

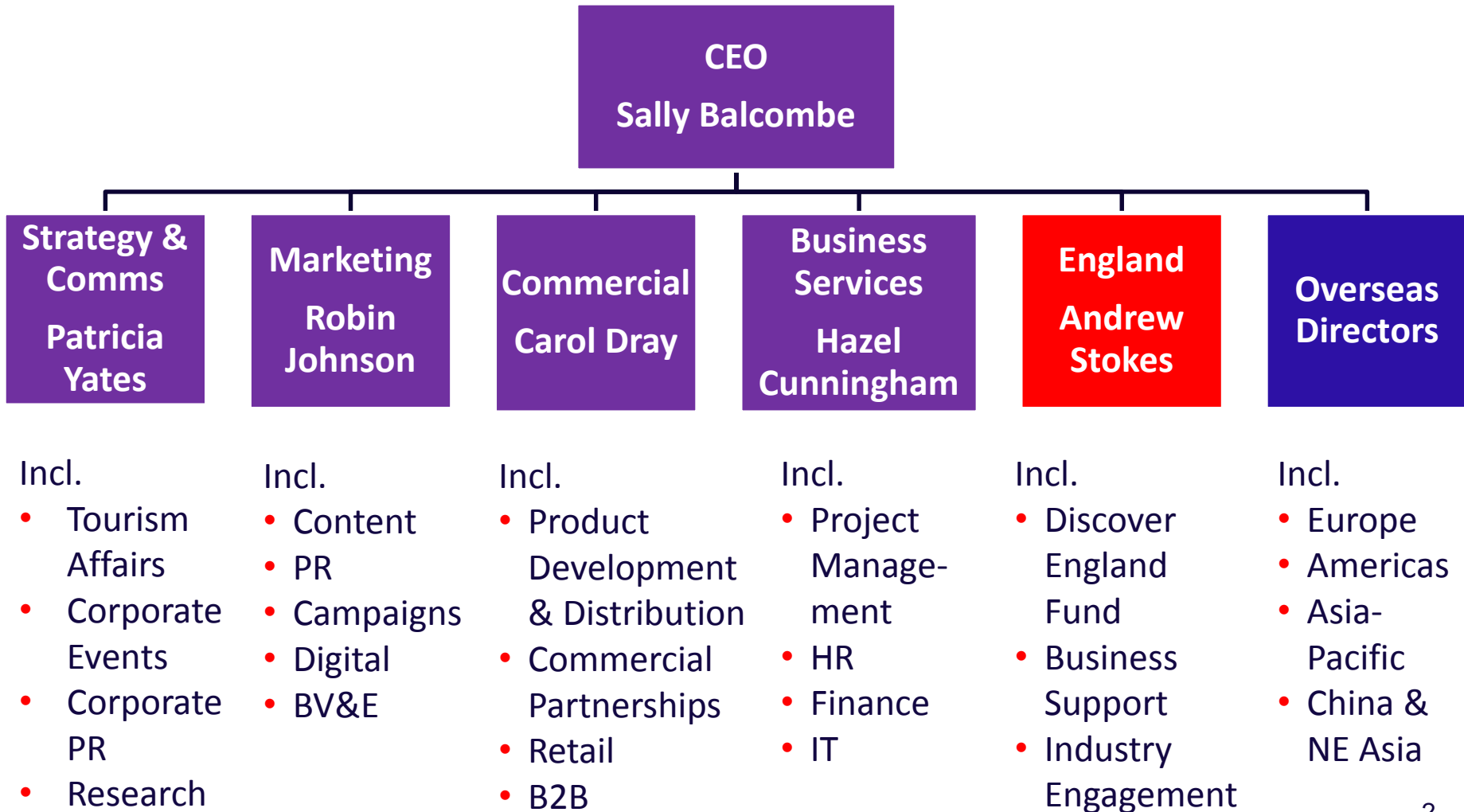


# VisitBritain/Visit England Update

**Andrew Stokes, England Director**

10<sup>th</sup> November 2016

