

RE-BUILDING CONFIDENCE AND DEMAND IN THE VISITOR ECONOMY

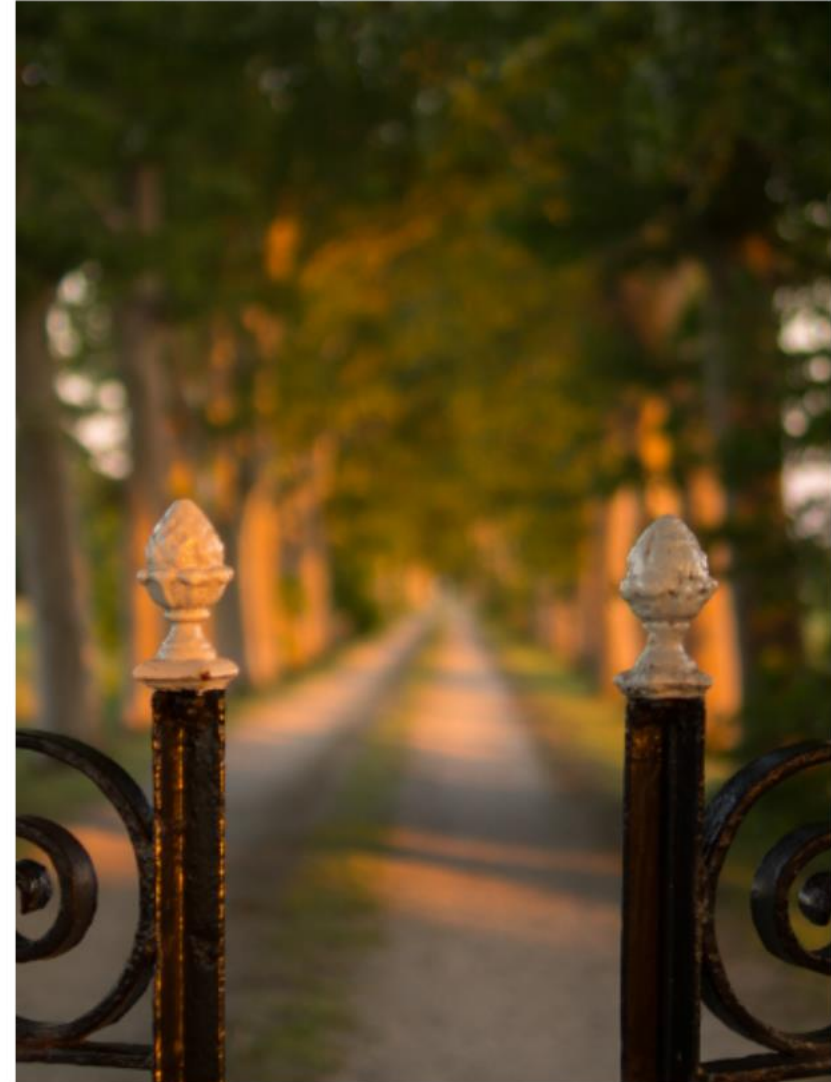
ACTIVITY EVALUATION REPORT

NOVEMBER 2021



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Introduction & Project Overview

This report looks to act as an evaluation piece around activity undertaken as part of the project 'Re-building Confidence and Demand in the Visitor Economy', which centres on a significant programme of recovery, following the COVID-19 pandemic.

The project's focus is to drive off-season visits and increase consumer confidence, to restart the once thriving visitor economy. Prior to COVID-19, tourism contributed significantly to the local economy and extensively supported the job market, worth over £8.6bn, and sustained more than 177,000 jobs as of 2015.

However, since the onset of the pandemic, both domestic and inbound visits saw a sharp decline. Consequently, the pandemic had a profound affect on the tourism sector, with visitor footfall across the region experiencing a reduction of over 90% in April and May 2020. Alongside this, consumer confidence has also been affected, with visitors to attractions becoming extremely cautious. Hence, reassuring visitors that SELEP destinations are safe and exciting places to visit was an integral element of project activity.

Consequently, many local businesses have experienced a loss of earnings, which is even more impactful given the seasonality of the sector, with businesses having lost income during the peak season. This, will have inevitably resulted in businesses struggling over the traditionally quieter winter period, particularly in rural and coastal areas, where the summer months account for the majority of visitation.

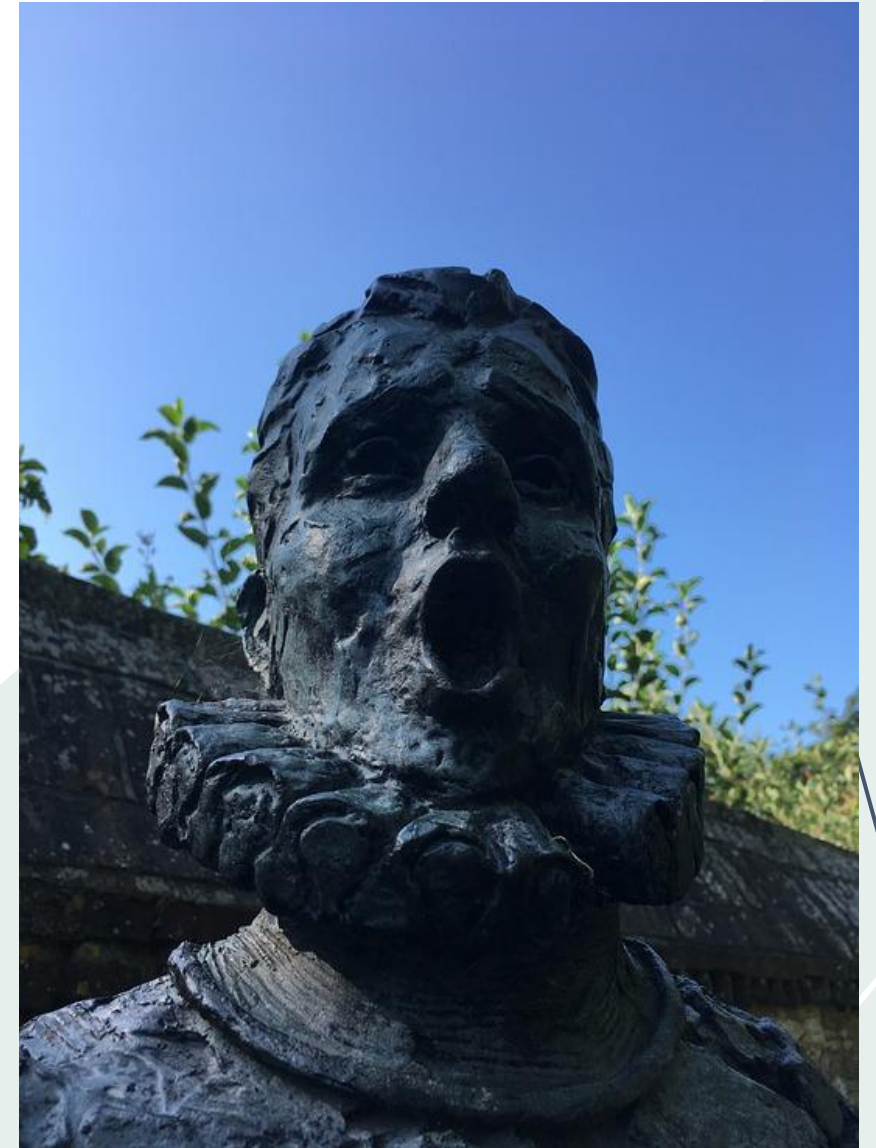
Therefore to address these challenges, partners from across the SELEP region proposed a significant programme of activity to aid the recovery of the visitor economy, through the SELEP Sector Support Fund.



This was achieved through a series of milestones including major digital campaigns, alongside dedicated local activity to drive off-season visits and increase consumer confidence, whilst dispersing footfall. The project itself was rolled-out across destinations in the South East Local Partnership (SELEP) area, with Visit Kent, Visit Essex, East Sussex County Council and Sussex Modern as project partners.

Activity set out to reflect the distinctive and diverse offer of each region, while reassuring visitors, supported by a collaborative approach to deliver economies of scale and maximise ROI. Activity also looked to build on the learnings from destination confidence initiatives, such as #RespectProtectEnjoy, alongside various insights that emerged from Visit Kent's Interreg Experience Autumn product testing campaign, to deliver pan-LEP benefits. The project also looked to build upon the partnerships developed through England's Creative Coast, and to increase collaboration between East Sussex, Essex and Kent destinations, to reduce the competition for the similar visitors at the same time through a coordinated approach. Overall, the project set out to address key opportunities and challenges, including:

- 1 To raise destination awareness and support sustainable tourism management through visitor dispersal
- 2 Support consumer confidence in travelling by public transport
- 3 Using key themes to showcase the diverse and high-quality tourism offering to key domestic markets and increase length of stay
- 4 Protect businesses and safeguard jobs by extending the season
- 5 Product development and business support to address seasonality
- 6 Build positive engagement and confidence among SELEP residents



In order to successfully and clearly evaluate project activity, essentially this report will look to outline activity undertaken by each destination partner by type of activity. This will include campaign concepts, timelines, key target audiences and channels used to promote activity.

The project also consisted of a programme of continuous testing and adaptation that was implemented by all partners throughout campaign delivery, to ensure activity and content was optimised and responded to key trends and insights. Therefore, this report will also look to outline the various pieces of research that were conducted throughout the project, which not only helped to assist with informing key strategic decisions and campaign content, but can be utilised as evaluation tools, to assess the performance and impact of project activity.

This will include consumer trends and sentiment research, as well as drawing on metrics from digital campaigns and post-resident surveys. Collectively, these sources will help to form an overall project-level evaluation, looking at how effective campaigns were at stimulating visits to the SELEP area, alongside the positive social impact that a vibrant visitor economy has on residents.

Finally, the report will also look to identify common threads across each destination and collate key learnings, possible project legacies and how project outcomes can help to inform future activity.

**Activity and content was optimised by
responding to key trends and insights**

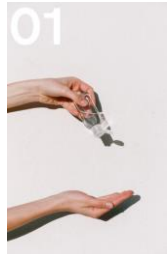


Consumer Sentiment & Audience Research

The initial stage of the project included partners gaining an insight from audience and market research, drawn from across various channels, alongside national level secondary sources and Interreg Experience consumer research. This allowed for emerging consumer trends to be identified and used to help inform strategies and campaign planning, to support the recovery of the SELEP visitor economy. Additionally, findings also aided towards establishing a benchmark for the project's evaluation.

Trends Report

To collate this information, a secondary research report was commissioned, to gather the latest insights and trends particularly post COVID-19, which were crucial in understanding visitor behaviour and demand, and to inform project activity and messaging. The report aimed to interpret key consumer trends in the context of the SELEP area, to highlight opportunities and key themes to showcase the area's offering to visitors and build consumer confidence. Consequently, the report identified 8 key areas, which were most relevant to the project's destinations, in addition to the latest statistics on consumer sentiment and confidence and outlined a series of key takeaways and recommendations.



01 Safety First

Importance of health & safety, touchless technology and effectively communicate this with consumers



03 Key Booking Trends

The power of planning, shorter booking cycles, greater flexibility needed & postponed plans



05 A Sustainable Future

Sustainability as part of the recovery, making greener choices as part of a social reset



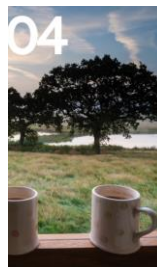
07 The Great Outdoors

Getting back to nature, open spaces & active travel



02 The Digital Shift

Investment in digital transformation, increased consumption & connected to safety



04 Closer to Home

Staycations, rediscovering the local area with added extras



06 Go Local Authentically

Immersive authentic local experiences, local produce & supporting local businesses



08 Wellbeing & Wellness

Relaxation, self-improvement & reconnecting with friends & family

The report identified an opportunity around domestic travel, with its recovery being much stronger compared to international visits, due to travel restrictions and a high level of uncertainty. This included recommendations around encouraging short-break bookings, through a combination of quality accommodation options and experiences, particularly with the self-catering market. To achieve this, it was vital that destination activity looked to showcase USP's and key product themes to stand out from competitors, while encouraging local visitors to rediscover places they may have not been to before, while showcasing hidden gems right on their doorstep.

The report also identified that the region's strong mix of both the coast and countryside, demonstrated that trends around the great outdoors and a desire to get back to nature, was a major opportunity to attracting visitors. This trend also allows for several key themes and strengths to be showcased.

The acceleration in digital consumption also presented numerous key takeaways, including the projected growth in online research and bookings. Therefore, it was recommended that destinations should provide inspirational and visual content to previous and potential visitors, to give visitors a taste of what to expect and inspire them to find out more, through the use of strong digital content.

To increase consumer confidence and bookings, the research outlined that destinations should ensure campaigns invoke clear and welcoming messages, while embracing shorter booking lead times through shorter-term marketing to encourage visitors to book now and reassure visitors through refund and cancellation policies, to reduce perceived risks and increase confidence.



