

VisitEngland

Andrew Stokes, England Director

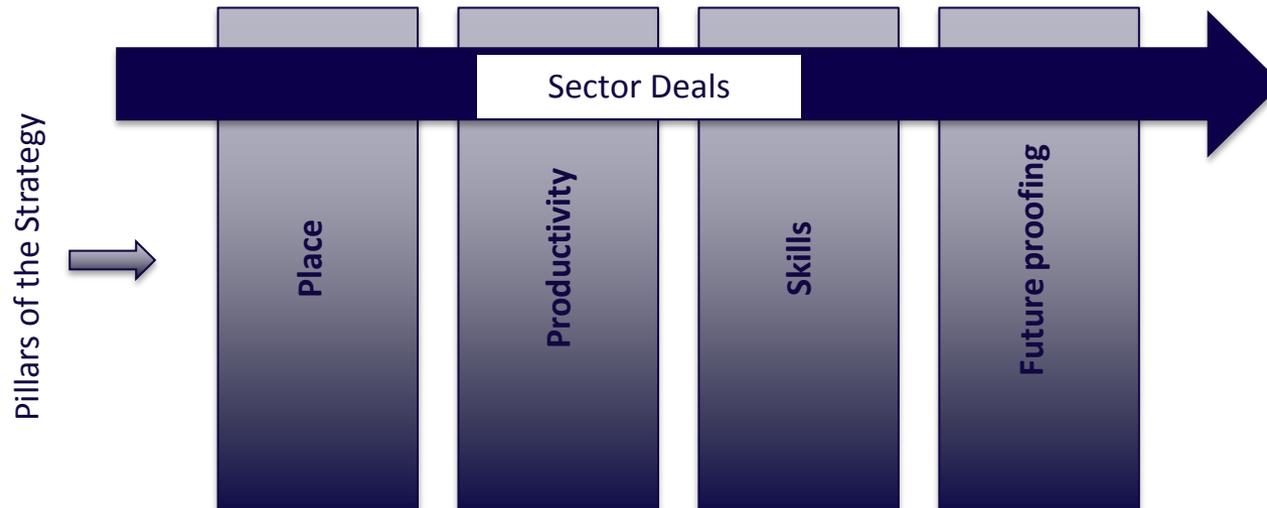
England

- England contributes the highest tourism return out of all British nations and our job is to look at the current and the future trends of domestic and inbound visitors to realize the opportunity.
- We need to unravel our ambition to increase volume and value and define what this actually means and what our role in this.

VisitEngland - Update

What is the Industrial Strategy?

- UK Government's long-term plan for the economy
- Improving productivity
- Building capacity and growth for the future



Tourism Sector Deal

- Steve Ridgway has led the deal....
- VisitBritain has coordinated...
- The Industry has had the final say...



The ambition – by 2025

- **Boosting productivity by 1% & Doubling the size of the sector**
- **Delivering an additional 70,000 jobs**
- **Building the most competitive tourism market in Europe by 2025**
- **Increasing the value of Tourism to all corners of the UK**

Flying the flag for tourism locally

- Working together is key
- Government wants to see local leadership and cooperation
- In order to be considered as a potential tourism zone, an area needs to show that tourism is a priority sector in the LEP's Local Industrial Strategy
- LEPs, DMOs, LAs and local businesses need to work in partnership to achieve joint aims

