Delivering a Golden Legacy
Consulting on a growth strategy for inbound tourism to Britain from 2012 to 2020

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“We’ve been pushing the message that Britain is a great place to visit, a great place to come and do business. I believe it is working, and there’s no reason to stop so we’re going to keep it going after the Games have finished.”

Rt Hon David Cameron MP, Prime Minister, July 2012
Tourism: A proven ability to deliver growth and jobs

- £115 billion a year to UK GDP
- 2.6 million jobs
- Overseas visitors spend £18 billion annually, contributing more than £3 billion in tax and duty to the Exchequer
- Every £40,000 spent by overseas visitors can create a new job
- Tourism is the UK’s third largest source of foreign exchange
The Golden Summer of 2012

2011 - Build Image
Royal Wedding as ignition point

Games Period
Showcase Britain
Diamond Jubilee, Torch Relay, 2012 Festival, Opening Ceremony, Games...

September 2012 – Close the Sale
Capitalise on exposure and shift in perceptions
Double or quits

“Our challenge is to turn the global feel-good factor generated by London 2012 into visits in the coming months and years, into earnings for businesses, jobs for people across the country and revenue for the British Exchequer.”
Britain’s ambition

40 million visitors and earn £31.5 billion from international tourism a year by 2020.
A significant prize...

Achieving 40 million visits by 2020 represents a significant increase in tourism to Britain compared with current levels:

- **9 million** additional visits a year in 2020
- **£8.7 billion** additional visitor spend annually (in today’s prices)
- **£910 million** additional tax revenues a year
- Support for **131,000 additional jobs** across the UK per annum
But also significant challenges

Britain’s share of the global tourism market 1980-2011

- Graph showing a decrease in Britain’s share of the global tourism market from 1980 to 2011, with two lines representing share visits (red) and share spend (blue).
Defend

Make

Grow
A global shift to cities

- Over half the world’s population lives in cities;
- In China, Shanghai will have the third highest GDP of any city in the world by 2025;
- In the USA, New York and Los Angeles between them are the source of almost one million visitors to Britain.
This Strategy builds on the Government Tourism Policy and asks:

What Next?

How do we get there?
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Market Plans

- Source markets present unique opportunities and complications reflecting their individual characteristics
- We’ve undertaken in-depth competitive analysis for each of our markets
- Carried out a bottom-up analysis
- Generated a market plan for each market
- Used this as the basis of this strategy for Britain
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Improve Our Image

What?

- Play to Britain’s strengths and address perceived weaknesses through advertising & PR work
- GREAT can act as a long term image builder
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Improve Our Image

How?

• Non-tourism brands & partners can play an active role in broadening and deepening interest in and recognition of Britain as a destination;

• Use digital marketing to create ‘ambassadors for Britain’ and augment tactical and image advertising

• VB will continue to attract private sector partners to deliver the current £100 million 4 year marketing campaign
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Get Britain on the shelf

What?

• Work with the travel trade in key markets to get Britain into brochures and sold by the travel trade
• Package and promote more areas of the UK to the trade and hence to overseas visitors;

How?

VisitBritain will deliver a trade engagement and promotion strategy for prioritised markets which will allow Britain to exploit GREAT and the tactical advertising campaigns.
Improve & Increase the range of product

What?
The UK travel trade, and tourist boards will work together to further improve Britain’s product offer and make it more easily available to overseas visitors.

How?
A focused strategy to ensure more destinations produce easily packaged, commissionable, product which is competitive in international markets.
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Make it Easier to Get Here

- A new aviation policy framework - new capacity to ensure tourism and economic growth is balanced with the needs of sustainability

- Develop & implement a route development strategy to improve capacity from key growth markets

- Improve connectivity by encouraging route development between regional airports both in the UK and in key markets
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Make it Easier to Get Here

- Risk-based approach to the design of visas. Selectively extend the validity period for a UK visitor visa, keeping the cost the same.

- Reduce visitor visa processing times and set out a clear service standard of handling all applications in 1 week.

- Return original documentation to applicants at the point of application.
Consultation Timeline

Consultation deadline: 9 November 2012

Available on: www.visitbritain.org

Respond to: Britainstrategyconsultation@visitbritain.com

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Questions to Consider

- Do you agree with the four strands of the strategy?
- Supply-side issues are not addressed in this strategy – what are the challenges/opportunities for supply side?
- Which would you consider to be an appropriate balance of markets and activity now and in 2020?
- Are there markets that should receive more or less focus than VisitBritain’s current portfolio?
- Are there additional policy areas that should be considered?
- Where are there opportunities for VisitBritain to work more with partners?
Any Questions?