

James Berresford  
Chief Executive  
VisitEngland



## The role of VisitEngland

- Champion the sector and drive forward the industry's shared Strategic Framework for Tourism
- Support local areas grow their economies through tourism
- Advise Government on English Tourism issues
- Provide official intelligence on tourism and visitor economy in England
- Promote England's tourism offer

# england

A Strategic Framework  
for Tourism 2010-2020

- Our shared growth ambition
- 5% average growth, year on year, in the value of tourism since 2010
- 7% uplift in jobs since 2010 = 178,000
- Currently being refreshed

## Vision

**A globally competitive tourism industry that acts as a key driver to the economy and of local prosperity across England**

**The strategic objectives are to:**

**Strengthen the competitiveness of businesses and England's tourism offer**

**Increase tourism employment and local prosperity**

**Increase the contribution of tourism to the English economy**

## **These objectives will be achieved by:**

Investing in the infrastructure and environment on which tourism growth relies

Attracting & retaining motivated people and developing their skills

Increasing the visibility & understanding of England's tourism offer

Overcoming barriers to business competitiveness and investment

Investing in tourism products and experiences in line with market trends & strategic needs

- In 2014, visitors to England spent an estimated total of £82bn
  - £18.1bn was spent by British residents on domestic overnight trips
  - An estimated £18.9bn was spend by international visitors
  - £45.1bn was spent on tourism day trips
- The English visitor economy contributes £106bn to the national economy (direct and indirect impacts), and supports 2.6 million jobs

## Heritage and the International Visitor

- Our heritage is a significant pull for our international visitors
- Castles or historic houses are visited by almost **one in three** international visitors – and by nearly half of those who come to the UK specifically for a holiday
- In the Nations Brand Index, a survey of consumers in 20 different countries, the UK is ranked **5<sup>th</sup> out of 50** competitor countries for its historic buildings, and **7<sup>th</sup>** for its cultural heritage

## Heritage and the Domestic Visitor

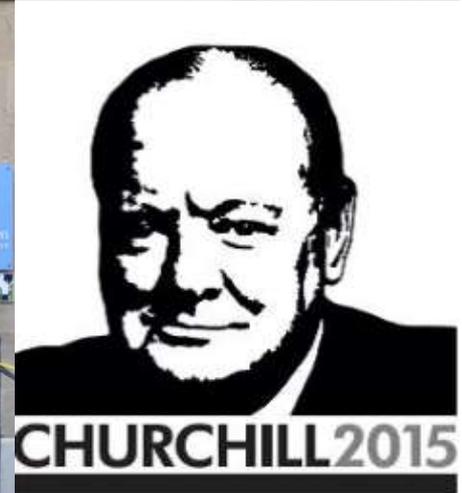
- Our heritage isn't only something that matters to our international visitors. Last year in England:
  - 5.4 million domestic overnight trips and 20 million day trips included a visit to a stately home, historic house or palace
  - 4.1 million overnight trips and another 20 million day trips included a visit to a castle or other historic site

## The Value of Heritage Tourism

- It is estimated that **£2.2bn** in UK domestic and international tourism spending can be attributed to our historic buildings and monuments
- A further **£1.9bn** can be attributed to our museums and art galleries – another important dimension of our heritage

Heritage is a key theme right across the VisitEngland Consumer activity

- **PR Campaigns** – recent campaigns include Churchill 50 and Magna Carta 800
- **Press Releases**
- **Online Media Centre**
- **What's On guide** – calendar of events and exhibitions across England
- **What's New guide** – calendar of new openings, launches and anniversaries
- **Social Media activity**
  - Facebook – 247,000 fans
  - Twitter – 142,000 followers
  - Instagram – 12,800 followers
- **VisitEngland Image Library**



# Romantic Heritage

- This was an audience led campaign fulfilling the need of romantic product to that need to increase visits across our heritage assets.







- **Holidays through history**

Campaign targeting families with kids to experience the history that is being taught in the classroom



## Holidays at Home are Great

- Adding a bit of humour and charm to our heritage we have Shaun the Sheep goes to Chatsworth & Giants Causeway UNESCO



For BAA-rillicant deals  
SEARCH  
HOLIDAYS AT HOME  
ARE  
**GREAT**  
BY BAA & VISIT ENGLAND

Adwork supplied © 25% of final cost. Final size: 1000x1000mm



For BAA-rillicant deals  
SEARCH  
HOLIDAYS AT HOME  
ARE  
**GREAT**  
BY BAA & VISIT ENGLAND

