

Annex 4

York Tourism Marketing Strategy – Recovery

June – December 2020

Background

- **York's tourist market (pre-covid) – noting February 2020 floods had affected numbers**
 - 8.4 m visitors p.a – 6.7m day visitors, 1.6m overnight visitors
 - 7.2m domestic – 26% Yorkshire (1.87m), 15% North East, 12% North West
 - 1 in 8 groups with children / 60% with partner/spouse
 - Typical age is 45-64years old, 65yo+ growing
 - 15% of York's visitors fall into the two most affluent Audience Spectrum segments (2% Metroculturals, 13% Commuterland Culturebuffs <https://www.theaudienceagency.org/audience-spectrum>)
- **York's tourist market (during covid)**
 - -65% hotel rooms sold, -58% visits to attractions, -69% visits to Visitor centre

Source: April Monthly Tourism KPIs tracked by Visit York (a part of MIY)

 - -84% (9 May) -68% (21 May) – 73% (22 June) drop in retail and recreation footfall

source: CYC coronavirus datatracker/

Estimated market post-Covid

- 36% of English adults are confident of a UK short break/holiday in July or August, 56% confident by September and 71% by the end of the year
 - Main audiences will be older couples (if safe to visit), families and millenials
 - Preferred English destinations for the summer are the South West, North West and Yorkshire.
 - Yorkshire has increased in desirability and is now ranked 3rd, ahead of London – whereas 2019 data shows that it was only the 6th most visited region by domestic overnight visitors last year
- source: VisitEngland [visitbritain.org/covid-19-consumer-sentiment-tracker](https://www.visitbritain.org/covid-19-consumer-sentiment-tracker)
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Assumptions

- We have started with the below assumptions:
 - Risk of infection: Concerns about the risk of infection will dramatically affect visitors' behaviour, initially leading to less people returning to the city
 - The product: York's attraction, retail and leisure offer provide the complete day-trip experience. For attractions to be successful, the retail and leisure offer needs to be strong and vice versa. Delaying opening of attractions could delay footfall numbers and as a result negatively impact on the retail and leisure market revenue positions.
 - Visitor location: Initially audiences will be hyper-local, those who can travel to the centre for an hour or two (regional) extending to their families and our neighbours over the first few months as confidence grows. This assumption is evidenced by Visit Britain data. We don't anticipate international visitors in significant numbers for at least 12 months.
 - Strong community ethos: Businesses, particularly the independents, have shown their support over the response period. Now as we move to recovery, there is an opportunity for the city to show its thanks.
 - A history of recovery: as a predominately people and place business, the tourist/attraction market is adaptable and has in the past changed operating models to weather different challenges.
 - Current consumer need: We need to find out what our audiences think about visiting the centre. We assume they are keen for fresh experiences after 12 weeks in lockdown, but this is assumptive. At present we are using Liverpool data, with York data to follow from MIY.
 - Resident pride: Residents are proud of their city, its beauty and heritage and want to support local businesses.
 - Experiential marketing: The cityscape with its different vistas and trails lends itself to unique cultural experiences that cannot be repeated in other cities (regardless of social distancing)

Principles

- York remains a welcoming city for all, with an offer that appeals to everyone. Whilst work takes place on a tourism strategy, over the next few months we will target those audiences who are most likely to return, uncovering and revealing some of the less known aspects that have a greater emotional resonance.
- We will work in collaboration, locally, regionally and nationally (with organisations, brands and the sector, eg Visit Britain, NP11, LEP)
- We will respond to the government advice and alert system and capitalise on government opportunities (eg. eat out).
- We will work in harmony with others to promote a rounded offer (within and outside of York).
- Our recovery marketing will influence, inform and support the wider vision for the sector.