# VisitBritain/VisitEngland structure



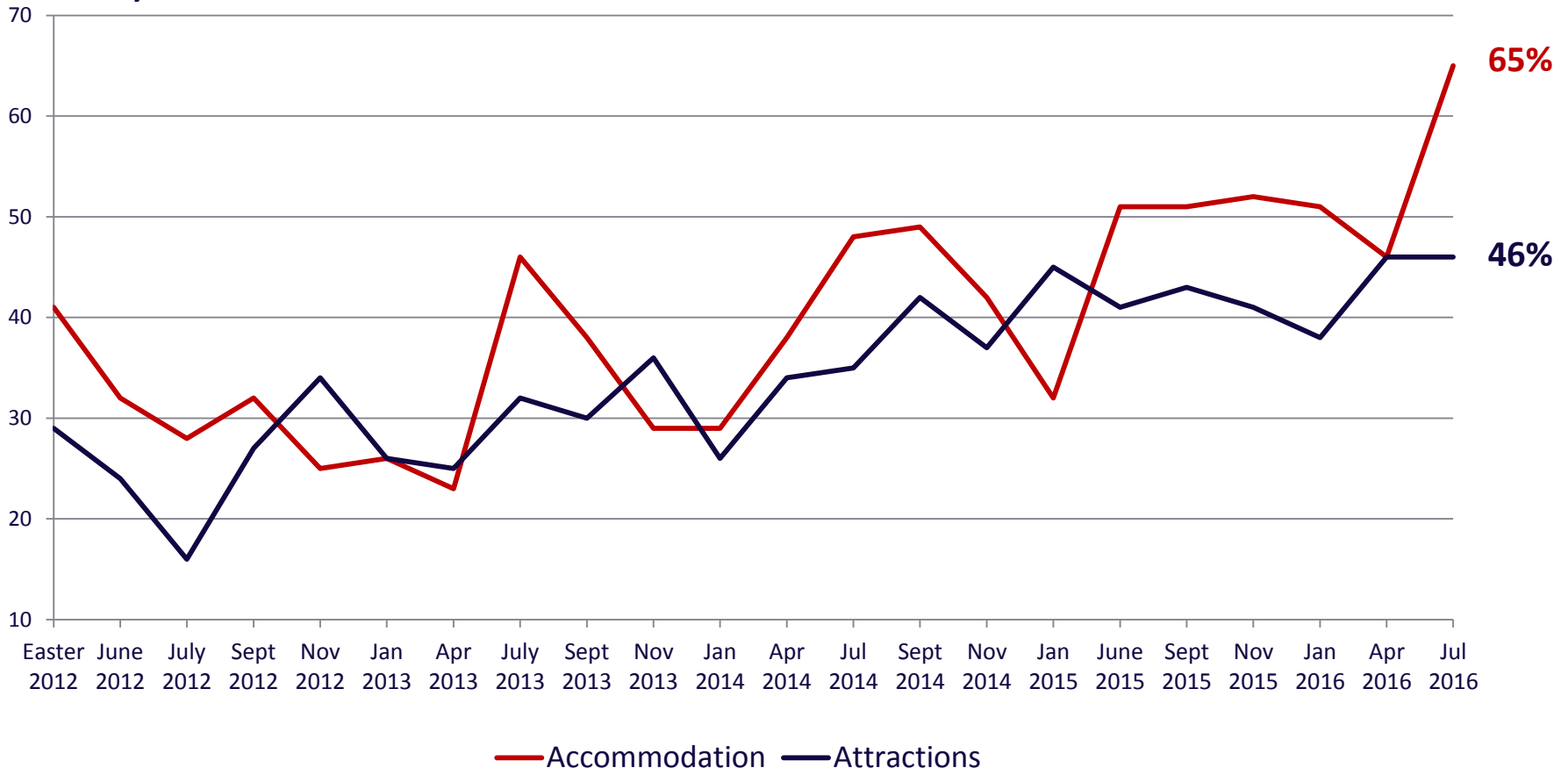
# Domestic tourism since the referendum

The story of the year?