Adwork supplied © 25% of final cost. Final size: 1000x1000mm

## Hadrian's Wall Connect Project

- £400,000 of government funding was made available earlier this year for the Hadrian's Wall Connect project to be delivered in 2015/16
- The project which VisitEngland is managing and supporting is led by Northumberland County Council along with Northumberland Tourism, NewcastleGateshead Initiative, Cumbria Tourism, Northumberland National Park Authority and English Heritage along with other agencies and transport providers
- The project aims to generate increased visitor numbers and expenditure in the visitor economy it will also assist with alleviating negative environmental impacts at current tourist 'hotspots' through developing product which will encourage distribution of visitors along a wider area of the WHS

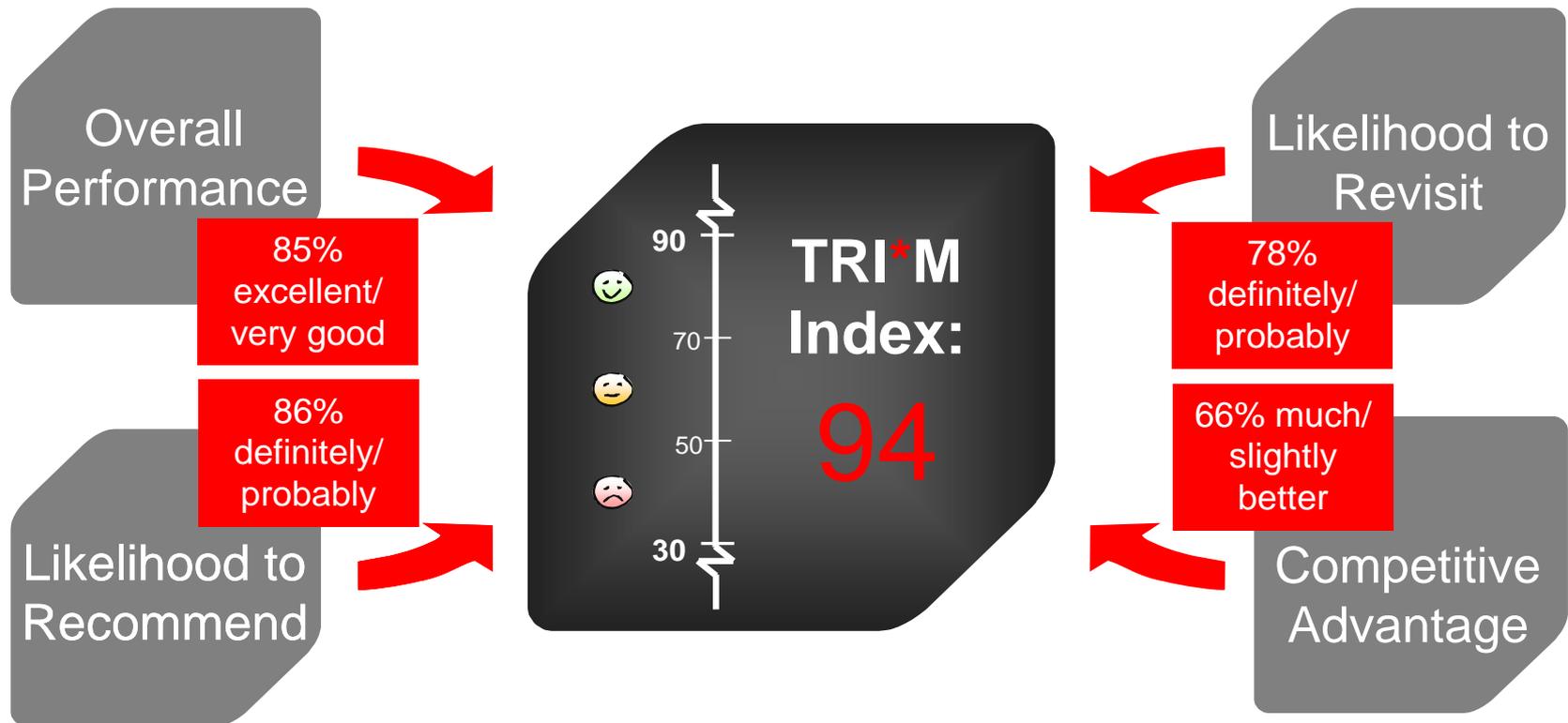
## Hadrian's Wall Connect Project continued...