Our approach

- City centre capacity – aim for daily target of c30% footfall, rising gradually up to Christmas to give opportunity to build confidence
- Balance capacity with revenue – recognising to be viable we need increased revenue with less capacity.
- Consumer choice – aggressively target those audiences who already enjoy York most and are most likely to return whilst showcasing the wider offer for different age groups.
- Consumer attitude – appeal to the consumer's by providing content that builds an emotional connection, this means over time interests and influences will be more important than demographics.
- Phase marketing to target audiences (as confidence builds)
- Prioritise high impact / low marketing cost – use budget effectively to minimise risk

<https://www.theaudienceagency.org/audience-spectrum>

Marketing strategy

- **Build confidence in the city as a safe and welcoming place to visit to attract a loyal and ever-increasing visitor base that are higher value and/or repeat visitors.**
- **Focus on promoting local experiences and local businesses to promote the city as a safe place to visit**
- **Use consumer sentiment and create case studies that emotionally connect the audience to promote safe and responsible tourism, as part of storytelling around how the city is adapting to the new age.**
- Use the marketing strategy model (Ansoff) to ensure the least amount of cost and risk to meet the aim.
- We will delay diversification into new markets until in a more stable position.

A safe place to visit

Throughout July we will test and adapt city centre safety measures, continuing to raise visibility of the below via the Visit York Feel at Home page: <https://www.visityork.org/explore/feel-at-home-in-york> and signposting, eg. via advertising in the local media or *Our City*, to encourage shop local

Know before you go: VisitBritain have launched a new industry standard quality mark to provide confidence for tourism businesses, and reassure visitors that businesses have clear safety processes in place. www.visitbritain.org/new-industry-standard-development-response-covid-19

Let's be York, safe, welcoming and considerate has been developed with visitor marketing in mind – visibly showing how the city is putting in place measures to keep visitors safe.

York Kind/reopen with care case studies show the steps independent businesses have taken to keep consumers safe during and after restrictions are lifted.

Outbreak Control Management Advisory Group communications demonstrate the steps being taken across the city, including sharing weekly case data



Marketing strategy

Visit Britain data suggests those who will travel first are:

families made up of intergenerational groups (a declining market, 16-12%, with least spend per head)

millennials (currently our smallest market, 9%)

couples 55yo+ if they have the confidence to do so (largest market, 45%, with most spend per head)

Promoted offer	Audience	Audience priority in terms of anticipated spend per head
Shop local /proud of our independent heritage: explore what's on your doorstep	Residents	5
Enjoy the cultural and high-end hospitality offer	1-2 hours drive couples age 55yo+	2
Evening cultural experiences for overnight stays	NE/NW couples age 55yo+	1
“York and beyond” short break for up to 2-3 days stay in York	NE/NW/national Intergenerational families	3
Explore the unique pioneering social history / green value of York	National millennials	4

Revenue and footfall percentages based on the assumption that day trippers continue to spend around half of overnight stays – there is no available insight onto the spend per audience group

Spend: Leisure visitors to the city spend £625m in the city per annum. The average spend per day is £54.16 for day visitors and £96.26 for staying visitors. Day visitor spend is the fastest increase in expenditure, with 40% increase in the past five years, and visitor spend has grown 8% in this time. Families spend less than those without children.

Source: York Visitor Survey and the Economic Impact Model for Tourism in York, both by Visit York (a part of MIY)

A themed programme (draft proposal)

