



Rebuilding Visitor Spend and Supporting the Industry

Andrew Stokes, England, TXGB & Retail Director - VisitEngland

Monsal Dale (VisitBritain / Jon Attenborough)

BTA Overview: Activity

VisitBritain

Promoting Britain as a destination internationally.

- International marketing campaigns as part of the cross-government GREAT campaign driving economic growth across Britain.
- Partnerships with international brands such as British Airways to expand our reach and drive conversion.
- Research, evaluation, and analytics to enable policy decisions.
- Trade missions (e.g. ExploreGB)
- Our in-market teams support diplomatic relationships and work with travel trade to sell British destinations and delivering positive media coverage.

VisitEngland

Supporting the English tourism industry and landscape and encouraging domestic trips.

- Support for SMES, building digital skills.
- TXGB, a platform enabling suppliers to sell internationally.
- Implementation of the Destination Management Organisation review to simplify the England tourism landscape.
- Sustainability and accessibility advice.
- Winning business events.

Tourism & the Economy (2019)

Tourism delivers economic prosperity for every region in Britain.

- Tourism is usually worth £127bn a year, around 9% of GDP.
- It was the UK's third largest service export and accounted for almost a third of all hotel investment in Europe.
- The industry supported 3.1m jobs in every part of the UK, and incorporated over 200,000 SMEs
- British residents took **99.1 million** overnight trips in England, totalling **290 million** nights away from home and expenditure of **£19.4 billion**.
- There were **41 million** inbound visits to Britain, totalling **£28.4 billion** in spend and **289.6 million** nights.

Regional Tourism Spend	Inbound	Domestic overnights
Scotland	£2.5bn	£3.2bn
Wales	£515m	£2.0bn
North West	£1.6bn	£2.9bn
West Midlands	£1.0bn	£1.5bn
South West	£1.3bn	£4.1bn
North East	£369m	£800m
Yorkshire & The Humber	£637m	£1.7bn
East Midlands	£464m	£1.2bn
East of England	£1.0bn	£1.7bn
London	£15.7bn	£3.0bn
South East	£2.6bn	£2.6m

Top markets by volume



Difficult context of recovery

We do not operate in a vacuum; external challenges face us all.

Cost of living

Pressures on finances mean leisure travel is de-prioritised and businesses in the sector are facing increased costs.

Visitor documentation

We are competing against the Schengen VISA area which is c.30% cheaper for access to 27 countries.