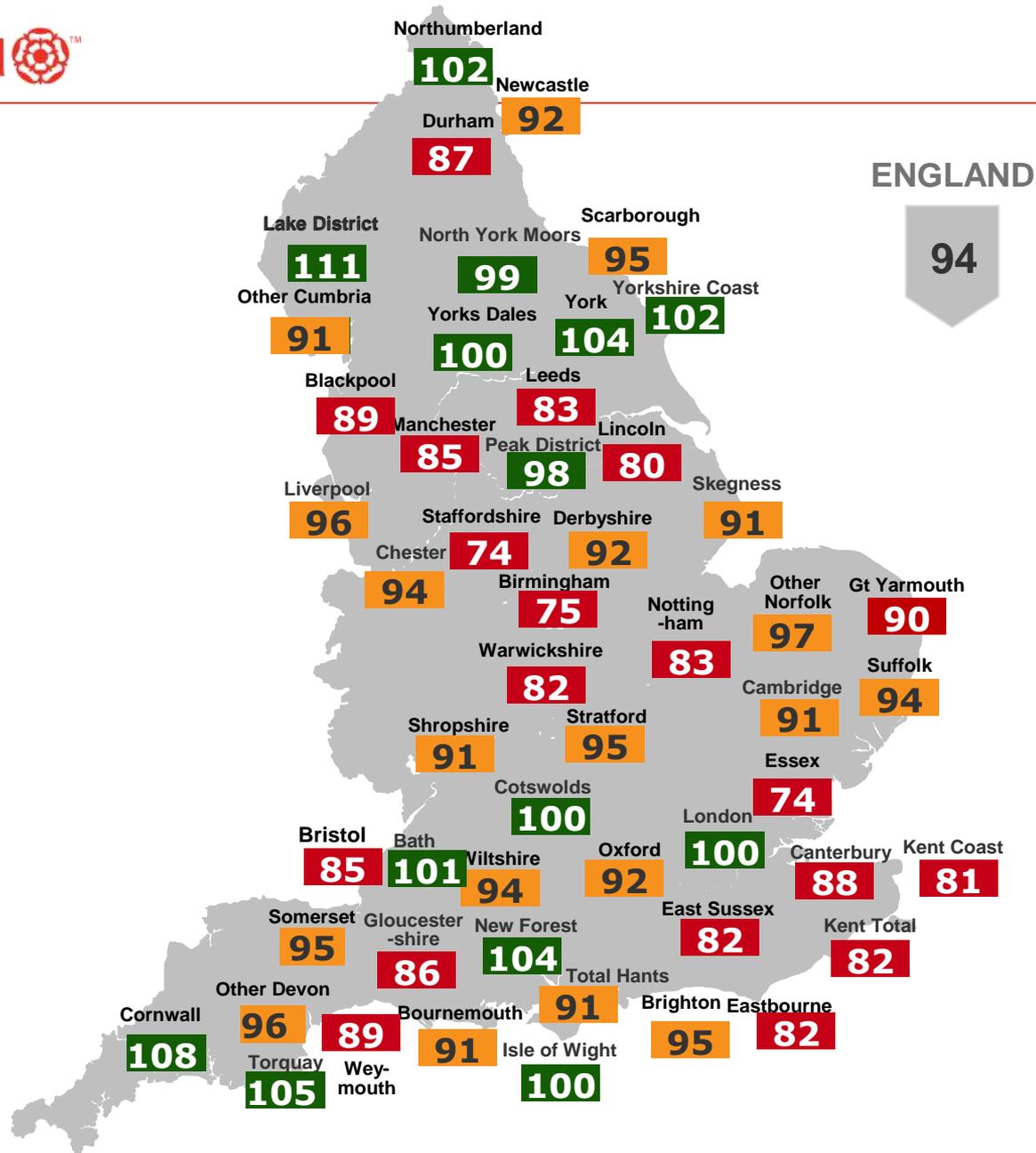
- Examples of activity are: improvements to visitor welcome and information at key transport hubs which connect to the WHS i.e. at Newcastle Central Station, improvements to and development of pre-booking information to help inform visitors about what activities and experiences can be had at the WHS, infrastructure improvements which will enable people to access Hadrian's Wall and move confidently around the site as well as a marketing campaign which will promote the WHS as a visitor destination to target markets

# People visit places – great destinations



# How Satisfied Are Visitors to English Destinations?





VisitEngland 

Futures ..... a  
need to future  
proof



# 1. Demographic trends

- The population is changing – over the next 10 years, the number of older people will increase  
...and as baby boomers hit retirement age, catering for this group (who don't behave like "old" people) will be vital
- There's also been a mini baby-boom – leaving the "squeezed middle" to care for (and finance) the growing numbers of young and old
- There are increasing numbers of UK residents born outside the country – but their leisure habits are often poorly understood
- The traditional family unit is less common than it once was – but this isn't always recognised by businesses

