



England: A Strategic Framework for Tourism 2010-2020

Economic Contributions

Tourism to England can help drive economic recovery.

The visitor economy is worth £97bn supporting in excess of 2 million jobs and is one of the main growth sectors capable of creating NEW employment in the UK.

This new Strategic Framework for English Tourism aims to make the sector more effective so that the industry can reach its full potential **and grow by 5%* per year, creating an additional 225,000 jobs by 2020 and increasing spend to £50billion.**

England represents 84% of the total UK tourist value. As the country eases out of recession tourism will be one of the few industries to make a positive contribution to the economy quickly. Tourism is an industry which offers potential for growth – it can't be off-shored – it can only happen HERE.

Tourism is a major foreign exchange earner and tax contributor. **Last year overseas tourists paid approximately £3.5billion to the UK Exchequer – the equivalent to the wage bill of 140,000 nurses.** The industry supports over a hundred thousand businesses from the local butcher to the multi-national hotel chain.

A 5% increase in domestic tourism has the potential to deliver a further £3.8bn into the economy.

Delivery

The Strategic Framework will maximise tourism contribution to the economy, employment and quality of life in England.

5% growth is based on following key drivers for tourism in England as outlined in the recent Deloitte Report 2010.

- Continuing trend for an increase in GDP & consumer expenditure
- Anticipation of favourable exchange rates
- Renewed interest and improved perception of England as a tourist destination
- Predicted investment in the tourism infrastructure in the lead up and post London 2012 Olympic & Paralympic Games
- Anticipation of continuation of the popularity of the Staycation.

The Framework will deliver on these key drivers via the creation of a detailed Action Plan that focuses on quality, targeted marketing, sustainability, accessibility, regeneration and maximizing the major

opportunities such as London 2012 Olympic & Paralympic Games and the forthcoming 'Decade of Sport'.

Regional Tourism Framework Agreements have been put in place to outline priorities that are relevant to the Framework. These agreements will be signed by the Regional Development Agencies – highlighting better co-ordination, joined up working and a commitment to tourism in England from the entire sector.

(Source: 2010 Deloitte Report: The Economic Contribution of the Visitor Economy UK & The Nations)

* 5% equals 3% real growth in terms of visitor spend plus 2% inflation - calculated using an average prediction over 10 years

Spokespeople available for interviews are:

- James Berresford, VisitEngland Chief Executive
- Lady Cobham, VisitEngland Chairman

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Quality

VisitEngland modernises quality schemes

As a result of the findings of recent research commissioned by the country's national tourist boards, VisitEngland announces plans to modernise the existing quality star rated schemes. In response to overwhelming demand from both the industry and the consumer, **VisitEngland will combine the best of the existing star rating schemes with the best of user review generated content** to provide the visitor with a better and more comprehensive picture of what's on offer.

80% of the industry thought that user generated reviews, should be included alongside the star ratings on Tourist Board websites and **75%** of the industry believed that star ratings improved their business. While **40%** of consumers said they were sceptical of user generated reviews, just over half said they always looked at them and **76%** said they sometimes or always used star ratings.

Star ratings are widely used and trusted. They help consumers to refine their search process. The **Common Standards Review** surveyed both the industry and consumers with particular reference to the increase in popularity of user generated reviews. The results clearly indicate that consumers are exposed and open to a wide range of reviews and ratings and will use a combination to make an informed choice.

VisitEngland will also launch a number of new **minimum standards** to further instil a higher standard of quality at an entry level for those businesses who are not already part of the ratings scheme. This process will also enable high-end niche brands to be showcased thus widening the spectrum of choice for the visitor.

Notes

The Common Standards Review was conducted on behalf of VisitEngland, VisitScotland, VisitWales and surveyed both the industry and consumers. The study was carried out using a self-complete with all members of either the VisitEngland or AA grading schemes for serviced accommodation invited to participate. Fieldwork was conducted from 20th July – 12th August 2009. The industry findings are based on over 2000 respondents from serviced accommodation. This consumer part of the survey was based on respondents from the UK, Germany and France.