Benefits of attracting international visitors

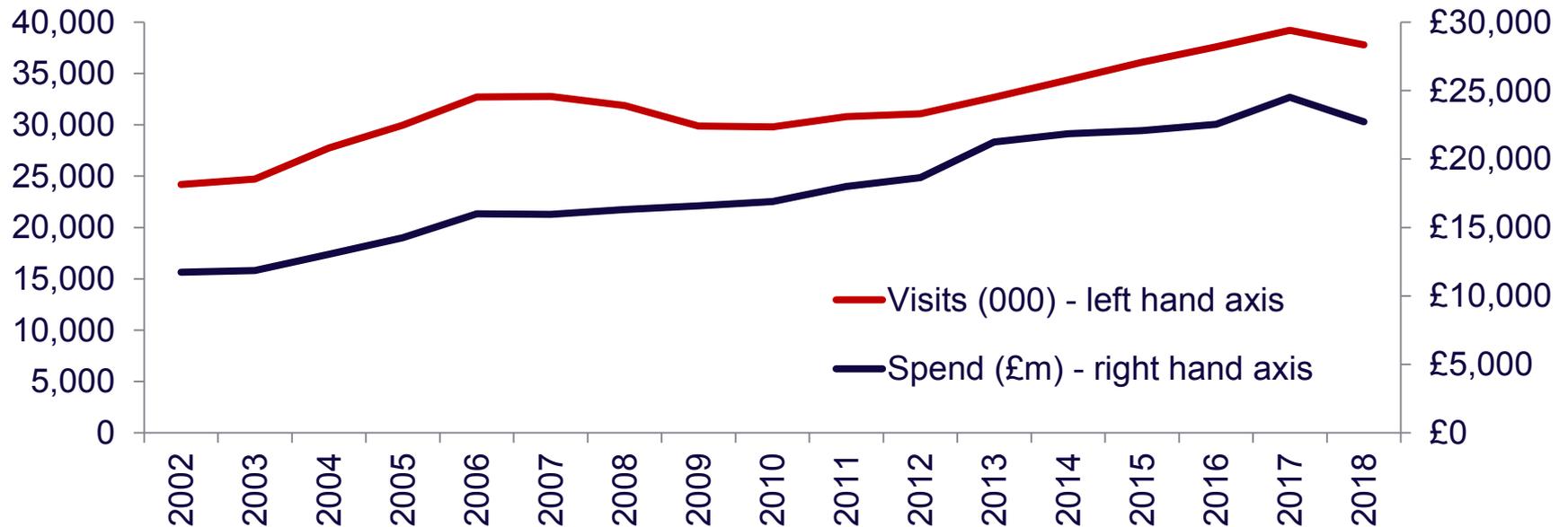
International visitors more likely to travel off-season

- Trips taken in England between October and March:
 - A third by domestic visitors (34%)
 - Nearly half by international visitors (44%)

International visitors spend more

- In a recent regional spend per trip survey:
 - £140 for domestic visitors
 - £434 for international visitors

Inbound long term trend: a dip in 2018 (vs a record 2017) with visits down 4% and spend down 7%



Source: International Passenger Survey

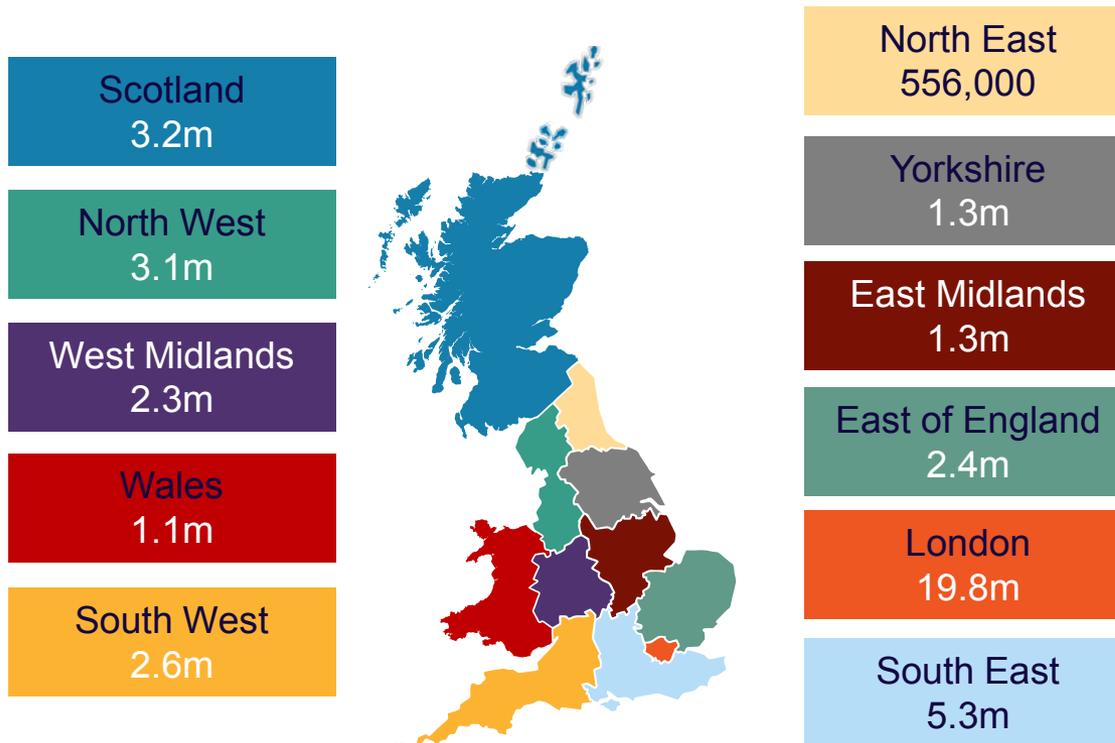
2018 overview: journey purpose and markets

