Britain Level Tourism High Level Marketing Plan 2017-18

March 2017
Objectives

Drive sustainable growth in the volume and value of inbound leisure tourism and business events across the nations and regions of Britain. This will deliver economic value, generate additional foreign exchange revenue and create new jobs at all skill levels.

Enablers

- Develop world class bookable tourism product distributed by international intermediaries
- Use Partnerships, Campaigns, Digital, B2B & PR to drive the customer journey

Partnership and collaboration is ever more important to ensure public money is spent effectively. Realising Britain’s growth potential is not within the gift of any single organisation. This is a marketing plan for Britain which identifies how the national boards can work together to deliver sustainable growth.
Leisure Tourism
## Common Issues / Challenges

### Tourism is a growth industry that benefits all parts of Britain.
Tourism jobs exist in every single local authority in Britain. In 2016 Britain saw a record 37.3 million inbound visits (up 3%) spending £22.2bn, matching 2015’s record. VisitBritain forecast +4% growth in visits and +8% growth in spend in 2017. However we face **fierce international competition and Britain is losing market share.**

- Britain is vastly outspent e.g. *Tourism Australia’s marketing budget in China is 37 times bigger than VBs*
- Focus – To reach 81% of our international visitors we need to be active in 20 markets – by contrast Australia would be in 14, France in 12 and Ireland in 7.

### Market Specific Challenges – E.g.
- *Changing demographic in USA & Australia*
- *Addressing welcome issues post-Brexit and leverage value opportunity in Europe*
- *Bespoke capability required in China where local, regularly refreshed is needed. (Speed & scale of China’s economic growth results in rapidly evolving consumer trends – this is further complicated by China’s unique social and digital landscape).*

### B2C Demand & Inspiration: Revitalising Image
- **Immediacy** – No urgency to visit now
- Poor perception/lack of awareness of Britain’s natural beauty, food & drink, fun, luxury, welcome, distances/how travel around
- Low awareness / knowledge of some destinations e.g. London neighbourhoods, rural/coastal offer
- Perception that Britain is expensive
- Complex Brand – lack deeper engagement
- Distributing content to where the customer is

### B2B - Conversion - Product Challenges
- Evolving & complex intermediary landscape.
- Fragmented international distribution network makes it challenging for product to reach market/customer segments.
- UK tourism suppliers need support to become ‘international ready’ (particularly SMEs).
- Insufficient bookable product. Lack of innovation in British holiday product including lack of all-season product.

### Differentiating (product & approach)
**Acquisition (first time visitor) vs. retention (repeat visitor) strategy and communications**

### Sustainable Growth
That recognises accommodation capacity issues in hot spots across Britain. Include driving shoulder season/off peak travel.
Customer Journey

VisitBritain is developing a detailed customer journey – we will all work together to identify where we work in partnership.

Focus on audiences ensuring the right product and the right content is placed to the right people at the right time.
## Channels - How do we move our customers along the customer journey funnel?

### Digital Activity

**Definition & Aim:** Use digital channels to reach, inspire and convert our target audience and social media as an advocacy tool.

**Delivery - How will we collaborate?**
- We have identified this as a focus area where will each up weight our activity and our collaboration. VB is developing a new digital strategy and is consulting with VS, VW and L&P.
- Explore strategic collaboration with tech partners (Google, Facebook, Snap) to target audiences more effectively, ensure Britain benefits from innovation and we get more bang for our buck. Potential efficiency savings.

### Brand & Tactical Campaigns & Commercial Partnerships

**Definition & Aim:** Work with Partners who extend our reach, leverage & impact across key markets & target customer segments, converting aspiration to booking & then amplification through advocacy. High-impact paid media or MIK brand partnerships that inspire our target audience to book a trip to Britain.

**Delivery - How will we collaborate?**
- Roundtable with AirBnB – a new kind of accommodation provider
- VB offered opportunities to buy in and unweight commercial partner activities e.g. BBC, Expedia
- Bilateral joint campaigns e.g. VB & VW – King Arthur campaign with Warner Bros. VB & L&P London’s Autumn Season campaign. VB & VS Loch Ness and Inverness Fund.