Sustainability

Sustainability means making things last through the balanced and wise use of resources. The nature of the sector is such that it brings positive economic benefit to communities and industry along with the potential for negative social and environmental impacts whilst providing for the needs for visitors. In order for tourism in England to reach its potential we must protect our assets so that we can maintain the product in a pristine condition for time to come. As such the Strategic Framework includes the first **Sustainable Action Plan for England**.

Green Start

VisitEngland will announce, at the Best of Britain & Ireland Show at London's Olympia on the 18 March, the creation of an online tool kit designed to help businesses – primarily SMEs, become more sustainable. **Green Start** is a one-stop-shop 'how-to' resource that allows businesses to assess and review how sustainable they currently are. The programme provides guidance from trusted experts in their field and practical advice on how to improve the sustainability of their business. This invaluable online resource will help tourism businesses to reduce their impacts on the environment and community in which they are located and improve profitability by doing so.

The site also contains case-studies which highlight businesses that have successfully incorporated sustainable practises to the benefit of their bottom-line and the local community. The sharing of best practise is a key part of establishing a strong on-line community of organisations with an interest in the delivery and management of sustainable tourism.

Green Start is another excellent example of the industry working together for the greater good. This project is reliant on strong partnerships between the International Tourism Partnership (ITP), The Centre for Environmental Studies in the hospitality industry (CESHI) and the DMOs.

Green Start will go live in April 2010 and will also be available on DVD from VisitEngland.

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Skills

Enhancing skills and preparing an unforgettable welcome to England during the London 2012 Olympic & Paralympic Games

VisitEngland is pleased to announce that People 1st, the sector skills council for the travel, tourism, hospitality and leisure industry, is working with Tourism British Columbia to develop the training programme used successfully at the Vancouver Winter Olympic games for the English tourism industry.

The original programme has been a key part of Vancouver's tourism industry training for the last 15 years, helping Canada to become one of the Top 3 countries in the world ranked as among the best for its visitor welcome. It is internationally recognised as being one of the most advanced short customer service / welcome course training programmes, regularly used to support world class events, and complements the National Skills Academy for Hospitality's recently launched customer service training.

It is anticipated that the new and adapted programme will be launched in the autumn.

VisitEngland and People 1st are committed to working with the existing Welcome to Excellence training network, and other delivery providers in education, to deliver world class customer service training in the numbers needed to make a significant impact on the industry, and are in discussions as to the planned roll-out of the programme.

On returning from the Winter Olympic Games in Vancouver, Lord Coe identified four key areas - labelled the four Ss - which he believes led to the success of the Games - **Stadia, Service, Sport and Sites**. With service being such a key success factor, VisitEngland and People 1st will work together to improve customer service throughout the tourism industry leading up to a successful Olympic and Paralympic Games in 2012.

Global Greeters

The Global Greeter programme originated in New York City with the Big Apple Greeters and has grown to create an international network of local residents sharing their knowledge and passion for their home town with visitors.

Where the scheme is already in existence (ie Kent and soon in the South West), visitors may book a Greeter via the local tourist information centre or online and they will be matched with someone with similar interests. The Greeter can then meet the visitors at the port of entry, or take the visitor along to a place of interest, or simply have coffee to give advice and insights into the area.

VisitKent, which set up the first UK Greeter network, has seen such a positive response from visitors that it is currently recruiting more Greeters. The South West Regional Development Agency has embraced the Global Greeter scheme and is working with VisitKent to pilot 2 Greeter programmes. In Dorset the Greeters will form part of the 2012 Games Sailing Event welcome initiative while a team of Greeters will welcome Paralympic Team GB and other teams using the University of Bath Pre Games Training Camp.

This scheme is now gathering momentum with many more destinations across England expressing an interest to set up the scheme under the Welcome to England element of the England Strategic Framework.

With 2011 being the Year of Volunteering and the Games bringing a national focus on volunteers, **by 2012 a number of Greeter networks across England will be set up to provide visitors with a charming welcome and personal insights into destinations across England.**

Spokespeople available for interviews are:

- James Berresford, VisitEngland Chief Executive
- Lady Cobham, VisitEngland Chairman
- Brian Wisdom, People 1ST Chief Executive
- Julia Stuckey, South West Regional Development Agency
- Kerstin Beeching, VisitKent

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Why should Westminster care?

