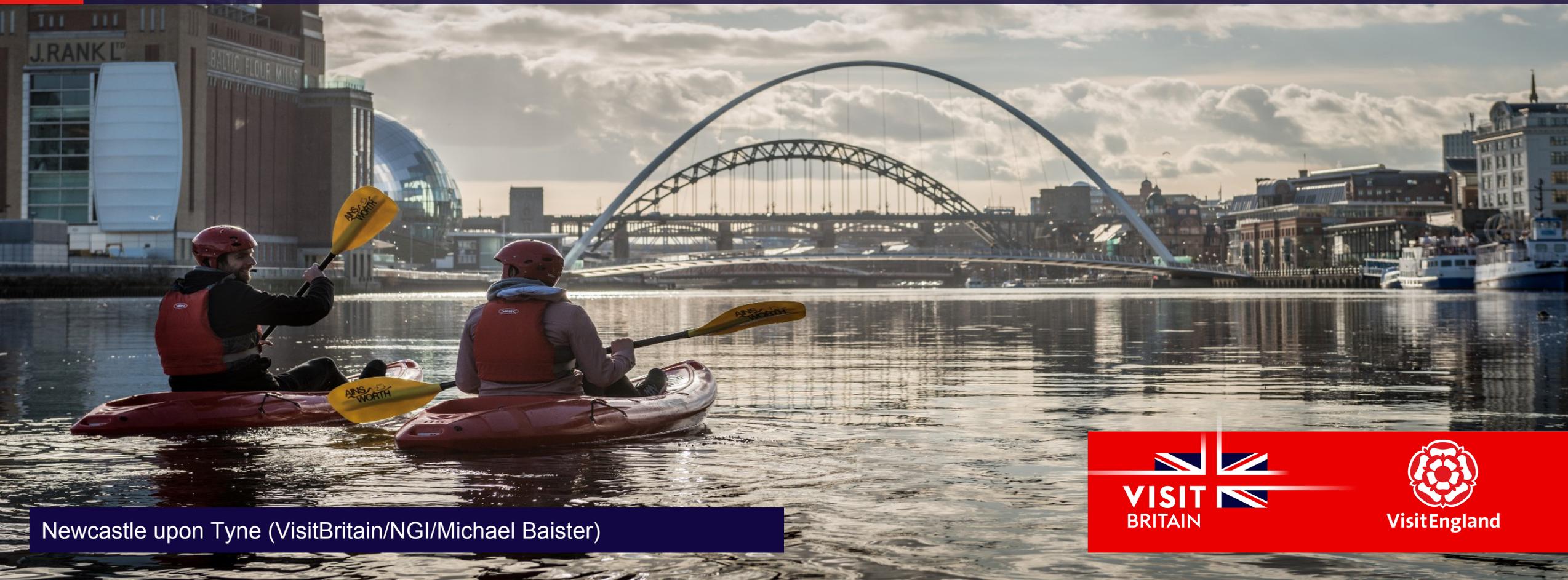
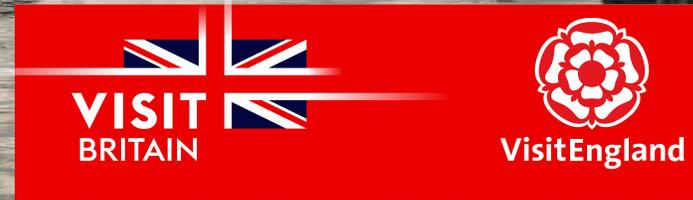


VisitBritain/VisitEngland & Tourism Recovery

Patricia Yates, CEO, VisitBritain/VisitEngland



Newcastle upon Tyne (VisitBritain/NGI/Michael Baister)



British Tourism Authority Update



Destination Britain North America in San Francisco (VisitBritain/Stuart Locklear)