# Staycation boom in Brexit Britain

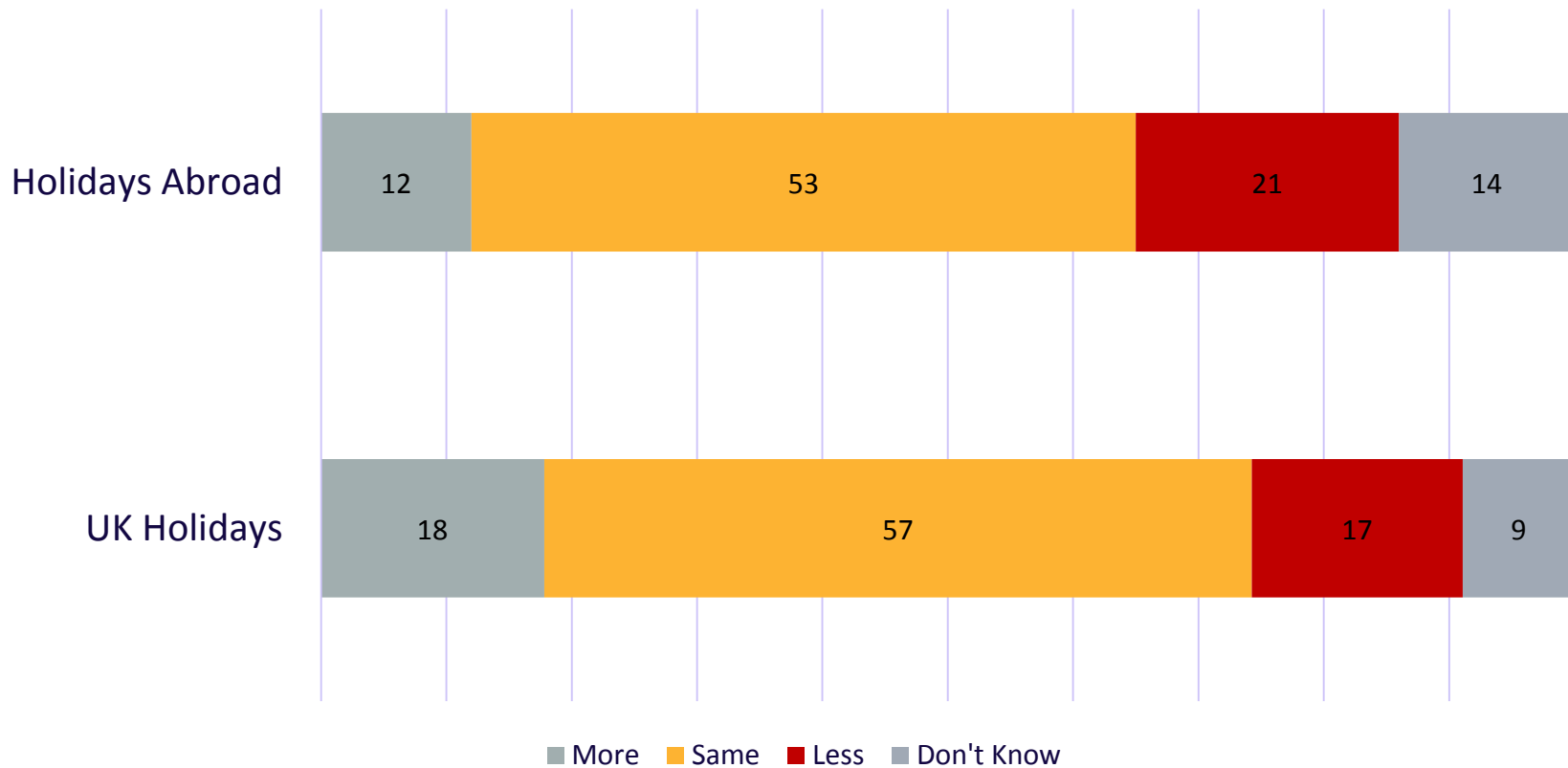
# Tourism business confidence is at a historically high level

