

A photograph of four people (two men and two women) sitting on a wooden fence. They are dressed in casual, outdoor-appropriate clothing. The background shows a scenic view of a valley with rolling hills and a coastline in the distance. A large, bright pink triangle is overlaid on the bottom half of the image, containing the text.

Visit Isle of Wight
**VISITOR ECONOMY
CONFERENCE**

Key Note Address

Andrew Stokes OBE

England Director of Visit England



Rebuilding Visitor Spend and Supporting the Industry

Andrew Stokes, England Director - VisitEngland

Getty images; Freshwater Bay; Isle of Wight

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.



VisitBritain/Harriet Hadfield; Isle of Wight; England

How is Britain's tourism industry recovering?



Domestic Day Visits

Between July – Sept 2023:

- **Tourism Day Visits within England reached 272 million** in Q3 2023, on par with Q3 2022, with visits peaking at 102 million in August.
- Visitors **spent a total of £11.9bn** during the 3 months, up 10% vs Q3 2022 (with the largest value attributed to August). In real terms, visitor spending was up 3% vs Q3 2022.
- The **average spend per visit** was £44, up 10% vs the previous year, for visits within England.
- In Q3 2023, the **South East** received the highest volume of day visits (49 million), overtaking London (48 million)

Great British Day Visits Survey 2023



Domestic overnight visits

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



Brook Bay (Isle of Wight flickr)

Domestic Sentiment Tracker – Jan 2024



January 2024 (in comparison to December 2023):



Isle of Wight performance

- The Isle of Wight's visitor economy equates to **38% of the overall Island economy**.
- The Island welcomed almost **2 million visitors** in 2023 which was **9% less than pre-covid numbers in 2019**, so has not yet returned to pre-Covid levels.
- Visitors spent **£276.6 million** in 2023 which was **£1.2 million more than in 2019**.



Inbound Tourism Forecast 2024



2024 Inbound tourism forecast Overseas visits to the UK



Source: International Passenger Survey to 2020 and 2022; VisitBritain model and forecasts for 2021, 2023-24.
(m = millions)

2024 Inbound tourism forecast Spending by overseas visitors in the UK



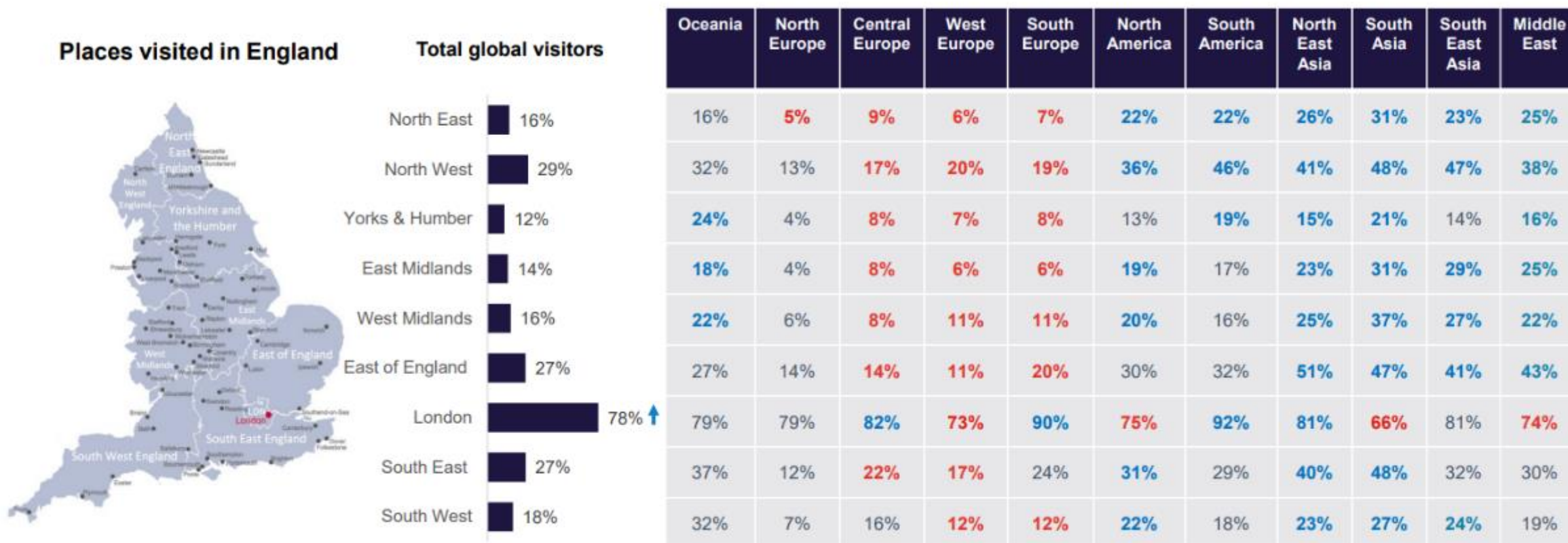
Source: International Passenger Survey to 2020 and 2022; VisitBritain model and forecasts for 2021, 2023-24.
All spending is in nominal terms (bn = billions)