## 2. Technological trends

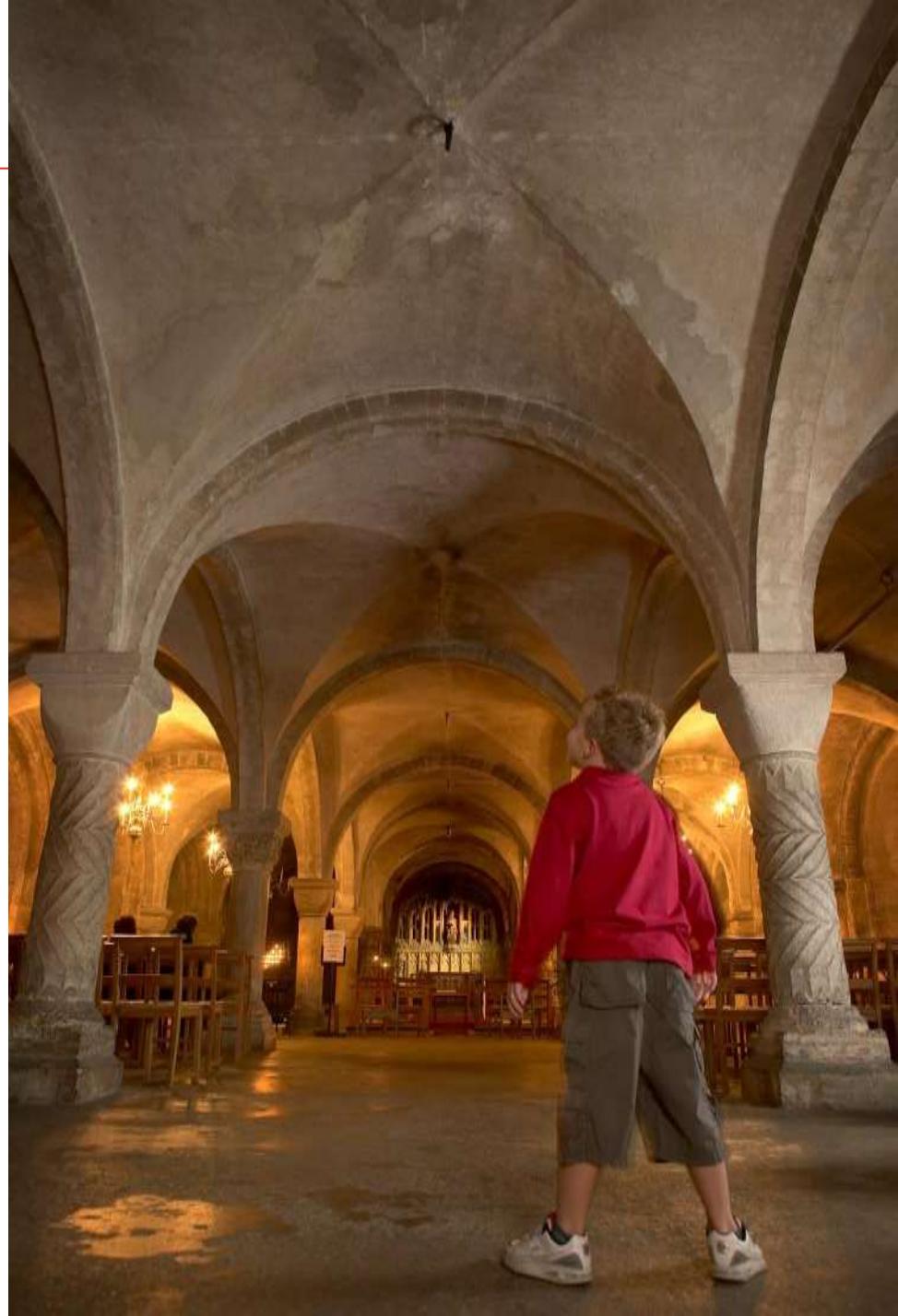
- Since 2006, there has been an increase of over 100% in the number of domestic trips booked online...
- ...mobile devices have changed how we use the internet...
- ...yet not all businesses have a website yet (and if they do, it's not always mobile enabled)
- Near universal internet penetration in the UK + proliferation of holiday-related UGC mean that the consumer has more information than ever before to help make a decision

