

england

The All-England Destination
Marketing Strategy:
A New Approach

1. Introduction

This strategy is owned and produced by the England Marketing Steering Group for VisitEngland and English destinations. It is directional, not prescriptive and is to be used as a guide to bring together what can otherwise be a fragmented approach to the marketing of England and its constituent parts.

The strategic objective outlined in the English Strategic Framework for Tourism is to increase England's share of global visitor markets. The main goals of a new, cohesive, better co-ordinated All-England Destination Marketing Strategy are to: increase the value of English tourism; improve brand penetration; and deliver long-term growth.

The Strategy suggests several key opportunities:

- That we concentrate our effort on the earliest stage of the consumer journey, before the consumer has decided on their choice of destination
- That we undertake improved dialogue with consumers as opposed to telling them what they should do
- That we provide a reason for an immediate visit and that we help close the sale
- And that we focus promotional work on our most attractive themes and places

The Strategy advocates a set of principles to which all English tourism stakeholders are encouraged to subscribe. These principles are built both on evidence-based research and a period of consultation with destinations across England. It does not prescribe roles or responsibilities to VisitEngland or to English destinations.

Individual destinations will have different target audiences, messages, markets and goals. The Strategy is designed to guide the development of the English destinations' Marketing Plans and form an appendix to those plans.

An integrated marketing strategy will enable destinations at all levels in England to promote their unique assets to maximum effect. These destinations will benefit from a coherent approach that a robust national marketing framework will bring: cost efficiencies; reduced duplication of effort; a more powerful aggregated voice; and more effective delivery.

2. Strategic Objective

Increase England's share of global visitor markets, focusing on priority audiences, destinations and themes.

3. Aims

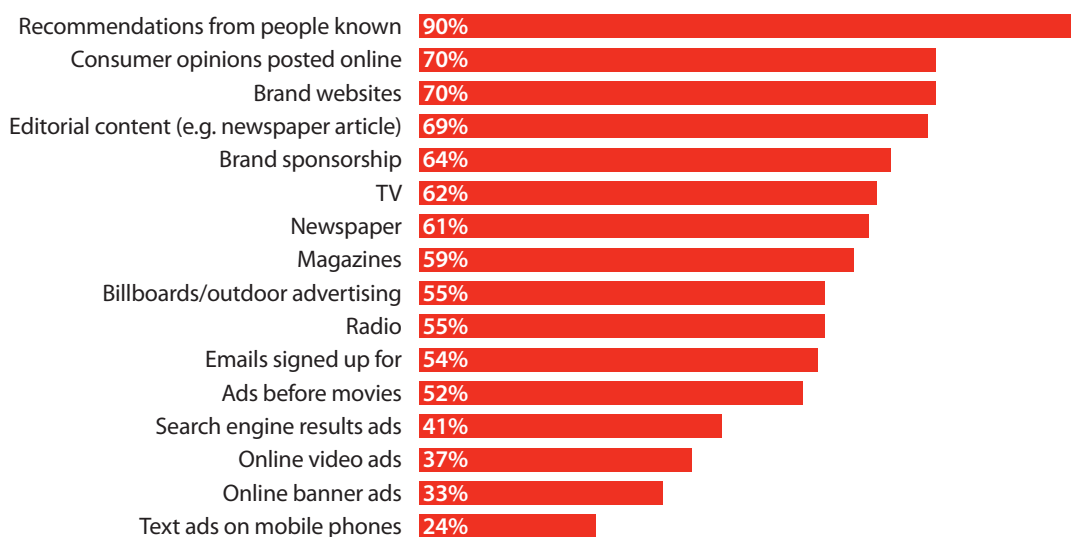
- 3.1 Grow the value of tourism for England by 5%+ per annum.
- 3.2 Proportionately increase UK residents' tourism spend in England.
- 3.3 Deliver long-term incremental growth.

4. Context

- 4.1 The changing tourism structures, with a likely increase in the number of players, strengthen the need for a national marketing framework in which destination brands and partnerships can support each other and flourish.
- 4.2 The current economic situation provides a good opportunity for growth in the domestic holiday market but some consumer perceptions around England need to be shifted, particularly for international and domestic consumers who have not previously holidayed in England.
- 4.3 Consumer trends that can be harnessed include a hunger for authentic experiences whereby visitors want to increase the depth or their engagement with the place, and, from a marketing point-of-view, the uptake of new social technologies.
- 4.4 In an increasingly vibrant social landscape, trusted peer-to-peer sharing and recommendation is the most powerful influence on decision making (*Diagram 1*). This trend necessitates an approach based on listening (to the consumer conversations being held), transparency and honesty (being absolutely open with the consumer) and collaboration (being part of the conversation not outside it).
- 4.5 Key psychological drivers for word of mouth such as networking, trust, passion and authenticity must be used as the basis for any approach.
- 4.6 The variable quality of the English tourism product could be a threat to growth but the trend towards increasing public consumer feedback can become a key driver of industry improvements.
- 4.7 Consumers are increasingly proactive and engaged in creating their own travel experiences and passion-based events, calling for a collaborative approach.
- 4.8 Quickly evolving cultural trends and growth opportunities (e.g. “glamping” and slow food) demand a swiftly reactive and socially aware strategy.
- 4.9 The ever-increasing consumer reliance on the Internet and smart phones for research prioritises online engagement.
- 4.10 English consumers are increasingly targeted by international destinations due to England’s position as one of the most important global source markets, making domestic strength important to protect market share.
- 4.11 With decreasing investment, fragmented efforts and competitor outspending, there is an increasing need for an all-England high value, scalable and sustainable strategy.