**Tourism Business Confidence Next 2-3 Months**  
% "Very Confident"



# Business optimism mirrored in consumer expectations for 2016 of (slightly) more UK but fewer overseas holidays

Expectations of Holidays in 2016 compared to 2015

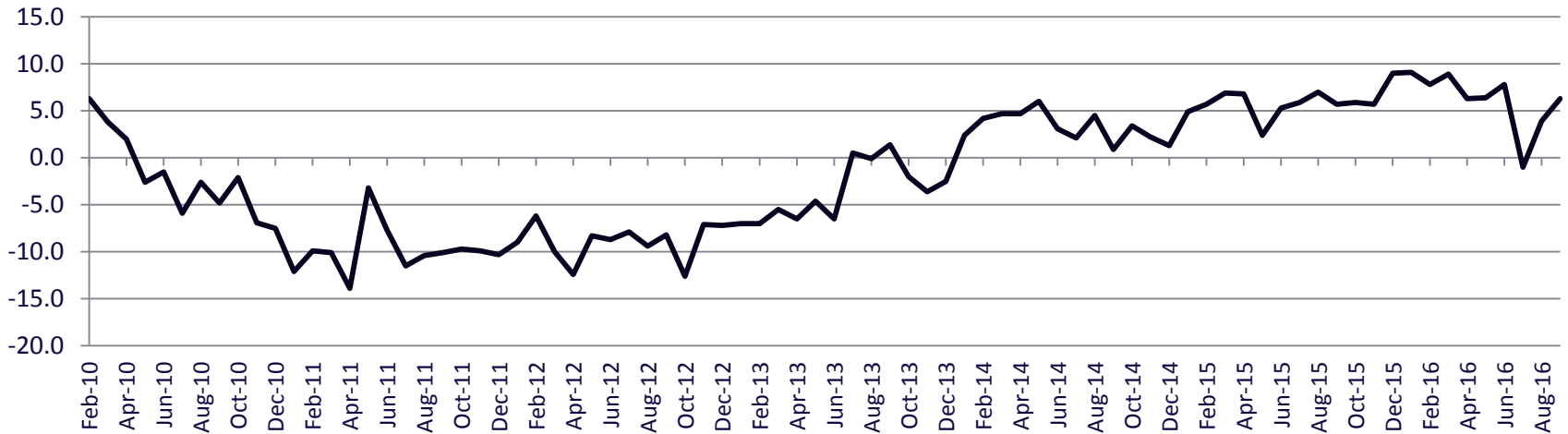


## There are many drivers of increased domestic trip taking – not just the exchange rate

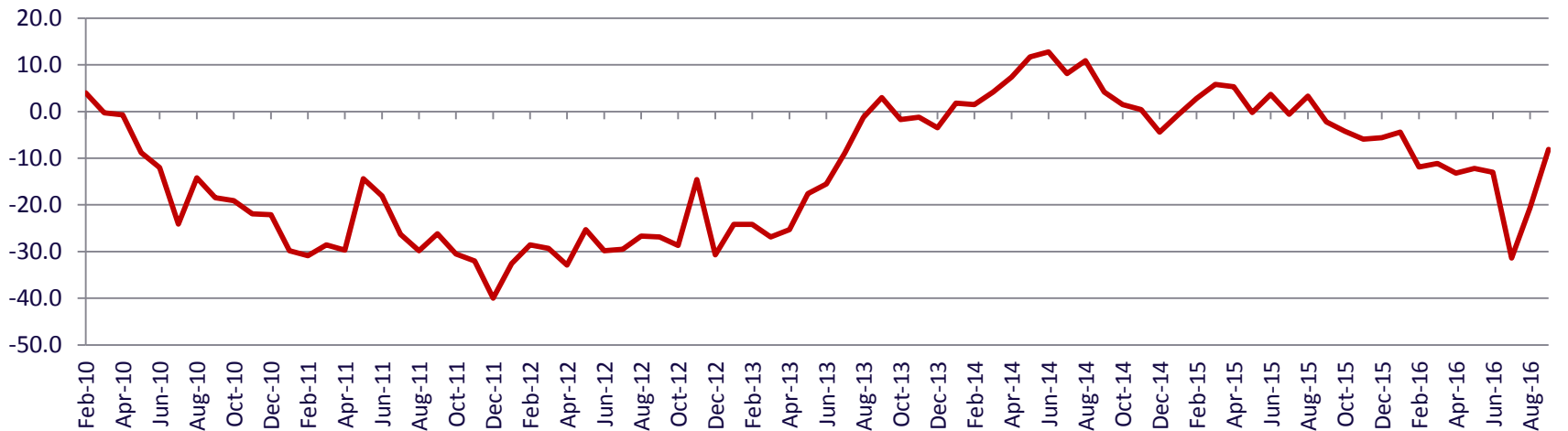
Reasons for Changing Behaviour in 2016	Will Take More UK Breaks (18%)
Just like taking holidays / breaks in UK	40%
Easier / more convenient to travel in UK	36%
<b>ANY Just Like OR More convenient</b>	<b>58%</b>
Holidays / breaks abroad generally too expensive	21%
<b>Drop in exchange rates following referendum</b>	<b>14%</b>
<b>ANY expense / exchange rates</b>	<b>32%</b>
Concerns about safety / security / terrorism	21%
Different special events this year e.g weddings	21%
UK weather better this year	18%
I feel financially better off this year	16%
Other change in personal circumstances	16%
No real reason – just happened that way	9%