## 3. Leisure time / economic trends

- Despite the recession, spending on leisure and recreation has held up – money may be tight, but work life balance is vital
- ...but value-seeking (and the role of great deals) will remain crucial
- It's not just about “the big holiday” any more - the average English holiday is getting shorter and shorter with people taking portfolios of trips
- ...and we've changed how we plan – last minute is ever more common, making it hard for businesses to predict customer flows

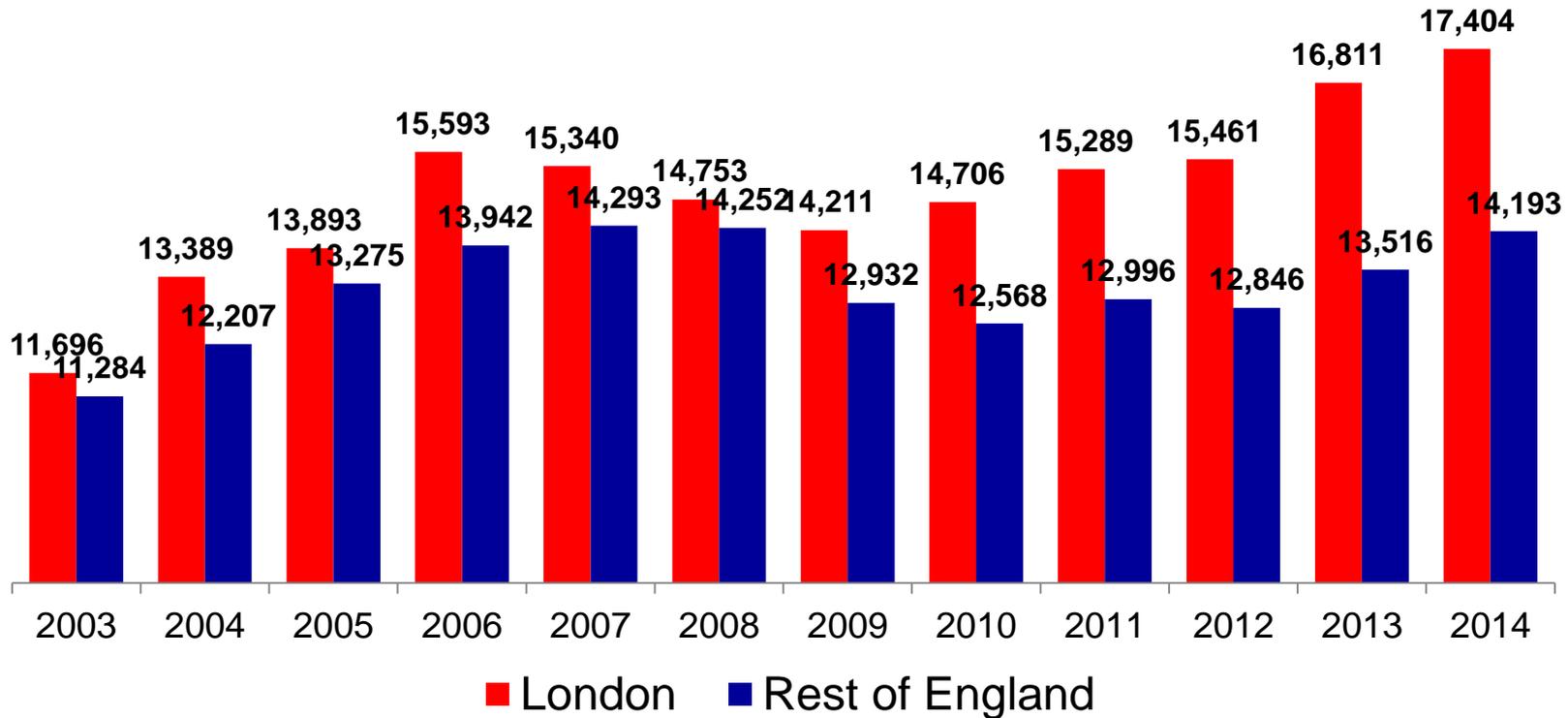
## The way the wind is blowing

- The number of domestic overnight trips taken in England fell back by 9% in 2014, while expenditure declined by 3%
  - In 2015 Jan-May trips are up 16%, with spend up 17% vs the same period in 2014
- The London question



However recent years have seen stronger growth in London than in the rest of the country

**Inbound Visits (Millions) – All Purposes**



## Structural Change

- The Triennial Review of tourism
- Product development and experiential tourism
- It is going to be challenging
  - National balance
  - International competition
  - Phase 2 of savings
  - Fewer, stronger destinations
- Delivering great experiences of great and unique character