### PR – Traditional Media and Influencer

**Definition & Aim:** Earned print, broadcast, online and influencer activity that inspires our target audience to book international travel to Britain

**Delivery - How will we collaborate?**
- “24 Hours of Amazing Moments” pilot with influencers, 21 June (Instagram).
- GREAT Trips
- Joint targeting of key media outlets in primary markets. VB to integrate themed years/ messaging to target media.
- Shared social intelligence platform for influencer marketing
Channels & Facilitators

### Intermediary Activity

**Definition & Aim:** To continue to develop partnerships with the top intermediaries by market introducing the Strategic Partners & UK Suppliers where & when it is relevant, identifying the ‘value add’ in the path to conversion.

**Delivery - How will we collaborate?**
- Intermediary mapping
- Through participation at VB trade missions, trade events and relevant ‘in market’ intermediary meetings
- Trade engagement through VB trade website with the provision of content
- With the increased focus on product development & distribution, promoting increased number itineraries, **new** products, as identified in the product development roadmap.
- Trade education through an evolving program of welcome, international ready & destination training supported by familiarisation trips.

### Product Development

**Definition & Aim:** To identify the product gaps & opportunities within the tourism landscape with the aim of broadening and improving the overall product offering to international audience.

**Delivery - How will we collaborate?** Through inclusion & participation in the overall VB product development & distribution roadmap which in 2017/18 is focused on:
- Rail - the Great Rail project – the government initiative working in partnership with the Rail Delivery Group (formerly ATOC), Rail Distributors & Operators
- Thematic opportunities to change perception of Great Britain through targeted audiences – Luxury, Food & Drink
- Supporting education of the Tourism landscape through International Ready & Welcome Program participation
- Supporting the delivery & distribution of the Discover England projects including year 1 & beyond L&P collaboration with Marketing Manchester and other key English gateway cities.

### Insights (Overseen by the Strategy Directors Board)

- Future forecasting and investment planning
- Mapping customer segments and drivers
- Working together on how track activity (evaluation and analytics), awareness and intent to visit
**Who are our Customers I?**

### Americas

**Objective:** *North America* - Revitalise Britain brand proposition to build new and repeat visitors. Support gateways with new air routes. Increase regional and seasonal spread across Britain (including within London). *Brazil* – Grow first time and repeat leisure visitors. Build demand for luxury product and experiences to motivate and convert incremental high yield travellers.

**VB Segments:** Affluent Trend Setters, Curious Explorers, Relaxed Sight Seers*

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<td>£3 billion spend, 3.2 million visits</td>
<td>£506 million spend, 708,000 visits</td>
<td>£256 million spend, 324,000 visits</td>
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### Europe

**Objective:** Combat post referendum welcome issues & maximise value opportunity. Drive significant seasonal growth and dispersion (including in London). Focus on entry points – air point to point and rail.

**VB Segments:** Curious Explorers, Active Buzz Seekers

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<td>£164, 277,000 visits</td>
<td>£371m, 1.2m visits</td>
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*See Annex for Definitions

Source: 2015 International Passenger Survey Statistics
Who are our Customers II?

**Asia-Pacific-Middle East-Africa**

**Objective:** Embark on an ambitious communications programme integrating content, digital, social media. Demonstrate significant increase in regional and seasonal product distribution in the markets to provide more choices for customers along the planning, shopping and booking cycle.

**VB Segments:** Affluent Trendsetters and Buzzseekers

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<th>Country</th>
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<td>#4 spend, #10 visits</td>
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<td>£1.1 billion spend, 1 million visits</td>
<td>£215 million 207,000 visits</td>
<td>£433 million 422,000 visits</td>
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The GCC markets together represent the 2nd inbound market to the UK for spend with all 6 countries being in the top 15 for average spend per visit.

**North East Asia**

**Objective:** Invest for long term growth in China & NEA, grow Britain’s market share. Double the spend from China by 2020, reaching GBP1bn p.a. Spread half of the tourism benefit into nations and regions. Strengthen and revitalise Britain’s proposition in Japan, HK and South Korea through partnership.

