

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 **5th out of 50** competitor countries for its historic buildings, and **7th** 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.



© 2013 VisitEngland. All rights reserved. | 01203 760000 | www.visitengland.com

© 2013 VisitEngland. All rights reserved. | 01203 760000 | www.visitengland.com

Stratford-upon-Avon

All the town's a stage

Geetha Anthony takes time off from acting with the RSC to treat his folk to cakes and ale in Shakespeare's old stomping grounds

I maging that the handsome, bearded, well-dressed actor who is sitting in a leather armchair in a room that looks like a 17th-century English drawing room is the same man who has just finished a performance of *As You Like It* at the Royal Shakespeare Company's Swan Theatre in Stratford-upon-Avon. He is Geetha Anthony, a 35-year-old actor who has been in the industry for over 15 years. He is sitting in a leather armchair, holding a glass of ale, and looking at the camera with a slight smile. The room is filled with books and a large window in the background. The lighting is warm and intimate.



Geetha Anthony in a leather armchair in a room that looks like a 17th-century English drawing room.

Geetha Anthony is a 35-year-old actor who has been in the industry for over 15 years. He is sitting in a leather armchair, holding a glass of ale, and looking at the camera with a slight smile. The room is filled with books and a large window in the background. The lighting is warm and intimate.

He is sitting in a leather armchair, holding a glass of ale, and looking at the camera with a slight smile. The room is filled with books and a large window in the background. The lighting is warm and intimate.

The mud cur, they say, was grown from a tree the hard times uplanded

The mud cur, they say, was grown from a tree the hard times uplanded. This is a traditional saying from the region, referring to the resilience of the people and their land.



10 Things of England Saturday Guardian 10/11/13

Bath

Baking with a French accent



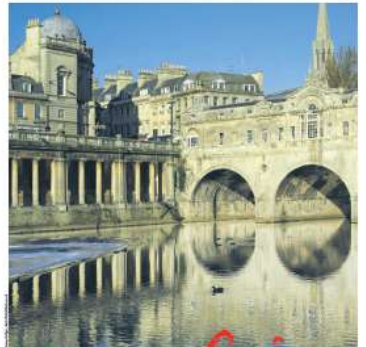
Kisses, cheese and agoutte (a type of bread) are the ingredients of a traditional French bread. This is a traditional saying from the region, referring to the resilience of the people and their land.

The mud cur, they say, was grown from a tree the hard times uplanded.

STRATFORD-UPON-AVON



© 2013 VisitEngland. All rights reserved. | 01203 760000 | www.visitengland.com



more fairy tale romance

The wedding cake is...
 ...
 ...
 ...



Historic Spots

- This was a more product focused campaign, including UNESCO product but not limited to it, trying to make it more accessible and experiential rather than straight historic storytelling

