

The background is a high-angle, black and white photograph of a busy shopping mall. People are walking on the tiled floor, and various storefronts are visible, including 'Mackage', 'ALL SAINTS', and 'ZARA'. A large, vibrant green graphic, composed of several concentric arcs, is superimposed over the center of the image. A green rectangular box is positioned on the left side, containing the title text in white.

THE CHANGING LANDSCAPE OF DESTINATION MARKETING INSIGHTS Q3 2022

A changing landscape and uncertain times..

At OnBrand, we like to keep on trend and well researched on changing patterns in destination marketing, so we can better meet the needs of our clients. 2022, so far, in the immediate wash up of a post pandemic period has been challenging and complex. Rising inflation, economic recession, supply shortages, war in Ukraine and government changes, have put both consumers and destination owners and operators under pressure, and unsure of the path ahead.

Will a return to in-person experiences and a resurgence of customer experiences be viable in an industry with recruitment issues, a lack of experience and training be viable? How will the online purchase habits of former COVID customers continue to manifest itself? And, as the costs to borrow increase, how far and how much investment should and will be made in infrastructure, development, people and experiences weighs heavily on owners and operators minds.

I hope that this document provides some positivity, answers and useful insights to all.
Please feel free to engage me directly daniel@onbrand.co.uk if you wish to discuss further,

Daniel Graham
CEO, OnBrand



Digital Fatigue

The start of a perfect storm?

Digital Fatigue is a new term starting to be used in the post pandemic landscape.

Consumers have had enough of lockdown, staying home and are now feeling more bold and adventurous and want to return to physical experiences.

Creating a welcoming environment will be key to trapping this audience thirsty for experiences.

Quick Fact:

[IDC](#) analysts predicted that by next year, to counter digital fatigue, 60% of leading organisations will look to differentiate by delivering trusted and memorable engagements that recreate physical experiences.

Quick Fact:

Coupled with this, e-commerce as a competitor to in store shopping is starting to level off ([Gartner](#) analysts saw e-commerce totalling about 17% of retail sales in 2022 with growth as a percentage of in-store shopping almost levelling off in the next few years).





Hybrid Retailing

It's not them or us. Physical Vs Digital.

Whilst most shopping journeys start online, it doesn't mean they should always finish there. In many cases an online shopping journey's best and most convenient destination is a physical store down the road ([NearSt](#))

Shedding the siloed approach and "us vs. them" mentality of "online vs. offline" is a huge opportunity for retail destinations.

Quick Fact

Consumers are opting for hybrid-shopping rather than strictly online, with 48% of people preferring hybrid-shopping compared to 39% this time last year," [Boston Consulting Group](#) research on shopping habits.

Quick Fact – Small & Big Retail Adoption

"We are seeing more of the smaller retailers develop 'hybrid' retail models, making better use of the opportunity provided by the internet to complement their physical store," Andrew Goodacre, CEO of the [British Independent Retailers Association \(BIRA\)](#).

Food Renaissance

Food is the new clothing. Well, almost. Market trends are pointing to a diverse food mix in shopping centres, and this new leisure activity will drive footfall.

Quick Fact

[Deloitte](#): "When it comes to the experience of food choices in the mall, a renaissance is coming."



"A great assortment of food and restaurants for dining or take-out, including a food hall" was respondents' top choice among amenities that would encourage them to visit enclosed malls in the future, chosen by

35%
of overall respondents

40%
of respondents aged 18–34¹¹





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Local & Loyal

Hyper local is an opportunity to be seized.

Tapping into the power of local to drive loyalty, as well as looking at other ways to strengthen relationships with existing customers will be crucial. Shoppers continue, post pandemic, to prefer to shop local.

Quick Fact

Local store lookups have increased more than 4x their pre-pandemic levels, and stay there, according to [Near St](#) research.

Quick Fact

Shorter trips, local tourism grows as travel risks linger. The farther you travel, the less secure you might feel. Searches containing “getaways near me” have increased by 100%, and searches containing “open now near me” grew by 40% between September 2019 and August 2021, reports Google. That’s good news for local merchants.

[Read more here.](#)

Sustainability

Conscious consumerism, which has been reshaping consumer behaviour is continuing to be a force to be reckoned with. Genuine and demonstrable commitment to sustainability is needed. Greenwashing is a big no no and harmful to reputation.

Quick Fact

63% of customer say they would like brands to be more vocal about their sustainability plans, but remain sceptical about their authenticity. [Chartered Institute of Marketing](#)

Quick Fact

90% of consumers are more concerned about sustainability than ever before. ([BCG](#))

Retailers need to evolve with the consumer to hold onto their brand relevance in 2022 and beyond... Brands need to show off their culture and purpose. Sustainability must be at the heart of their business and across the entire supply chain. ([British Retail Consortium](#))

41% of Brits recognised that recyclable choices and sustainable packaging influence their buying decisions, and 70% are willing to pay a price premium of 5% for sustainable products.



