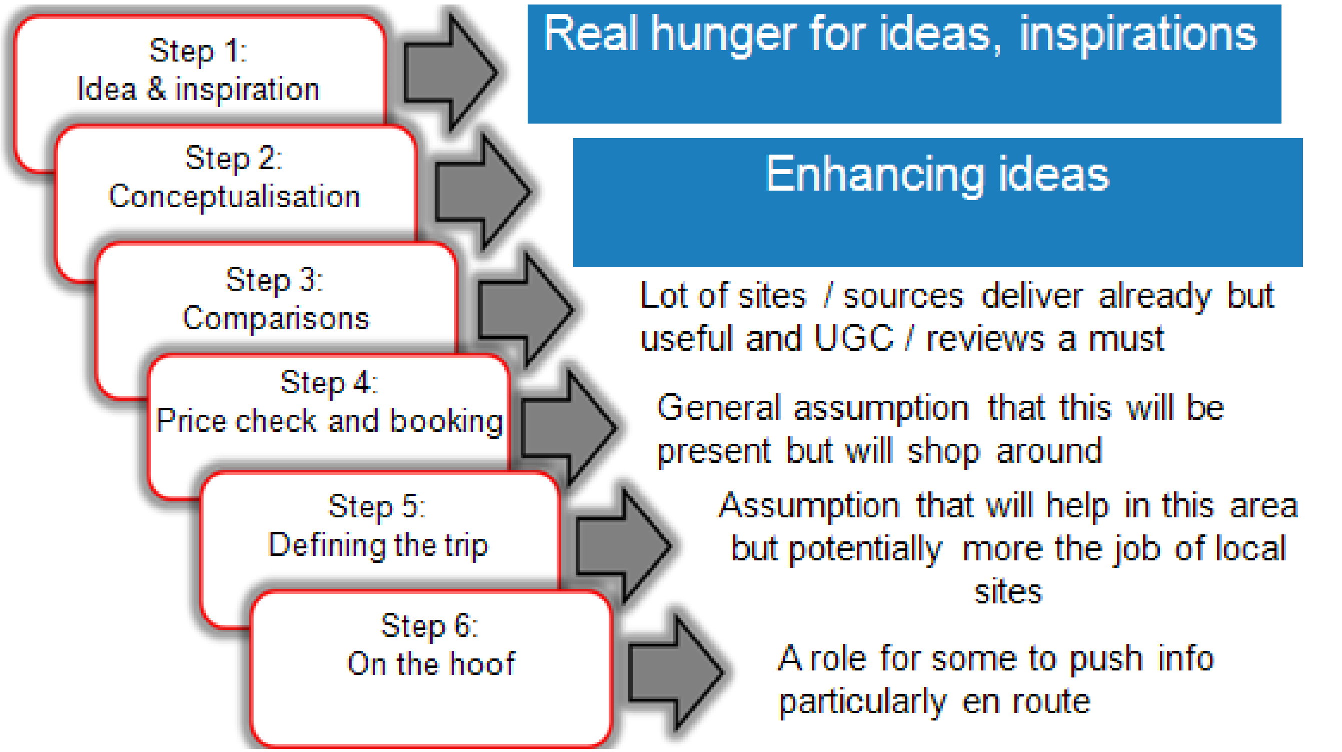
The chart below illustrates that in the future people are predicted to take more short and mid-term breaks in England. It highlights that short breaks are best positioned to drive incremental trip-taking behaviour, while mid-length breaks would primarily be taken at the expense of overseas trips, impacting future messages and communications channels. This correlates with the commitment segments and their short/long break-taking habits.



Credit crunch research March 2011

3.3. The six steps of inspiration – the consumer journey

VisitEngland conducted some extensive research in to what consumers want from a new national tourist board website. The findings highlighted the six steps of inspiration. It was clear that VisitEngland can service steps 1 and 2 in this process as the industry already delivers steps 3 to 6 very well across a range of organisations and channels.