Conversational Listening Reports



Monthly Reports
April – September 2021



Trending Topics & Hashtags

Engagement with Keywords & Themes

Intent to Travel

Engagement by Demographics

Insight into Brand Health

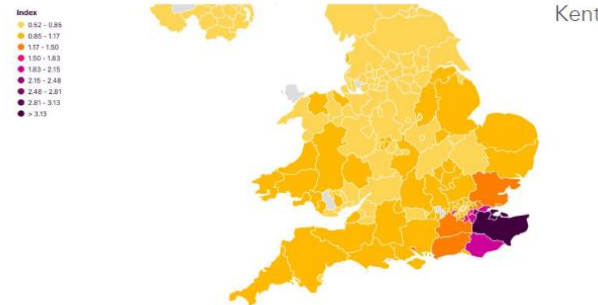
Campaign Metrics & Key Takeaways

As part of the project, partners also commissioned a rolling programme of conversational listening reports to track consumer sentiment, audiences and key drivers across the region, to both inform and monitor campaign activity. These included details on top trending hashtags and topics, alongside intent to travel and an insight into brand confidence and overall sentiment across each of the project's destinations.

These were produced on a monthly basis from April 2021, and key insights and trends identified were used to help inform activity around each destination's consumer confidence campaigns. This included aspects such as use of key words, timings and messaging.

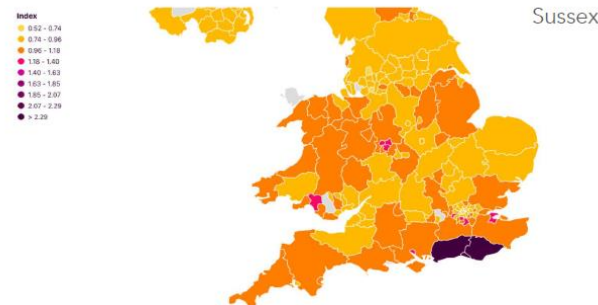
A final report was then also produced in November, which aimed to reflect back over the course of the project. Furthermore, insights gained from the latter will help to further evaluate the successes and outcomes of project activity and will be outlined later on in this report.

Geo Performance

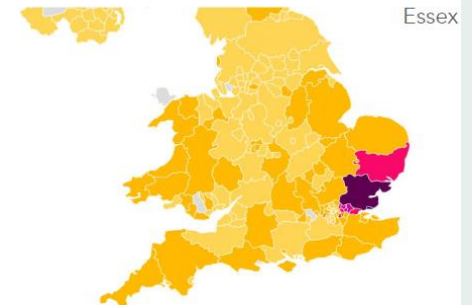


Comparison showing **general population demographics** of those with an interest in each destination who have **domestic travel intent**.

Geo Performance



Geo Performance



This initial data showed that once restrictions lifted, one of the major drivers for travel was for consumers to reconnect with family and friends, highlighting an opportunity to focus on increasing footfall from SELEP residents and those within a 2-hour drive time.

Findings from the conversational listening report from April and May 2021, also highlighted consumer interest and engagement with content and searches around staycations, getting outside and outdoor activities.

This sentiment was also reflected in Visit Kent Business Barometer, which highlighted that businesses experienced more visits from people closer to home, alongside findings from the Experience resident research, which indicated that people's perceptions of their local area and interest in exploring places closer to home had increased following the national lockdown.

Key insights were used to help inform tweak & consumer confidence campaigns, including use of key search words, timings and messaging



PARTNER ACTIVITY OVERVIEW



**SELEP BUSINESS RESILIENCE
WORKSHOPS**



**SELEP CONSUMER
CONFIDENCE CAMPAIGNS**



**SELEP RESIDENT
CAMPAIGNS**

Business Resilience Workshops

As part of the project, a series of SELEP-wide business resilience workshops were delivered via webinar on various subjects, with the aim to help support business readiness and promote sharing of best practice.

More specifically, this included the delivery of four sessions, which shared key learnings from research conducted, including practical advice about how to effectively respond to emerging trends and challenges within their businesses and develop their product offering.

These sessions were delivered by Digital Tourism Think Tank, who have a considerable level of industry experience and knowledge, drawing on worldwide and local case studies. Businesses from across all three destinations were invited to participate and share examples of best practice. From this, over 130 attended the webinars, alongside a further 80 viewings of the sessions' recordings post-event.

To promote this, partners drew upon existing partner networks and shared via various B2B channels.



Visit Kent - Shared via newsletter to B2B database and promoted via Visit Kent's B2B Twitter page and LinkedIn account



Visit Essex - Shared with businesses using B2B database.



Sussex Modern - Promoted the workshops to a total of 30 businesses via the Sussex Modern partner network



BUSINESS RESILIENCE WORKSHOPS

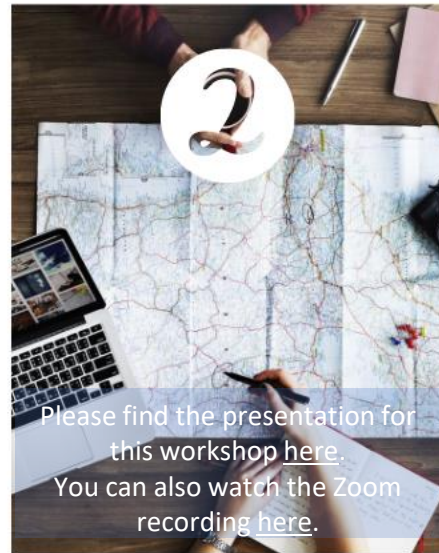


Please find the presentation for this workshop [here](#).
You can also watch the Zoom recording [here](#).

Rebuilding Consumer Confidence
23rd June 2021

With confidence in visiting indoor attractions, attending events, travelling by public transport and visiting a busy town or city centre remaining subdued, this session was designed to provide practical tips and best practice examples of how to encourage visitors back and help customers feel comfortable. Examples of best practices include Port Lymne Hotel & Reserve, Hever Castle and Chichester Festival Theatre.

Total registered: 42

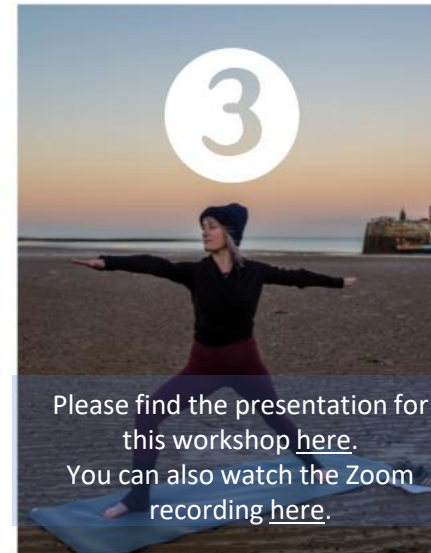


Please find the presentation for this workshop [here](#).
You can also watch the Zoom recording [here](#).

Co-produce Marketing Messages with your Destination
30th June 2021

With consumers looking at staycations to fulfil their travel needs and to explore new destinations within their home region or country, having a cohesive destination message is key to encouraging visitors to visit the local area. This session was designed to inform businesses on how they can maximise tools and messages created by the DMO and increase reach through collaboration with destination partners. Examples of best practices include Shepherd Neame, Holiday Inn Southend-On-Sea and Hastings Fish.

Total registered: 38

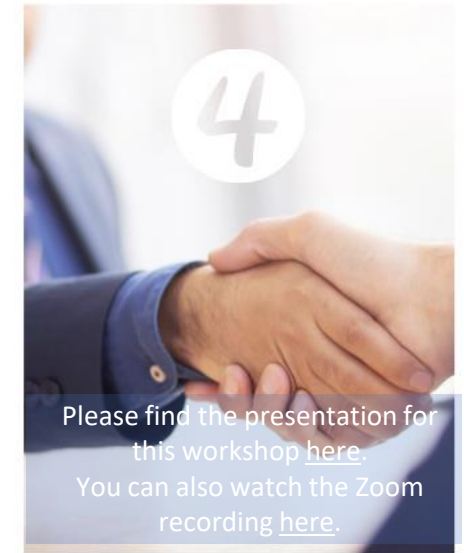


Please find the presentation for this workshop [here](#).
You can also watch the Zoom recording [here](#).

Adapt your Business Model to New Trends
7th July 2021

With the pandemic causing a shift in consumer priorities, leading to long-term changes in behaviour, certain trends around authentic experiences and wellbeing have accelerated, while others that had been gaining momentum have regressed. This session was designed to show how businesses can respond to trends, create new revenue streams & reach new audiences to support recovery. Examples of best practices include Reuthe's The Lost Garden of Sevenoaks.

Total registered: 38



Please find the presentation for this workshop [here](#).
You can also watch the Zoom recording [here](#).

Design New Packages in Collaboration with other Businesses
14th July 2021

With consumers looking for new ways to experience destinations and a desire for them to be easy to find and book, this session was designed to help channel this ingenuity to support the development of new products in partnership with local businesses, covering practical tips on how to manage partnerships, price products and success stories from across the region. Examples of best practices include Bewl Water, Canterbury Cathedral, Joe's Bow, Depot and Ditchling Museum of Art + Craft.

Total registered: 24

Consumer Confidence Campaigns

Each partner then looked to share learnings and best practice to help inform the development of integrated audience development and consumer confidence campaigns for each destination. The campaign plans and creative collateral were informed by the key audience, sector and market trends identified in the previous research. The curation of new and adaptation of existing assets for each destination aimed to capitalise on emerging trends and showcase the unique landscapes and cultural offering of each area, including products such as England's Creative Coast and Wine Garden of England. Using the plans developed in the previous stage, partners then delivered a series of integrated B2C campaigns across digital, social, outdoor, PR and influencer channels. The timings and weighting of the campaigns for each destination were also determined by the needs of the destination and Government guidance in place at the time.

The overall aims of these campaigns looked to address shared challenges seen across the SELEP area including:

- Increasing consumer confidence and positioning each destination as safe and appealing.
- Driving spend and investment in the visitor economy by raising awareness and consideration of the key cultural, landscape and experiences across the region.
- Taking the pressure off of the traditional honeypot sites.
- Encouraging visits during quieter periods to sustain the much needed cash flow to help businesses survive through the winter period.
- Targeting high-spending audiences from priority locations, with a focus on independent, self-guided visits and short breaks

The campaigns also looked to build on the #RespectProtectEnjoy messaging to educate visitors on the Countryside Code and promote responsible and safe tourism. Activity was also aligned with national messaging to build confidence, including the Visit England's "Good to Go" industry standard. As part of this, the campaigns also utilised hooks such as major events, anniversaries and new openings taking place across the region in 2021, and to use them as a platform to increase destination awareness and drive future visits.



Welcome Back To Kent Campaign

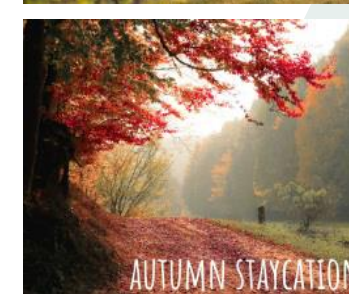
Following the lifting of COVID-19 restrictions, Visit Kent launched a two month summer consumer confidence campaign 'Welcome back to Kent', which launched in August 2021. The campaign looked to take advantage of the opportunity to inspire a wider domestic audience, by showcasing Kent's variety of destinations and attractions. The campaign aimed to attract a localised audience by showcasing what there is to do on their doorstep and re-engage visitors with what makes Kent special. Planned activity also looked to capitalise on emerging trends identified in the previous trends research, such as staycations, an appetite for travel and shorter booking cycles. Activity also looked to align with Visit Kent's Visitor First strategy, which looks to respond to emerging visitor trends for authentic experiences and increasing overnight visitation.

The 'Welcome Back to Kent' campaign ran throughout August and September, during the height of the summer holidays, at a time when families were seeking out travel inspiration and taking advantage of restriction free time. In terms of targeting, the campaign focused on residents and those within a 2-2.5 hour drive time from the county. Consequently, demographically targeting was broad, ranging from families and empty-nesters to pre-nesters and local residents. In order to showcase Kent's varied offering to different markets, a series of wide-ranging thematic features were developed, with targeting to match each theme, incorporating both short and longer led-time activities, in order to drive summer and early autumn visits. Each theme also comprised of relevant accommodation options, in order to promote the staycation overnight message.

- School holidays and family days out - families
- Dates nights and romantic locations - pre-nesters
- Reconnecting with family - empty-nesters, pre-nesters and families
- Places to recapture lost celebrations, such as anniversaries and birthdays - empty-nesters, pre-nesters and families
- Events and festivals in summer and autumn - pre-nesters
- Midweek special offers and products - empty nesters and families with young children
- Instagram worthy summer locations - pre-nesters
- Brunch and lunch locations and gems - pre-nesters
- Travel around the world in Kent with safaris, wildlife parks and accommodation - families and pre-nesters
- New ways to experience Kent - Kent residents
- Looking forward to autumn- forward bookers, pre and empty nesters



To re-engage
visitors with what
makes Kent
special



As part of the campaign, a series of new imagery was commissioned, which responded to the trends identified in previous research. Alongside this, new inspirational features were also developed and designed with diverse audiences in mind. Activity focused on experiences and places where visitors could imagine they were abroad, for those missing out on their usual trip abroad, and midweek days were also used to encourage visits at quieter times, alongside promoting people getting back together and planning an autumn break to help extend the season.