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The screenshot displays a retail analytics dashboard. At the top, there's a navigation bar with tabs for 'Overview', 'Products', 'Customers', and 'Reports'. Below this, a table lists products with columns for 'Product Name', 'SKU', 'Status', 'Price', 'Quantity', 'Sales', 'Profit', and 'Actions'. The table is filtered to show 'All Products'. Below the table, a summary section shows 'Total Sales: £10,000', 'Total Profit: £2,000', and 'Total Customers: 152'. At the bottom, there's a table with columns for 'Product Name', 'Sales', 'Profit', 'Quantity', 'Status', and 'Actions'.

Product Name	SKU	Status	Price	Quantity	Sales	Profit	Actions
Product A	SKU001	Active	£10.00	100	£1,000	£200	View
Product B	SKU002	Active	£15.00	80	£1,200	£240	View
Product C	SKU003	Active	£12.00	90	£1,080	£216	View
Product D	SKU004	Active	£18.00	70	£1,260	£252	View
Product E	SKU005	Active	£14.00	85	£1,190	£238	View
Product F	SKU006	Active	£16.00	75	£1,200	£240	View
Product G	SKU007	Active	£11.00	95	£1,045	£209	View
Product H	SKU008	Active	£13.00	80	£1,040	£208	View
Product I	SKU009	Active	£17.00	70	£1,190	£238	View
Product J	SKU010	Active	£19.00	60	£1,140	£228	View

Product Name	Sales	Profit	Quantity	Status	Actions
Product A	£1,000	£200	100	Active	View
Product B	£1,200	£240	80	Active	View
Product C	£1,080	£216	90	Active	View
Product D	£1,260	£252	70	Active	View
Product E	£1,190	£238	85	Active	View
Product F	£1,200	£240	75	Active	View
Product G	£1,045	£209	95	Active	View
Product H	£1,040	£208	80	Active	View
Product I	£1,190	£238	70	Active	View
Product J	£1,140	£228	60	Active	View

Data Driven Marketing

Marketing is evolving. Shopper Marketing has needed to change. COVID has provided that catalyst.

Consumers are now much more digital (tech) savvy. Mobile phones have allowed consumers to price check, research and showroom in real time.

Today's destinations need not only to readily accept digital, but embrace it in equal measure to join the clicks to bricks.

This means that destinations should be more data driven not only for business decisions, but in marketing to shoppers, specifically in managing shopper data, insights using the best of CRM technology to personalise and add more relevance and reward to shopper comms.

Summary



For some challenging times, create problems.
For others, they create opportunities.

If you're looking for an agency with insight, experience and knowledge to help you manage how you communicate with shoppers, manage your digital assets and marketing, or simply want some help in increasing footfall, dwell times and spend, then read on.

Welcome to OnBrand.



Who we are

We're a full-service marketing agency, with specialism in Shopping Centre, Retail Parks and place making destinations.

Founded in 2001, we continue to supply our instore radio service, Centre Radio to 200+ shopping centres in the UK & Ireland, putting at us at the sharp end of understanding shopper and consumer messaging and the day to day operational needs of our clients.

Beyond this, we provide full service management to several local community centres including Social Media, Websites, Content Management, PR, Branding, Retailer Engagement and Events.

Our goal is to create memorable customer experiences across all touchpoints, driving increased conversion, spend, dwell times, repeated loyalty and enjoyment.

We like to think that we make each moment memorable, customers happy and brands shine. Our combined team experience spans a history of working with big brands and in high profile agencies.

And, hey, we love shopping centres so much, we work from one! (We are a tenant of the Maltings Shopping Centre, St Albans)



Destination Marketing Team

Our team is made up of a broad range of talent who have worked across brand clients, both large and small, and delivered numerous successful digital, social media, branding, PR and event projects.