Discover England's historic spots



Discover England's historic spots

1. Reading, UK, Museum
See how the city of Reading has grown from a small town to a major city.

2. Tower through the history of industry
Discover the story of the Tower through the history of industry.

3. Ship in a building
Discover the story of the ship in a building.

4. All, art, science and medicine in Birmingham
Discover the story of all, art, science and medicine in Birmingham.

5. Operation Black & White
Discover the story of Operation Black & White.

6. Discover the story behind the Gulf War
Discover the story behind the Gulf War.

7. Catherine Wheel, 18th & 19th Century
Discover the story of Catherine Wheel.

8. Discover the story behind the Gulf War
Discover the story behind the Gulf War.

9. Discover the story of the Gulf War
Discover the story of the Gulf War.

10. Discover the story of the Gulf War
Discover the story of the Gulf War.

11. Discover the story of the Gulf War
Discover the story of the Gulf War.

12. Discover the story of the Gulf War
Discover the story of the Gulf War.

13. Discover the story of the Gulf War
Discover the story of the Gulf War.

14. Discover the story of the Gulf War
Discover the story of the Gulf War.

15. Discover the story of the Gulf War
Discover the story of the Gulf War.

16. Discover the story of the Gulf War
Discover the story of the Gulf War.

17. Discover the story of the Gulf War
Discover the story of the Gulf War.

18. Discover the story of the Gulf War
Discover the story of the Gulf War.

19. Discover the story of the Gulf War
Discover the story of the Gulf War.

20. Discover the story of the Gulf War
Discover the story of the Gulf War.

21. Discover the story of the Gulf War
Discover the story of the Gulf War.

22. Discover the story of the Gulf War
Discover the story of the Gulf War.

23. Discover the story of the Gulf War
Discover the story of the Gulf War.

24. Discover the story of the Gulf War
Discover the story of the Gulf War.

25. Discover the story of the Gulf War
Discover the story of the Gulf War.

VisitEngland.com

DISCOVER ENGLAND'S HISTORIC SPOTS

- **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

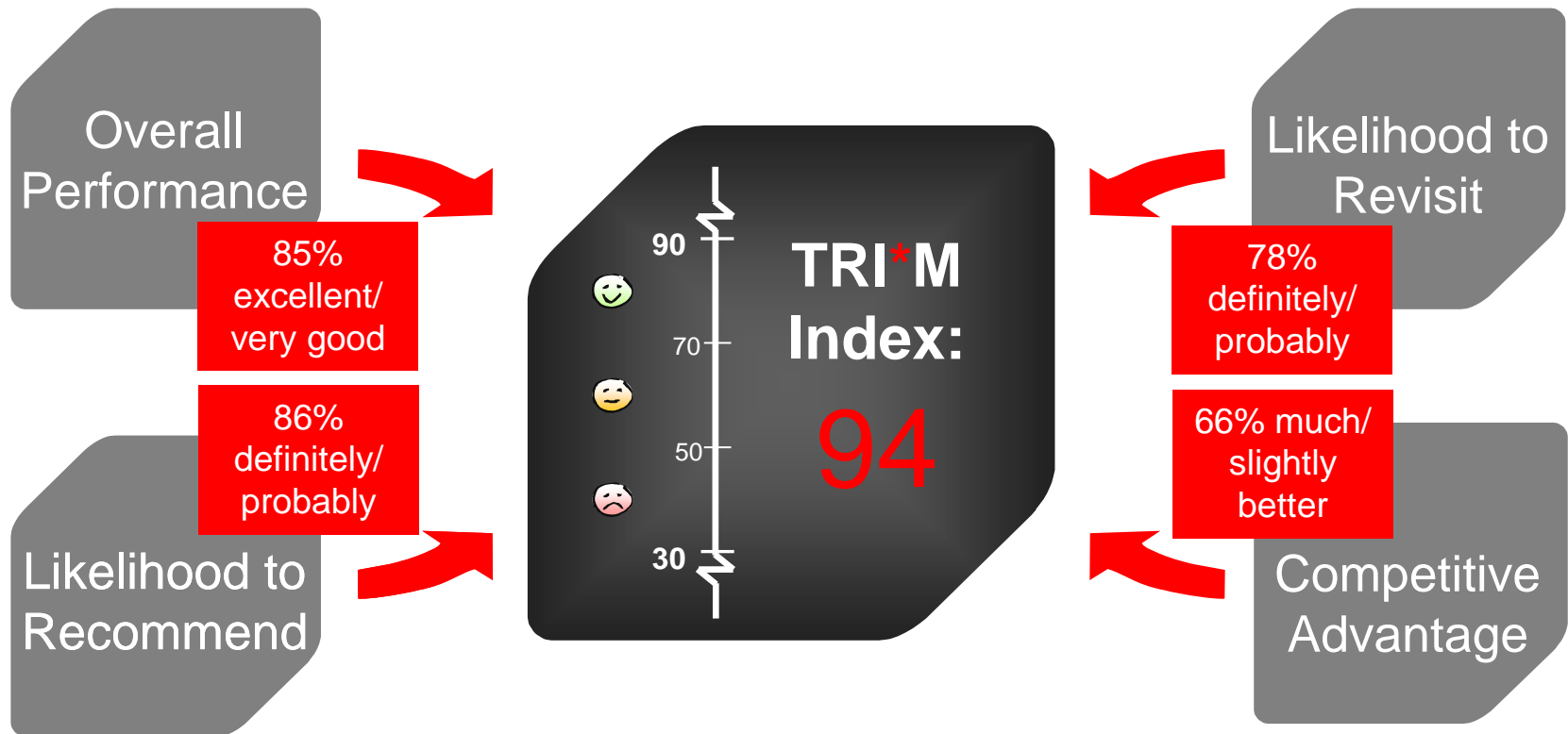
Hadrian's Wall Connect Project continued...