The campaign included the following activity:

- **Paid Social Promotion** – Paid promotion focused on paid social activity with one overall brand campaign to direct traffic to a campaign landing page, with individual adverts to each thematic feature. Targeting was based on those within a 2-hour drive time of Kent through geo-targeting and audience demographic advertising on Facebook, Instagram and Instagram stories.
- **Pay per click campaign** – A PPC campaign with one overall brand advert and a selection of sub strands linking to each of the thematic features were created.
- **Thematic Features** – 10 new thematic features were created in line with key summer and autumn themes. Themes were wide-ranging in order to capture a variety of Kent attractions and accommodation providers and target a wide range of audiences, to give opportunities of Kent partners. These were shared through paid activity, and organically across Visit Kent's channels.
- **Press & Influencer Activity** – This included 12 dedicated influencer trips (one for each district), and the content generated from these partnerships were shared across both participating influencer channels and Visit Kent's social media in order to target new, third party audiences with inspiring authentic activity.
- **E-newsletters** – A selection of campaign e-newsletters were also sent out to Visit Kent's database of more than 24,000 consumers, created using feature content and linking back to the Visit Kent's website.
- **Competition** – Activity also included a dedicated competition hosted on the Visit Kent website with prize packages from East, North and West Kent. Participating partners were also given GDPR compliant opt-in data and the competition benefited from organic social media, a homepage takeover and inclusion within an e-newsletter.
- **Photography** – As part of the campaign, the above activity was also supported with a selection of new photography, which aimed to capture each theme, and were used across social media and paid advertising



Businesses were also provided with a toolkit containing assets and templates to share through their channels. This included key partner campaigns and shared messages, details of themed feature content and planned organic digital activity. The toolkit also gave partners guidance on how they can promote the 'Welcome Back to Kent' campaign, alongside additional information and links.

Key partner and shared messages also included:

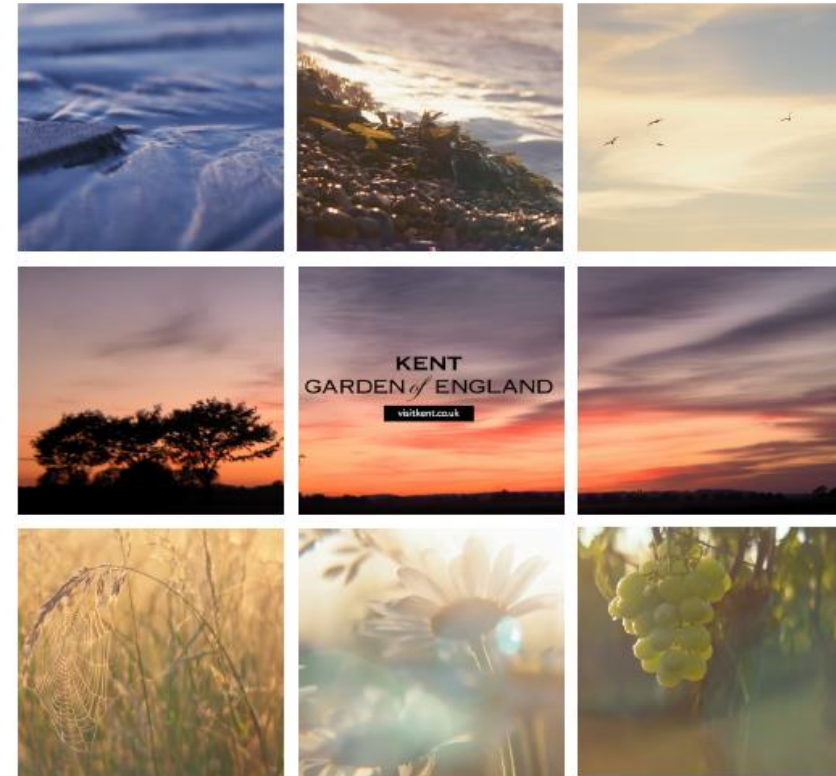
- ✓ **'We're Good to Go'** - The COVID-19 industry standard and consumer mark to help support businesses as they welcome visitors back following the pandemic. This included using this through campaign content to encourage visitors to look out for the kitemark.
- ✓ **Southeastern's Rediscover Summer campaign** - This aims to target families, active retirees and young urbanites to rediscover the beauty of Kent. The campaign centred on recreating memories with friends and family on days out by train and encourage consumers to travel off-peak for great value on quieter trains.

The campaign toolkit also gave partners examples of social media and website copy. The campaign also used the hashtag #WelcomebacktoKent, which partners were encouraged to use, to promote awareness among consumers and continently.

#WelcomebacktoKent

WELCOME BACK TO KENT

2021 TOOLKIT

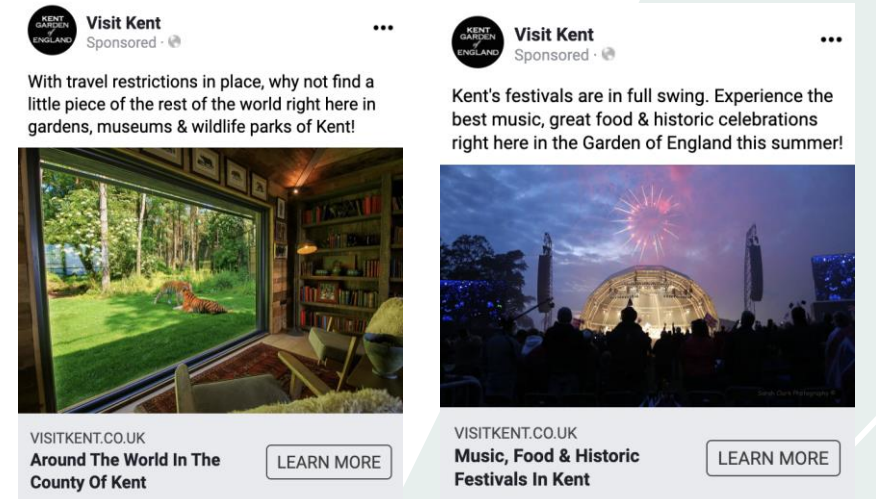
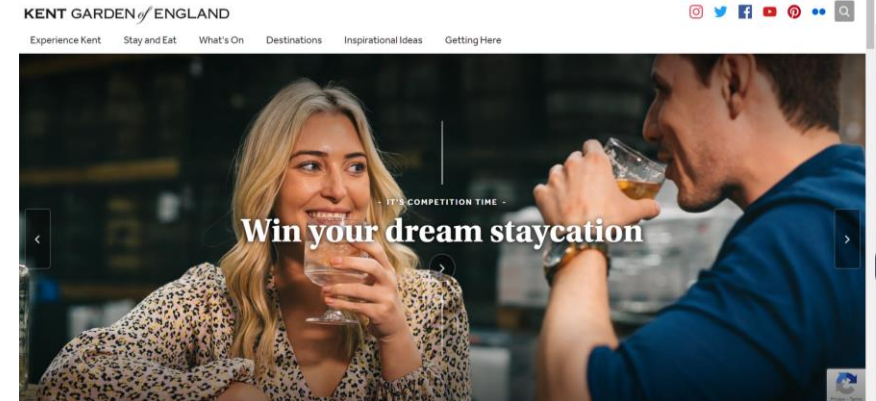


WWW.VISITKENT.CO.UK/WELCOME-BACK-TO-KENT

#WELCOMEBACKTOKENT

Campaign Insights

- o Activity across a range of digital channels including paid social, PPC, and display ads plus across Visit Kent website, social channels and newsletters achieved a total of **6.9m** impressions, **78.7K** sessions and over **100K** pageviews.
- o The most effective ad for families and pre-nesters centred around travel around the world creative.
- o Events and festivals performed well with pre-nesters, while empty nesters engaged well with midweek special offer content.
- o To complement digital activity, **12** Influencer trips around the county were also hosted, with a combined total of **200k** followers helping to reach new and different audiences.
- o Visit Kent also sent out **9** press releases focusing on a variety of themes including, summer holiday fun in the Garden of England, around the world in Kent, top coffee shops and brunch spots and recapturing missed memories.
- o **3** e-newsletters were also sent out including 'Welcome Back to Kent', 'new ways to experience Kent' and 'looking ahead'. Overall, e-newsletters had an average open rate of **31.6%** and a click through rate of **3.49%** and a total of **11,899** opens.
- o The staycation competition which included three prize packages, received over **10,000** entries along with data capture for Visit Kent and partners.



Essex Stay Local Campaign

In Essex, Visit Essex launched the 'Essex Stay local campaign' aimed to local people to spend locally, and to encourage people to discover destinations on their doorstep and travel around their own county. Similar to the Kent consumer confidence campaign, activity looked to capitalise on trends around the increase in appetite for staycations, reconnecting with friends and family and the desire for authentic local sites and attractions to make memories.

The campaign centred on building local civic pride and encouraging people to support local businesses, increase spend within the visitor economy, and looked to achieve the following campaign objectives:

- Spend locally (support local businesses)
- Talk positively about Essex and its places
- Become loyal, repeat visitors (via events and new experiences)
- Invite friends and family to visit
- Discover new places on their doorstep and help with visitor dispersal

Key campaign messages included discovering what is on your doorstep, making memories close to home, love local, protect and respect, support your local economy and to book in advance. The campaign also looked to showcase the amount of open space the county has, as people look more to getting back to nature and avoid crowded areas post pandemic. Activity also focused on re-connecting through nostalgia and familiarity and to encourage VFR visits.

- In terms of targeting, the campaign was aimed to local Essex residents, including families and both younger and older couples.
- Activity ran from 7th- 30th September and centred on the call to action to encourage consumers to visit the Visit Essex website to learn more and book activities.
- Planned campaign activity also utilised insights gained from the conversational listening reports to help inform the use of search terms and key words across social channels and inform the choice of influencers.



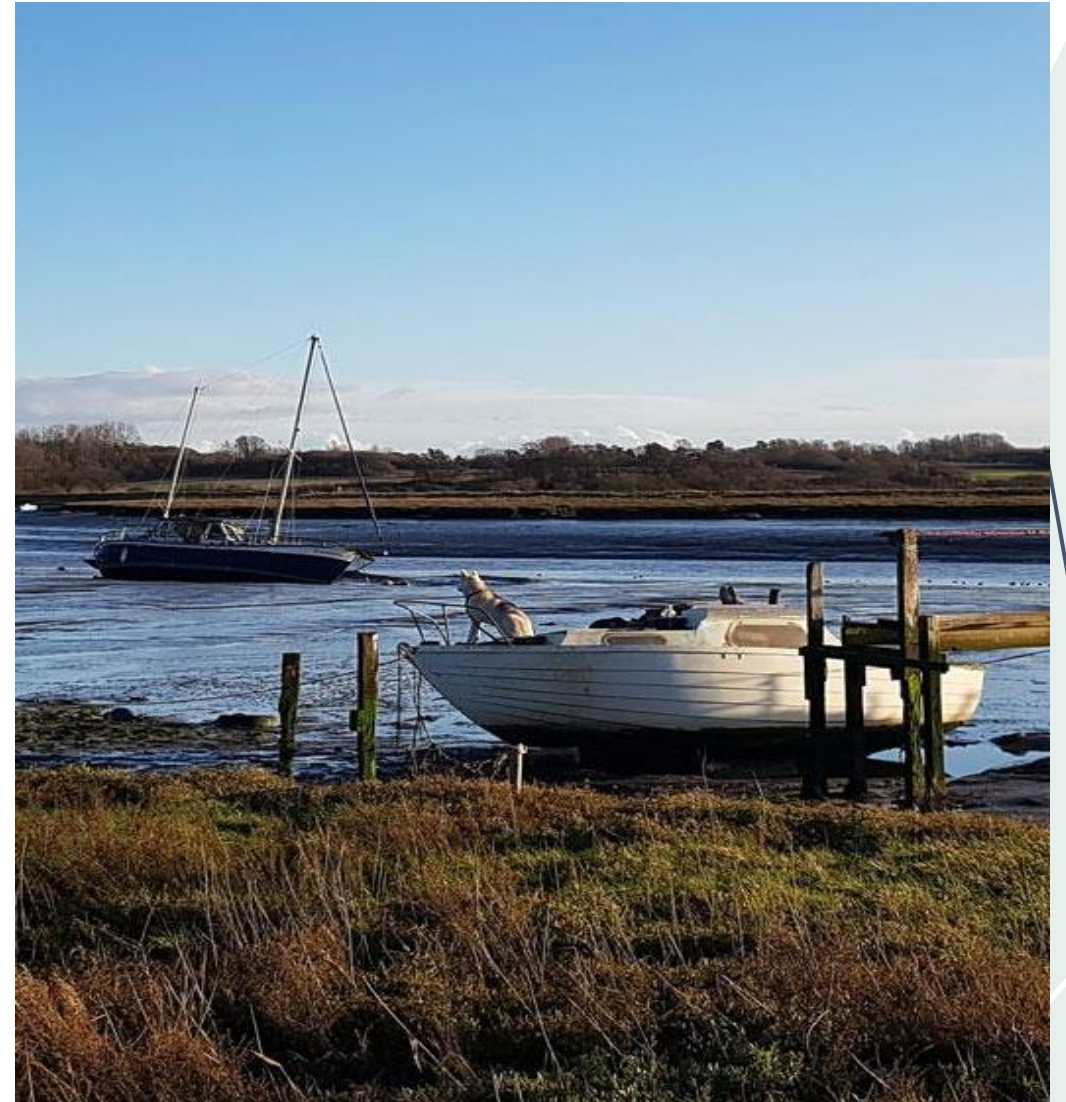
Campaign Insights

Campaign activity included a range of promotions across both sites digital and print advertising, with the former including display ads, promotion through Spotify and across Visit Essex's Facebook and Instagram, through carousels and stories. With activity bringing in an additional **28,825** visitors to the Visit Essex website

Campaign promotion also included engagement with blogger 'Twins and Travel'. This included 1 Instagram post to their **27,000** followers, a blog posted to their **25,000** followers and a Facebook post (**12.5k** followers), bringing in an additional **158** new visitors to the website.