Olive Insight 17/09/2009

VisitEngland will use step 1 as the basis to target the Shallow segment group. Activity will predominately target the short-break market (1-3 nights) through relevant partnerships. The enhancing of ideas (step 2) will support the Committed segment by offering greater depth and choice of ideas to support the propensity to take longer breaks (4-7 days) as well as helping them plan incremental short breaks.

With the consumer journey mapped, VisitEngland activity will focus on steps 1 and 2 and use the key drivers below to increase commitment – these are areas that currently offer England an opportunity to either change perceptions or use as a key motivation to travel. By working with commercial partners VisitEngland will be able to deliver the ideas and inspiration with partners delivering steps 3 to 6 (comparisons, price checking and booking, defining the trip (e.g. DMOs), on the hoof):

Connection with England (history and heritage)	**Conceptualisation - Enhancing ideas**
Suits budget/good value	**Conceptualisation - Enhancing ideas**
Less hassle that overseas breaks	**Conceptualisation - Enhancing ideas**
Relive treasured memories (nostalgia)	**Conceptualisation - Enhancing ideas**
Revitalisation	**Ideas and inspiration**
Quality of food, shopping and entertainment experiences	**Conceptualisation - Enhancing ideas**
England's beaches	**Conceptualisation - Enhancing ideas**
Unique experiences	**Ideas and inspiration**
Excitement and adventure	**Ideas and inspiration**

3.4. International audience

Working in partnership with VisitBritain, VisitEngland will provide a route to international markets for English destinations and industry (in parallel with our sister agencies VisitScotland and Visit Wales). VisitEngland will work with English destinations to identify the highest return markets and will deliver flexible representation; specifically delivering Business Tourism promotion as well as Media Relations and Brand Promotion. VisitEngland will provide the channel by which all English destinations can maximise the promotional opportunity available overseas. VisitEngland will identify specific target audiences in collaboration with English destinations and VisitBritain. Due to the relatively low budget commitment to this area VisitEngland will work closely with VisitBritain insights to identify the highest return segments in target markets.

3.5. Travel Trade

VisitEngland will work with domestic operators and key in-bound tour operators to educate and grow the value of domestic and inbound tourism through the travel trade. Travel agents provide a high street opportunity to become advocates of England providing information and selling England product as opposed to competitor product. An agents training programme will be put together using a range of channels including training sessions, industry events and travel trade partners to raise awareness of English destinations, products and the opportunities for agents to sell core tourism products in England that will be aligned with the key motivations for taking trips e.g. family packages, short breaks etc. VisitEngland will use insights to ensure the travel trade is educated in line with current holiday trends so they can apply this knowledge to their own customers and maximise profits. VisitEngland will dedicate a resource to working with the travel trade. With 5,000 travel agencies and 900 tour operators this audience provides a key route to marketing England's destination messaging.

3.6. Business Tourism

VisitEngland will provide "at-cost" Business Tourism Platforms at key international events (such as EIBTM and IMEX) whilst also providing a joined up approach across Sales Missions, Familiarisation Trips, Trade Shows and Workshops. VisitEngland will ensure leisure messages are cross-sold with Business Tourism activity to maximise extension of visits and encourage potential future events.

4. <u>Brand England</u>

At the heart of the "all England" brand will be a robust understanding and appreciation of what England stands for, which can then be applied with value and consistency across a broad range of domestic and international English tourism stakeholders. The England brand will differentiate the destination from Scotland, Wales and Britain (although part of it) to offer a unique consumer proposition.

VisitEngland is developing an all-embracing brand promise which can be applied with equal relevance and consistency across a broad range of audiences and destinations to ensure we all deliver to the brand. Every destination in England will be mapped against the brand values, helping to identify where each destination should be focusing their efforts (financially and through tourism development).

VisitEngland are running an extensive research project that will be available for publication in spring 2011. It identifies the key motivations of the target segments, where they go and what they do. This will allow us to understand the relative importance of different themes across different consumer segments (commitment and life-stage).

The England destination brand is built from four key categories that will inform activities and partnership campaigns to ensure the correct motivations to travel are targeted.