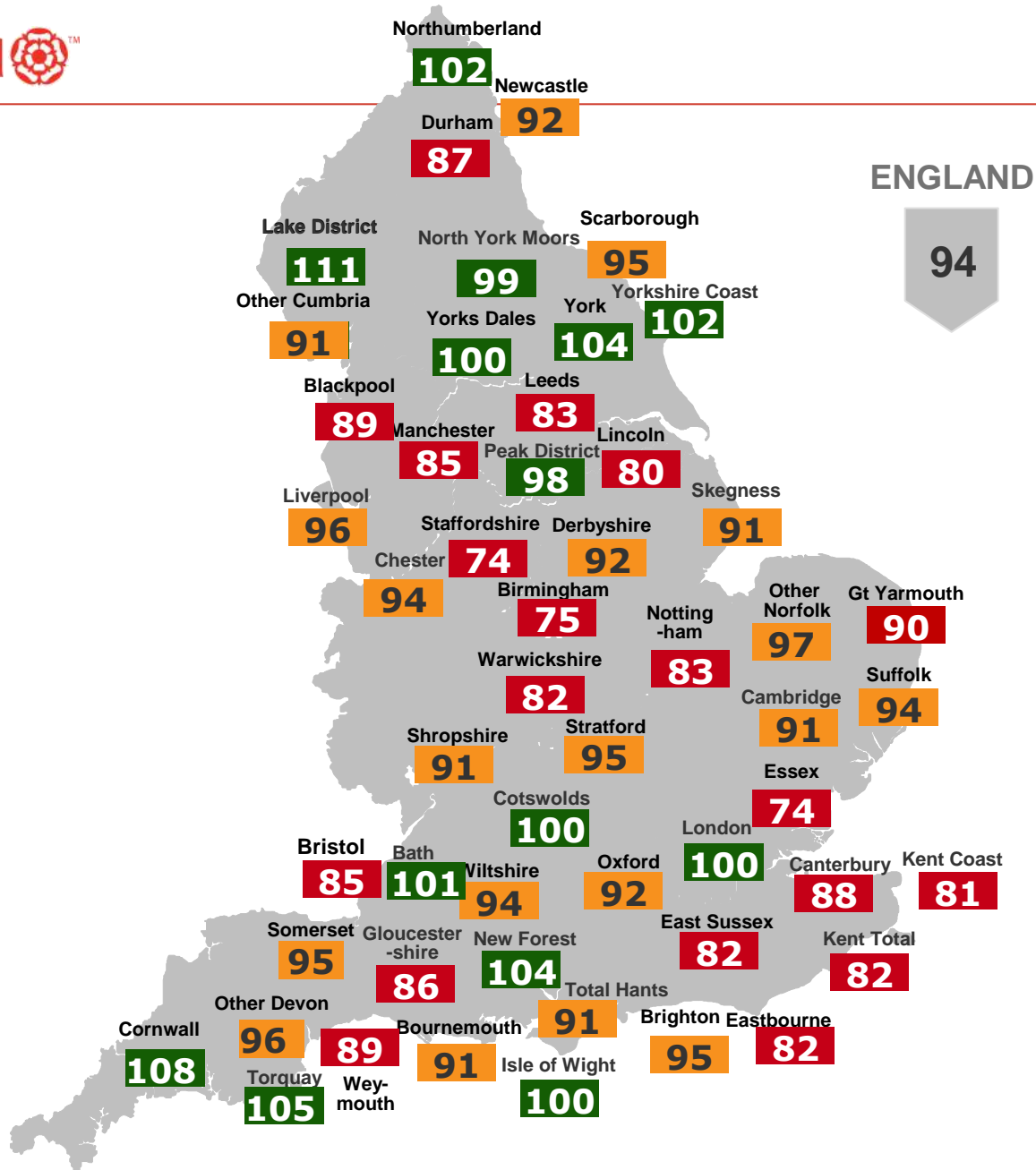
- Examples of activity are: improvements to visitor welcome and information at key transport hubs which connect to the WHS i.e. at Newcastle Central Station, improvements to and development of pre-booking information to help inform visitors about what activities and experiences can be had at the WHS, 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