**VB Segments:** Cultural Adventurers

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<td>#9 spend, #25 visits</td>
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<td>£586 million spend, 270,000 visits</td>
<td>£139 million spend, 224,000 visits</td>
<td>£214 million spend, 194,000 visits</td>
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**Light Touch markets** (Nurture/ Watching Brief): Turkey, South Africa, Mexico, Indonesia, Thailand, Malaysia, Singapore, Hong Kong, Taiwan, Eastern Europe
What are the key themes and messages for 2017/18?

VisitBritain/Visit England's campaign aims to inspire more people to come and experience our culture and countryside. It will target audiences in key markets and deliver inspiring content that will drive additional visits Britain – the campaign will be mapped against the customer journey using partners to deliver an integrated communication cross channel approach. VisitBritain will amplify its strategic partners key themes and messages through #OMGB, integrating and weaving them through its B2B and B2C activity.

VisitEngland has declared 2017 to be the “Year of Literary Heroes” in recognition of the 200th anniversary of Jane Austen’s death and 20 years since the first Harry Potter book. It will celebrate some of the publishing phenomena that have helped put England on the map.

London & Partners will showcase London as a vibrant, welcoming and forward looking world capital through #LondonisOpen. Culture will continue to be a key theme as will city to city collaborations. It will encourage visitors to experience the capital like a Londoner by shining a spotlight on the best of London’s outer neighbourhoods, from the green landscapes and historic buildings of Greenwich in the south to the vibrant nightlife and the trendy atmosphere of Shoreditch in east London, the alternative vibe and lively music scene of Camden Town in the north to the quiet tranquillity of the riverside village of Richmond in the west.

#Scotspirit - Scotland has a unique spirit, all of its own. No matter where you go, or what you see, our spirit imbues our land and our people. It's deep, enriching and felt by everyone who visits. The“Spirit” creative strategy underpins VisitScotland’s consumer, trade and industry communications alike. Meanwhile Scotland’s calendar of focus years shines a spotlight on key assets; in 2017 the Year of History, Heritage and Archaeology will highlight and celebrate tangible and intangible heritage – Scotland’s built heritage and archaeological riches as well as the range of its unique traditions and culture, all with a focus on engagement and participation, and in 2018 Scotland’s Year of Young People. Sustainable tourism development is a key focus, as we use events to drive seasonal spread and direct access points and new product development including North Coast 500 and the new V&A in Dundee to steer greater geographic spread.

VisitWales celebrates a Year of Legends in 2017 – it will bring Wales’s past to life like never before and celebrate modern day legends made or inspired by Wales. The message is a simple statement / invitation /challenge: ‘This is Wales’ with the hashtag #FindYourEpic. The focus is on Wales’ unique culture, high quality heritage offer and festivals and events. Highlights include the King Arthur film, UEFA Champions League Final and the launch of new ‘Routes of Wales’ product in the autumn. In 2018 Wales will aim to reposition its seaside offer - promoting a high quality coastal experience on all levels – through its Year of the Sea. The Volvo Ocean Race will be a highlight.
**Engagement Process – GREAT Tourism Story**

**Telling a compelling & consistent story**

**Principle:** Ultimately, VisitBritain plays one small part in selling Britain and we will only see progress if, together with our partners and industry, we start to tell them the same compelling and consistent story.

**Engagement Process:**
- VisitBritain are now in the ‘test and refine’ stage of this project and looking to define specific examples as hero experiences, collaborating with all our strategic partners.
- As part of the engagement process VisitBritain will work with its strategic partners to identify exactly where the strand alignment is. VisitBritain commits to mapping how the GREAT tourism story fits with and supports the strategic partners individual brand propositions.

**Timeline**

- **Feb-March**
  Discussions to identify brand alignment, challenges & opportunities and hero experiences

- **May**
  Customer journey fully mapped

- **April Onwards**
  Regular brand meetings with partners to ensure the story continues to evolve
Business Events
## Common Issues / Challenges

Increased competition within Europe.