Experience at the border

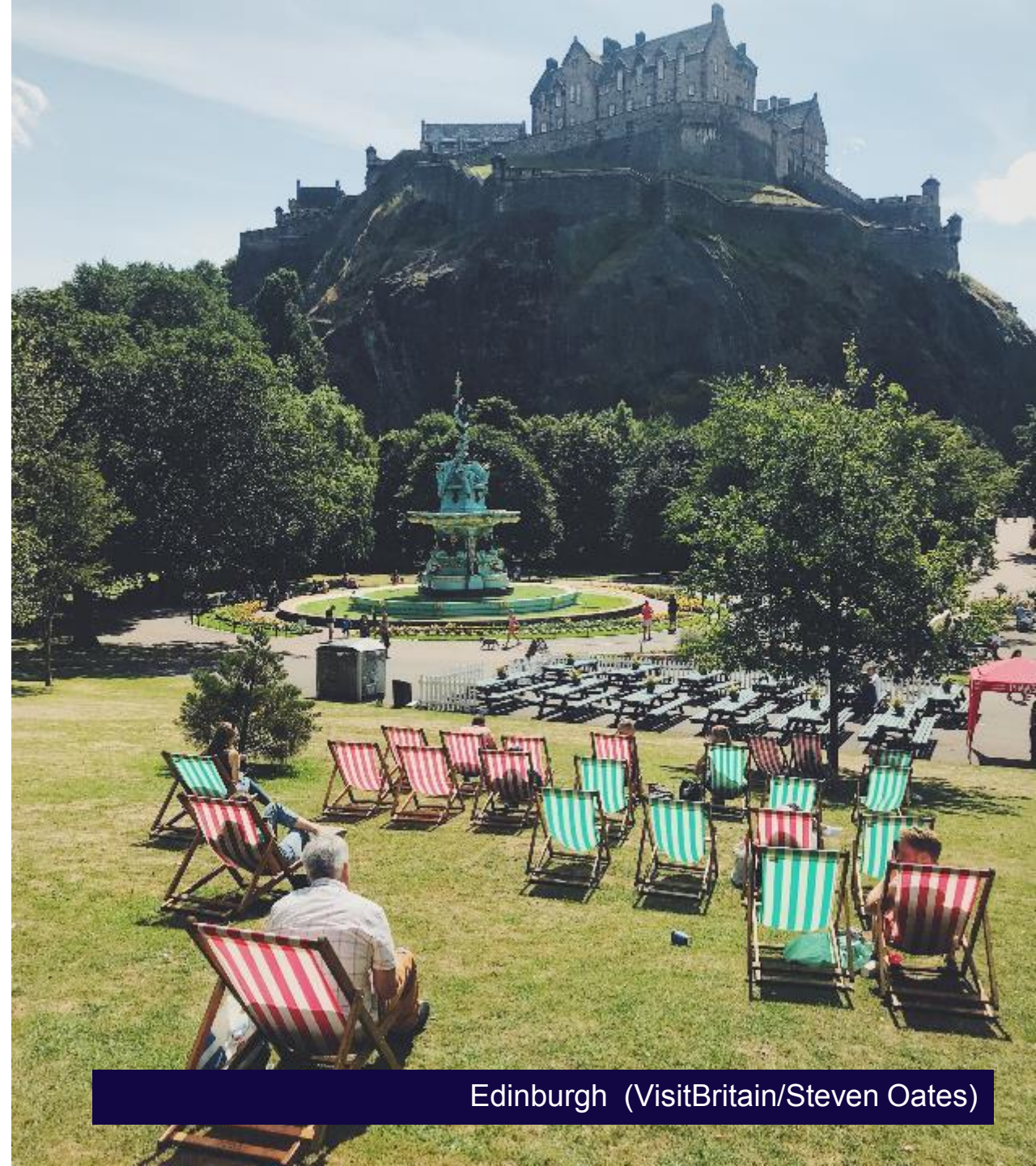
Last Summer we saw delays at the border and flight cancellations which could have a negative impact on perceptions.

Regional spread

In 2019, London received more than £15.7bn in inbound visitor spend, in comparison to £9bn in the Rest of England, and £2.5bn and £515m in Scotland and Wales respectively.

Urgency

Britain is seen as a destination to visit one day, not today



Edinburgh (VisitBritain/Steven Oates)

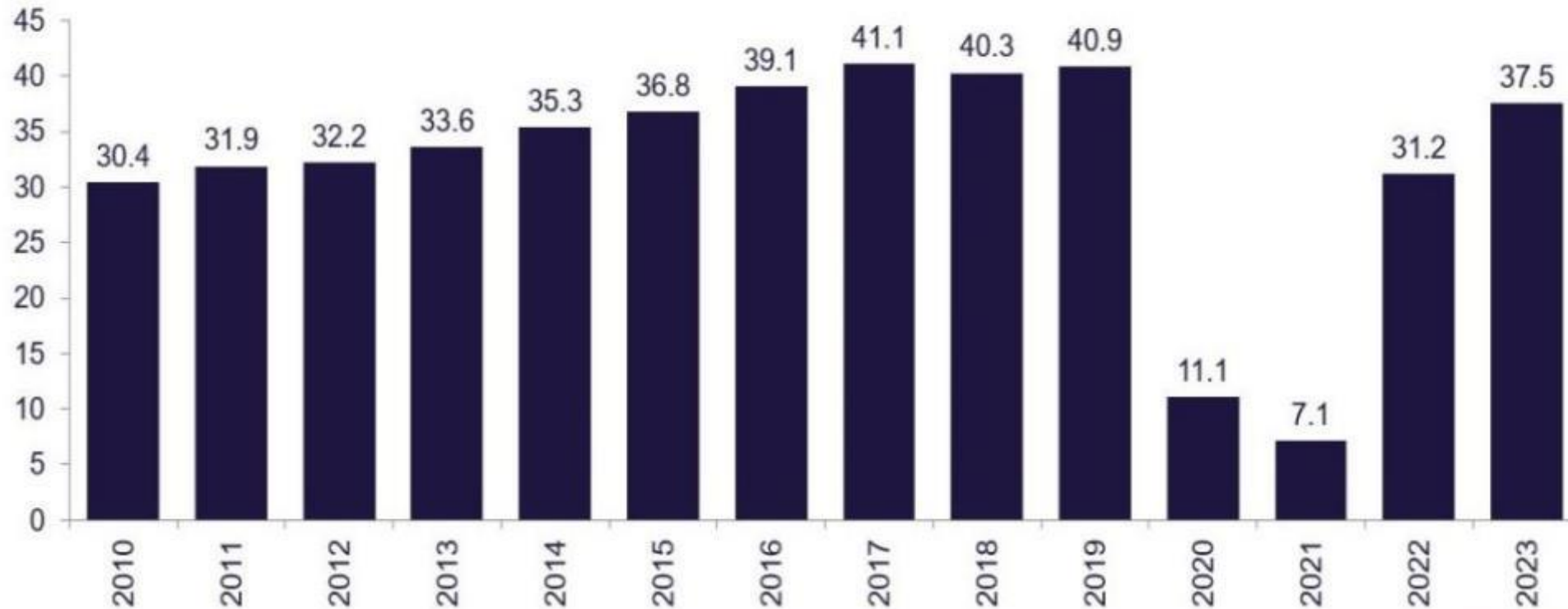
How is Britain's tourism industry recovering?