- The body of England ... Cities, Costal, C-side
- The mind of England ... Events, Attractions, Activities
- The personality of England ... Culture, Cuisine, Lifestyle
- The soul of England ...History, Heritage, Iconic England

VisitEngland will ensure thematic activities are supported by either paid-for partnership activity or affinity marketing (e.g. Walkers Brit Trips, Müller), PR and digital and social media channels.

Through identifying the key motivations of the target segments and how they gain emotional fulfilment each destination brand will understand where they support and build Brand England.

VisitEngland is producing a brand toolkit to assist in communication of the brand so that destinations and industry can identify where they fit and how they can use the England brand to deliver on the brand proposition. It will visualise and translate the values for VisitEngland to base future marketing campaigns and partnerships. The toolkit is being developed not to create new logos but to better coordinate the England brand architecture so all destinations in England can use it with equal relevance. With a single brand promise as well as aligned look-and-feel and tone-of-voice all destinations benefit from cumulative brand strength.

5. Marketing Platforms

All Marketing activity and platforms will focus on step 1 (Ideas and inspiration) and step 2 (Conceptualisation)

VisitEngland will deliver national thematic campaigns (e.g. Countryside, Coastal, City) in partnerships with commercial tourism businesses, DMOs, and non-tourism partners through paid for and in-kind activities benefitting tourism destinations across the country. VisitEngland has also identified Attract Brands that have the greatest consumer appeal based on four main sources which we will use to highlight our best assets:

1. Visitor numbers: destinations accounting for the highest numbers of visitors (considering both holiday and business trip purposes) – Source: UKTS (1) and IPS (2)
2. Consumer perceptions from the VisitEngland (3) Brand Tracker: destinations which are top of mind for consumers when asked to name destinations associated with English holidays
3. Consumer perception work carried out in regions (4), in which consumers were asked to name “top 5” destinations for a break or holiday, using an analysis of results across four categories – countryside, coastal, city and classic.

By engaging with national brands on a specific theme, VisitEngland will work with aligned destinations that can contribute to activity and will benefit from the halo effect of these campaigns. These partnerships will focus on either the Committed segment or the Shallow e.g. city breaks may appeal to Shallow pre-family and Committed pre-family. Partners will play different roles e.g. partners with a price-led message might support the Committed segment (e.g. Superbreak) and partners that enable VisitEngland to shift perceptions would help encourage the Shallow segment group. Using destinations and partners to inspire an extra visit or switch a visit from an overseas destination will be central to all activity.

VisitEngland will rely on DMOs to provide the local knowledge and content to support the marketing activity and align them with national partner activity e.g. VisitEngland delivers a national partnership with an Attract Brand and DMOs could engage with individual attractions to deliver destination-specific activity. English destination messages will feature throughout our content be it web, CRM, PR or through-the-line communications.

To further enhance a national message VisitEngland will produce a campaign to support the event programme in 2012. This campaign will stem from the England brand and will provide a 2012 message that DMOs can align with. VisitEngland will produce collateral that can adopted by DMOs who wish to use it.

VisitEngland will enhance relationships with English destinations through discussion, quarterly updates and yearly joint business-planning sessions. There will be a marketing destination strategy group assembled to create a unified approach to national marketing. VisitEngland will undertake joint business-planning sessions with DMOs in the autumn of every year. Where thematic groupings (such as Heritage Cities) can occur VE will work to provide a secretariat and enable national synergies for DMOs to work together to reduce the duplication of effort and gain economies of scale.

To ensure marketing takes a coordinated approach VisitEngland will provide media planning advisory to English Destinations and where possible employ the combined media spend of VisitEngland and English destinations to improve value and efficiency. To avoid duplication of effort and ensure efficiency, VisitEngland will work with the destinations of England and industry partners to understand the best and most cost-efficient routes to market. This will enable commercial partners with varying budgets to work with VisitEngland to deliver truly nationwide activity yielding the highest return in investment for all involved. This will result in a national tourism media plan where VisitEngland can advise, contribute and add value to ensure there is sustained marketing effort targeting the commitment segments throughout the year.