*E.g. Netherlands’ shift to pure Business event marketing in the US vs leisure Channels*

How do we move our customers along the customer journey funnel?

### Intermediary Activity

**Definition & Aim:** Conversion. Linking UK product suppliers with targeted Event Organisers, PCOs and agencies

**Delivery: How will we collaborate? On territory** - National Boards, key cities and destinations retain lead and responsibility for client relationships, including sales appointments, in core markets e.g. North America, Western Europe. VB adds value to these relationships as required. e.g. “Britain”/”UK” context, soft support, and through its VisitEngland remit, will deliver on-territory representation for England.

**Trade Missions & Events** - National Boards will be invited to attend relevant VB missions, engage in Hosted Buyer activity; and bespoke Britain showcases in market where relevant and appropriate. This may be in core and emerging markets. VB brand at trade shows where Britain brand adds a beneficial focus to the UK stand area for buyers”

### Content Development

**Definition & Aim:** Provide compelling and authentic calls to action to enhance the UK’s competitive position

**Delivery:** Collaboration on content development – National boards provide rich content for film, guides, case studies

### Targeted Event Support

**Definition & Aim:** Financial and non-financial intervention to help secure targeted priority events

**Delivery** - Core UK cities and destinations retain responsibility for researching, bidding for and owning relationships with target associations and clients. VB may initiate moves to bring a major, ‘gold list’ event to the UK where a candidate city is not yet aligned. VB to channel soft power support including letters of support at UK Ministerial level, DIT. Access to direct or indirect funding streams accessible to all UK destinations. VB to become engaged in live bid process (if requested) once the UK Candidate city has been selected. VB must be neutral at a pan-UK level, and must support all potential UK candidate cities equally. VisitScotland, L&P and Wales can propose cities and destinations within their regions to be UK candidate city against other UK cities. National Boards collaborate with VB where appropriate, relevant and beneficial i.e. shared networking events, promotional evenings, trade shows with no NTB presence.
Who are our customers?

**USA & Western Europe**

**Objective:** Secure identified association congresses, corporate meetings and exhibitions HQ’d in market

- Bid committees & CEOs of International Associations.
- Event Planners within International Associations
- Professional Conference Organisers buyers representing corporate clients
- Trade & consumer exhibitions organisers

**Priority Sectors**
Life Sciences; Technology; Infrastructure; Energy; Advanced Engineering; Retail

**China**

**Objective:** Secure one Chinese mega-incentive by 2019, and build a pipe line of future prospects

Corporations and agencies for mega incentive trips

**Themes & Messages**

“Meet among great minds. With global connections to great venues, a hub of leading international event professionals, world-renowned research in top universities and centres of excellence. For a meeting of great minds, choose Great Britain”

For more info see: [https://www.youtube.com/watch?v=CaLzSg7u_ho](https://www.youtube.com/watch?v=CaLzSg7u_ho)
Marketing & Activity
## So What? Big Things in 2017/18

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<th>King Arthur Co-Campaign</th>
<th>DEF Project: London-Manchester, Birmingham (GCC/China/US)</th>
<th>Loch Ness &amp; Inverness</th>
<th>24 hours of Amazing Moments</th>
<th>BBC Films &amp; Events</th>
<th>London’s Autumn Season</th>
<th>Outlander Campaign</th>
<th>Scot Spirit Phase II</th>
<th>NFL Partnership</th>
<th>Missions &amp; Events</th>
<th>Developing GREAT Tourism Story</th>
<th>Commercial Partner campaigns</th>
<th>‘Always On’ – e.g. joint targeting media and trade education</th>
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**Media/Influencer Press trips**

**Marketing Campaign**

**BBC Events**

**DB North America**

**DB China**

**VIBE London**

**VIBE Glasgow**

**VIBE Explore GB**

**VisitScotland**

**Visit Wales**

**VisitBritain / VisitEngland**

**London & Partners**
So What?

- **Expedia 365:** A 4 year £24 million campaign which influences the consumer at every point of the customer journey. At its heart is a bespoke 365 platform which showcases regional Britain and #OMGB experiences – a daily event or experience is promoted. Media advertising is running on Expedia’s site and offsite. Priority markets are Germany, France and USA. Opportunity for Strategic Partners to provide content.