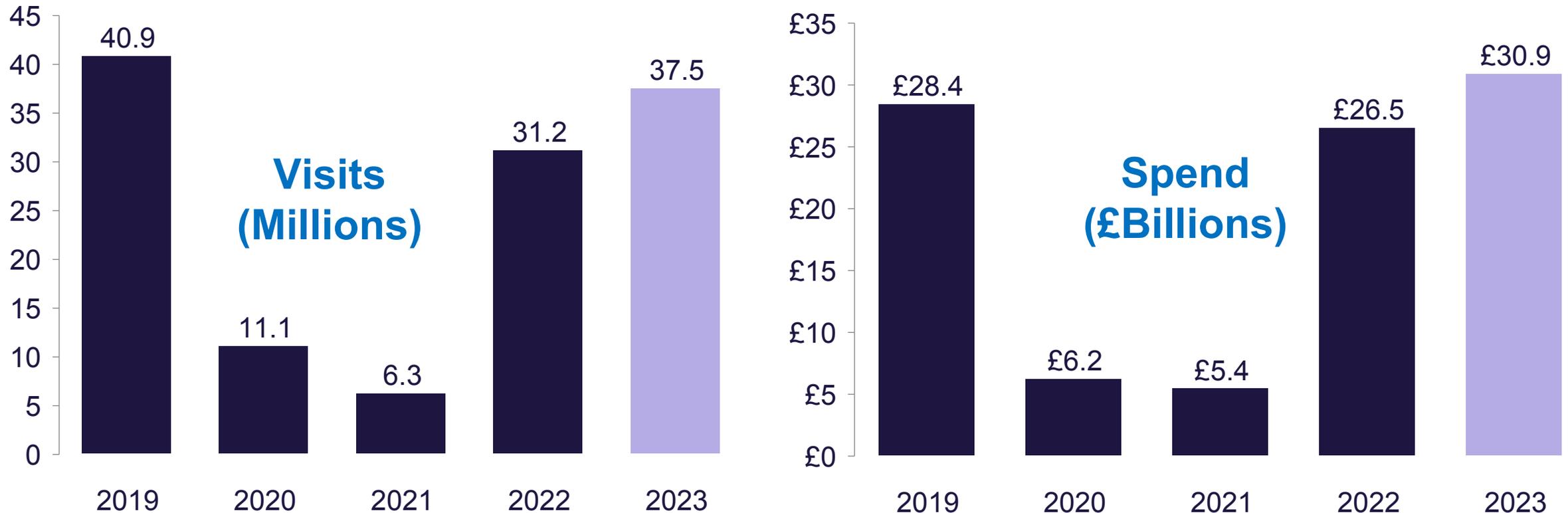
Latest Data & Statistics



Sector recovery post-pandemic

Inbound visits to recover to 37.5m in 2023 (92% of 2019 level) – spending forecast to reach a record high but only in nominal terms

Over 2020 & 2021 Britain saw a loss to the visitor economy of £147bn (£50bn inbound, £97bn domestic).



Source: International Passenger Survey to 2021; VisitBritain forecasts for 2022-23