By global region	PROVISIONAL 2018 (JAN - DEC 2018)	
	Visits (000)	% change vs. 2017
EU Total	26,930	-4%
North America	4,750	0%
Rest of World	6,100	-4%

By journey purpose	PROVISIONAL 2018 (JAN - DEC 2018)	
	Visits (000)	% change vs. 2017
Holiday	15,040	-2%
VFR	11,690	-3%
Business	8,500	-3%
Miscellaneous	2,570	-16%

- Markets:
 - Long haul visits dipped in 2018 but were still up 11% on 2016
 - European visits, however, were down on 2016 as well as on 2017
- Journey purpose:
 - Holidays had a bumper 2017 so this is still the second highest ever

Inbound to the UK: regional spread



Source: International Passenger Survey, 2017

- Guildford received 71,000 overnight visitors in 2017 (59th place)
- But also 33,000 day trips from inbound visitors (44th place)

Brexit

The British tourism industry is working very hard to reassure visitors that our warm message of welcome remains the same as do our breath-taking landscape, world-famous culture, our rich heritage and vibrant cities. We also want to send the message that it is always a great time to visit Britain and this year is no exception. This spring and summer there is a feast of fantastic events and celebrations lined up from cultural performances and sporting events to food, literary and music festivals. It really is a great time to book a trip.

Brexit – VisitEngland Activity

- **Objective**

Consider increasing propensity to take domestic breaks by leveraging uncertainty in relation to Brexit

- **What has VE been doing?**

Testing messages and creative routes domestically to mitigate the impact of Brexit on British tourism and generate positive conversations about England

Brexit – Family Campaign

Insights

- Target middle class (ABC1) 18-24 year olds and middle class Families, as these are the most likely to have changed their plans or planning to change due to Brexit.

Audience:

- Family audience (affluent) focus on April – September longer breaks and short family getaways

Channels:

- Family audience: develop new channel strategy for family audience focusing on stimulating summer demand
- Co-ordinated PR campaign through owned, earned and partner channels

Messaging:

Family audience: Focus on ‘family adventures’ (England only)

- Focus on immediacy and reasons to travel now
- Use occupancy data to inform destinations to promote
- Work closely on content in partnership with relevant strategic partners, DMOs & the industry
- Ongoing underlying theme of ‘family adventures in England’

Budget: £700k

Discover England Fund

Discover England Fund - overview

- We have invested over £22 Million in grant funded projects over the past 3 years, creating a wealth of new and exciting products that showcase England as one of the world's premier destinations
- Not only has the fund brought products to the market, it has also enabled collaboration and strengthened our tourism offer.
- Throughout the delivery of the Fund we have seen destinations and VisitEngland engaging with the travel trade like never before. The networks and knowledge gained through this process has been an important piece in the distribution landscape and will reap benefits for years to come.

DEF successes so far

- 3 rounds of 1 Year Projects Delivered for Business Events, Luxury Sports, Electric Cars, Food & Drink, Music Festivals and of course Attracting Faith Visitors to England
- 14 Large Scale projects now with product in market. All 14 to be live by next week!
- Nationwide collaboration between tourism stakeholders including regional itineraries, packaging and aligned international trade activity and Commercial Partners



The importance of sustainability

- As we are all aware, sustainability must now be a key focus in ensuring the products taken to market through DEF projects continue to develop and sell in greater numbers after the life of the fund. We want to see the great products you have created flourish, to reap the full benefits of the activity you have undertaken and build on the fantastic achievements to date
- Continuing trade engagement is vital to this, as is business engagement, training, and doing what we can to ensure products remain high quality and visible to the consumer

So our priorities for the year ahead..