JO MORRIS
Account Director, Destination Marketing



GENEVIEVE GREY
Account Manager



DANIEL GRAHAM
Managing Director



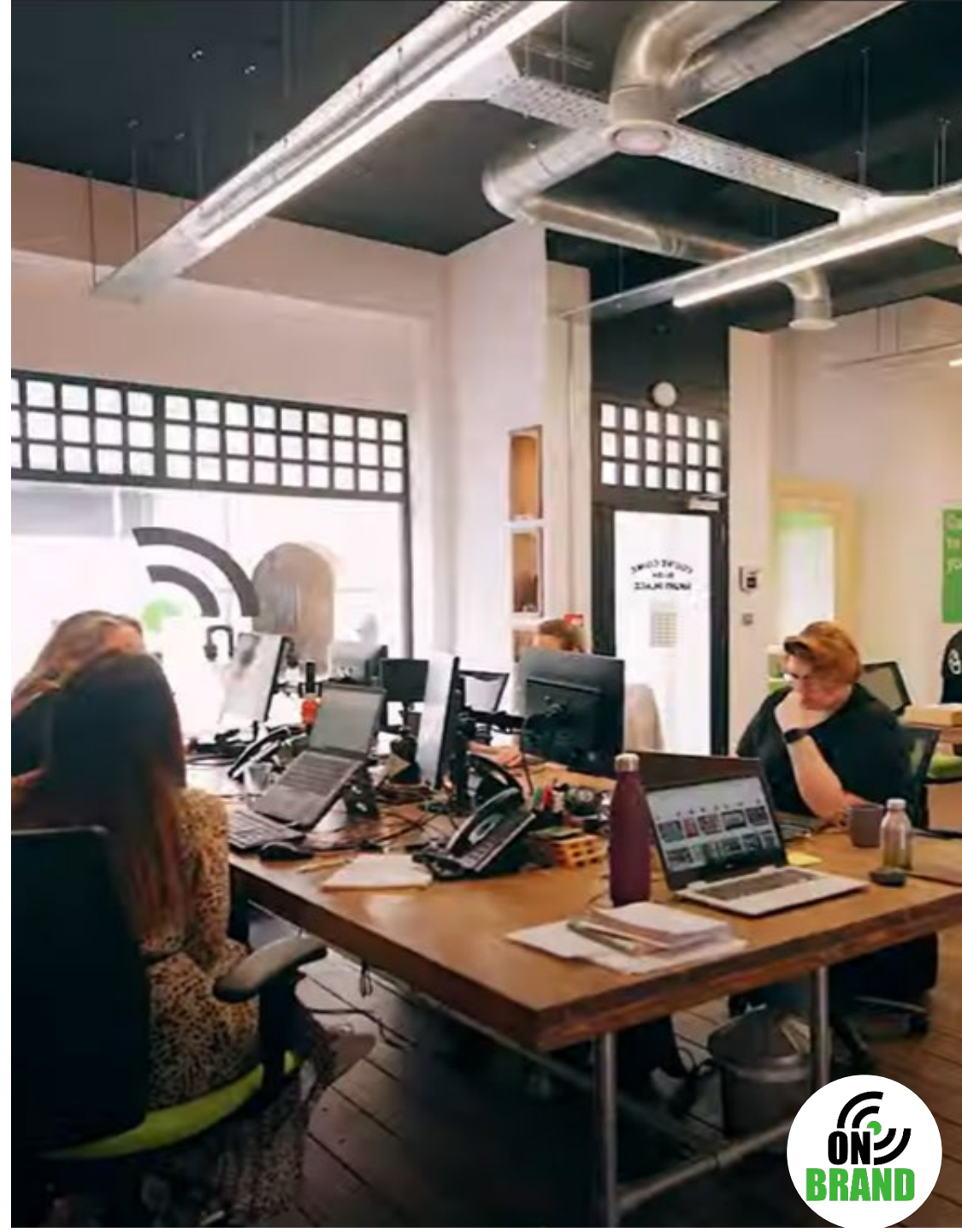
DAVID DINGVEAN
Head Of Digital Development



DEBBIE RAINES
Account Director, Client Services



SARAH WARREN
Digital Account Director





Our approach

We are driven by 4 core principles:

Knowledge – we want to understand you, your market, your goals and ambitions – success comes from knowledge, insight and research. We like to do the big thinking upfront so that when it comes to execution nothing is left to chance.

Customer – we are customer experts. We understand how customers want to engage with brands, instore, online and across multiple channels.

Measurement – and lots of it – we're in a data driven world and we use data points and campaign results to inform and guide success.

Attitude – it takes passion, energy and positivity to create great results. We've got bags of it! We invest passion, time and energy into you - but we know it's worth it, when we see the smile on your face, your customer reactions and the results.

What we do

- **Strategy, Creative & Branding**

Everything we do is guided by a sensible, pragmatic and well thought out plan. Great ideas are brought to life with great creative and strong branding to help you connect to your audiences.

- **Content Creation**

Your audience needs to hear your brand story, and in every touch point. We're expert at brand messaging and content delivery.

- **Digital assets management : Web & Email**

Our team will build, manage and maintain your core digital assets, including CRM, Email Marketing and keep your website fresh and up to date.

- **Social Media & PR**

Great social defines your personality and is the go to place most customers use to validate choices and sense check their pre purchasing decisions. Strong PR will deliver great brand trust and awareness in the heartland of your targeting.

- **Engaging Events**

We love creating magic moments, experiences that engage and footfall driving events.

- **SEO & Pay Per Click (PPC) and paid media**

Trust us to get you noticed. We'll attract the right audience in an efficient and effective manner, capitalising on the right channels, spend and blend of targeting, placement and re-targeting.



HAPPY CLIENTS



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