Tourism suffers from a lack of visibility and understanding at various levels of Government resulting in a legislative framework that is unhelpful to its development. The economic and social benefits of tourism far outweigh many other industries in England and yet it remains too far down the government's agenda.

Every constituency is affected by tourism – therefore every MP has a vested interest to ensure that tourism issues are top priority – whether it's improving transport, accessibility or tax benefits for start-up businesses.

Tourism is unique in that by supporting the domestic market, it attracts direct revenue into the Exchequer that cannot be outsourced. Local authorities are also key to this process in helping to improve the visitor experience in terms of modernising information provision and quality schemes.

Issues such as VAT, visa requirements, transport network all affect the perception of England. The 'Take Tourism Seriously' campaign needs to gather momentum to educate government on the many wide reaching benefits of tourism on the UK economy.

To date there has been some very encouraging signs that tourism is starting to see the commitment it deserves. There is an active All Party Parliamentary Tourism Group and enthusiastic party leads for the brief. VisitEngland enjoys a productive relationship with all interested groups and looks forward to continuing to do so.

Local Delivery

The England Strategy identifies the need for the highest standards of destination development in England if it is to remain competitive, and destination management planning will be at its most effective when the cultural and tourism sectors work closely together - **initiatives like Total Place provide the platform to take a 'whole area' approach to delivery and development at destination level. This type of approach, connected to a joined up tourism strategy, will provide more opportunity for us to work closely with MLA, Arts Council, English Heritage, Sport England and Commission for Architecture and the Built Environment. Connecting critical initiatives from the culture, tourism and sport sectors provides a win-win situation – creating compelling destinations and excellent experiences for visitors and residents alike**

Regional Tourism Framework Agreements have been put in place to outline priorities that are relevant to the strategy, sets out baseline deliverables for the region, areas of added value and specific

areas where the region will lead. These agreements will be signed by the Regional Development Agencies – highlighting better co-ordination, joined up working and a commitment to tourism in England from the entire sector.

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The Staycation is here to stay

VisitEngland has recently completed the latest stage of **Staycation Research** into consumer attitudes to the economy and the sustainability of the staycation trend.

Almost half of those questioned said that even beyond 2010, they expected to take more holidays in the UK than they “normally” used to, suggesting that the shift to domestic breaks certainly has the potential to become a longer term trend, even when there are fewer financial constraints to overseas travel.

Research agency BDRC has published results from its “Project Mars” Recession Spend Tracker. This too reports increased interest in domestic holidays, with **31% feeling that the UK is becoming more appealing as a destination, compared to 25% in 2009** and just 19% in the pre-downturn days of 2008.

14% of holidays taken last year in England replaced one that would have normally been taken abroad (the proportion was higher for longer breaks, beach holidays, and camping & caravanning holidays). Over 60% cited the economy/their own financial situation as a reason for this, and a further 31% mentioned the exchange rate.

Cost may have been the primary motivation, but the research suggests that the majority did not feel that they had sacrificed the quality of their holiday – **77% said that their holiday experience was as good as, or better than the overseas break it replaced.**

Inspiring Brits to holiday in England

Everyone in full time employment is entitled to 20 days holiday a year, 8 bank holidays and 104 weekend days that could all be defined as holidays!

Recent research conducted on behalf of British Tourism Week (15-21 March) revealed that **Brits in paid employment failed to take up to 7 days annual leave each year** with 40% of respondents saying they ‘had too much to do at work’ and 31% simply ‘not getting around to it’. By taking a three-day domestic holiday break rather than forgoing so much annual leave the British economy could benefit from an additional £5.1 billion worth of spending each year.

VisitEngland will launch the Enjoy Every Minute campaign on national TV on April 2. The advertising campaign aims to inspire Brits to make the most of their free time whether it be a couple of hours, a day trip or a long weekend or week’s holiday. It will feature hundreds of ideas to motivate the British public to discover their own back yard and enjoy all the fantastic towns, gardens, cities, heritage, coastline, festivals and events that England has to offer - whether its families, couples, groups or solo

travellers. The advertising campaign is a partnership worth £3million with the National Trust as a key contributor.

VisitEngland has also teamed up with The Guardian and The Telegraph to launch special England supplements again providing readers with inspiration and practical advice about how to get the best out of England.