Print advertising was also used promote campaign activity, including a segment in the 5th July edition of the Primary Times, Essex which has a circulation of **60,000** copies. This encouraged a call to action for people to plan their visit to Essex and to visit the Visit Essex website. In addition, there was also a feature in Kid Around online magazine, which was sent to **600** schools in the county, and generated both social and online sign-ups.

4 press releases were also sent out to the local media and generated **53** pieces of coverage from a range of media outlets, including Essex Magazine, Essex TV, Braintree & Witham Times, Echo online, Essex County Standard, Brentwood Live, Chelmsford Mid Essex Times and Thurrock Gazette. These covered a range of topics from five best autumnal walks and Isles of Essex, to rustic retreats and Essex memories.



In addition to the previously mentioned campaign tactics, the following table outlines additional promotional activity including, advertorial and radio coverage, timescales and the total reach achieved.

Activity	Reach
Bus streetliners 7th June – 4th July (4 weeks)	Reach of 311,070 people & total 480,830 impacts
Heart Radio Essex 7th - 27th June	324,000 listeners reached & 1,214,000 impacts
Heart Radio Essex 6th – 21st September	326,000 listeners reached & 1,214,0000 impacts
Radio Essex 21st June - 11th July (2 weeks)	63,000 listeners per week
BBC Essex	A weekly slot on the Ben Fryer show at 12pm every Friday from 15 th May – 8 th October – with 294,000 listeners each week
Foodie Festival	The foodie festival was set over 3 days and 150 names were collected for Visit Essex’s database and newsletter
Gazette advertorial – 22nd June	Readership of 1.4 million

28,825
Additional
Website Visits

➤

1
Influencer trip

➤

4
Press releases

➤

53
Pieces of media
coverage



Sussex Modern Spring/Summer Campaign

In response to the increase in staycations and the competitive nature of UK destinations to capture this market, Sussex Modern launched their 2021 spring/summer campaign. As outlined in the campaign plan, Sussex Modern's established platform and proposition, alongside its growing audience recognition, is well positioned to be at the heart of the recovery strategy.

Activity looked to deliver a phased marketing communications and digital campaign to grow audience awareness and engagement, and to rebuild consumer confidence, whilst increasing demand in the visitor economy to encourage visitation from those in the county and surrounding London and SE regions to re-discover Sussex. The campaign also looked to use the campaign as an opportunity to emerge stronger through a recovery plan that uses Sussex Modern's strength and other platform to work more collaboratively through a shared vision and purpose.

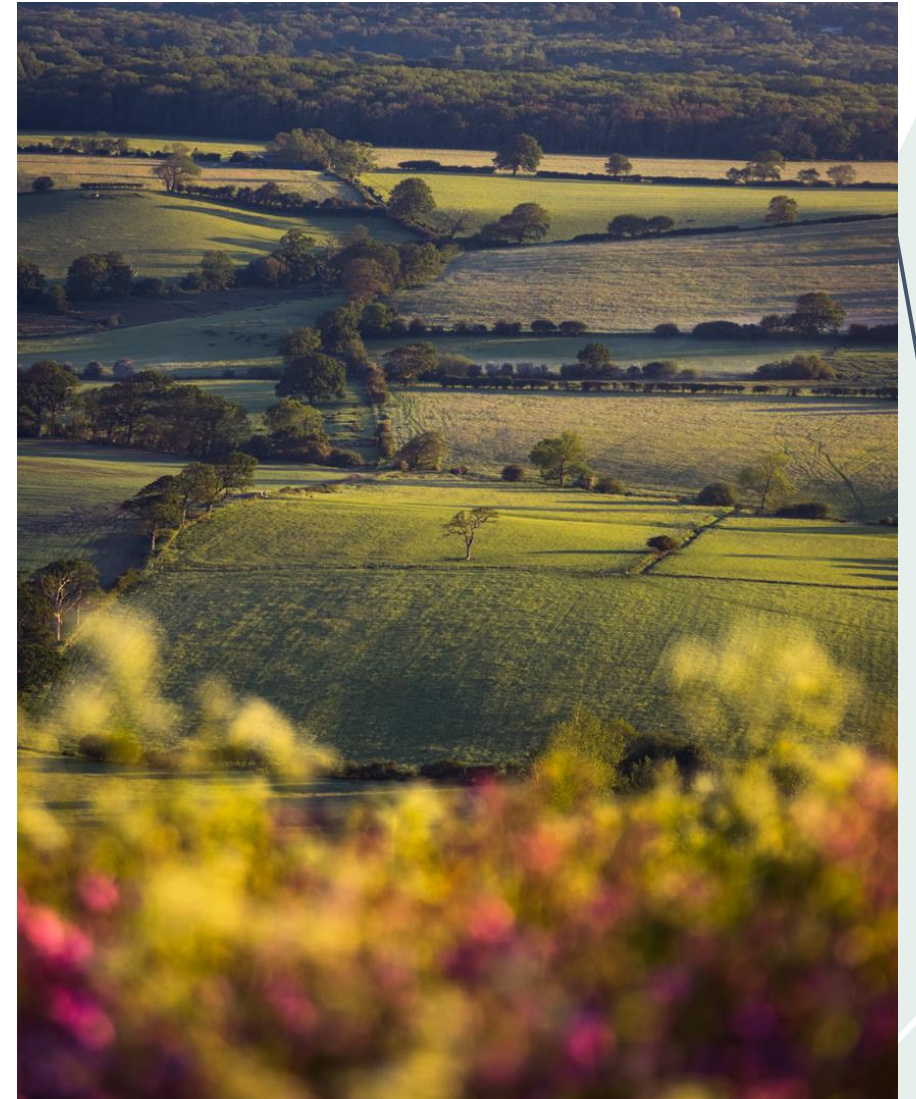
The campaign strategy also responded to various tourism trends including an increase in domestic demand and appreciation for the UK as a holiday destination, in addition to a demand for flexible customizable holidays and the desire to travel more responsibly and sustainably.

Building on the work to develop a cohesive image and offering of the region, it aimed to put Sussex on the map as one of the finest and most distinct destinations for a staycation. This included highlighting the county's unique aspects and invite people to discover what the county has to offer, whether it was a for a first time visit or those that live there. Planned activity looked to focus on authentic quality and aspirational experiences, and build upon hero products around art, landscape and wine. Furthermore, the campaign used striking and contemporary visuals across print, digital and outdoor channels, to capture target audiences' interest and encourage and inspire them to discover more and create their own journeys.



The campaign strategy also highlighted various insights, considerations and challenges the activity took into account.

- The campaign plan highlighted that there is limited audience awareness of the location of East Sussex and locations within the county, and therefore activity must look to increase awareness among visitors.
- It was also identified that the county's visitor offering is fairly fragmented, and that low spending tourism makes up the majority of the current economy. Therefore, activity also looked to increase spend within the destination, through promoting various activities, experiences and accommodation options to extend length of stay.
- Insights also highlighted that there is a perception among non-visitors that the county is far away and inaccessible, and that activity should look to address this by highlighting transport links and accessibility from other areas.
- It was also noted that activity needs to be flexible and reactive to changes due to the pandemic, and to ensure that messaging is responsible and inline with the most recent Government guidelines and restrictions.
- Finally, it was important to look at how activity can act as a precursor to encourage autumn and winter visitations and support the shoulder season months.

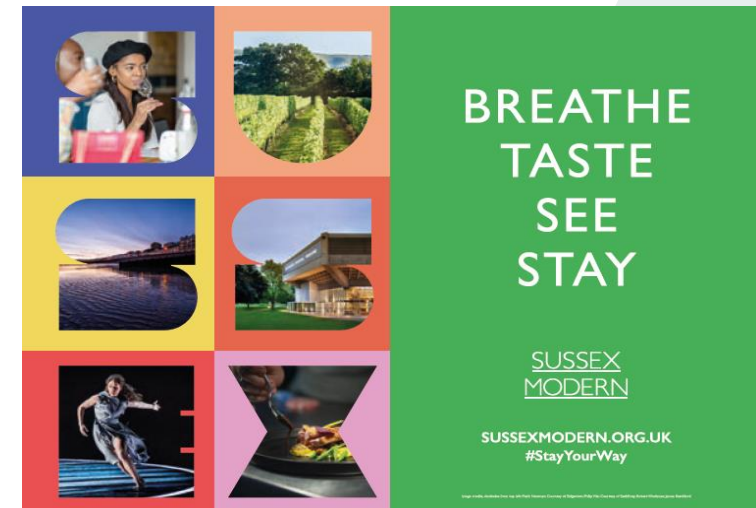


In terms of key messages and selling points, the campaign looked to focus on the following:

- o Be seen as being well-connected in the case of London, as an accessible day trip destination.
- o Celebrating the independent traveller and encouraging people to go their own way and plan their own journey.
- o Highlight the areas' unique climate in the UK as being very sunny
- o The areas' diverse and distinctive landscape, from artist gardens to beaches and chalk cliffs to rolling hills and woodlands on the South Downs National Park.
- o Highlighting that the area is home some of the best art and cultural venues and events in the UK, including art galleries, museums, performance venues, festivals and England's Creative Coast.
- o Showcasing the areas' internationally renowned wine and viticulture experiences, alongside independent food and drink businesses, from micro-breweries to pop ups and Michelin star restaurants.
- o The areas quality accommodation options from shepherd huts and yurts to hotels

The campaign also looked to achieve various objectives through campaign metrics:

- 1) This included to broaden reach and engage target audiences, through activity that reflects the brand's position and a celebration of the county's contribution to culture and experiences.
- 2) Activity also looked to build upon the brand's collaboration with local businesses and partners, to create and deliver compelling reasons to visit the area and support the longer-term goals of the destination to have both national and international recognition.
- 3) Lastly, the campaign looked to drive engagement through encouraging audiences to discover more and plan their own experience, through driving engagement across the brand's social channels, website and in-person.



Targeting

In terms of targeting, the campaign looked to attract 3 segments, with a focus on aspects such as demographics and interests.

Metroculturals – This is a prosperous group who favour a city lifestyle and cultural opportunities. They are likely to be working in demanding professions and are interested in a wide variety of activities and are likely to consider themselves to be a creative person. This group are likely to be active museum goers, and engage with the arts on a weekly basis. They largely originate from cities, with the majority being based in London. They are also made up of different age groups, with the average being slightly younger than the population average, with a fifth having children and 50% being single.

Experience Seekers – This group are in search of new things to do and have disposable income to spend on a variety of cultural and leisure activities. They are likely to live close to city centres, so they can easily access a variety of cultural and contemporary assets. A large proportion are single or couples in their 20s and 30s with no children, with the majority being based in the South. They are likely to seek out digital narratives and information online, and are frequent visitors to heritage sites, museums and galleries.

Comunterland Cultural Buffs – This segment are willing to pay for more premium experiences, are affluent and professional, and lean towards castle and traditional offerings. They are particularly prevalent in the Southeast but less so in London and they are often more mature families or retirees, based in suburban or green belt areas. Their motivations are varied and are likely to seek out learning opportunities, and socialising with friends is an important motivator.

The screenshot shows a Guardian article titled "Hit the wine trail" with a large image of a vineyard. The article includes sections for "TILLINGHAM" and "ASHLING PARK". A sidebar on the left says "EXPLORE" and "BRITISH WINERIES ARE NOW HOT SPOTS FOR A SHORT BREAK OR DAY TRIP. HERE'S WHERE TO HEAD TO FOR A FULL-BODIED GRAPE-TO-GLASS EXPERIENCE". The Guardian logo and navigation bar are visible at the bottom of the article.



Campaign Timings

April – May : Own channel activity around easing of lockdown restrictions and the beginning of the staycation season.

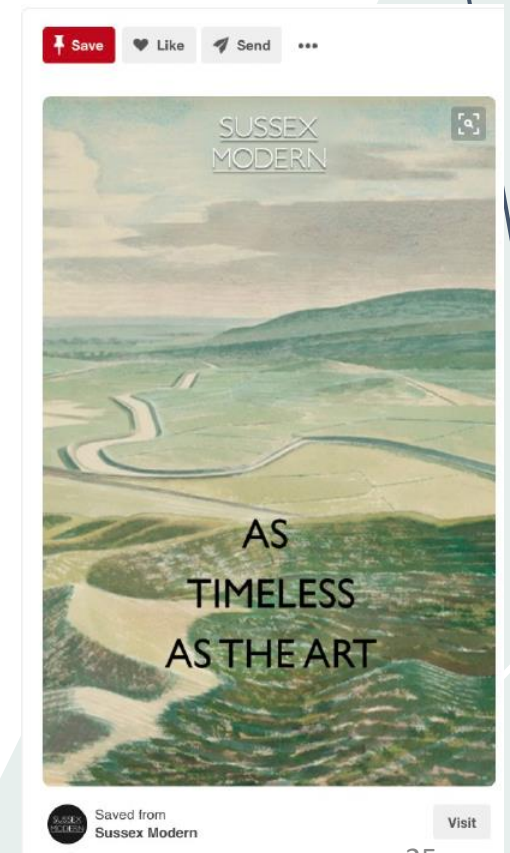
May – June: Phase 1 campaign to support the planned wider reopening on the 17th May of museums, galleries and indoor hospitality.

