



# Tourism – the National Picture

Nick de Bois, BTA Chairman

VisitBritain/Hannah Argyle, Location: Cromer; Norfolk



# Tourism recovery in Britain

A row of colorful beach huts (sheds) on a sandy beach at sunset. The huts are built on stilts and have wooden stairs leading up to them. The sky is a mix of blue and orange, with the sun low on the horizon. The huts are in various colors, including white, blue, and yellow. The beach is wide and sandy, and the ocean is visible in the distance.

# Inbound tourism insights

- The pandemic saw a devastating impact on the sector, with inbound spend forecast to take until 2024 to surpass 2019 levels in nominal terms
- Flight data: key markets are now recovering well, esp. the US and the Middle East, followed by Western Europe, but China still at -99%, with no immediate change in sight
- The propensity to visit Britain varies by market, with high levels seen in the Middle East and the US



# Domestic tourism insights

- The percentage of people intending to take more domestic and overseas overnight trips in the next 12 months has decreased in October.
- As a result of the cost of living crisis, UK adults are likely to cut spend on their overnight trip in the UK by saving on accommodation, activities or eating out.
- 30% of UK adults say they will take fewer day trips (only 20% said they will go on fewer overnight trips).
- Others will cut on spending on their UK day trip by looking for free activities or spending less on eating out.



# Forward Look – Challenges

- 1. Britain is behind the curve on recovery.** Key competitors have secured higher levels of flight arrivals this summer and forecasts see the UK's recovery outpaced by major competitors (eg France, Spain, Italy, Netherlands, Ireland)<sup>1</sup>
- 2. Britain is being outspent by competitors** and it is increasingly difficult to get cut-through – for example the US is spending \$250m (£215m) in a single year on Brand USA and Tourism Ireland have a €80m (£70m) marketing budget for 2022
- 3. The global cost of living crisis** is heralding an economic downturn in some of Britain's major international markets, with rising inflation and interest rates affecting consumer confidence and potential spend on international travel
- 4. Brand Britain faces a range of reputational challenges**, from the legacy of EU Exit to value for money and the current industry issues on skills and staffing impacting customer experience
- 5. The UK industry feel there has been limited engagement and collaboration** on the development of VisitBritain's sales & marketing programme

<sup>1</sup> Forward Keys, Oxford Economics

# Forward Look – Opportunities

1. During the Covid-19 pandemic, **VisitBritain and the industry partnered well** on initiatives such as ‘We’re Good to Go’ and a domestic marketing campaign – when there has been open dialogue with a clear goal, we have seen success
2. **Industry input has helped to evolve plans positively**, leading to the development of DMC and international gateway funds, as well as trialling a different co-op marketing approach to give more opportunities to smaller industry players
3. **International tourism continues to receive the largest amount of funding** from the Government’s GREAT campaign, meaning tourism continues to see good international marketing investment
4. **Indicative results from VisitBritain’s most recent campaign activity** (especially in the US) have been very positive, suggesting a positive economic impact and more regional dispersal for the industry
5. **2022 has been a positive year for Britain** on the world stage with the Queen’s Jubilee and the Commonwealth Games over the summer, and **2023 offers another moment in time** for global attention on Britain.

# Our vision and priorities



VisitBritain/ Hannah Argyle, Location: Norfolk

# Priorities 2022-2023

**Our role is to drive immediate tourism recovery by building back visitor spend as quickly as possible and support the industry**

- Rebuild international visitor value - position Britain as a dynamic, diverse, sustainable and inclusive destination, prioritising regional and seasonal dispersion and improved productivity.
- Build our future - transform the way we work to compete in a digital world, build our strengths in data and diversify our funding.
- Build the English visitor economy - lead and enable a sustainable and resilient visitor economy in England.
- Build our influence - be the trusted voice in tourism. Support growth by shaping policy and providing insights.
- Build our team - work as a global team. Ensure our structure and skills best deliver on the strategy.

All to deliver on the ambitions set out in the Tourism Recovery Plan – creating as more resilient, more sustainable, more inclusive and more innovative sector.



VisitBritain/Emma Wilkinson, Ipswich; Suffolk

# How you can work with us



# Rebuild International Visitor Value

## What are we doing to deliver for industry?

- International marketing campaigns
- 'Always On' Activity
- Partnerships
- Travel trade events
- Supporting business events

## Where can we work together?

- Share your stories, news and product updates
- Submit your brand imagery and access our asset library
- Attend international trade events
- Working in partnership to win business events
- Training and digital upskilling
- Engage with educational programme for Trade and Media

[www.visitbritain.org/opportunities](http://www.visitbritain.org/opportunities)

VisitBritain/Ollie Kilvert, Happisburgh; Norwich



## The importance of inbound

- Inbound visitors spent more than £28bn in 2019.
- International visitors spend more per trip than domestic visitors (eg Australians spend more than £1,000 per trip)
- US and Middle East are driving the recovery of the visitor economy post-pandemic, with number close to 2019 figures



# Build the English Visitor Economy

## Implementing the DMO review

- A simplified and more effective two-tier structure of accredited DMOs
- Destination Development Partnership pilot
- National portfolio of Local Visitor Partnerships (LVEPs)

## What can you do?

- Work together as partners across the region to support Visit East of England

The de Bois Review: an independent review of Destination Management Organisations in England

Nick de Bois

August 2021

## Build the English Visitor Economy (2)

### Support for industry

- Sustainability and accessibility – best practice, training, guidance
- Business Advice Hub – resources and advice for SMEs
- Awards for Excellence - celebrating quality, innovation, best practice
- TXGB - building bookable product, connecting suppliers, distributors, destinations and tech providers

### How can you work with us?

- Make use of our website and Advice Hub
- Attend our webinars and training courses
- Apply to the VEE awards for a chance to enter the VE awards
- Get involved in TXGB



# Questions