Flight bookings made to UK, by global region

Bookings from North America tracking ahead of pre-COVID

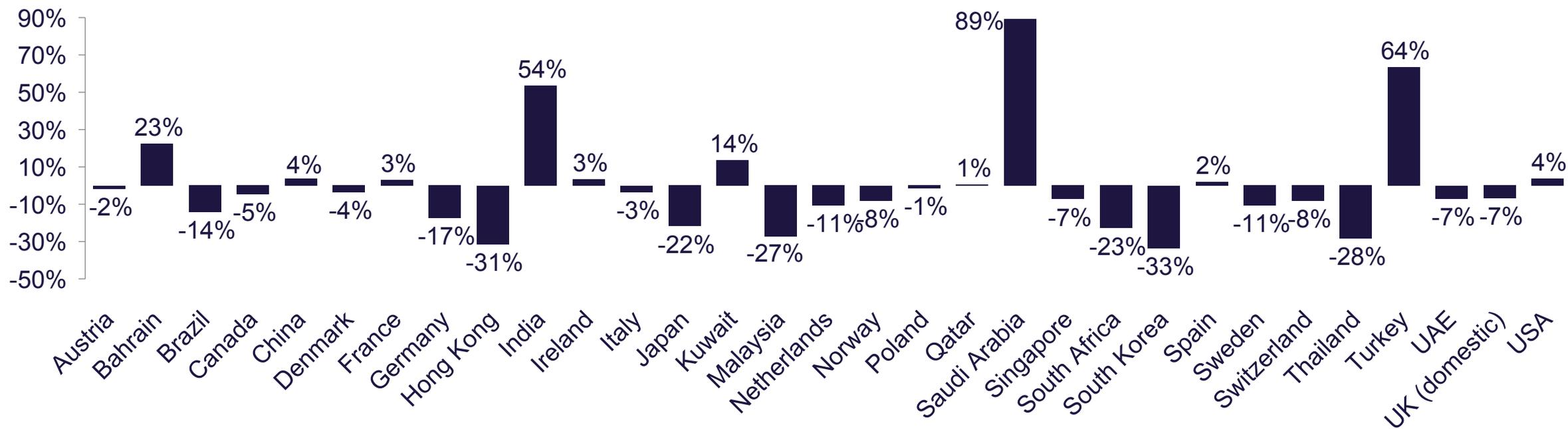
	Total	Eastern Europe	Middle East	North America	NorthEast Asia	Northern Europe	Oceania	South America	South Asia	SouthEast Asia	Southern Europe	Subsah. Africa	Western Europe
Mon, 17-Apr-23	-10%	-46%	-19%	4%	-51%	2%	-6%	14%	-20%	-21%	-11%	4%	-9%
Mon, 24-Apr-23	-10%	-43%	-13%	6%	-55%	-6%	6%	4%	-23%	-25%	-14%	2%	-9%
Mon, 01-May-23	-16%	-49%	-1%	-3%	-48%	-10%	-19%	-14%	-16%	-42%	-21%	-14%	-19%
Mon, 08-May-23	-16%	-53%	1%	3%	-49%	-21%	-18%	4%	-22%	-42%	-23%	-10%	-19%
Mon, 15-May-23	-17%	-59%	-5%	6%	-54%	-20%	-24%	-10%	-21%	-29%	-24%	-18%	-19%
Mon, 22-May-23	-16%	-60%	-3%	4%	-57%	-19%	-27%	7%	-24%	-24%	-1%	-19%	-15%
Mon, 29-May-23	-14%	-62%	-9%	11%	-52%	-12%	-28%	10%	-24%	-27%	-22%	-19%	-10%
Mon, 05-Jun-23	-11%	-59%	55%	8%	-42%	-17%	-19%	0%	-15%	-12%	-20%	-18%	-19%
Mon, 12-Jun-23	-17%	-48%	-13%	7%	-43%	-25%	-21%	6%	-31%	-32%	-22%	-19%	-18%
Mon, 19-Jun-23	-16%	-54%	-11%	7%	-49%	-22%	-20%	21%	-23%	-30%	-21%	-16%	-14%
Mon, 26-Jun-23	-18%	-48%	-37%	10%	-43%	-20%	-29%	-1%	-32%	-31%	-27%	-20%	-10%
Mon, 03-Jul-23	-17%	-58%	-19%	12%	-49%	-17%	-25%	0%	-26%	-38%	-27%	-11%	-15%
Mon, 10-Jul-23	-14%	-41%	-12%	6%	-46%	-10%	-22%	11%	-24%	-37%	-23%	-16%	-9%
Mon, 17-Jul-23	-13%	-39%	-7%	6%	-44%	-13%	-20%	-14%	-17%	-18%	-18%	-20%	-12%
Mon, 24-Jul-23	-20%	-42%	-13%	-10%	-54%	-11%	-36%	-20%	-32%	-38%	-20%	-21%	-5%
Mon, 31-Jul-23	-9%	-36%	-7%	13%	-46%	-7%	-23%	-5%	-19%	-28%	-18%	-21%	1%
Mon, 07-Aug-23	-11%	-41%	-5%	10%	-46%	-9%	-28%	-3%	-15%	-30%	-22%	-21%	-11%
Mon, 14-Aug-23	-11%	-44%	44%	1%	-42%	-16%	-26%	-2%	2%	-24%	-14%	-16%	-13%
Mon, 21-Aug-23	-13%	-46%	1%	2%	-38%	-21%	-23%	-9%	-18%	-34%	-13%	-22%	-10%
Mon, 28-Aug-23	-15%	-48%	-30%	3%	-38%	-13%	-23%	-9%	-20%	-25%	-18%	-31%	-9%

Source: Forward Keys data up to 3rd September. Bookings made in each week starting on the date shown, vs. those made the same time in 2019, within the ForwardKeys database. NB weekly data can be volatile.