Diagram 1

Have some degree of trust* in the following forms of advertising, April 2009



Source: The Nielson Company. *E.g. 90% of respondents trusted “completely” or “somewhat” recommendations from people they know

5. Approach

The approach has been reached following consensus from the All-England Marketing Strategy Steering Group and after a period of engagement and open dialogue with English destinations.

- 5.1 The focus of our approach will be growing market share and acquisition of both share of visits and additional visits.
- 5.2 In order to ensure this sustainable new growth we will deliver a robust retention plan through an efficient profiled Customer Relationship Marketing programme.
- 5.3 Marketing activity will form around two areas: through-the-line advertising campaigns delivered in partnership with, and match funded by, commercial partners; and low-cost affinity marketing activities providing reach and engagement chiefly employing product placement, public relations and below-the-line marketing.
- 5.4 We will prioritise an increase in overnight and longer stays, using day trips to inspire deeper engagement.
- 5.5 Using suitable events and festivals marketing communications activity should provide a trigger for a near term or immediate visit.
- 5.6 We will use the best-known and best-loved destination brands or “Attract Brands” to engage consumers and provide a platform for increased awareness of “Hidden Gems”; both geographically and thematically.
- 5.7 Research suggests that possible themes might include: seaside, rural, city, heritage, family, events and cuisine. These will be interwoven with supporting messages such as ‘wise’ responsible growth and accessibility.
- 5.8 The themes provide a route into achieving long-term industry partnerships to maximize effect and profitability.
- 5.9 We will develop cross selling opportunities between leisure and business travel encouraging extended stays and repeat visits post event.
- 5.10 Whilst it is important to engage with the customer throughout the consumer cycle, the priority for resource allocation and marketing effort must be the point of inspiration during the decision-making process, rather than providing for the already decided (*Diagram 2*).
- 5.11 Whilst the majority of our resources should be applied at the earliest stage of the buying cycle, all marketing effort should provide a clear consumer call to action and the ability to purchase.

Diagram 2



- 5.12 Word of mouth will be fundamental to the approach across all marketing channels, demanding authenticity, transparency and a commitment to dialogue and collaboration; creating further debate and creating positive sentiment to Brand England.
- 5.13 The commitment to collaboration means 'doing' as well as 'talking' so that the feedback and insight from consumers drives improvements within the destinations and industry.
- 5.14 Instigating word of mouth around themes will allow destination brands to address and react to seasonal imbalances, mitigating downtimes and harnessing peaks; driving demand and profitability for tourism businesses.
- 5.15 Future-proof our approach by monitoring evolving cultural trends to ensure emerging platforms and technology are utilised effectively and efficiently.
- 5.16 Focus on a collaborative approach to partner marketing to reduce areas of duplication amongst destination brands.

6. Target Market

- 6.1 To identify and prioritise best prospects we will segment the market by considering their emotional attitude to England as a holiday destination (commitment segmentation).
- 6.2 Research identifies differing levels of commitment in visitors, indicating their likelihood of deepening their engagement with England as a holiday destination.
- 6.3 The two groups that are most easily persuaded to take new breaks in England are those who have the potential to be better engaged and those who are already highly engaged; these are our best prospects respectively for acquisition and retention.

7. England Brand

- 7.1 We will deliver a consistent brand voice stemming from a consumer-focussed brand essence and employing core values determined by empirical evidence based research.
- 7.2 The brand framework will provide both destinations and industry a unified approach to England's core themes and motivations.
- 7.3 We will communicate the depth of choice England offers through its cultural, historical, visual, emotional and physical attributes focussing on the best products based on consumer motivations.
- 7.4 Focussing on the experiences, character and emotional connectedness that English destinations offer we will position them as destinations of choice.

8. Consumer Proposition

- 8.1 Consumers will move towards a more emotive, conversational and inspiring relationship with the destination brands, discovering engaging, energising and enriching experiences which are relevant to their passions and which they widely advocate.

9. Communications Strategy

Understanding and stimulating consumer conversation sits at the heart of the communications strategy. By adopting an integrated approach across all marketing channels on and offline, we will build lasting relationships with the people who have the best potential to enjoy England, driving measurable acquisition, retention and revenue.

9.1 Creating an Advocacy Journey

Activity should be geared towards creating independent, positive consumer advocates who will visit and discuss England's attractions (*Diagram 3*). This is achieved via:

- 9.11 **Understanding:** listening to consumers on and offline to understand what they are already talking about and why. This allows us to identify opportunities, challenges and motivations as well as to profile potential advocates and detractors in order to improve perceptions (*Diagram 4*).
- 9.12 **Ideas:** the use of these insights to develop opportunities for consumer experiences and campaigns for above-the-line marketing channels. This will facilitate an engagement with those advocates or detractors and inspire word of mouth. These will also combine with the key themes and messages and plug any product gaps.
- 9.13 **Relationships:** deepening and broadening these relationships over time and reaching out to new audiences.