June – August: Phase 2 campaign to highlight accommodation, retail, restaurant and dining, live events and staycation ideas to support the ending of restrictions on 21st June.

August – October: Phase 3 campaign, which included experiential activity and a local residents campaign.

Marketing Activity

- **PR & Influencers** – PR outreach centred on key stories to secure print and digital editorials in media titles, alongside engagement with on-brand influencers, to generate social content and target new audiences.
- **Website** – Creation of 8 new blogs around key search terms, to support activity and encourage visitation to Sussex. Landing pages for Sussex Modern's key content pillars of art, landscape and wine, showcasing experiences and destination inspiration. SEO audit and fixes to improve visibility in search results.
- **Social Media** – Organic and paid for activity on Sussex Modern's Instagram, Facebook and Twitter accounts, which showcased news stories about the county to drive engagement. Highlights included, #MuseumWeek content with an Instagram takeover by Towner Eastbourne, #EnglishWineWeek content with a Instagram takeover by Tillingham, #MidsummerModern, involving a micro-influencer campaign on Instagram to celebrate the summer solstice. In addition to #SussexDozen wine giveaway, to win a bottle of wine from one of 13 wine partners and #AutumnisAlive, promoting an autumn offering from new exhibitions, harvest experiences to walks and places to stay.
- **Video** – Inspiring video content was created in order to support campaigns and key messages.
- **Out-of-home** – The creation of print and digital billboards within the region and within London, to increase awareness at key milestones in the campaign.
- **Print** – Distribution of existing print guides to each partner venue and to high footfall destinations across the county.



Campaign Insights

Website:

- o 18,396 page views, 6,394 users, with 44% of traffic originating from social media, representing a +25% increase in page views, a +39% increase in users and a +40% increase in sessions.

Social Media Activity:

- o Findings show that activity generated over 4.5M impressions, 147K engagements, with both seeing a significant increase on the previous period. Activity also generated over 23K link clicks, and 1,593 new followers across social media channels (+67% increase). Findings also show that the video content was viewed by over 381K users.

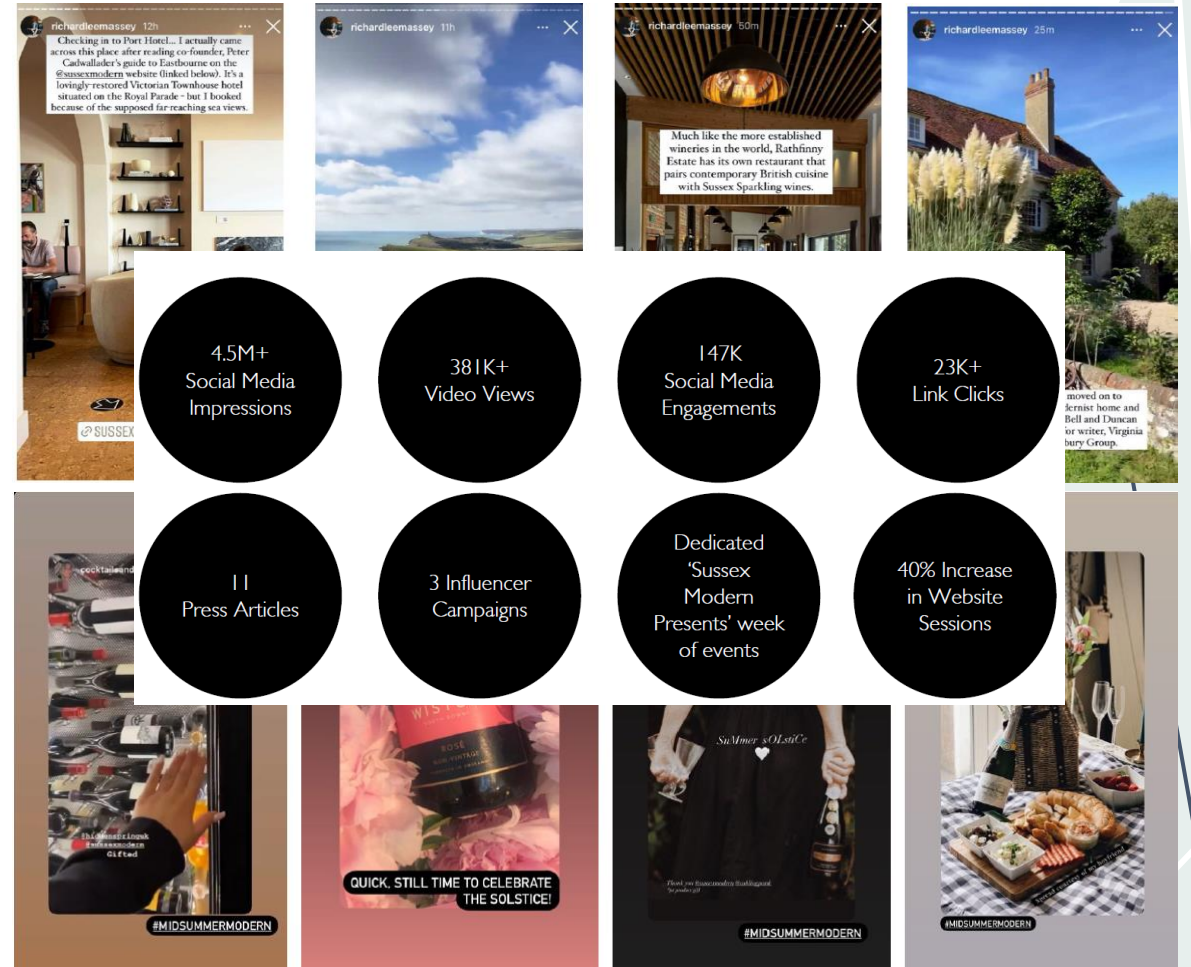
Paid Social Activity:

- o Overall, results show that activity had over a 1M reach, generating over 2.5M impressions and 22.3K link clicks.

PR & Influencer Activity:

- o Key insights included coverage from a number of media outlets, including Grazia Magazine, The Guardian, Tatler, The Spectator and The Telegraph.
- o The #MidsummerModern Instagram campaign including 8 micro-influencers, and generated a reach of over 20K, 266 new followers and over 400 profile visits to the Sussex Modern Instagram page.

- o Activity also included the #GourmetGardenTrails micro-influencers visit and Richard Lee Massey's trip. With the latter generating a 39K reach, 2.9K likes and over 500 visits to Sussex Modern's Instagram page.



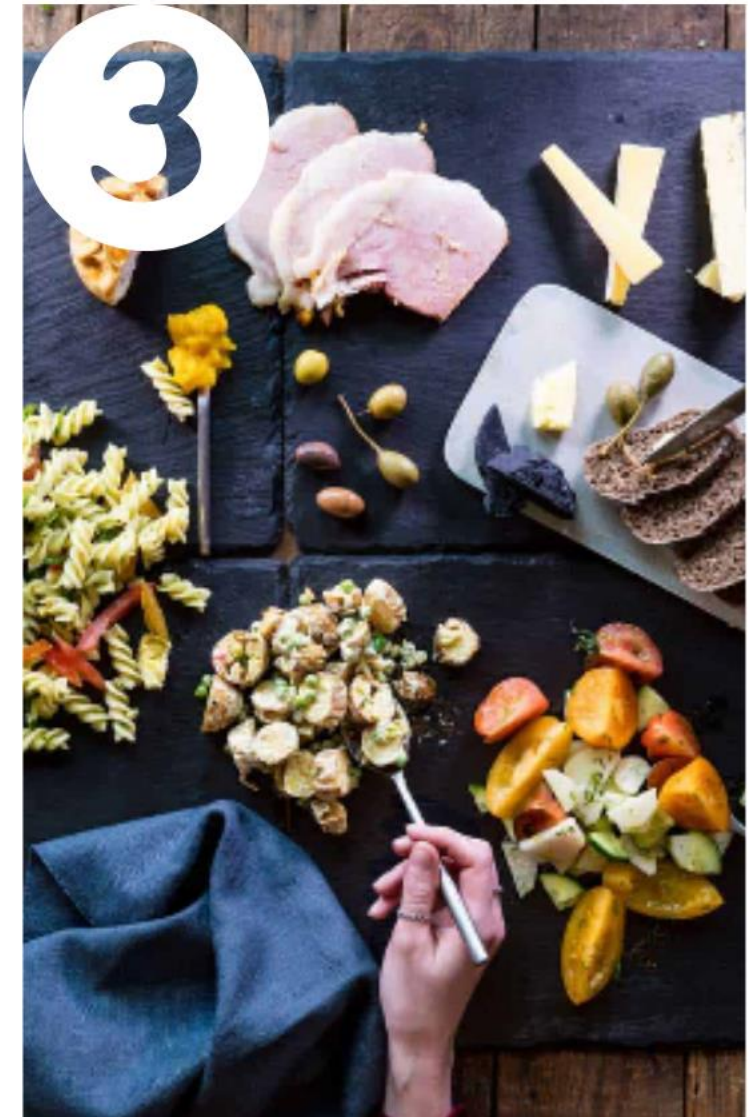
Local Resident 'Reboot' Campaigns

In order to reboot the visitor economy for the 2021 season, partners also delivered campaigns to stimulate the local visitor economy, by celebrating local businesses and engaging residents. The campaigns aimed to encourage residents to discover and rediscover hidden gems across the South East, whilst increasing pride in their local communities and boosting VFR visits to the area.

Each destination campaign was open to all SELEP residents, to stimulate trips around the region and deliver triple the benefit. Each partner also cross-promoted the other resident campaigns to increase reach. This activity was also informed by consumer insights that demonstrated that the recovery will be driven by more local and regional travel. With at least 40% of post-lockdown trips being for the purpose of visiting friends and relatives, this further justifies the need to deliver campaigns for this market.

Consequently, for Kent and Essex this was delivered by building upon the successes of the Big Weekend platform, with a Kent and Essex Bigger Weekend being delivered, which was not only opened up to neighbouring counties, but also ran for an extended period of time, to maximise return and further boost the local visitor economy. For Sussex Modern, Sussex Modern Presents was delivered, which involved a curated week of experiences celebrating the best of contemporary Sussex culture, which was also open to residents across the SELEP region.

We know from previous post-Big Weekend campaign research that businesses also see high levels of return visits and additional spend as a result of participating. Therefore, a shared approach to post-campaign research was also applied, in order to gain a better understanding of the positive social and economic impacts of this activity on SELEP residents, which will be discussed in further detail later on in this report.



Kent Bigger Weekend 2021

The Kent Bigger Weekend looked to celebrate what is special about the county and encourage residents to discover some of the great places and attractions right on their doorstep, while recommending their experience to friends and family.

The campaign offered Kent residents alongside those in neighbouring counties in Essex and East Sussex the chance to win free tickets for days out to attractions across the county. For 2021, this also ran for an extended period over an entire month from 26th June - 23rd July and beyond.

The campaign was hosted on a dedicated Kent Bigger Weekend website, where attraction listings were updated and residents could enter the public ballot to win tickets and access other information and FAQs.

As part of planned activity, paid social activity was commissioned through Sleeping Giant Media, in order to build cost effective campaigns to increase awareness and conversion to sign-up to the Bigger Weekend, by using effective targeting to provide the most relevant audiences through social channels and display advertising. This included using relevant keyword targeting for those searching for days out in the future through the use of PPC activity and existing audience data, to target relevant audiences in Kent, Essex and East Sussex areas.

To further promote the campaign, partners were provided with a toolkit containing key information such as dates, guidance on ticket allocation and how they can promote their attraction and the wider campaign. Businesses were asked to spread the word about the event and their ticket offers via their own digital and communication channels, to both consumers and staff. The toolkit also gave partners examples of website copy, alongside sample Tweet's and relevant hashtags such as #KentBiggerWeekend and #KBWselfie.



#KentBiggerWeekend

Campaign Insights

Entry Statistics

60 participating attractions

3,163 winnable tickets

29,426 entrants

113,018 applications

2,863 winners

Kent Bigger Weekend
29,426 entrants

Website Statistics

56,949 website users

86,749 website sessions

725,090 pageviews

316,634 ,minutes spent on the website

Largest number of users from London (11,399), Maidstone (6,404), Gravesend (3,148) & Ashford (3,055)

PPC Performance

127,755 impressions

7,710 clicks

652 direct conversions



Campaign Insights

As part of the post campaign evaluation process for the Kent Bigger Weekend, a survey was also sent out to both participating business and participants, to gain an insight into their experience to help inform future campaign activity.

Participants Survey

- Total of **529 respondents**
- **97%** were Kent residents, with the rest originating from either Essex or East Sussex
- The largest proportion (**51%**) were aged 45-64
- When asked how they heard about the Kent Bigger Weekend, **40%** stated they were already familiar, followed by **32%** selecting the Kent Bigger Weekend website and **13%** via enewsletter
- **100%** of respondents felt the idea of the Kent Bigger Weekend was either 'very good' or 'good'
- **94%** felt the website was 'very good' or 'good' and **86%** selected the same options for the ballot process
- In terms of ticket redemption, **75%** used their ticket, with **74%** visiting with their partner and **32%** with children
- Looking at mode of transport, as expected **96%** travelled via car
- **78%** said they would be more likely to visit places in Kent due to their experience of the Kent Bigger Weekend

Below are also some of the open-ended comments received, which demonstrate the value of the campaign to residents.