DMOs have consulted on the All-England Marketing Strategy and there is broad agreement that everyone will adhere to this to deliver an approach that:

1. Concentrates our efforts on the earliest stage of the consumer journey
2. Improves dialogue with consumers
3. Provides reasons for an immediate visit and closes the sale
4. Focuses promotional activity on England most attractive themes and places

5.1. Campaigns

Target audience: Partners will be chosen to activate a specific commitment segment and life stage segment (see below).

VisitEngland will find core long-term partners whose objectives align with our own; ideally for our four- year funding round. Given the nature of these partnerships we will need to remain flexible and 'fleet of foot'. We will agree detailed marketing plans only once the partnership is embedded; then look to extend the campaign's reach through introductions between the partner and its subsidiaries to destinations at a local level. It is envisaged that partnerships will be finalised during 2011.

Once identified, we will work with the national (tourism and non-tourism) partners to deliver national campaigns promoting themes; working with relevant Attract Brands to support the wider campaign activity. Campaign objectives will be set and marketing channels identified to deliver activity. Working with industry and DMOs, affinity partners will also be sought to deliver content in addition to channels including PR and advocacy to maximise awareness and extend consumer reach.

VisitEngland will look to gain a minimum investment of £250K from any one partner and a maximum of £1m.

Potential partners are identified by key commitment segment, life stage and theme or motivation:

Partnership 1: VisitEngland are proposing a joint marketing campaign with Partner 1 (£250K-£500k investment for each party) to promote family weekend breaks and multi-trip day excursions. VisitEngland will also coordinate cross-campaign promotion via individual attractions and DMOs.

Target segment: Shallow (switch from overseas family holiday) and Committed (take additional family break)

Life stage: Family

Timing (TBC): May/June 2011

Partnership 2: VisitEngland are proposing the continuation of long-term relationship with the Partner 2 promoting the heritage and countryside offering. Proposed commitment: £250K from each partner.

Target segment: Committed (additional breaks centred on offering)

Life stage: Pre-family, Family

Timing: Summer 2011, March 2012

Partnership 3: VisitEngland are proposing a national short-break campaign with Partner 3 promoting city and countryside locations. Proposed budget commitment: £250K from each partner.

Target segment: Shallow (switch from overseas short breaks)

Life stage: Pre-family

Timing: Oct/Sept 2011, Mar/April 2012

Partnership 4: Promote short breaks in England focussing on package deals (e.g. theatre, hotel, dinner, travel etc) with a strong tactical message to deliver sales. Proposed budget commitment: £250K from each partner.

Target segment: Committed (take additional short breaks)

Life stage: Pre-family

Timing: Sept/Oct 2011

Partnership 5: Promote longer breaks (4-7 nights) through Partner 5 offering. Proposed budget commitment: £500K-1m from each partner.

Target segment: Committed (additional long break 4-7 nights)

Life stage: Family

Timing: Sept/Oct 2011, Jan/Feb/Mar 2012

Partnership 6: Promote short breaks in England with a strong tactical message to deliver sales. Proposed budget commitment: £250K from each partner.

Target segment: Shallow (switch from overseas breaks 1-3 nights)

Life stage: Pre-family

Timing: March 2012

5.2 Website

Target audience – VisitEngland will deliver inspirational content directed at each segment’s needs.

VisitEngland will provide a website platform promoting all of England, ensuring speedy delivery of consumers to local destination and industry sites to maximise the conversion from inspiration to purchase. Through partnerships (listed above) the website platform will be a tool used to drive bookings to partner sites and provide information on destinations where there is none available.

VisitEngland's new website was launched in early 2011 both domestically and internationally. It provides inspiring ideas based on individual's needs and guides them to partner sites to convert to bookings.

5.2.1 Content strategy

Working with English destinations and industry we will disseminate both their content and our own to engage consumers across the web to direct consumers to a purchase. As the age of driving traffic to any one site is becoming less relevant we will deliver our content when, where and how they want to consume it. With a move to distributing content across the web, rather than just on our own site, VisitEngland will develop engaging content to support themes for external sites that convert inspiration and interest into sales. As part of the new VisitEngland content strategy we will also be looking to develop and distribute richer content (imagery, videos) and user-generated reviews through mobilising partners' distribution channels to ensure content is in places that will disrupt the consumer decision-making process.