- **King Arthur Film Campaign:** The campaign aims to highlight the breadth of bookable King Arthur and myths/legends tourism product and promote Britain as an adventurous destination. It will position its heritage in a modern and innovative way, encouraging consumers to book a trip to Britain now. VW are contributing £100k to the campaign – total spend £640k.

- **DEF Project (if agreed):** L&P are bidding into the Discover England Fund years 2, 3 to promote ‘London and cultural England’ which will involve open jaw ticketing to drive regional dispersal. If successful, this two year initiative will be delivered in partnership with Marketing Manchester and Marketing Birmingham in the GCC, China and the US.

- **Loch Ness & Inverness Fund:** Year III (500k) of a four year campaign to showcase the breadth of experiences available in Loch Ness Inverness to French, German and Dutch consumers – focus on lengthening stay and driving travel at times of year (shoulder season/off peak) and by method of travel (FIT) that meets capacity gaps.

- **24 Hours of Amazing Moments:** We will all be collaborating to run an innovative global 24 hours in Britain Instagram takeover with key influencers – it will showcase the amazing moments only available in Britain and feature all the nations and regions.

- **BBC Films & Events:** Opportunity for Strategic Partners to buy in and unweight VB partnership. Investment £50k by each of the strategic partners gives them inclusion in a dedicated film which will air on BBC World News TV in the US and media inventory and a dedicated partner module (branded content unit). The campaign aims to raise awareness and promote regional Britain (objectives and KPIs being worked through – total value of campaign £1m).

- **London’s Autumn Season Campaign:** The 4th year of this successful initiative will drive visits during autumn by promoting the best of what’s on across the capital and Britain. Target markets are the US and France.

- **Outlander:** The Outlander series has developed into one of the most binge-watched series on catch up TV and interest in the storyline drives high levels of organic traffic to the vs.com site. In extremely timely fashion Series 3 action will open on the battlefield of Culloden, providing an excellent link for further extension of ancestral tourism campaign activity during YoHHA 2017.

- **Scot Spirit Phase II:** Anticipated to launch in September 2017, this new evolution of the Scotland brand strategy is anticipated to reach beyond the visit agenda to provide a platform for wider sectorial marketing.

To Follow: VisitBritain/VisitEngland is undertaking a significant piece of work to map the alignment between audiences and drivers. VisitBritain/VisitEngland will then work with its strategic partners to identify which audiences/drivers they will work together on – collectively and bilaterally.
Annex
Annex – Governance

The Britain Marketing Plan is jointly owned by the Marketing Directors of VisitBritain, Visit England, Visit Scotland, Visit Wales and London & Partners. They are equally responsible for its delivery.

The British Marketing Board (BMB, meets quarterly) will act as a forum to review progress and as a delivery mechanism. This acts alongside the Strategy Directors and expert to expert inter-boards.

The plan is supported by bi-lateral Memoranda of Understanding and Service Level agreements between VisitBritain and its Strategic Partners.

The Plan is informed and underpinned by:

- **Research** – this is a data driven plan that puts the customer first.
- **A favourable policy Environment**
- **Access** All parties are continuing to work on route development making it easier for international visitors to access Britain.
ACTIVE BUZZSEEKERS

AGE
• Most likely to be 18-24, 35-44

KEY MARKETS
• India, France, Germany, Brazil Australia, GCC

GENDER
• 58% Male

DEFINING ATTITUDES
• Like taking risks
• Keen sense of adventure
• Like to be independent
• Strive for a life full of people, ideas and activities
• Like novelty and challenge
• Spontaneous in their lifestyle and choice of holiday
• Global view of world
• Optimistic

ACTIVITIES
• Outdoor pursuits.
• Clubbing
• Live events (Music and sports)
• Keen to get out in the world they enjoy new cuisines.