International forecast for 2023

Inbound visits to recover to 37.5 million in 2023 (92% of 2019 levels)

Inbound tourism to the UK – visits (millions), trend and forecast



*Source: International Passenger Survey 2020 and for 2022; VisitBritain model and forecast for 2021 and 2023

International forecast for 2023

Inbound spending to recover to £30.9 billion in 2023 (up 9% on 2019)

Inbound tourism to the UK – spending (£billions), trend and forecast (in nominal terms)



*Source: International Passenger Survey 2020 and for 2022; VisitBritain model and forecast for 2021 and 2023

Welcoming visitors back to Britain

US visitors are driving recovery

- **American Airlines** restored direct service from Seattle and expanded its London service from Los Angeles and Charlotte, North Carolina, offering its largest ever schedule between the US and UK this summer.
- **British Airways** launched new service from Cincinnati, Ohio to London in June.
- Flight Bookings from North America were **up 2%** on 2019 in the week commencing 21st August*

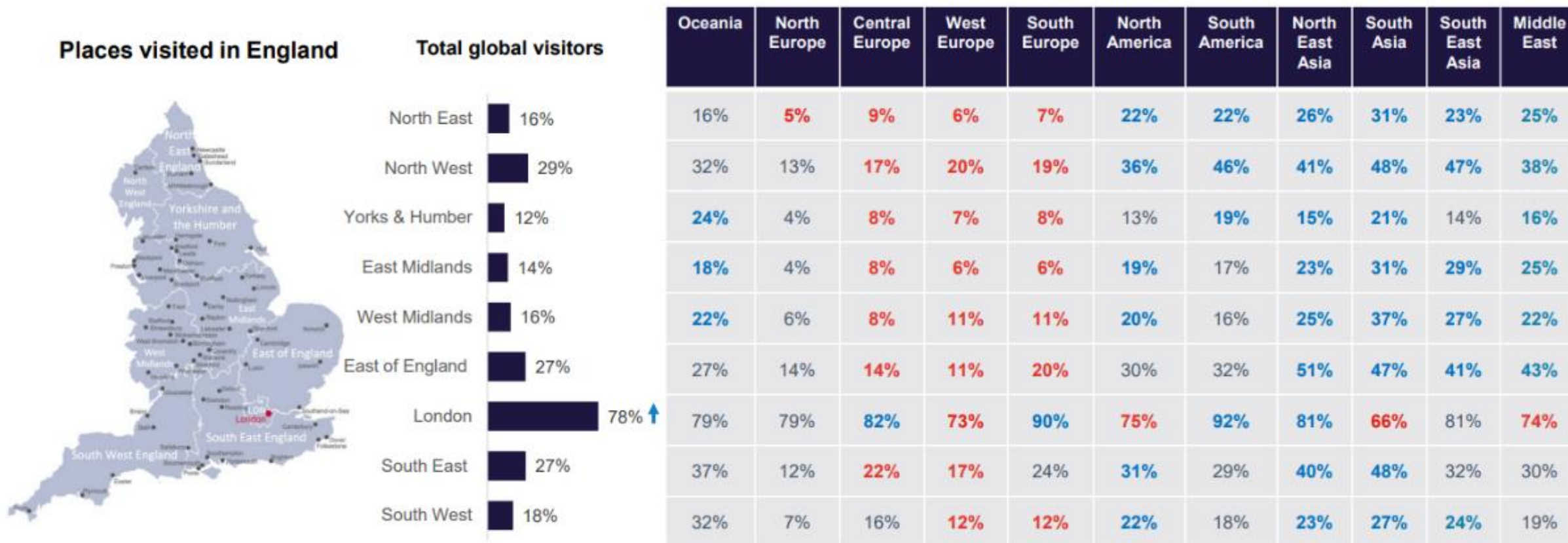
*Source: Forward Keys data up to 27th August 2023