5.3 Customer Database

Target audience: Predominately the Committed segment as they are already predisposed to taking holidays in England

VisitEngland will deliver relevant content to a segmented and profiled database of domestic and international consumers, promoting England's destinations and themes. To ensure this platform delivers the highest possible return it will deliver content that creates action through industry price points. VisitEngland will work with destinations and industry to deliver dynamic, relevant and up-to-date opportunities that are delivered to the right audience at the right time to maximise sales opportunities within the tourism industry. VisitEngland will use the plethora of events planned as the key driver for immediate consumer action focussing on the key motivations for the target segments (commitment and life-stage). The current database (500K) provides a clear route to market for promoting partner activity that delivers a price point and immediacy to take a trip. The focus of the CRM programme will be to focus on retention (the Committed segment) working with English destinations to increase visits for each life stage supporting market downturn e.g. seasonal spread.

5.4 Public Relations

Target audience: All. Titles will be chosen to activate specific commitment segments and life stage groups

VisitEngland's in-house PR team will maintain a wide base of journalist contacts, nationally and internationally; delivering suitable, timely and inspiring content to encourage editorial inclusion. As part of this a press visits framework will encourage journalists to experience destinations throughout England relevant to the key thematics focussing on the Shallow segment's appetite for holiday trips – this will highlight the new and surprising product on offer to change perceptions. PR will play a key role in delivering the 'extra' information the committed audience needs to decide on additional trips. There will be a focus on delivering PR across all platforms (offline and online) to ensure VisitEngland utilises new technological advances. By using events as a hook VisitEngland will help reposition England as a relevant and exciting place to visit. VisitEngland will work with destinations and industry to deliver combined messages to support specific themes or sectors ensuring there is a clear call to action to purchase focussing on short breaks (1-3 nights) and longer breaks (4-7 nights).

5.4.1 Advocacy (Social Media)

Target audience: Through targeting different types of advocates VisitEngland will activate commitment segments and different life stage groups e.g. bloggers for the committed, celebrity endorsement for shallow audiences

As part of our Public Relations work VisitEngland will harness and build on positive sentiment towards Brand England and England's Destination Brands. VisitEngland will listen to the customer, use these insights to develop opportunities and deepen these relationships to create a dedicated group of consumers who will promote England. This will enable VisitEngland to communicate more effectively with consumers at all levels, whether through the passively involved or with key England ambassadors.

Social Media will play a key role in helping to deliver this activity, allowing us to listen and engage with key ambassadors, such as influential bloggers, as well as mobilising millions of advocates through this cost-effective channel.

VisitEngland will develop tool kits, run workshops as appropriate and use existing schemes to create a unified approach to advocacy that destinations and industry partners can adopt, use and develop. Advocacy will also support the key themes that motivate consumers to take holidays in England. Providing consumer-to-consumer recommendations will enable VisitEngland and destination partners to harness the good sentiment towards holidays in this country and collect a deeper breadth of content on specific themes. By making information more readily available and targeted towards increasing the propensity to take a holiday, VisitEngland will have a foundation to support all partner activity.

5.5 Visitor Information

Target audience: All segments will be targeted as increased access to information provision will enhance consumer experience

Whether through technology or via face-to-face contact, visitor information will provide an opportunity to influence decision-making: the choice of destination; the length of stay; what to see and do. VisitEngland will practise world-class information provision, leading to increased spend, delivering compelling reasons for visitors to return and recommend others to visit.

VisitEngland will facilitate the development of appropriate systems (e.g. Quick Response codes below) and technical platforms that support the delivery of information that meets the needs of visitors in the 21st century to convert inspiration into booking and ensuring information provision is available at the right point in the decision-making process e.g. apps to provide information (one of which VisitEngland has recently developed) when on holiday to inform and inspire on different activities, QR codes to deliver visitor information where there is no other viable source.