Once consumers have been engaged through this advocacy journey, there will be access to a dedicated 'tribe' or group of consumers who will promote both England and its destination brands. Through this approach we will also improve the perception of England across a broader more passive audience who will be motivated to holiday in England.

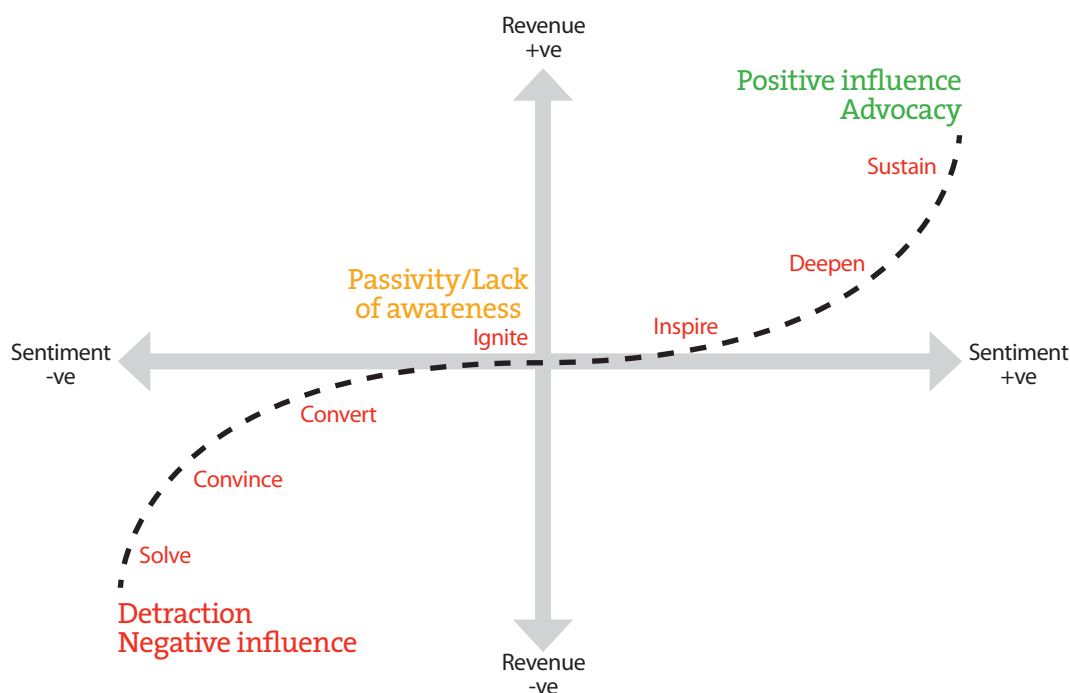
9.2 Integrating channels

This journey will be consistent and therefore activated across the full marketing mix of above- and below-the-line channels such as PR, advertising, product placement, digital, mobile, social media, CRM, outdoor, word of mouth and free to access platforms (e.g. Tourist Information Centres). The travel trade also provides a core route to market for destinations and this relationship will be developed in line with other marketing channels. This approach will ensure full impact for consumers who use all or some of these as touch points with the destination brands.

Diagram 3



Diagram 4



9.3 Being dynamic

- 9.31 There is a huge opportunity to harness quickly evolving cultural trends by monitoring and responding to consumer conversations on an immediate and ongoing basis. This involves destination brands becoming involved in these conversations, sharing insights and suggestions, as well as using trend issues and topical events to drive above the line advertising and advocacy experiences.
- 9.32 A word of mouth approach will enable very quick responses, capitalising on positive conversation and minimising negative discussion as it occurs.
- 9.33 This leads to a constantly evolving spirit of inspiration and adaptation.

9.4 Measurement

- 9.41 We will employ a wide range of measurements to track success and evolve the strategy.
- 9.42 A marketing success/metrics dashboard will enable destination brands to share and learn from effective methodologies and meaningful metrics.
- 9.43 This will include a national brand tracker to measure shifts in perception, commitment and sentiment; reach and ripple of conversation; correlation between visits and conversation; and the value of advocacy.

10. Outcomes

This approach can be implemented quickly while delivering a long-term incremental legacy over the next decade and embedding a consumer-focussed way of working into destination activities and culture. English destinations working collaboratively within this marketing framework will ultimately bring significant positive change.

Marketing Steering Group

National Trust	Wilkinson, Sue (Chair)
Cotswolds & Forest Tourism	Dee, Chris
Eurostar	Jones, Matt
Marketing Birmingham	Rami, Neil
Merlin Entertainment	Fish, Jon
Millennium & Copthorne Hotels	Curtis-Brignell, David
Northwest Regional Development Agency	Brooks-Sykes, Nick
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VisitEngland	Mawer, Alex
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