"Well worth the experience and the ability to use the tickets after the actual weekend for a couple of weeks"

"I think what you do is amazing and I can't wait to enter next year to see if I win tickets to another attraction which I didn't know about before!"

"Great scheme as it allows people like myself on a low income to visit places in Kent, also it lets me tell other people that the places I visit are worth going to see"



Campaign Insights

Business Survey

- A total of **20 businesses** completed the survey
- When asked how they heard about the Kent Bigger Weekend, the Bigger Weekend website, the Visit Kent website and newsletters were all selected by **50%** of businesses
- **75%** of businesses agreed that the Kent Bigger Weekend is a good idea
- **95%** felt they had all the information they needed and **75%** stated they felt the ballot process went 'very well' or 'quite well'
- When asked about the inclusion of neighbouring counties and extending the campaign period, the largest majority (**40%**) felt that other counties should be included to some extent, but that tickets should be capped. This was then followed by **35%** agreeing that it is a great opportunity to raise awareness of the county and to encourage visitation and secondary spend
- Responses around extending the campaign period were fairly split, with **55%** of businesses feeling the period should continue to be extended and **45%** expressing it should not.
- Overall, sentiment around the campaign was very positive with **100%** of businesses agreeing that it should continue.

Overall, the results indicate that businesses feel very positively about the Kent Bigger Weekend, alongside having a positive experience with both the ballot process and access to the necessary information. In terms of extending the campaign to other neighbouring counties overall businesses agreed this should continue but that tickets should be capped.



Essex Bigger Weekend 2021

The Essex Bigger Weekend also looked to target local residents and encourage them to bid for tickets submitted by local attractions, in order to encourage days out in the county and celebrate all the great things there is to do on their doorstep, while supporting the recovery of the visitor economy.

Similar to Kent, this was also extended to neighbouring counties and ran for an extended period of time, from the 18th September to 27th October and beyond, over an entire month. Businesses were also provided with an attractions toolkit, which gave information on key dates, guidance on ticket allocation and other important information. This also included information on the selfie competition which was running throughout the entirety of the campaign encouraging consumers and businesses to use the hashtag #EBWselfie. The toolkit also gave businesses examples of website copy and sample Tweet's, and encourage them to use the hashtag #essexbiggerweekend. The campaign also had a total reach of 311,070 people and a total of 480,830 impacts.

Entry Statistics

49 businesses
1,186 pairs of tickets (which included some family tickets which may have made this number slightly higher)
8,856 entries
100,928 applications
1,173 minutes
2,046 opt-ins (23%)

Website Statistics

42,497 users
870,153 page views



#essexbiggerweekend
#EBWselfie

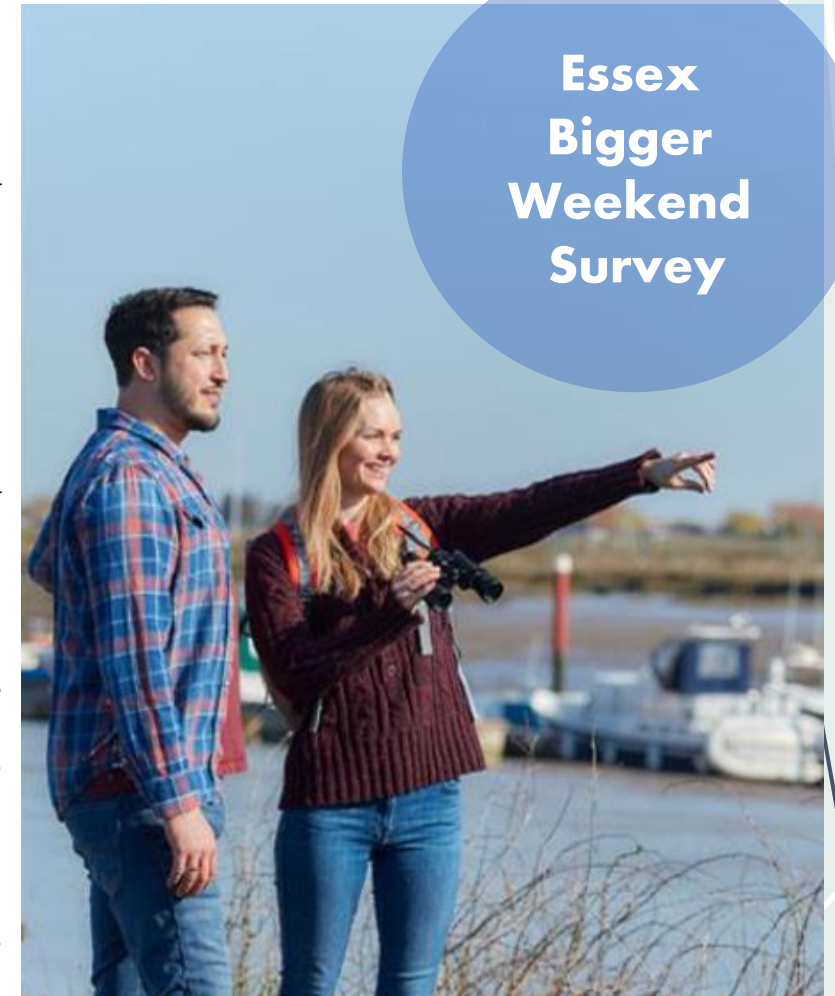
Campaign Insights

Participant Survey

- A total of **192 respondents**
- **95%** of participants originated from Essex, 4% from Kent and 1% from East Sussex
- When asked how they heard about the campaign, the most popular responses included the Essex Bigger Weekend website (**25%**), the Visit Essex newsletter (**23%**) and **21%** specified they were already familiar.
- **88%** rated the idea of the Essex Bigger Weekend as 'very good'
- **92%** rated the website as either 'very good' or 'good'
- **86%** rated the ballot process as either 'very good' or 'good'
- **64%** stated they had won tickets previously, with the largest majority (**35%**) selecting a particular attraction because it 'sounded interesting'
- The majority of participants visited the attraction with their partner (**63%**), followed by **29%** with children
- As expected, a significant proportion (**92%**) travelled to the attraction via car, and **100%** came to Essex for the day as opposed to overnight - which may be attributed to the majority of participants originating from Essex.
- **79%** stated they were likely to visit the attraction again, with the largest proportion specifying this would be during 2022
- **88%** were likely to recommend the attraction to friends and family and as a result **73%** stated they were more likely to visit more places in Essex.
- **92%** stated they were proud to live in Essex with a similar proportion specifying they would be proud to show their friends and family around the county

Business Survey

- A total of **6 businesses**
- **67%** of businesses agreed that the idea of the Essex Bigger Weekend was a good idea, and businesses felt the campaign allowed them to promote venues to an Essex audience and increase awareness
- **83%** stated they had all the information they needed and **100%** felt the Essex Bigger Weekend should continue
- When asked about the timing of the campaign, **67%** felt extending the campaign period was a good idea with the majority (**67%**) displaying a preference for this to happen in September and October at the end of the season
- **83%** also stated that the campaign should continue to allow residents from neighbouring counties to apply for tickets



Sussex Modern Presents

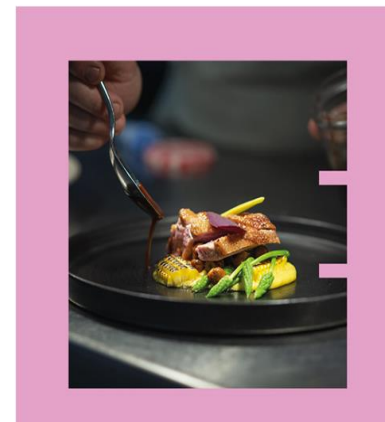
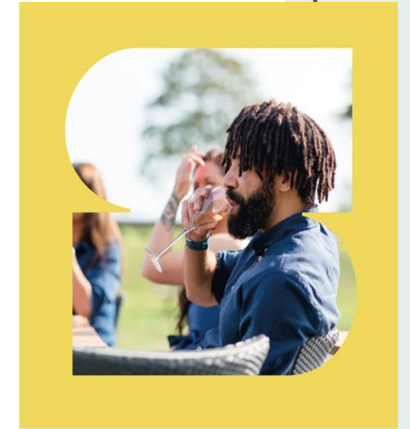
As part of the wider project, Sussex Modern also launched a resident reboot campaign 'Sussex Modern Presents', which looked to celebrate the very best of contemporary culture in the county. The campaign aimed to bring the Sussex Modern network together, to encourage local residents and those within Kent and Essex to experience cultural attractions and experiences to extend the summer season into the shoulder the season month of September. The campaign aimed to showcase the areas' offering and highlight the creative an inspiring side of Sussex that even locals might not be fully aware of and centred on the vital element of collaboration within the destination.

This involved a curated week of experiences running from the 13th - 19th September, working with wine, art and landscape partners to provide a week of events and exclusive collaborations. This included gastro treats, guided trails, behind-the-scenes tools, all set against the backdrop of the iconic countryside.

Key activity highlights included:

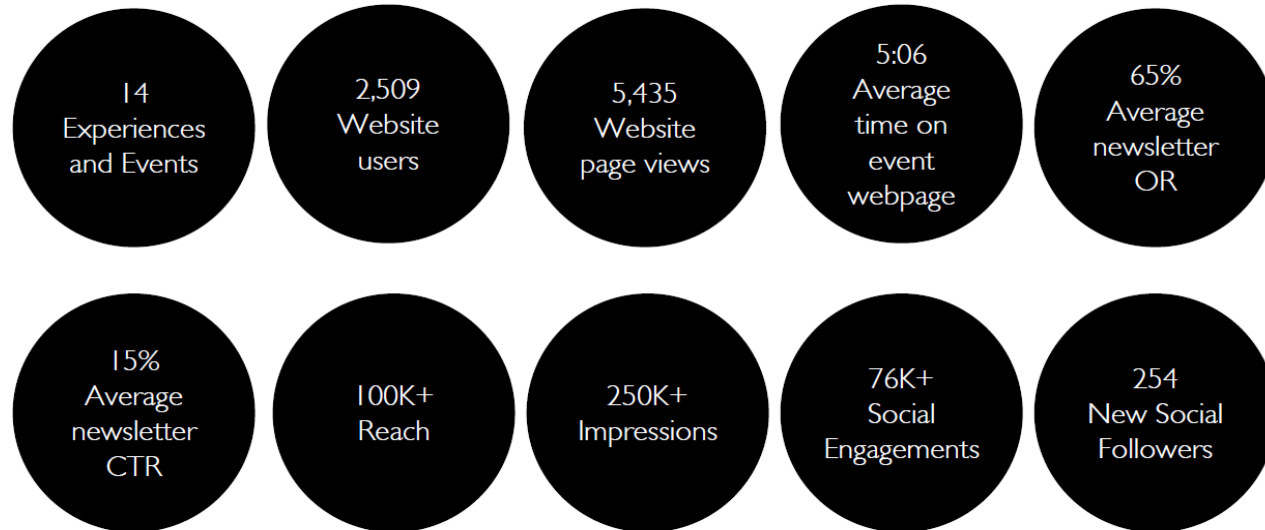
- High-profile digital 48-sheet in Brighton to promote the event
- #SussexModernPresents launched across Sussex Modern's website, social and newsletter channels
- Partners were asked to share and post using the campaign toolkit and assets provided
- In-feed ads on Facebook and Instagram were promoted via a Facebook event
- A campaign launch enewsletter was issued
- Event live and campaign takeover was hosted across Sussex Modern's channels

#SussexModernPresents



Campaign Insights

- o Looking at results from the campaign, there were a total of **14** experiences and events
- o The website generated **5,435** page views, with an average dwell time of **5:06** minutes.
- o Statistics also show the campaign had over a **100K** reach and generated over **250K** impressions
- o This also included **76K** social engagements with an additional **254** new social followers



#SussexModernPresents



Campaign Insights

Following the campaign, Sussex Modern sent out a survey to businesses, to gain an insight into the success of the campaign and aspects including, brand perceptions, awareness of press and campaign activity, social media presence and business support and priorities for the future. The survey had a total of 23 respondents.

Key Findings

- When asked what their relationship is with Sussex Modern, **52%** of survey participants stated they were wine providers, followed by **26%** being art-based businesses, with the remaining **21%** were either 'other' or 'external funders'.
- **48%** of respondents agreed that the Sussex Modern brand is changing perceptions of Sussex, with **43%** selecting 'maybe' and only **8%** selecting 'no'.
- The survey then asked if they thought that Sussex's coverage in the press has increased in the last six months. Findings show that **63%** felt this had increased, with **33%** selecting 'maybe' and **4%** feeling this had not increased.
- When asked whether they were aware of the London and Brighton billboard campaigns this summer, responses included they were very appealing and showcased the best of Sussex, and conveyed a strong position for the destination. However, for some thought the branding needed to be stronger and call to action needed to be clearer.
- Respondents were asked if they feel Sussex Modern's social media presence is improving. Responses included that this is very engaging, with a vast improvement in content. Feedback also included that imagery is a strong aspect, and that consistency of posts is being positively received. However, comments also included that this could be improved further, and that more investment is needed to increase reach. Although, overall feedback was positive and gives exposure for partners and the destination.
- When asked how Sussex Modern can help to support businesses further, responses included continuing to coordinate conversations and collaborations between partners and an appetite for more themed campaigns, events and press trips.
- Businesses were then asked what they felt the priorities should be for the future Sussex Modern campaigns. Responses included ensuring that the brand clearly communicates what the offering is and to make the visitor journey easier through improving website functionality and targeting new audiences. Comments also highlighted the desire to focus on wine tourism and accommodation, alongside creating unique experiences, while targeting additional visitors from international markets and London to increase overnight visits.