VisitBritain/Philipp Pley

Dispersal of international visitors

London is clearly the most popular destination in England. Visitors from Indian (South Asia) visited more places across England with fewer travelling to London



Highlights for England

Between April – June 2023:

- In Q2 2023, there were **25.1 million overnight trips** in England (up 7% vs Q2 2022) made by British residents.
- There were in total **69.8m nights away** and they spent **£6.7bn** on their trips (up 12% vs Q2 2022).
- Great Britain residents spent on average **£269 per trip** in England (up 5% vs Q2 2022) and **£97 per night** (up 14% vs Q2 2022). Their trip in England lasted on average 2.8 nights (down 8% vs Q2 2022).

Great British Tourism Survey 2023



Chatsworth House (VisitBritain)

Highlights for the East Midlands

Between April – June 2023:

- The East Midlands accounted for 8% share of domestic tourism in England
- Total spend was **£411million** in the East Midlands.

Great British Tourism Survey 2023



Hollinsclough (VisitBritain / Julian Hill)

Rebuilding Inbound Value

Position Britain as a dynamic, diverse, sustainable and inclusive destination, prioritising regional and seasonal dispersion and improved productivity.

Connect & Distribute:

Linking buyers and suppliers through familiarisation visits, ExploreGB and Destination Britain North America.

Inspire:

Launch of *'Welcome to Another Side of Britain'* campaign in 2022, and *'See Things Differently'* in early 2023.

Convert:

Working with British Airways, Trip Advisor, LastMinute.com, and Wego to convert inspiration into bookings.



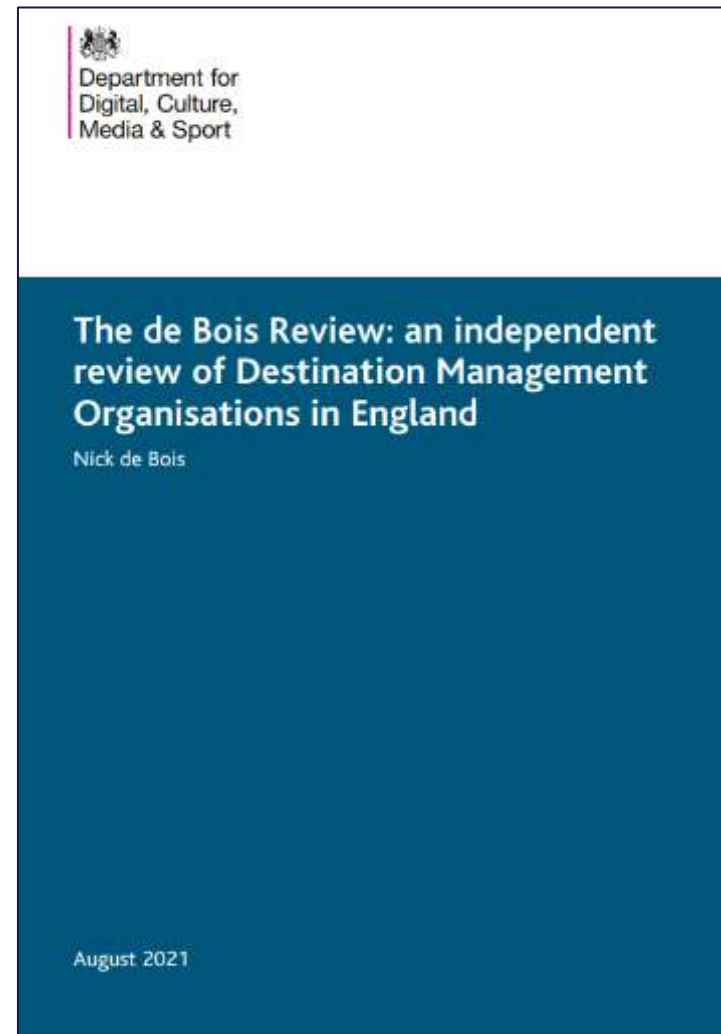


How is VisitEngland supporting the development of a sustainable visitor economy in England?