ACCOMMODATION
• Most likely to couch surf
• Backpacking & camping
• Hostels
• Alternative accommodation

TRAVEL PREFERENCES
• Last minute
• Look for deals
• Shorter holidays

WHO ARE THEY?
Free spirited, spontaneous, in the moment and ferociously independent, they are looking for a buzz. This can be through active pursuits or meeting new people in international cities. They are on the hunt for new ideas, new people and new activities.

HOW DO THEY HELP US?
Primary segment for welcome & value. Delivering a high number of visits to urban hubs in the UK + selected regional experiences. Segment most affected by Brexit & responsive to value!

HOW DO WE REACH & CONVERT?
Reach - “Authentic content with a great offer onto their mobile phones” Social, Blogs', Lifestyle Magazines & Cinema. Price-comparison/meta. Influencer opinions more important than National Boards.
Convert – Savvy rather than loyal - convert where they get the best deal! Partner offers, Direct via airlines, meta or OTA. (very specialist via operators)

SOURCE: MEDIACOM: TGI SEGMENTATION
RELAXED SIGHTSEERS

AGE
- Most likely to be 45+

KEY MARKETS
- USA, China, India, France, GCC

GENDER
- 58% Female

DEFINING ATTITUDES
- Family is most important
- Like to plan in advance
- Like to be well informed
- Knowledgeable and savvy
- Important to continue learning
- Time is more important than money

ACTIVITIES
- Visiting monuments & museums
- Heritage and history tours
- Fashion and food

ACCOMMODATION
- Comfortable hotels

TRAVEL PREFERENCES
- Like to plan
- Take long holidays - more than 2 weeks

WHO ARE THEY?
Most family focused segment, their prime concern is to relax with their nearest and dearest. They are all about sightseeing, do not like to veer off the beaten track and spend considerable time planning their holiday. They think learning, growing and being well informed are important.

SOURCE: MEDIACOM: TGI SEGMENTATION
WHO ARE THEY?

Ambitious, successful, career-driven or post-career travellers, they seek luxury, unique, and bespoke experiences, that reaffirm and reflect their status. They want destinations that are fashionable, and of the highest quality.

SOURCE: MEDIACOM: TGI SEGMENTATION
CURIOUS EXPLORERS

WHO ARE THEY?

See themselves as spiritual people, they are driven by ethics and faith. Taking life slowly, they primarily enjoy the outdoors and seek relaxation by getting back to nature. They are broadly into healthy living and tend to seek deep intense experiences to explore other cultures – rather than breadth - and this could include volunteering. The group is still relatively risk averse and will identify planned activities.

AGE
• Most likely to be 55+

KEY MARKETS
• Germany, France, USA, Brazil

GENDER
• 54% Female

DEFINING ATTITUDES
• Risk averse and ensure safety in holidays
• High importance for ethics & faith
• Keen interest in nature, sustainability, natural and healthy living. Very likely to volunteer for a noble cause
• Slow paced and spontaneous
• A sense of familiarity and reassurance is important

ACTIVITIES
• Gentle outdoor activities – hillwalking
• Visiting parks and gardens
• Immersing in the arts and crafts
• Learning a hobby or new skills
• Cooking
• Fine arts, galleries

ACCOMMODATION
• Retreats
• Out of city destinations

TRAVEL PREFERENCES
• Take the longest duration holidays of all groups
• Plan well for their holidays
• Safety is important in holidays
• Frequent flyers and use rewards programmes
• Also likely to travel with family

SOURCE: MEDIACOM: TGI SEGMENTATION

HOW DO THEY HELP US? THEY HELP US?

Primary segment for regional growth repeaters, high spenders, culturally interested, product is there – awareness, desire & urgency needs to be created.

HOW DO WE REACH & CONVERT?

Reach -“Interesting content with detail at the right time & easy to book, where they keep up with current affairs”
Digital, Newspapers & lifestyle/cultural magazines, Facebook, Partner & VB newsletters, operator programmes, National Board platforms more important – trusted.
Convert – Regional will require detail and create urgency is more important than the price. Direct via carriers, and Tour ops.