# A watch out: future leisure spending will be influenced by consumer confidence

Personal Financial Situation – next 12 Months



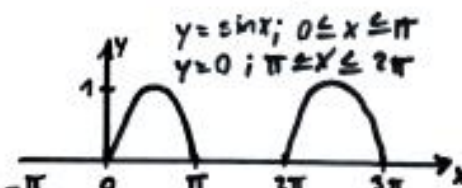
General Economic Situation – Next 12 Months





The signs are that 2016 has been a good year for domestic tourism...

The signs are that 2016 has been a good year for domestic tourism...

$\sqrt{t} e^{-at} \rightarrow \frac{\Gamma'}{2} (a^2 + \omega^2)^{-3/2} \cos\left(\frac{3}{2} \arctan\left(\frac{\omega}{a}\right)\right)$   
 $t^{\nu-1} e^{-at} \rightarrow \Gamma'(\nu) (a^2 + \omega^2)^{-\nu/2} \cos\left(\nu \arctan\left(\frac{\omega}{a}\right)\right)$   
 $\int_0^1 (1 + 2x \cos a + x^2)^{-1} dx = \frac{a}{2 \sin a} \quad (0 < a < \frac{\pi}{2})$   
 $\int_0^1 x^\alpha (1-x)^\beta dx = 2 \int_0^1 x^{2\alpha+1} (1-x^2)^\beta dx = \frac{\Gamma(\alpha+1) \Gamma(\beta+1)}{\Gamma(\alpha+\beta+2)} = B(\alpha+1, \beta+1)$   
 $B(x,y) = \frac{\Gamma(x) \Gamma(y)}{\Gamma(x+y)} \quad \int \frac{dx}{y \sqrt{x}} = \begin{cases} \frac{2}{\sqrt{\Delta f}} \arctan \frac{\sqrt{x}}{\sqrt{\Delta f}} & ; \Delta f < 0 \\ \frac{1}{\sqrt{\Delta f}} \ln \frac{\sqrt{x} + \sqrt{\Delta f}}{\sqrt{x} - \sqrt{\Delta f}} & ; \Delta f > 0 \end{cases}$   
  
 $y = \frac{1}{\pi} + \frac{1}{2} \sin x - \frac{2}{\pi} \left( \frac{\cos 2x}{1 \cdot 3} + \frac{\cos 4x}{3 \cdot 5} + \frac{\cos 6x}{5 \cdot 7} + \frac{\cos 8x}{7 \cdot 9} + \frac{\cos 10x}{9 \cdot 11} + \frac{\cos 12x}{11 \cdot 13} \right)$   
 $\int_a^b f(x) dx = F(x) \Big|_a^b = F(b) - F(a); \quad F(x) = \int f(x) dx + C; \quad F'(x) = f(x)$   
 $\int_0^{2\pi} \sin x dx = -\cos x \Big|_0^{2\pi} = -\cos 2\pi - (-\cos 0) = -1 + 1 = 0$

...but the drivers of consumer behaviour are a little more complex than the headlines suggest

# Inbound headlines

## International visitors topline year to date (Jan-Aug 2016)

	Q1 (Jan-Mar)	Q2 (Apr-Jun)	July	August	Year to date (Jan – Aug)
	% change vs. 2015	% change vs. 2015	% change vs. July 2015	% change vs. August 2015	% change vs. Jan – Aug 2015
<b>ALL VISITS (000)</b>	8%	0%	2%	2%	3%
<b>Spend (£ million)</b>	-2%	-1%	4%	4%	0%

Source: International Passenger Survey, August provisional data

- Visits: increase in Q1, flat in Q2; growth in July and August
- Spending: a shift in the post-referendum months; spend per visit now increasing
- Forward Keys flight booking data: next 3 months looking positive with the Nov 2016 – Jan 2017 period up 4%, longer term up 4% for the next 6 months (Nov 2016 – Apr 2017)
- Particularly long-haul bookings from China and the US looking very positive for the upcoming Christmas period