6. Timing - Financial year 2011-2012

VisitEngland will work with between four and eight partners over the next four years to increase annual GIA marketing budget from £2m to an overall marketing campaign budget of £4m to achieve the identified marketing KPIs. There is a clear need for VisitEngland to be more commercially astute to ensure public funds are used and stretched to encourage and boost commercial spend on marketing tourism product. Partners will be encouraged to sign up to a four-year marketing commitment to deliver consistent and sustainable marketing programs. This commercial route will result in VisitEngland needing to be adaptable and flexible to ensure the organisation will gain maximum benefit from these partnerships. VisitEngland will ascertain areas for concern and assemble new working relationships with local destinations following the demise of the Regional Development Agencies to ensure tourism economies across England are supported. VisitEngland will outline partners where there is potential and verbal commitment to date. Non-government funding for 2010/11 was £600K and by working to this new strategy VisitEngland will increase the tourism marketing budget by at least £1.4m.

The first year of delivering campaign partnerships will be recruiting long-term partners and commitment to a four-year rolling program hence the year 2012/13 will have more partners included. Please note this is all predicted activity/campaigns at present and government approval is needed to progress and commit budget to partnerships.

		Target segments								
		Commitment		**Life stage**			**20011/12**			
2011/12 YEAR 1		**Committed**	**Shallow**	**Family**	**Pre-family**	**Empty nesters**	**Q1**	**Q2**	**Q3**	**Q4**
Channel	**Budget**									
Partnership campaigns	GIA £2m+ £2m NGF	x	x	x	x	x			x	x
Partnership 1	£2m (£1m GIA+£1m NGF)	x		x					x	x
Partnership 2	£600K (£300K GIA+£300K NGF)		x		x	x			x	x
Partnership 3	£600K (£300K GIA+£300K NGF)		x	x						x
Partnership 4	£300K (£150K GIA+£150K NGF)	x		x		x				x
Partnership 5	£600K (£300K GIA+£300K NGF)		x		x	x				x
Website	£100K (maintenance costs, updates, new digital tools, SEO)	x	x	x	x	x	x	x	x	x
CRM	£50K (cleaning data, styling, production, software, social media integration)	x		x	x	x	x	x	x	x
Visitor Information	£50K (QR codes, apps, events, mystery shopper)	x	x	x	x	x	x	x	x	x
Public Relations (incl. Advocacy activity)	£350K (Familiarisation trips, press cutting service, content creation (visual – still and moving, writing), delivery of advocacy activity)	x	x	x	x	x	x	x	x	x
International marketing	£100K (content and VB tools provision)	**NA**	**NA**	x	x	x	x	x	x	x
Business tourism	£250K (Trade trips, international trade shows)	**NA**	**NA**	**NA**	**NA**	**NA**	x	x	x	x

The above plan is for year one and is for illustrative purposes. This is an outline of how activity will roll out for the next four years taking into account that new partnerships may change the timings and target audiences. Total plan for the four years will be £2m marketing expenditure on media

Detailed breakdown of year 1 activity:

Quarter 1	A. Identify industry/non-industry partnerships (50/50 funding and affinity) - VisitEngland will focus on building the foundations for campaign activity for the next four years recruiting partners (tourism and non-tourism)
	B. Deliver PR to support key thematics – Food and Drink, Coast/seaside, Countryside, Events/festivals
	C. Bug testing and official launch of new enjoyengland.com website (soft launch March 2011)
	D. Outline key strategic overseas markets for England and in country (VisitBritain staffed) representation where applicable
	E. Delivery of a trial QR code campaign with selected partners
	F. Understand the marketing needs of destinations in England
	G. Develop and deliver the 'Welcome to England' collateral for ports of entry e.g. airports, ports etc
	H. Communicate new England brand to destinations of England
Quarter 2	A. Roll out advocacy program and tool kits - VisitEngland will develop and communicate how the nationwide advocacy program will be engrained in all marketing activity and how the industry can adopt elements to help meet individual objectives.
	B. Deliver three affinity partnerships to support Countryside, Coast/seaside theme and Events/festivals – Partners TBC
	C. Test international websites for priority overseas markets
	D. Development and roll out of new CRM segmentation strategy nationally and internationally