- The year ahead will bring new focus for projects and products they have facilitated.
- Continued embedding, distributing and promoting will be key to ensuring products stand on their own two feet.
- Sharing learnings will be important to inform what comes next and continuing to be at the forefront of people's minds when they are considering where to visit.
- DEF Distribution Platform - TXGB

Raising the bar to attract international visitors

For half of visitors to UK their trip exceeds expectations, however the following areas are generally felt to be below expectations:

- **Provision of information in visitors' native language**
 - **Ease of driving and finding food that appealed**
- Globally the **strongest influence** on choice of destination is **word of mouth recommendation** via talking to friends/family (40%) followed by **search engine result** (33%).
- Destinations need to stay up to date with current trends:
- online/ mobile-friendly information for visitors
 - engagement on social media, allowing visitors to easily share their experiences
 - awareness that any negative experience will find its way onto social media, so quality and customer service are more important than ever

Business Support

England Business Support

- Driving the productivity and growth of tourism businesses in England
- Three key initiatives aimed at 67,666 accommodation & 6,000 visitor attractions

Business Advice Hub

Connecting businesses
with resources and key
local support providers

Awards for Excellence

Providing a voice for
English tourism

Accessible Tourism

Fixing an issue in the
visitor journey; ensuring
product responds to
demographic shifts

Business Advice Hub

➤ 19/20: Implement communications plan to raise awareness and drive visits to Hub



Start up/Scale up content

Connecting biz with research and insights to identify potential demand for new business; facilitating start up with one to one support through advisors and mentors and accessing funding

Legislation content

Provide a common sense approach to helping accommodation providers understand their complex and often daunting legal obligations; available both online and printed book to purchase

Growth content

Help businesses grow by reaching new markets, exploiting opportunities; inspire business excellence
e.g. Inbound Toolkit, Digital Marketing Toolkit

VisitEngland Awards for Excellence

➤ 19/20: Implement a new region fed national awards system

A celebration of English tourism that champions innovative & leading tourism experiences, products and services, and inspires business excellence



Identify, reward, publicise and celebrate the best tourism experiences, products and services

Highlight and promote new and innovative English tourism experiences, products and services

Champion best practice to inspire business improvement and contribute to improved productivity

Accessible Tourism

- 19/20: Implement a programme of activities to ensure England's tourism product responds to demographic shifts in our population and visitor profile

Convene and guide England's
Inclusive Tourism Action
Group

Deliver a suite of leading
business support resources
e.g. Accessibility Guides tool

Act as a key advisor to DCMS
on accessible tourism

- Longer term: Opportunity to go beyond business support and position England as a world-class accessible destination

Product Development

Product Development for England (excl. DEF)

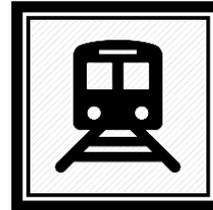
- Identifying gaps and opportunities in England's tourism landscape with the aim of broadening our product offering for international visitors
- Encouraging collaboration and advising England tourism suppliers on their product development and distribution in line with the thematic areas of focus:
 - Food & Drink
 - Rail
 - Gateways
 - Luxury
- Advising tourism suppliers on the most effective distribution channel, supporting them to contract and sell new product
- Providing tools for education and engagement: Trade website, Britagent training programme, inspirational itineraries, imagery/video/assets, educational programme, commercial partnerships

Thematic Product Development focus areas



Food & Drink

A cross government partnership with DEFRA and DIT mapping food hubs across Britain showcasing heritage, modern and innovative food & drink products and experiences.
Existing hubs: London, South West, Yorkshire
New food hubs are: Cumbria, South East



The Great Rail Project

A cross government initiative working with the rail industry & attractions to encourage international visitors to explore the UK using rail & incorporating 'final mile' solutions.



Luxury

Identification of luxury travel experiences featuring a curated collection of authentic and unique product and experiences across Britain.
Test and learn project with the GCC for London plus luxury product



Gateway Proposition

Leveraging key gateways (air/port/rail) as a hub and spoke model for product development.
Gateways: Manchester, Bristol, Birmingham, Newcastle, London

Please support your DMO!

We rely on the DMOs for content input and product ideas, for support of our PR and trade activity.

They engage with us through many channels, incl. the Discover England Fund, the English Destinations Forum and Business Planning