Summary & Key Learnings

As part of the social listening activity, a final report was compiled in order to gather insights over the duration of the project. The report looked to evaluate the response and impact of each destination’s campaigns on consumer behaviour and sentiment, including top trending topics, engagement and geographical insights.

- o Overall, from a UK perspective findings show that ‘holidays’, ‘staycations’, ‘family’ and ‘day (out)’ were the most prominent topics of conversation throughout the period of the project, alongside ‘stay’ and ‘local’. Consequently, these findings point towards the overriding theme of staycations and visiting places locally. Furthermore, the top trending word was linked to day breaks and days out, indicating that consumers were enjoying short breaks and visits during the year.
- o In terms of prominent hashtags used over the project period, this was dominated by #staycation, the travel word of the year. Other travel related hashtags also prominent, included #holiday, #win/#competition/#giveaway (with many competitions running over the period), #beach, #glamping, #summer, and #travel. The locations #Devon, #Cornwall and #Scotland were prominent.
- o Sentiment was fairly consistent across the project period, with negative comments relating to accommodation prices and travel restrictions, whereas positive sentiment related to summer, family, seaside, and local visits. However, overall, most confidence for travel during the project period was towards local or national domestic travel with the most mentioned phrases attributed to Government policy or handling of the COVID crisis, the Green/Amber/Red lists, staycations, holidays, and bank holidays.

TOP HASHTAGS

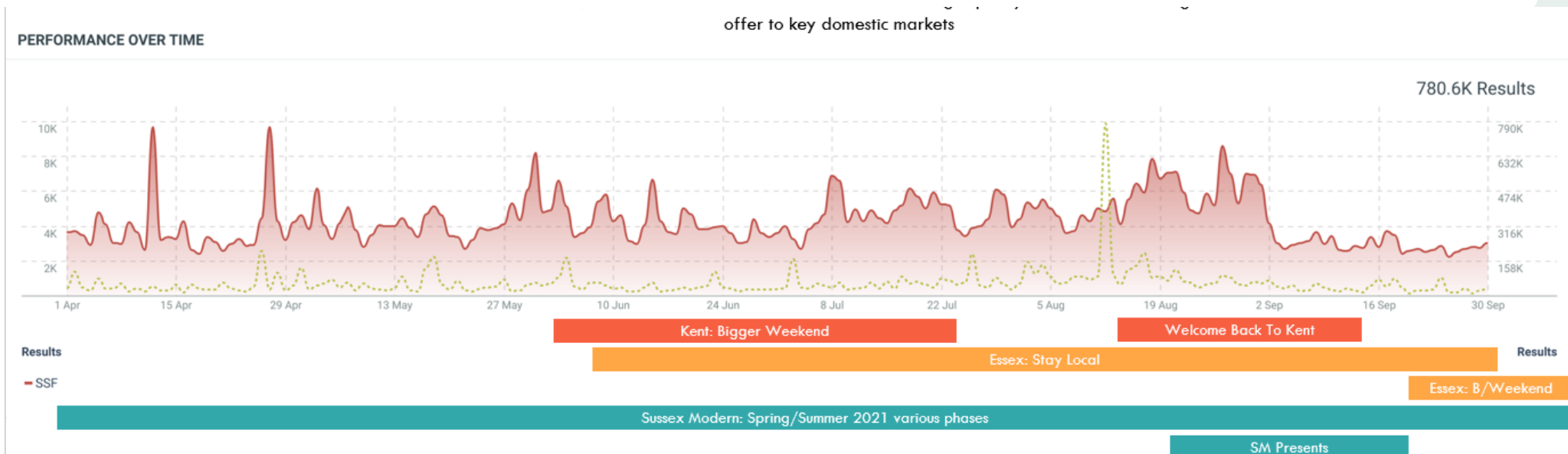


Destination Specific



The following results specifically mention Kent, Essex, or Sussex in connection to all topics that mention those destinations.

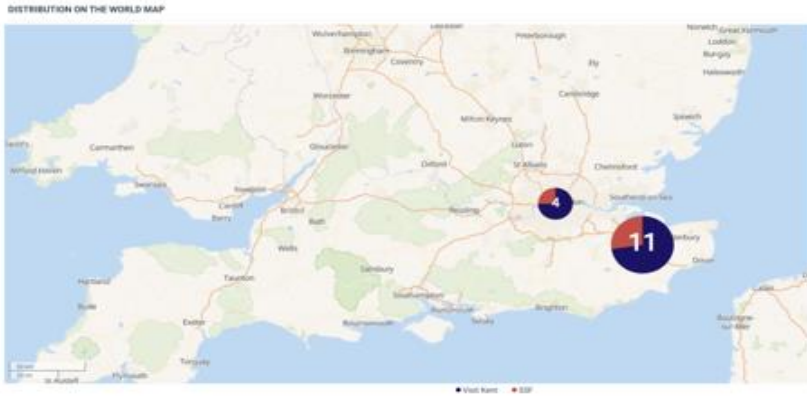
- Over the period of the project there were a total of **780k** results with **10.2m** engagements.
- Kent registered the most mentions and the highest levels of engagement, closely followed by Sussex, then Essex. Over the period of the project the most engagement and reach came from newspapers sites across all destinations, with the highest number of results originating from Twitter in all destinations.
- The top hashtags across all destinations were #staycation and #holiday, and top topics included, holiday, day (out), family, bank (holiday), short break, place, and staycation. This indicates the short nature of holidays, ranging from day visits to a few days away. 'Family' also had a high volume of mentions as people took the opportunity to spend time away with their families. The most negative sentiment came from 'holiday' and was associated with news stories about foreign travel.
- Peaks in mentions of each destination tended to correspond to peaks in conversations about bank holiday, and positive news stories about local travel, with the highest peaks corresponding with specific attractions to visit, news stories about best destinations or beaches, staycations, and types of holiday.



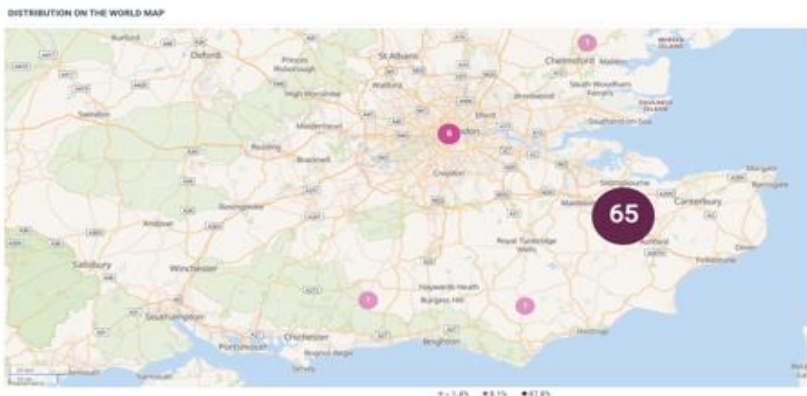
Social Listening: Kent



Kent Bigger Weekend



Welcome Back To Kent



- There are peaks in results and engagement coinciding with both campaigns with a potential reach of **2.1m** and **667** engagements.
- The top two hashtags are **#visitkent** and **#kentbiggerweekend**. Other prominent hashtags include **#kent**, **#HeverCastle**, and **#EscapeTheEveryday** in the May to June period.
- Hashtags also included **#ukholiday** and **#Airbnb**, indicating that people were thinking about **staying for longer** than a day trip.
- Positive key drivers were broadly similar across all destinations. In Kent they related to activities and things to experience including wildlife, family, historical, garden, park, glamping, walks, accommodation, and the beach.
- Kent's brand health over the project period was strong at **58.8% positive sentiment** with very little negative sentiment.
- There were peaks in sentiment which related to positive news stories or experiences in Kent including **award winning beaches, paintings of Kent, amazing coastlines, wineries, and lovely staycation experiences.**
- Sentiment for both the Kent Bigger Weekend and the 'Welcome Back to Kent' campaign were positive (**62.8% & 36.8%** retrospectively)
- Key positive drivers for the 'Welcome Back to Kent' campaign also included **#welcomebacktokent, #findyourspace, and #visitkent**, with the most prominent key drivers being autumn, family, countryside, Kent Downs and **#experiencekent**.
- In terms of demographic engagement in Kent, **55.8% were male**, and predominantly those aged **25-34** years followed by the **18-24** age group, in addition to an increase in females posting.
- 18-34s grew slightly in July across all destinations, but in Kent there was an increase in engagement from those ages 35-44 in September.
- Geographically, Kent was most mentioned in **London, Kent, Surrey, and Hampshire.**

Social Listening: Essex



- Findings show that there were peaks in results and engagement coinciding with both of Visit Essex’s campaigns, with a potential reach of **79.5m** and **1,400** engagements. However, due to the low volume of mentions across Bigger Weekend, the campaigns were shown collectively.
- The top two keywords were **#Essex** and **holiday**, with other prominent words including summer, weather, places, estuary, beaches, and **#staycation**.
- During the campaign period the most active hashtags were **#Essex**, **#staycation**, **#holiday**, **#Southend**, **#Suffolk** and **#Banksy**.
- Overall, sentiment was very positive at **60.4%**.
- Positive key drivers included **woodland**, **trail**, **vineyard**, **lake**, **sailing**, **#Essex**, **#staycation**, **holiday**, **summer**, and **family**. Furthermore, these results indicate towards an **interest and uptake in outdoor-based activities** and experiences.
- **Coastal towns** were also often mentioned including Brightlingsea, Clacton and the Northeast Essex coast, with key drivers consisting of woodland, tranquillity, history, estuary, and experience.
- In terms of demographics, in general, age groups and gender were broadly similar to the national average. However, engagement was highest among **male consumers (61.7%)**, and those aged **25-34 years** followed by those aged **18-24**.
- **18-34s** grew slightly in July, with an increase in **35-44s** in September.
- Geographically, Essex was most mentioned in **Essex, Suffolk, Hertfordshire, and London**.

Social Listening: Sussex



- There are peaks in results and engagement coinciding with both Sussex Modern’s campaigns, with a potential reach of **1.6M** and **204** engagements. However, due to the low volume of mentions both campaigns were shown collectively.
- The top two keywords are **#EastSussex**, **#WestSussex** and **#staycation**. Other prominent keywords included weekend, experience, holiday, and day (out).
- Over the course of the campaigns **#staycation**, **#eastsussex**, **#westsussex**, **#sussex**, **#summer**, and **#Hastings** were the most prominent.
- This also extended to specific destinations, including Brighton and Bexhill, and days out to the **#beach** and **#seaside**.
- Sentiment was very positive at **60.9%**, with peaks of positive sentiment seen throughout the duration of the campaigns.
- Key positive drivers included **#EastSussex**, **#staycation**, **#WestSussex**, **gardens**, **#escapetheeveryday**, visit, history, Chichester, experience, **#Hastings**, and the sun emoji, alongside historic, place, family and explore.
- The audience demographics of those who engaged with the campaign hashtags were **67% male, aged 25-34**.
- Age groups and gender are broadly similar to the national average, although across Sussex there was a slight increase in males by the end of the project period and **18-34s** grew slightly in July.
- Geographically, Sussex was most mentioned in **Sussex, London, Hampshire, and Surrey**.

Summary & Key Learnings

- ✓ Looking at similarities between destinations in terms of campaign planning, each responded to various insights and trends, such as the increase in staycations, an increased appetite for travel and the desire to reconnect with friends and family following the pandemic. With each region having a similar mix of both coast and countryside, this also linked well with consumers' desire to explore open and outdoor destinations, which was also identified as a key trend in the project's secondary research report.
- ✓ Each destination campaign also looked to respond to trends around booking lead times and planning, with each looking to capture both shorter and longer-term booking cycles, while providing consumers with strong, visual, and inspirational imagery and content to encourage them to explore the area and extend their length of stay.
- ✓ The consumer campaigns really did highlight and showcase the very best of the counties, and by looking at campaign analytics, each campaign achieved a considerable reach and increased engagement via website visits and social media, in addition to an increase in opt-ins and social media followers.
- ✓ Ultimately, project activity helped to increase the awareness of each destination, alongside increasing brand visibility. This was aided through the extension of the Kent and Essex Bigger Weekend campaigns, which encouraged visitors to visit local attractions and explore their local area for an extended period of time. As all of the resident campaigns were open to SELEP residents, this also stimulated trips around the region to deliver an increased benefit, with each partner cross-promoting the campaigns to increase reach. When looking at the results from the Bigger Weekend surveys, although the majority of respondents did originate from their home county, there was a degree of uptake from neighbouring areas. Therefore, this does indicate that the campaigns helped to increase awareness and visibility in other destinations close by.