Quarter 3	A. Deliver two affinity partnerships to support City theme and Events/festivals – Partners TBC
	B. VisitEngland will deliver a national tourism partnership campaign – partner TBC
	C. Deliver PR to support key thematics – City, History and Heritage, Events/festivals, Food and Drink
	D. Deliver a word-of-mouth tactical campaign to support latent industry demand
Quarter 4	A. VisitEngland will deliver a national tourism partnership campaign – Partner TBC
	B. Deliver PR to support key thematics – City, History and Heritage, Events/festivals, Food and drink
	C. Deliver a word-of-mouth campaign to support latent industry demand

7. Measurement

In October 2009, a new England domestic brand communications and advertising tracker was introduced. This survey provides a continuous measurement of key variables (behavioural and attitudinal) at the same time as providing the detailed campaign evaluation. Additionally, it is used to measure visitor satisfaction among those who have taken holidays in England in the past 12 months.

This survey is a valuable source of information over the past year, and will continue to run a Brand Tracker of this type in future to support and evaluate the work of the marketing team and the wider organisation.

VisitEngland will use this national continuous tracking survey, alongside other internal and partner data sources to measure:

1. Commitment to England as holiday destination : TARGET - Increase commitment from 30% to 35%
2. Increase in the target segments – Committed and Shallow : TARGET - Increase target segments size from 68% to 75%

Specific measurements to evaluate the effectiveness of individual campaign activity will be:

a. Campaign reach (awareness)
b. Campaign impact on consideration of England as a holiday destination
c. ROI measures (impact on activity)
d. Brand perceptions (e.g. value)
e. Commitment
f. Impact on word of mouth/advocacy of marketing activities
g. Partnership bookings and satisfaction

The below chart illustrates how VisitEngland will monitor impacts and success of the business in line with the government tourism policy

VisitEngland™

***England Ambition as expressed in: England – A Strategic Framework for Tourism 2010-2020**	**Average 5% pa growth over 10 years £50bn increase in tourism value 225,000 jobs**
Measure	Measures: UKTS total domestic tourism, IPS total inbound tourism, day visits, employment statistics

VE Ambition	**Increased share of domestic tourism in English residents' repertoires**	**Increased inbound leisure tourism** Partnering with VB	**Increased business tourism**	**Increased Leisure Day Trips**	**Increased VFR trips**	**Improved product leading to improved visitor experience**
Measure	*UKTS Holiday volume and value*	*IPS Holiday volume and value*	*UKTS and IPS*	*New Day Visits Survey*	*UKTS and IPS*	*Visitor Experience Score (TRI*M) – based on rating, recommendation, revisit, comparison to others)*
VE Priority	High	Low	Medium	Low	Low	High

External Factors that will influence both domestic and inbound tourism:
Economic (in)stability (+/-), Exchange rate(+/-), Consumer Confidence (+/-), Weather (+/-), Oil Price (+/-), Overseas Unrest (+/-) etc

VE Marketing Ambition	**Increased Consumer Closeness to England**	**Increased propensity to holiday in England** Partnering with VB
Measure	Increase commitment from 30% to 35% Increase Shallow + Committed from 68% to 75%	Britain Marketing Board

External Factors
Other Marketing Activity (for domestic holidays (+) AND competitors (-)
VB International Marketing Activity (+)

VE Campaign Ambition	**Short Term Campaign Impact**	**Long Term Impact**	**Short Term & Long Term Impact**
Measure	*Reach*	*Perception on key attributes*	*ROI*
Measure	*Motivation*	*Advocacy/WOM Impact*	*Partner Bookings*
Measure	*ROI*	*PR EAV*	*PR EAV*
Measure	*Partner bookings*		

VE Marketing

Other VE Teams

Increased satisfaction on key English product dimensions (e.g. quality accommodation, improved welcome, customer care etc)
Satisfaction Monitor

Action by destinations and tourism businesses

VE Leadership and Improved Co-ordination of destinations and businesses
Stakeholder satisfaction (inc. DCMS/govt) with VE
Monitoring of Strategic Framework Actions

*** This growth target is aligned with the government's ambitions for tourism, outlined in the Government Tourism Policy, published in March**

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