Implementing the DMO review

- Great destinations are great places to live and work as well as to visit.
- Strong leadership and governance means more likely to generate sustainable growth in the local visitor economy
- They can drive place-shaping agenda
- They can create value-added jobs, bring in new talent and stimulate innovation
- VisitEngland is creating a portfolio of nationally supported, strategic and high-performing Local Visitor Economy Partnerships (LVEPs)
- Implementing Destination Development Partnership pilots in the North-East and West Midlands



An LVEP for Visit Peak District Derbyshire & Derby!

- **Visit Peak District, Derbyshire & Derby LVEP**
- Engaging with businesses across Derbyshire and Derby, therefore representative of full geography
- Can provide a vehicle to reflect all destination development activity delivered by public sector
- The opportunity to develop a coordinated and strategic approach to the development of the visitor economy across the city, county and national park.

VISIT
PEAK DISTRICT
& DERBYSHIRE

**Local Visitor
Economy
Partnership**

Recognised by



VisitEngland

So, what does this mean for VPDDD?

Enhanced destination insights and intelligence:

- Participation in Data Hub initiative to generate more rich data for LVEP destinations, in partnership with VisitEngland research team.
- As part of this LVEPs will be able to make use of the data provided while at the same time identifying local data sources to feed into the Hub

Network of peer support:

- Opportunities to collaborate with, and learn from, other destinations, businesses and organisations across the local and national visitor economy as part of a national portfolio of strategic LVEPs

Locally significant status:

- The confidence for businesses of investing in – and supporting - a nationally recognised and resilient LVEP.

Supporting a sustainable, inclusive and innovative industry



Sustainability - why is it important for business?

CONSUMER DEMAND

- VisitEngland research from 2022 showed more than two-thirds of international travellers are thinking more about sustainability and environmental impact when planning future holidays
- 90% said they had engaged in some form of sustainable behaviour on holiday
- Travellers are most likely to define sustainable tourism as 'enjoying holidays in a way that minimises their impact on the planet.'

PROFITABILITY

- For a cash strapped business, it's easy to view sustainability as a 'nice to have'
- But sustainability makes businesses sense
- Companies building sustainability into their planning are on average 2.5 times more profitable
- Cost savings result from better resource management
- Sustainability also presents differentiation opportunities as consumers associate it with good quality

VisitEngland: Supporting Business Sustainability

OUR FOCUS

- Undertaking relevant research
- Curating and signposting effective resources: Business Advice Hub
- Raising awareness of key issues and opportunities (e.g. webinar on cutting energy costs: 14th November)
- Listening and responding to industry needs
- Raising awareness of funding opportunities e.g. Office for Zero Emissions Vehicles (OZEV) easy access grants for EV charging installation (end in March 24)!
- Connecting stakeholders and highlighting good practice to accelerate positive change



Foraged mushrooms (Visit/Britain / Jon Attenborough)

New Accessible & Inclusive Tourism Industry Toolkits

Equipping the visitor economy with the resources and knowledge they require to deliver accessible and inclusive experiences

- Consolidate and build on our leading standalone guidance currently available to form holistic toolkits with practical tips and real-life case studies
- Help you to develop destinations, venues and experiences that people with a wide range of accessibility requirements can enjoy
- The Business toolkit will comprise practical guidance on improving accessibility across the key areas of Customer, Place, Information and Employment.
- Real-life case studies and downloadable business-specific actionable checklists to plan and prioritise improvements, as well as some more aspirational technical guidance for the built environment
- Hosted on the new VisitEngland and VisitBritain industry website



New Accessible & Inclusive Tourism Toolkit

OUT NOW

Main Toolkit

Holistic guidance with real-life case studies

Action Checklists

Downloadable business-specific actionable checklists to plan and prioritise improvements