#2024forecast

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



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, 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.



Developing innovative partnerships

VisitBritain and British Film Commission sign Memorandum of Understanding to boost screen tourism across the UK

Set-jetting is a booming trend in travel. Inbound tourists spent an estimated £892.6 million in film-related screen tourism in the UK in 2019 alone.

Putting the spotlight on film-and-TV-inspired experiences you can only have in Britain encourages more visitors to come and explore our amazing destinations for themselves, driving immediacy to visit and boosting tourism across the nations and regions, benefitting local economies.

'Starring GB' GREAT Campaign due to launch later in 2024.



The Guardian
Newspaper of the year

Seen the show? Now visit the location:
Britain embraces surge in 'set-jetter'
tourists

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



What the VisitEngland team is working on

England strategy

Development of England-wide visitor economy strategy in partnership with LVEPs

LVEP programme

Ongoing accreditation of LVEPs (26 to date) and LVEP support programme

DDP pilots

Programme sign-off, governance, best-practice sharing, amplification

Sustainability

Development of VisitEngland sustainability plan
Toolkit and training for LVEPs

Accessibility

New toolkits and training for LVEPs and Businesses
New approach to Accessibility Guides

England brand

Development of a destination brand for England

What the VisitEngland team is working on

Business support

Paid marketing campaign
Updated Business Advice Hub on new industry website

Training

England Academy, LVEP training, TETTW
Wine tourism training for vineyards

Quality

Modernising approach to accommodation quality
in consultation with industry (go live end of Jan 2024)

Awards for Excellence

VEAE event w/c 3 June 2024
Local competitions for 24/25 opening Feb 2024

English Tourism Week

15-24 March 2024
Tourism Superstar, MP engagement, comms toolkit

Social Tourism

England for Everyone - providing breaks for families in need

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


Department for
Digital, Culture,
Media & Sport

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

Nick de Bois

August 2021

An LVEP for the Isle of Wight!

Visit Isle of Wight LVEP:

- In September, Visit Isle of Wight was announced as one of the Local Visitor Economy Partnerships
- Engaging with businesses across the Island
- The opportunity to develop a coordinated and strategic approach to the development of the visitor economy across the Island.
- Supported by VisitEngland Regional Lead

Achievements:

- Isle of Wight Ramblers shortlisted for Tourism Superstar!
- Best Group Destination (Group Leisure & Travel) and Event of the Year - IoW Walking Festival (Beautiful South Awards)
- One of only 7 UNESCO Biosphere reserves in the UK

**Local Visitor
Economy
Partnership**

Recognised by



VisitEngland

So what does this mean?

National strategic engagement:

- A clear **strategic link** for the region from the local to the national level (Government, VisitBritain/VisitEngland, other key national bodies)
- Access via the LVEP to **national initiatives**, and a clear port of call via the LVEP as the delivery partner for visitor economy

Destination and business development:

- Specialist support to help LVEPs and businesses become more **sustainable** and **accessible**.
- Access to a new **training and development** platforms for businesses and LVEP team members.

National portfolio of strategic LVEPs:

- Opportunities to collaborate with, and learn from, other destinations, businesses and organisations across the local and national visitor economy