Air capacity to the UK: Sep23-Nov23 vs. Sep19-Nov19

Overall international capacity at 1% for next 3 months but huge variation.

Seats available, Sep-Nov 2023 vs. same time in 2019, by selected country of origin.



		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Change in capacity vs 2019 (all int'l routes to UK):	2021	-81%	-90%	-91%	-91%	-87%	-81%	-71%	-59%	-52%	-46%	-41%	-36%
	2022	-49%	-42%	-31%	-18%	-16%	-14%	-15%	-15%	-14%	-9%	-12%	-12%
	2023	-11%	-11%	-8%	-8%	-7%	-5%	-4%	-4%	-3%	3%	3%	2%

Source: Apex. Data run August 25th.

Inbound tourism: drivers of influence in selecting a destination

“Offers good value for money” and “Is a welcoming place to visit” are the strongest global drivers of destination choice for a holiday, each chosen as important by 87% of respondents.

Drivers of Influence in Selecting an Destination for an International Break/Holiday



D3. Please tell us how important each of the following considerations are in choosing a destination for an international break or holiday? (7 point-scale where 7 = 'extremely important' and 1 = 'not at all important'; Blue figures are significantly higher; Red significantly lower Base N=22,840 Weighted global

Organisational Update

A person with a yellow backpack and two dogs looking over a lake in a valley. The person is standing on a grassy hill, looking out over a large lake surrounded by mountains and forests. The sky is cloudy and the overall scene is scenic and peaceful.

Performance of BTA

VisitBritain is a high performing ALB, delivering value for money for the taxpayer.

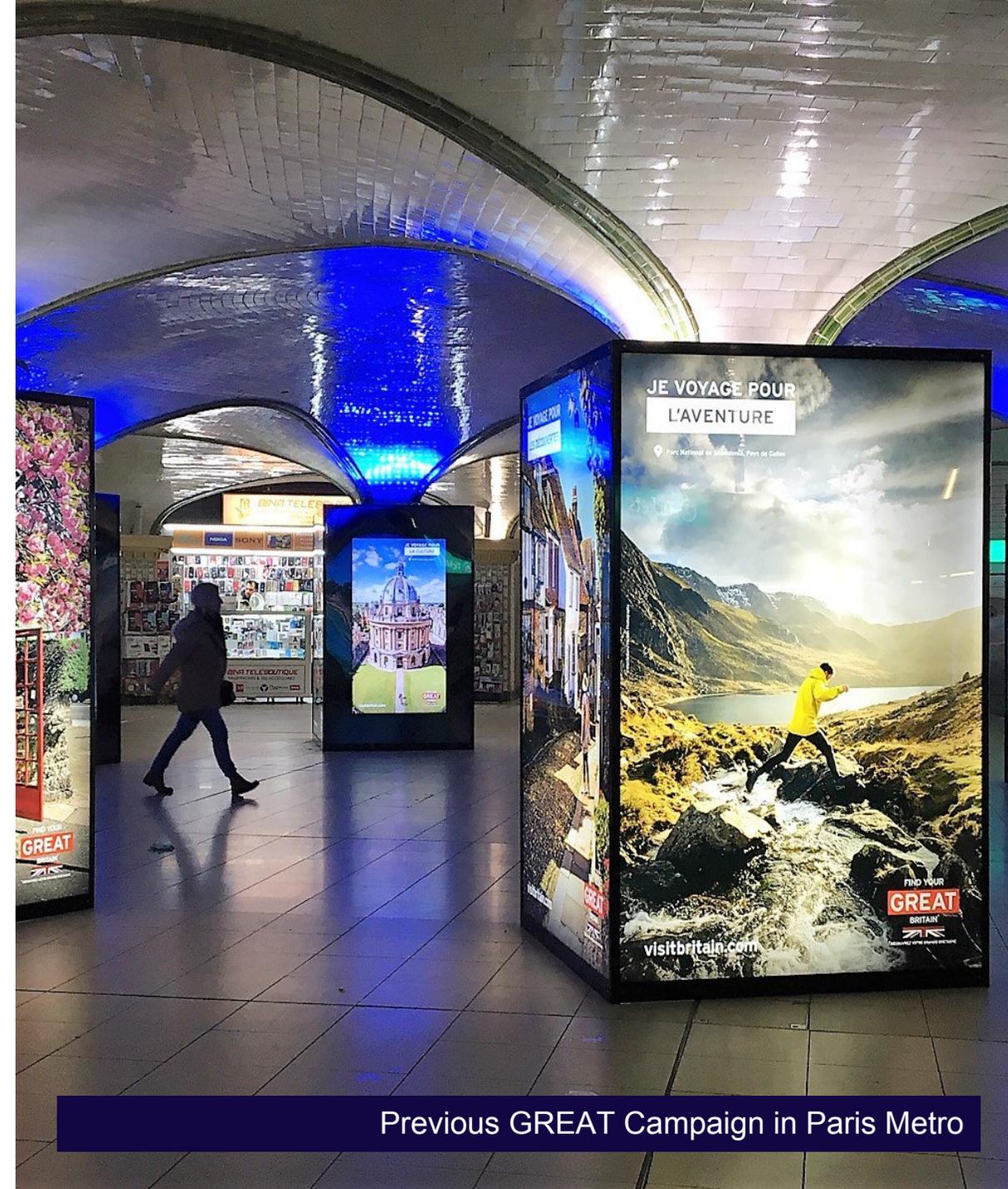
Results from Apr 2021 – June 2022:

