



About us

Our five-year strategy

2020-2025

**To make tourism
one of the most
successful and
productive sectors
for the UK economy.**

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Foreword

Britain's tourism sector is a vital economic powerhouse, generating billions of pounds a year from both domestic and inbound travel. Spending by overseas visitors is predicted to reach a record £26.6 billion in 2020 with overseas visits growing to 39.7 million, the highest ever.



Steve Ridgway CBE, BTA
(VisitBritain/VisitEngland)
Chairman

Today, tourism is worth £127 billion, contributing 9% GDP and accounting for 10% of all jobs. It is the UK's third largest service export, out-performing in trade other industries like automotive, digital and nuclear.

Last year we saw tourism recognised as a leading sector in the Government's future economic planning, with the granting of a Tourism Sector Deal, as part of its Industrial strategy. It is a game-changer for tourism, spelling a step-change in how we underpin the success of tourism for a generation, moving it to the top table for the UK Government's future economic planning. I am proud to have led on the deal, working collaboratively with industry on a shared agenda to build a significant and long-lasting strategy to drive economic growth, focusing on increasing productivity, through developing skills, career paths and building seasonality.

“Our new strategy sets out not only how we will support the delivery of the Tourism Sector Deal, but also our vision for the next half decade. Our ambitious growth target for Britain is to attract 49 million visits by 2025 and £35 billion in spending.”

We will achieve this by delivering against five clear objectives and our customers will continue to sit at the heart of everything we do. Focusing on the most valuable visitors to Britain and those with the highest propensity to

travel, we will **grow the value** of both leisure and business tourism to Britain through our new market strategies and support venues and industry to win international business events. We will also encourage more people to holiday at home through our domestic marketing activity.

Driving the **dispersal of tourism value across Britain**, we will develop products to appeal to our best prospect visitors, working with destinations across England, Scotland and Wales on our global marketing campaigns. Building on our commercial activity, our partnerships will be integrated further and deepened to leverage even greater reach, innovation and value.

We will **support productivity optimisation**, through the development of product that extends the season and length of stay for both international and domestic visitors, as well as through the distribution of that product through platforms such as Tourism Exchange Great Britain (TXGB).

In line with our statutory role as advisor to Government and industry, we will continue to **be the expert body on growing tourism**, trusted to provide unique insights and guidance so that the economic importance of tourism is understood by politicians, Government departments and the media.

The three-year £40m Discover England Fund helped stimulate new product development in England, but there is still a wealth of opportunities for growth in England's regions. We will **deliver a clear strategy for England**, continue to be a “voice for England” and work with industry to support productivity, grow value and reach new markets and segments.

Through working together, we will achieve our ambition, united behind a clear mission: **to make tourism one of the most successful and productive sectors for the UK economy.**

Our ambition is to attract 49 million visits by 2025 spending £35 billion

Our new forecast sets our ambition to grow the value of tourism across Britain, ensuring the nations and regions all benefit from this sustained growth. By extending the season and targeting high value markets and visitors we will help the industry to become more productive.



To enable Britain's tourism industry to capture its share of global and domestic growth across our nations and regions and build on tourism's record of success, our mission is clear:

To make tourism one of the most successful and productive sectors for the UK economy.

We are going to work to achieve this by:



Growing the value of tourism



Driving the dispersal of tourism value across Britain



Supporting productivity optimisation



Being the expert body on growing tourism



Delivering a clear strategy for England

The VisitBritain strategy

- Building demand in international markets
- Supporting the growth and development of the industry
- Being the industry expert and advising UK Government
- Building commercial activities to support our mission



Grow value

Prioritising our international market mix based on current value, projected growth and regional dispersal, our activity will focus on the most valuable visitors for Britain and those customers with the highest propensity to travel to Britain – working on business, leisure, visiting friends and relatives (VFR) and student audiences as appropriate. We will choose the most effective channels to reach customers with the most appropriate product. By encouraging repeat visitors we will grow lifetime visitor value. We will also build a pipeline of major international business events to enable Britain to win big events that align with the Government's priority export sectors.



Support productivity

Our focus will be on developing product that extends seasonality and length of stay. We will also aid product distribution by delivering platforms to connect businesses and destinations to international buyers and help the industry reach international markets by providing data and insights. Through our role in the delivery of the Tourism Sector Deal, we will explore the development of a new national tourism data hub to gain further insight and trends in real-time to help inform local and national policy as well as businesses across the country. Supporting venues and the industry to win international business events will be essential to growing seasonality and we will provide the industry with platforms to access international buyers, intelligence and bid support.



Drive regional dispersal

Working in partnership with Visit Wales, VisitScotland and VisitEngland, we will grow visits across the nations and regions. This will be aided by supporting the building of regional product and distribution to optimise visitor dispersal and address product gaps. In addition, we will support route development to regional Britain, building our partnerships and expertise.