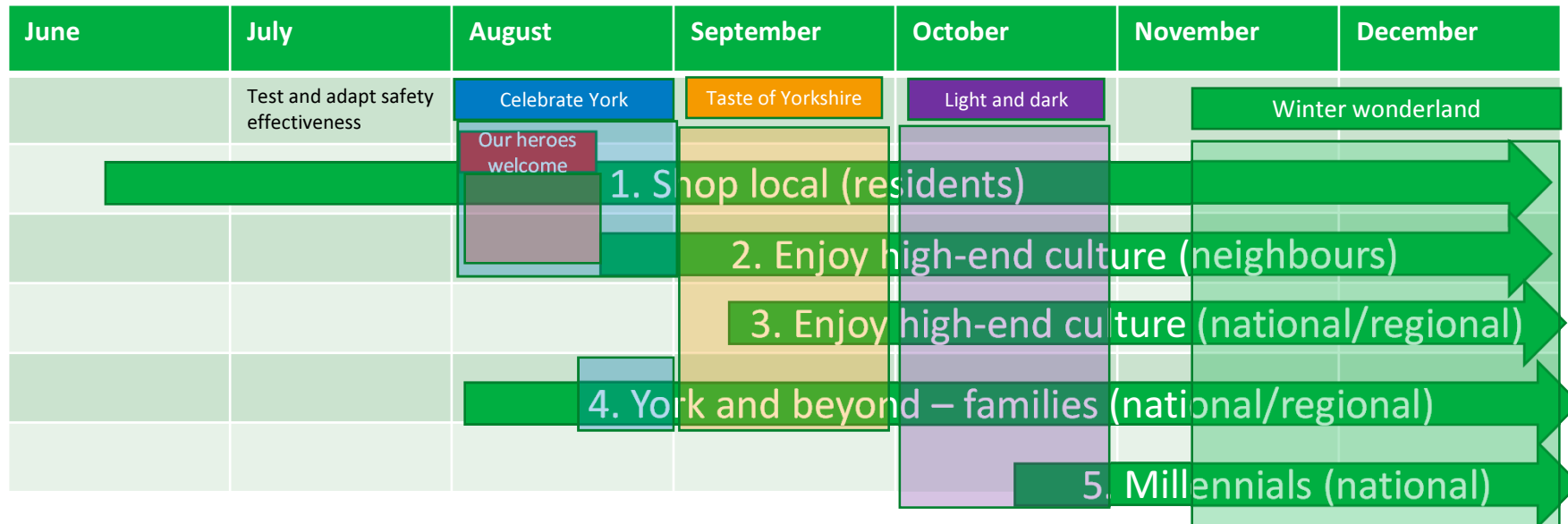
	Our heroes welcome	Celebrating York	Taste of Yorkshire	Light and dark	Winter wonderland
When	1-7 August Yorkshire Day	1 – 31 August Yorkshire Day	18-27 September Festival of Food	October half term (2 weeks)	(14 Nov – 24 Dec?) St Nicks
What	Equivalent of the resident festival retailers offers exclusively for keyworkers (experience safety measures with safe audience)	Harness civic pride – celebrate all York has introduced to the world/UK/region Celebrate Yorkshire	Showcase the great food and drink extension/replacement for food festival) National affinity marketing partner (Yorkshire tea?)	Blend history and art to light up our built heritage and explore the shadows	Local business market and Christmas experiences Resident discounts at twilight hours



Phased targeted marketing

15/6 retail

4/7 hospitality (some attractions, phased openings over summer)



The safety of the city is of paramount importance.

We will need to continually assess impact of marketing on footfall and adjust if it attracts too many visitors.

If we cannot manage volume, targeting higher spend consumers will become even more important.

This means knowing how much each of our audiences are spending and creating a city experience that is of sufficient quality it attracts those who are used to and expect the best.

CYC investment (initial budget) **DRAFT**

Item	Cost
Visual content to showcase our unique beauty and heritage	£12,500
Advertising campaign inc. social, magazine and radio	£30,000
Celebrating the best of York	£37,500
Listings / what's on	£10,000
Monitoring visitor profile and anticipated spend (to adapt marketing to try and maintain balance of capacity and revenue)	£10,000
In addition, marketing in kind and support from local, regional and national supporters	
TOTAL	£100,000

Challenges

- Audience understanding
 - Insufficient insight about audiences preferences post covid, or what attracts them to York now (especially higher spend / repeat visitor)
 - Its not clear how regular audiences will respond post-covid, eg. Student families
- Partners support
 - Key headline events are now a significant risk for partners post covid (eg. Northern lights, festival of food)
- Unsustainable demand
 - If footfall increases rapidly, this could negatively impact on the reputation we are building as a “safe, welcoming, considerate” city. We will adapt marketing activities and carefully monitor footfall.
- A second wave
 - Spend is profiled for Qtr2 and Qtr3, rather than Qtr4. If there is a second wave, this investment may need re-profiling quickly.
- Competition
 - Pace of marketing is crucial to secure loyal and repeat visitors – all heritage towns/cities will be marketing to the same audiences, in addition, the speed at which the economy returns will have a direct impact on protecting livelihoods