The BTA generated £673 million in additional visitor spend across the nations & regions of Britain.

In 2022/23 our ‘Welcome to Another Side of Britain’ international campaign took place in Q4 21/22 and Q1 FY22/23 in the US, France, Germany, Italy, Spain and the Netherlands.

- With an investment of £16.7m we generated an incremental value of £190m for the British economy.
- This is equivalent to 193k additional international visitors, and over 3,500 jobs created

In 2022, our Business Events Growth Programme approved 27 applications for business events in 12 cities with a potential value of £57 million.



Previous GREAT Campaign in Paris Metro

Our Purpose

To drive a thriving tourism industry creating economic prosperity across Britain

We will:

- use data and digital systems to innovate, improve and adapt.
- work with industry and Government partners on joint activity that positions Britain and England as diverse and accessible destinations and drives visits and economic growth.
- work globally learning from others, using our talented staff wherever they may be located and welcoming change and challenge.

Enabled by:

- reinventing our business model to be fit for a digital age
- working in partnership acting as a catalyst to bring people and organisations together
- becoming the single voice of truth for data
- reducing our dependence on Government funding
- being an influential and impartial link between industry and Government



Responding to contextual factors

Ongoing challenges for the BTA and wider sector.

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.

Political uncertainty

MPs are looking ahead to the next election. We must be able to pivot our messaging to show how tourism and the BTA can deliver for the respective party priorities.

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.



Edinburgh (VisitBritain/Steven Oates)

Delivery for England

We are working to lead and enable a sustainable and resilient visitor economy in England.

Implementation of the DMO review: Leading the reforms to the English tourism landscape to maximise investment and visitor numbers to every part of England.

- ✓ DDP pilot launch
- ✓ National LVEP application process launched in February 2023
- ✓ 22 LVEPs accredited!
- ✓ LVEP staff training programme, grant funding toolkit, and accessibility guidance all in development.

Business Support: Growth of Business Advice Hub, TxGB platform, and Taking England to the World toolkit to increase sales and bookings.

Seasonal Spread: Encouraging day trips outside of the usual peak period through the National Lottery Days Out scheme.

Social Tourism: More than 800 families given a well needed break in England.



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, ExploreGB 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.



Sussex (VisitBritain/Ben Selway)

2023 Campaign in action



Spill the Tea on GB in the Paris Metro



VisitBritain at the world's largest travel show, ITB Berlin



GREATLove at World Pride



Some of the 120 international travel buyers from 16 countries we brought to the UK on trade visits.