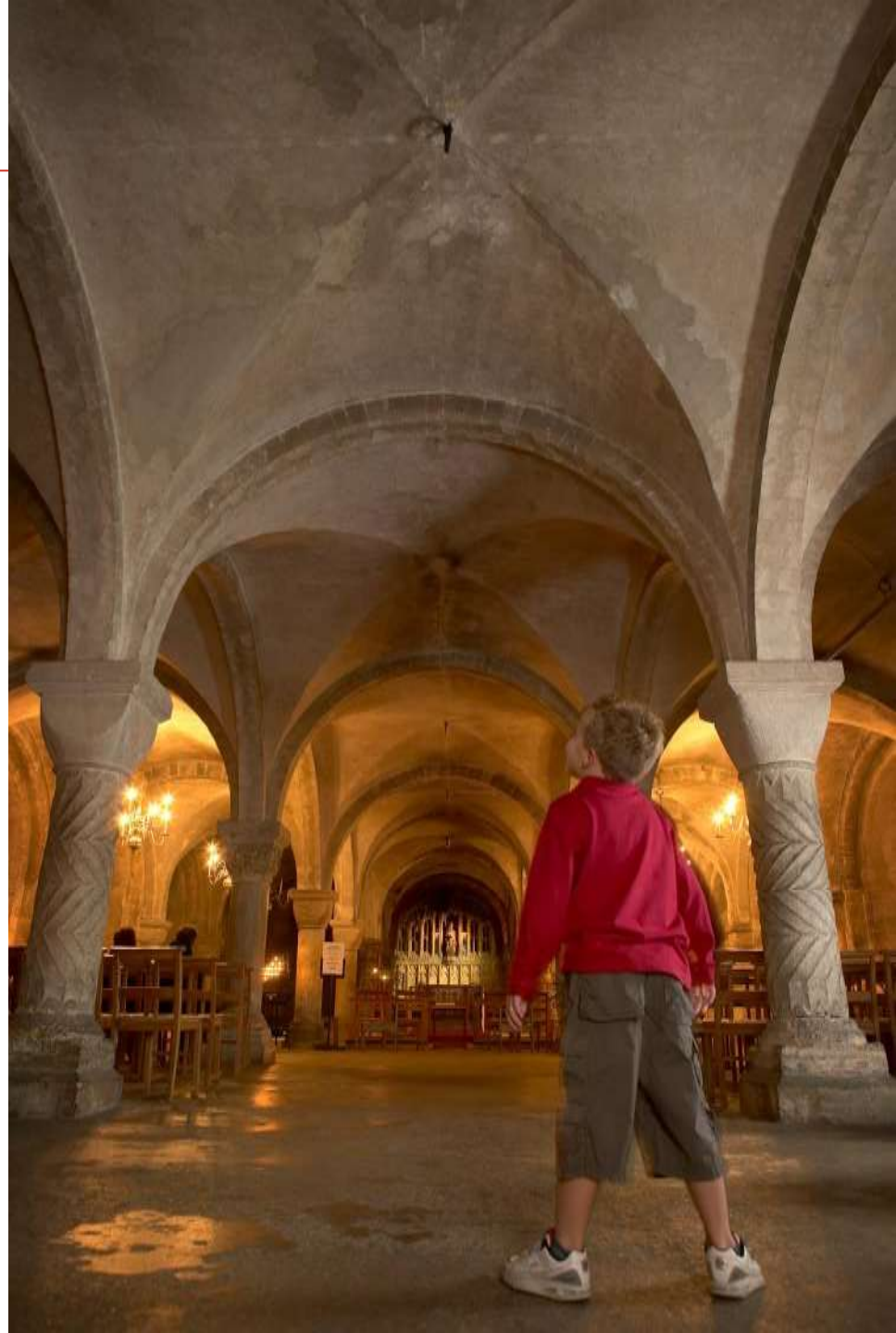
- Since 2006, there has been an increase of over 100% in the number of domestic trips booked online...
- ...mobile devices have changed how we use the internet...
- ...yet not all businesses have a website yet (and if they do, it's not always mobile enabled)
- Near universal internet penetration in the 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