- ✓ A major element of the campaigns was to promote off-season visits and drive visitor dispersal, and through increased awareness and visibility project activity will inevitably have aided in increasing future visits and those in the shoulder season. Again, through the results of the Bigger Weekend surveys, the majority of respondents stated they would be more likely to visit places within the county and bring their friends and family in future.
- ✓ Through increasing awareness of what the destinations can offer in the off-season, this will have helped to work towards a more sustainable tourism management approach, through taking the pressure off of traditional honeypot sites. Consequently, this will have facilitated towards bettering product development to address seasonality, thus protecting businesses and safeguarding jobs.
- ✓ The findings from the social listening exercise ultimately show there was an uplift in mentions that coincided with each of the destinations campaigns particularly with Welcome Back to Kent, Essex Stay Local and Sussex phase 3 and Sussex Modern Presents. This together with coinciding with Gourmet Garden Trails and the Wine Garden of England, alongside reinforcing messaging from KCC's phase 2 Good to Go and #RespectProtectEnjoy, this created a strong product offering which increased engagement and awareness among consumers.
- ✓ Project activity will also have helped each destination address shared challenges, including to increase overnight visits and extend length of stay, alongside attracting higher spending visitors and position each destination as being easily accessible via public transport from areas such as London.
- ✓ Sharing quality accommodation options and positioning messaging to push an overnight message, will inevitably have increased the awareness of destinations as a staycation option. In turn, this will allow for activity to be further built upon and continue to work to drive overnight visits and create compelling reasons to visit the area, to support longer term goals to have both national and international recognition while driving investment to the area.
- ✓ Also, the project look to build consumer confidence and increase pride among local communities, and through the results of the Bigger Weekend surveys, results indicate that residents did display a high level of pride for their local area. Furthermore, activity has certainly brought about both social and economic impacts for the local area and residents, by using key messages around safety and increasing welcome.



- ✓ Through the business resilience workshops businesses were provided with an array of guidance and support, alongside access to examples of best practise which will have enabled them to develop their off-season product offering, adapt to new trends and create marketing messages. Overall, the project has certainly increased collaboration not only between each destination, but also building upon partner networks within each region and encouraging destinations and businesses to work on a collaborative approach, shared visions, and goals.
- ✓ Due to the coordinated approach of the project, there was also reduced competition to target visitors at the same time and helped to promote local businesses following the pandemic. Following the completion of the project, this collaboration can be used as a foundation which can be built upon, to further aid towards the success of future work and further position each DMO as a catalyst for growth, to encourage cross-sector collaboration, partnership development, and build upon existing partnerships such as England's Creative Coast.

Looking at the results from the final social listening exercise, the following insights emerged that can provide recommendations for future activity.

- ✓ Over the period of the project the most engagement and reach came from newspaper sites across all destinations, with the highest number of results originating from Twitter. This shows that these channels are key to further increasing engagement and reach in future projects.
- ✓ The results also indicate that staycation was a major overriding theme, alongside visiting places locally. Findings also point towards visitation to destinations for both day trips and short breaks, indicating the growth of this market.
- ✓ There was also a high volume of mentioned around family as people took the opportunity to spend time away with their loved ones, demonstrating that this market was strongly captured, and is one that will continue to be a prominent target audience.
- ✓ Findings also show that hashtags around competitions and giveaways were popular with many running over the campaign period among destinations. This indicates that this is a key tool to increase engagement and awareness that can be used in future.



Kent

- ✓ Findings showed that hashtags around holidays and Airbnb were frequently used, indicating that people were thinking about staying for longer than a day trip and shows an uptake and interest in overnight visits, which can be built upon further.
- ✓ The social listening also indicated that over the project, Kent brand health was strong with the majority expressing a positive sentiment.
- ✓ Key positive drivers in Kent related to activities and experiences around family, heritage, the outdoors, and coast, alongside accommodation. Furthermore, this indicates that these are key hooks for consumers for visiting and should continue to be showcased in order to further increase visitation.
- ✓ When looking at demographics, engagement in Kent was highest among those aged 18-34, with engagement for this demographic growing slightly in July, and engagement among those aged 35-44 increasing in September. This indicates that Kent appeals to a range of demographics but particularly those of a younger age, although this may be due to the use of digital channels.
- ✓ Geographically, Kent attracted the highest number of mentions in London, Kent Surrey, and Hampshire, showing interest in these areas which can be used to help inform future activity and grow beyond these regions and helped to inform future targeting.
- ✓ Looking at results from the consumer campaign in particular, families and pre-nesters responded well to travel around the world creative, alongside events and festivals, while empty-nesters engaged well with midweek special offer content. Consequently, this shows that these types of content can be used to further engage these audiences in future activity.

Essex

- ✓ In Essex positive key drivers indicated there was a high level of interest in the outdoors, which links well with the aim to showcase the prominence of outdoor and open spaces in the county, alongside woodland, vineyards and as a staycation destination.
- ✓ Results also show that coastal towns were often mentioned, demonstrating the importance of coast and the outdoors as part of Essex's offering.
- ✓ Similar to Kent, throughout the project, sentiment was positive, which showcases the success of campaign work and brand visibility.
- ✓ Looking at demographics, engagement was highest among younger visitors, with again 18-34s growing in July and 35-44s in September, indicating a strong interest from these groups which can be further built upon.
- ✓ Geographically Essex was most mentioned in Essex, Suffolk, Hertfordshire, and London, which demonstrates the high level of interest in these areas which can be further built upon and used to help inform future targeting.

Sussex

- ✓ Again, sentiment was positive throughout the project, showing again the success of campaign work,
- ✓ Key positive drivers show high engagement and possible uptake in staycations and exploring, alongside heritage, family activities and the use of the sun emoji in social posts. This indicates that consumers responded well to messaging around encouraging people to explore the local area and create their own journey, alongside acknowledgement of the areas unique sunny weather.
- ✓ In terms of demographics, those aged 25-34 engaged most, with an increase in engagement among those aged 18-34 in July, indicating interest among these age groups which can be built upon further.
- ✓ Geographically, Sussex was most mentioned in Sussex, London and Hampshire, which shows a high level of interest in these areas, which can be built upon and used to help inform future marketing activity and targeting.



Key Learnings

- ✓ Each destination also looked to ensure that destinations were seen as being accessible, through highlighting key public transport links. Findings show that engagement and interest was sparked in surrounding areas, which indicates the success of working towards destinations being seen as more accessible. Furthermore, it will be important to continue to work with key transport partners to highlight transport links and further increase perceived accessibility.
- ✓ Overall, the results from each of the campaigns certainly show many successes that have emerged from the project, which were further enhanced through key elements such as collaboration, responding to key trends and identifying key learnings for future activity.
- ✓ Increased awareness and brand of visibility, together with showcasing each destinations' product offering, will certainly help to further increase visitation particularly overnight, which can be built upon further.
- ✓ Some of the key insights around demographics, geography, key products themes and use of key channels can be used to help inform future activity and marketing campaigns.
- ✓ The project has allowed for key partnerships to be strengthened and for businesses to engage further with the DMO, to work towards to increasing off-season visits and visitor dispersal, which again should be used as a foundation to build upon.
- ✓ Project partners should look to use the project to create continued legacies through building upon existing work and maintain partnership working to work towards shared challenges and goals.
- ✓ Looking to the future, this project leads onto the REVI-VE programme which is part of the SELEP COVID-19 support fund, to provide further support for the visitor economy and long term benefits and adaptation of the industry. This will include injecting businesses with financial investment, through the availability of grants, alongside providing a framework to ensure rapid recovery of the economy and to be a catalyst for wider place-based recovery and regeneration.
- ✓ And in the context of the recent DMO review, these projects will act as key case studies for regional partnership working and collaboration, and future projects and campaigns should look to build upon the successes of this project and continue to respond to key trends and utilise project insights and recommendations.



Tourism Forecast

Looking ahead, according to the tourism forecast published by VisitBritain, in 2022 inbound visits to set to increase to 24 million, with spending also seeing an increase to £19.2 billion, seeing a 59% and 67% respectively compared to figures seen in 2019. The forecast also outlines that footfall in relation to pre-COVID levels are set to steadily increase in spring and more so in the summer months, aided by both the easing of travel restrictions and increasing consumer confidence. Furthermore, the forecast predicts that by the end of 2022, visits will have recovered to around 68% of pre-COVID figures, although this will ultimately take a few years to fully recover. More specifically, this states that visits from Europe will see a quicker recovery, compared to long-haul markets, however figures predicts that spend per visit is set to remain higher than pre-pandemic levels, due to a longer average length of stay and higher prices. When looking at domestic tourism, the forecast published based on 2021 figures indicate that the year is set for a recovery of £56.2 billion in terms of spending, up 65% compared to 2020, although still only 61% compared to spending seen in 2019.



Future Funding Opportunities

1. DMO Review

The DMO review consisted of conducting a root and branch review of the DMO landscape in England, to essentially create a picture of the current landscape and appraise this, to establish the extent to which it is economically efficient, effective, and sustainable. This also set out to assess its potential to support the delivery of the Government's tourism policy, and that it is sufficiently integrated within the wider local and regional economic landscape. Furthermore, this review was informed by previous concerns raised by DMOs about their financial stability and a need to rationalise the landscape, further justified by the impact of the pandemic, with this having a major impact on DMOs commercial revenue and the need for further business support during this time.

The review found that there is a strong need for DMOs, as they are a fundamental part of the tourism ecosystem and an essential support system for local businesses and the success of a destination itself. The review looked to identify what a high-performing DMO looks like and what role the Government plays in helping to creating and maintain this. Furthermore, the review set out various recommendations for Government, including the need for a tiering DMO approach using an accreditation process. Alongside this, DMOs should be provided with core funding to focus activity on ensuring the destination remains sustainable, competitive and responsive to key strategic challenges, including skills, inclusivity and levelling up. Consequently, this review presents a significant future opportunities for DMOs in the SELEP area, to access additional funding streams and work more cohesively nationally to achieve a common goal, including working to tackle shared challenges.

2. The Tourism Recovery Plan

In November 2020, the Government committed to bringing forward the tourism recovery plan in 2021. This was set against the backdrop that the tourism sector is a major contributor to both jobs and economic growth, while showcasing innovation and connecting people to history and the key role that the sector will play in the recovery following the pandemic. This is further justified as the sector was one of the most impacted following COVID-19, and figures predict that pre-pandemic levels will not fully return until 2025.

The recovery plan therefore looked to set out a framework to work with the sector to build back tourism better. The plans sets out central aims in order to achieve this, including recovering domestic and inbound tourism, increasing length of stay and grow occupancy rates in the off-season, alongside working towards higher levels of investment in tourism and transport infrastructure.

In addition, this includes ensuring the sector works towards enhancing the county's cultural, natural, and historic assets, while minimising damage to the environment. Ultimately this will be achieved firstly by the successful reopening of the tourism sector, while providing further support and funding to businesses. Furthermore, this links closely to the central aims and objectives of the SSF project, in terms of working towards the recovery of the sector, increasing spend and length of stay to the region and further developing a appealing and successful product offering.

3. UK Community Renewal Fund (CRF)

Following the UK's departure from the European Union, DMOs are now confronted with a period of substantial change, due to a significant shift in the Government's funding landscape. As part of the road to the UK Shared Prosperity Fund, this includes a new funding stream, the UK Community Renewal Fund, also known as CRF.

This fund has been brought in to build upon local partner capacity of local beneficiaries in readiness for the launch of the prosperity funding April 2022. The CRF is worth £220 million, and was announced as part of the March 2021 budget to help local areas to prepare for the UKSPF, by providing interim funding, as the flow of EU structural funds reduces.

4. UK Shared Prosperity Fund (UKSPF)

Although the UKSPF remains unclear, the overall purpose of the fund is to level up and create opportunities across the UK for both its people and destinations. In terms of place-based activity, this will consist of targeting places most in need across the county, including deprived towns and rural and coastal communities.

This will include focus on supporting local communities, by opening up new opportunities, while encouraging both regeneration and innovation, achieved through a jointed-up approach through holistic investment.

This will also be paired with a people targeted portion to address employment and skills programmes, to meet local needs and to tackle labour market barriers. Ultimately, this fund will act as the main funding source post-BREXIT, and the CRF will act as a precursor to this and will help to inform the UKSPF, helping to identify the key focuses of the fund, including, investment in skills, businesses, communities and places, alongside supporting employment opportunities and a focus on net zero and innovation.



The aforementioned funds, present SELEP destinations with significant opportunities for future funding and to help inform strategic planning, which will help to not only improve opportunities for local people in terms of the visitor economy and employment opportunities, but to also help DMOs move into the next phase following the pandemic and changes to EU funding streams. As previously highlighted, the various funds will also provide destinations with much needed funding to help further development the in destination offering, and increase length of stay and off-season activity.

In addition to the funds outlined, it will also be imperative that DMOs also look outside of the traditional tourism related funding pots, including those that look to support aspects such as the rural economy, net zero emissions, active travel, the last mile, alongside areas around placemaking and health and wellbeing.

Appendices

Type of Benefit	Target	Number of benefits created
Secondary consumer sentiment and trend report	1	22 Inc 1 overview report
Delivery of LEP-wide workshops/webinars drawing on insights and best practice	2	4
Number of businesses engaged through resilience workshops	160	210
Development of campaign plans using an insight-led approach	6	6
Creation of inspirational campaign assets including:		
Image libraries	6	3
Inspirational videos	6	3
Campaign content	30	30+
Total campaign reach across all digital media spend	6,000,000	15,200,000
B2C newsletters sent to support campaign activity	6	6
Number of press releases issued	6	6
Number of influencers / press contacts engaged	12	16

This research report has been produced by



As part of the Sector Support Fund