Copenhagen Trade Mission



GCC Campaign Launch Event

This Autumn and beyond

Q4 2023/24 Marketing:

- 'Spill the Tea': Ramping up again in autumn in the GCC, France and Germany, driving consideration and bookings during the shoulder season.
- Rugby World Cup: Joining GREAT for branded pop-up stores in Lille, Bordeaux and Marseille, where we will host trade and media events.
- British Airways partnership: Launching a new campaign in the US in Autumn.
- Co-op campaign with industry: Launching new programme in Autumn. Pilot campaign saw 15 UK and US industry able to 'buy in' to a £575K GREAT-branded 'See Things Differently' campaign.

In development:

- We'll continue to tell the stories of Britain's regional diversity to drive growth through British culture. For example, screen tourism - film and TV are powerful motivators for travel.



Strengthening Industry Support & Partnerships



Overseas Missions & Events

Our programme of overseas missions and events remain a key part of our strategy.

- Delivering business wins and driving seasonal and regional impact.
- Our recent industry survey clearly showed events to be a highly values area of VB support.

We're listening to your feedback:

- Recognise the need to adapt our strategy to be more agile in our approach.
- Moving towards different formats including workshops and roadshows.
- Exploring setting up an Events Advisory Group.
- 2024/2025 events programme to open for expressions of interest in the coming weeks.



Showcase Britain

Showcase Britain 2024 is VisitBritain's international B2B hosted buyer programme

- The programme brings a fantastic chance for UK suppliers to connect with a target of 120 hosted international leisure travel buyers from 15 International Markets.
- We are working closely with ETOA and UKInbound to welcome the hosted buyers to the Britain and Ireland Marketplace (BIM) on Friday 26 January 2024 where they will be available for meetings through the ETOA event platform.
- Following BIM, VisitBritain hosted buyers will explore the best of Britain's tourism offers and products on a series of educational trips around the country.
- A range of sponsorship opportunities will be available shortly.



Industry Engagement

We're listening to your feedback

- Our market update webinars have been well received and will continue to refine how we share insights from our global teams.
- We continue to engage at industry events and forums such as this - our team will be at WTM this coming November.
- International B2B teams focus on business development with trade partners in market.
- Working closely with Visit Scotland, Visit Wales, DDPs and LVEPs with VisitEngland to engage their partners and members.
- Sales & Marketing Advisory Board.
- You want contacts to speak to, the team are here -

Louise Bryce - Director of Partnerships

Stuart Heath - Senior Industry Engagement Manager

Laura Capraro - Industry Engagement Manager

Ed Cummins - England Planning & Projects Manager



Snowdonia, Gwynedd (VisitBritain/Nadir Khan)

Data, Insights & Policy

Research:

- International Passenger Survey (Office for National Statistics)
 - Official measure of inbound tourism
 - Q2 (Apr-June) detailed data, including nations/regions and markets, due 19th October
 - July and August topline data due 27th October and 23rd December
- Forecast: VisitBritain inbound tourism estimate for 2023 and forecast for 2024 due December/January
- Nation Brands Index
 - Annual study on perceptions of the UK in 20+ countries. Due out November/December.
- MIDAS research (Motivations, Influences, Decisions and Sustainability)
 - Major research study conducted in 2022 in 29 inbound markets – more reports and visualisations to come
 - <https://www.visitbritain.org/MIDAS-research-project>

Next year:

- There will be a General Election before the end of 2024.



Digital Transformation & Industry Resources

Our work so far:

- New consumer website, **VisitBritain.com**, launched in December 2022, offering user-friendly navigation and increased focus on practical information, theme-specific content and images to inform and inspire visitors.
- Features increased focus on embedding partner content and external links to drive online traffic to partnering destination and industry sites, and the VisitBritain Shop.

Coming soon:

- New industry website, replacing **VisitBritain.org**, will launch in autumn 2023.
- Industry discovery research in summer 2022 informed new website's design so we can meet the needs of key audiences across the industry.
- Will offer improved access to latest data and research, news about tourism trends and products, opportunities to attend industry events and training and support materials for UK businesses and international travel trade to sell travel to Britain.



Questions