# The Discover England Fund

## Fund Objectives

- To grow tourism in the regions of England
- To increase the competitiveness of England's tourism offer, domestically and internationally
- To develop world-class bookable tourism products in line with market trends and in response to consumer demands



## High-level criteria

- Collaborative – demonstrate that each bid has the support of a group of public/private partners, DMOs and LEPs
- Integrated transport solutions are key
  - pricing / passes
  - local solutions e.g. linking attractions
  - technology
- Match-funded
- Demonstrate how products meet customer needs
  - bookable
  - tangible
- Demonstrate international and domestic tourism benefits

# Funding profile





## Round 1 – Successful Projects

- 21 projects announced
- Total value – circa £4m
- Impact of bids will be felt across all regions
- A number of projects have national coverage:
  - Golf Tourism England – Golf Tourism England
  - Incentive England – Leopold Marketing
  - Brit Xplorer – National Express
  - Britrail England Pass – ATOC
  - Britain Fix-(ED) – STA Travel
  - Town and Country – Superbreak



## Gardens and Gourmet

- Collaborative project between Marketing Peak District and Derbyshire with Visit Kent, Marketing Cheshire, Visit Essex and Visit Hertfordshire showcasing each area's outstanding gardens and first class culinary offer.
- Focus on Belgium, France, Germany, The Netherlands and the USA, as well as potential staying visitors from the UK
- Aim: to create bookable packages for international tourists incl. insider tips, local recommendations and interactive media
- Marketing Peak District and Derbyshire will develop its own cluster of gardens and gourmet experiences, incl. attractions, places to stay and eat and personal recommendations

## Manchester international gateway project

- The Marketing Manchester-led project will deliver a set of leisure excursions and business extender trips for international visitors flying into Manchester.
- This includes a programme of excursions to visit well-known locations such as the Peak District, Chester, The Lake District or Liverpool
- It will also create programmes for conference organisers to encourage their delegates to extend their stay, take an excursion and travel beyond the city.
- The Peak District is also part of Manchester's campaign with VB in China (not part of the Discover England fund)

# Round 2 Opportunities

## Option 1: 2 year large-scale collaborative projects

- The major bulk of investment in Years 2-3 (£13m) will support a limited number of 2 year projects
- Minimum value of £1m
- 40% match funded – 20% cash and 20% in-kind
- They will deliver the required step-change in English bookable tourism product and joined-up collaborative delivery
- NOW CLOSED FOR EOIs



## Round 2 Opportunities

### Option 2: 1 year projects & pilots

£2m is available in Year 2 to support:



- A limited number of new 1 year projects of up to £250k that test and trial approaches to product development, build knowledge and generate good practice to share widely across the tourism industry
- Continuation funds of up to £250k for a limited number of Round 1 projects where early successes can be demonstrated
- Further details on when and how to apply available in early 2017.

## Timetable for Round 2, option 1

<b>By 28<sup>th</sup> October 2016</b>	<b>Logging of Expression of Interest (EOI)</b>
<b>During November 2016</b>	Telephone calls to determine whether to take EOI forward to full application
<b>End of February 2017</b>	Deadline for Full Application Form
<b>May 2017</b>	Applicants notified of Awards Panel's decision
<b>May – June 2017</b>	Grant offer process and project set-up
<b>July 2017 – March 2019</b>	Project delivery (dependent on the set-up process above)



# English Tourism Week 2017

## English Tourism Week: 25 March – 2 April 2017

- A week-long celebration of events showcasing the quality and vibrancy of the visitor experiences and the value our industry brings to our nation
- Become part of a national campaign and promote your business
- Get involved by holding events or offers – they don't have to be big or costly! You may already be doing something at your attraction which you could “badge” English Tourism Week
- Download the ETW toolkit which is packed full of artwork for logos, posters, web banners and ideas on how to get involved
- It's never too early to start planning how to get involved
- Look out for details on [www.englishtourismweek.org](http://www.englishtourismweek.org)



## Please support your DMO!

We rely on Marketing Peak District and Derbyshire 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





VisitBritain®



VisitEngland™

**For further information:**

[www.discoverenglandfund.org](http://www.discoverenglandfund.org)

[www.english tourismweek.org](http://www.english tourismweek.org)

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