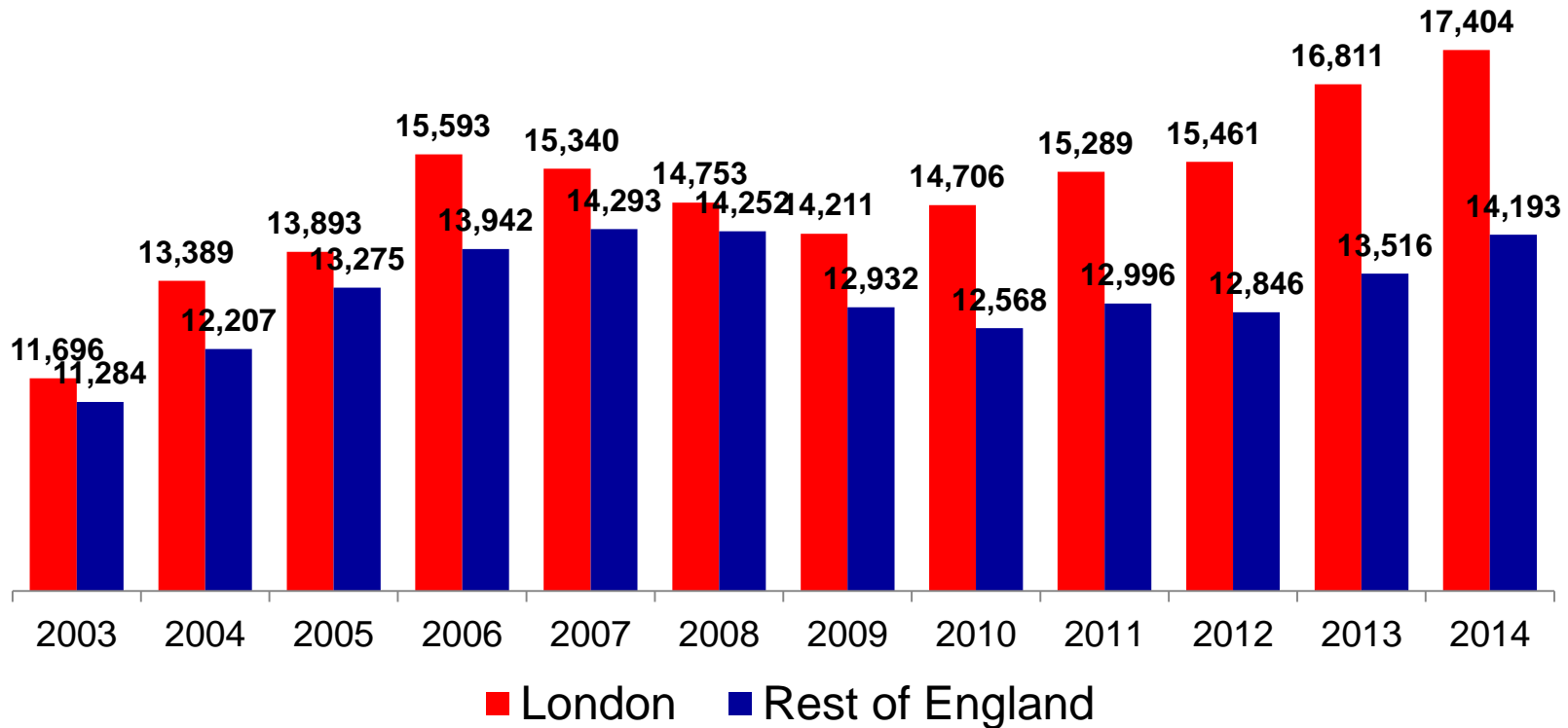
The way the wind is blowing

- 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