TO FOLLOW SHORTLY

Top 20 Tips

Downloadable business-specific top tips

Technical Guidance

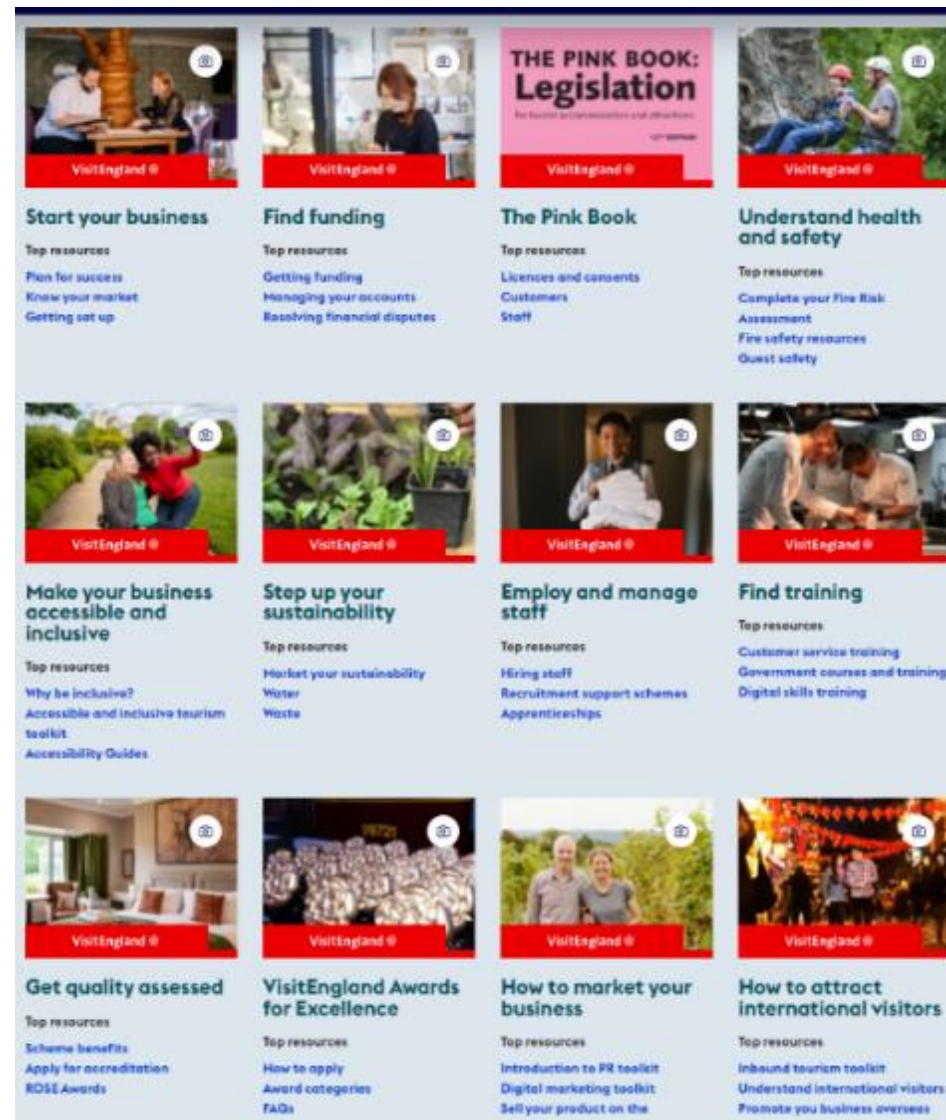
Technical guidance for the built environment for renovations and conversions



VisitEngland Business Advice Hub

More accessibility tips and other free resources to help businesses to succeed and grow

- Links to external resources
- Sustainability guidance
- Fire Risk Assessment Template
- Digital Marketing Toolkit
- VisitEngland Awards for Excellence
- Pink Book of Legislation (12th edition out now)
- TETTW Inbound Tourism Toolkit
- TXGB
- And much more!