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Improving transport for the visitor

Over 70% of all long journeys made in this country are made by tourists. The substantial increase in tourism trips envisaged over the next 10 years (63%), together with very heavy dependence that the domestic tourism industry has on private transport, means **there needs to be a strategy for ensuring that England's transport policies and infrastructure take account of tourism demand.**

Despite UK residents currently taking a staggering 1bn trips per annum in England, it would be unwise to presume that transport policy makers will automatically take account of the needs of tourism in the development and implementation of transport strategies over the next 10 years.

The Strategic Framework for Tourism in England strongly encourages the improvement of access to tourism destinations while reducing the pollution and congestion associated with tourism travel.

Tourists require more support regarding the transport system than local commuters, meaning that they have not undertaken that particular journey previously or, if they have, routes, timetables and facilities may have changed since their last journey. We must as a priority provide incentives and additional information so tourists are able to make the best use of our excellent public transport system, so they can travel with greater ease and enjoyment and use the system to travel more widely and with greater confidence.

Transport sector & Tourism working hand in hand

As a first stage of the Tourism & Transport Action Plan, VisitEngland is delighted to announce working with First Group on a groundbreaking project to support integrated travel for tourists visiting the South West. Tourists visiting destinations on the First Great Western network who buy a return train ticket to Bristol Parkway or Bristol Temple Meads will be entitled to free travel from the train station to anywhere in Bristol and back again. Bristol will be the first city to take part in this exciting project which will begin 1 April 2010. The project will incentivise tourists to make the best use out of the public transport system so they can more easily explore the beautiful countryside at no extra expense – making their hard earned holiday spending money go further.

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Harnessing new technology in order to modernise Visitor Information for the future of English Tourism

Information is power! Last year 24million people visited a Tourist Information Centre in England!

Our Vision for the future of Visitor Information is to ensure the availability of excellent information, tailored to the needs of the individual visitor, when, where and how it is most useful. The simplicity and speed of this process will set England apart from its competitors.

VisitEngland will harness technology to overcome some of the challenges of traditional ways of delivering information to visitors. We will invest in new ways of working, tailored to the needs of destinations in a range of formats focusing on mobile and web formats.

In the UK 76% of the population, equating to 46.8m people, use the internet. It is regarded as the main source of information for travel planning. It is also the key medium at the booking stage; but although online transactions have increased rapidly, offline booking alternatives remain important

24% of UK mobile phone users have browsed the Internet with their handsets, with an annual increase of 33%. The widespread use of smart phones with global positioning will have a major impact on visitor information provision in 2020

In 2020, there will be a wealth of user generated content (UGC) available on the Web. It will have improved substantially in its comprehensiveness, depth and quality, partly as a result of partnerships between VisitEngland and the major UGC Web sites.

Visitor Information Centres are not only important information providers in their own right, but they also act as 'hubs' for information provision through many other outlets such as shopping centres, visitor attractions and cafés in their locality. **The emphasis is increasingly on taking information to the visitor, rather than expecting the visitor to come to the information.**

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Embracing the Cultural Olympiad to leave a lasting legacy from London 2012 Olympic & Paralympic Games

VisitEngland is delighted that the Cultural Olympiad has today announced further exciting events throughout England during the summer of 2012. We will be working closely with the Cultural Olympiad to maximise tourism potential for the events and involve as many visitors as possible.

A programme entitled **Discovering Places** promises to deliver exciting events around England showcasing local artistic talent in traditional and modern settings. The **Bandstand Marathon** will take place along the coastline of England and across the country's parks and green spaces. Up and coming bands will play in the bandstands of England in a marathon event which visitors can follow across the country or simply catch one off events.

Pop up concerts will emerge in heritage sites across England and for one night only. Concerts will be announced for 2012 to give visitors a unique and authentic opportunity to experience some of the best creative talent in a location rich in heritage and beauty.

A new artistic commission will create an unforgettable experience in the **secret tunnels of Dover**. In an exceptional opportunity, the public will be allowed into the Tunnels, which are being restored by English Heritage, and which open in 2011.

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- James Berresford, VisitEngland Chief Executive
- Lady Cobham, VisitEngland Chairman
- Ruth MacKenzie, Cultural Olympiad Director

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