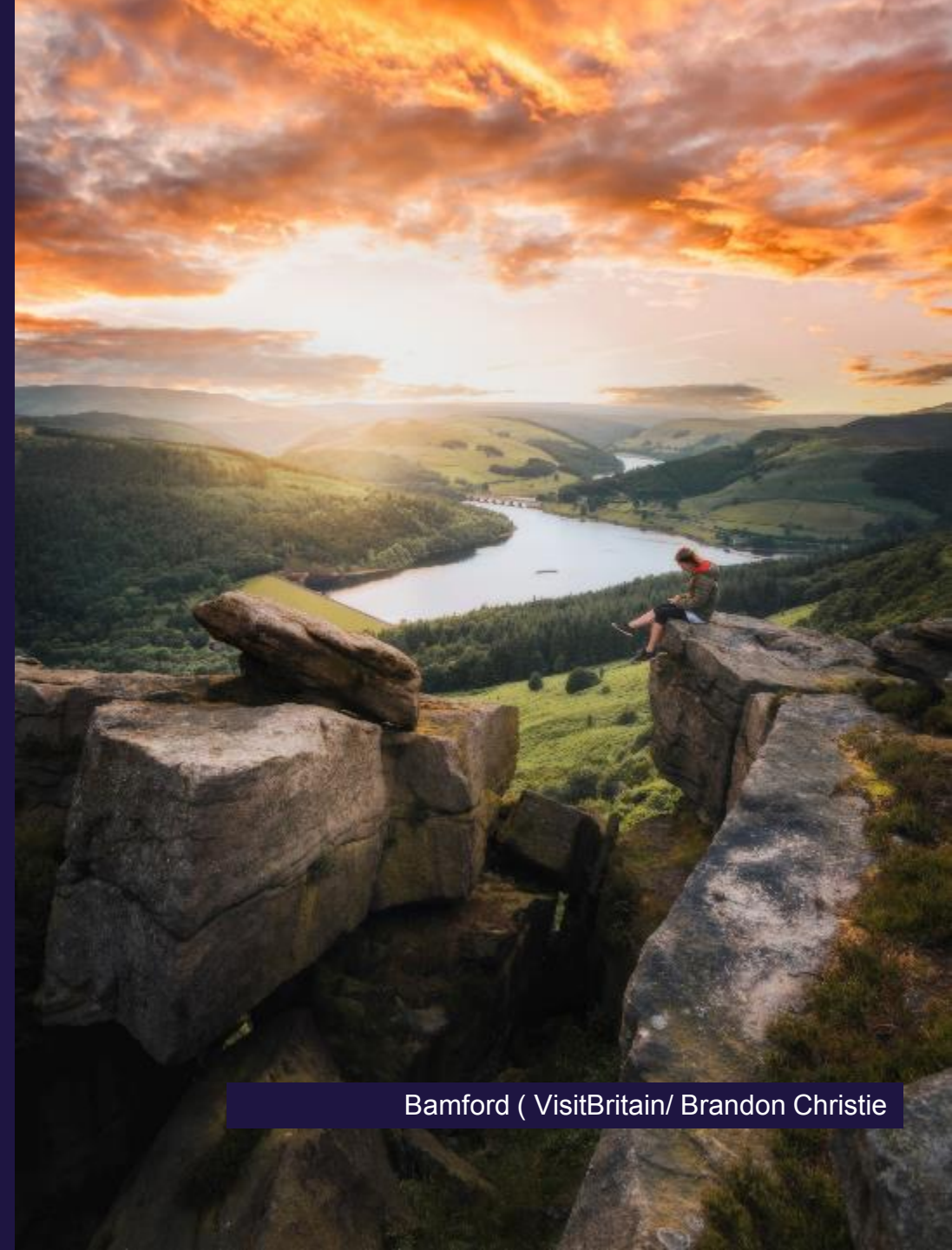


The screenshot displays the VisitEngland Business Advice Hub website, featuring a grid of 16 resource cards. Each card includes a representative image, a title, and a list of top resources. The cards are arranged in four rows and four columns.

Card Title	Top Resources
Start your business	Plan for success Know your market Getting set up
Find funding	Getting funding Managing your accounts Resolving financial disputes
The Pink Book	Licences and consents Customers Staff
Understand health and safety	Complete your Fire Risk Assessment Fire safety resources Guest safety
Make your business accessible and inclusive	Why be inclusive? Accessible and inclusive tourism toolkit Accessibility Guides
Step up your sustainability	Market your sustainability Water Waste
Employ and manage staff	Hiring staff Recruitment support schemes Apprenticeships
Find training	Customer service training Government courses and training Digital skills training
Get quality assessed	Scheme benefits Apply for accreditation ROSE Awards
VisitEngland Awards for Excellence	How to apply Award categories FAQs
How to market your business	Introduction to PR toolkit Digital marketing toolkit Sell your product on the
How to attract international visitors	Inbound tourism toolkit Understand international visitors Promote your business overseas

www.visitengland.org/businessadvice

Thank you



Bamford (VisitBritain/ Brandon Christie