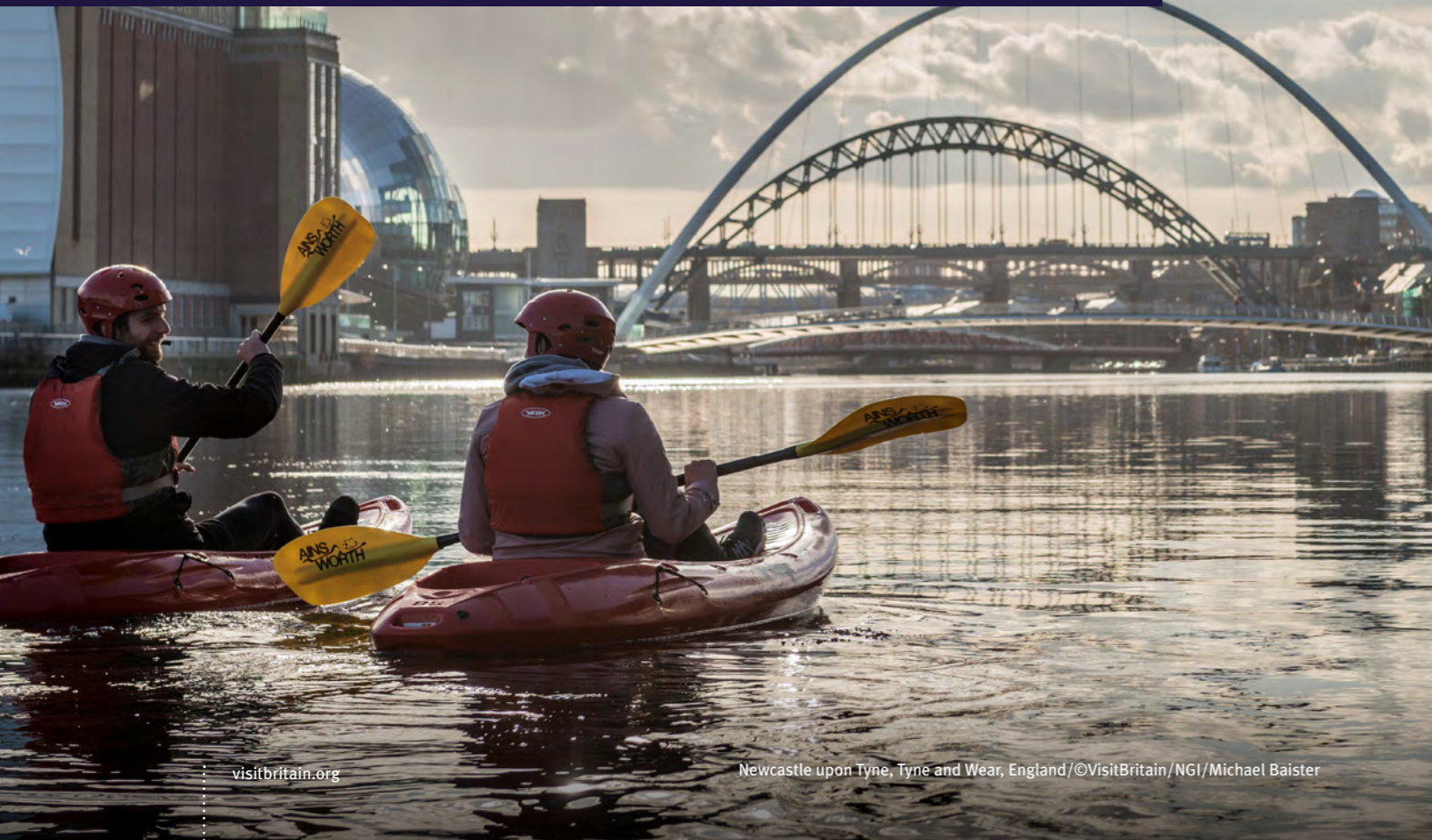


Be the expert

We will ensure that VisitBritain is seen as a trusted partner in delivering on the Government agenda to grow tourism and ensure the industry's resilience and sustainability. By strengthening our statutory role to advise Government on tourism, we will ensure that the industry is factored into policy development, building our expertise on policy issues such as productivity and will continue to provide data, insights and analysis to inform decision-making by Government and industry. We will project manage the Tourism Sector Deal's implementation with Government, the devolved bodies, businesses and trade associations to manage the delivery of the commitments and targets relating to tourism zones, the data hub, accessibility and business events.

The VisitEngland strategy

- Developing regional English tourism product
- Distributing and promoting product to our domestic and international customers
- Helping businesses to grow through business advice and support
- Growing the business events industry



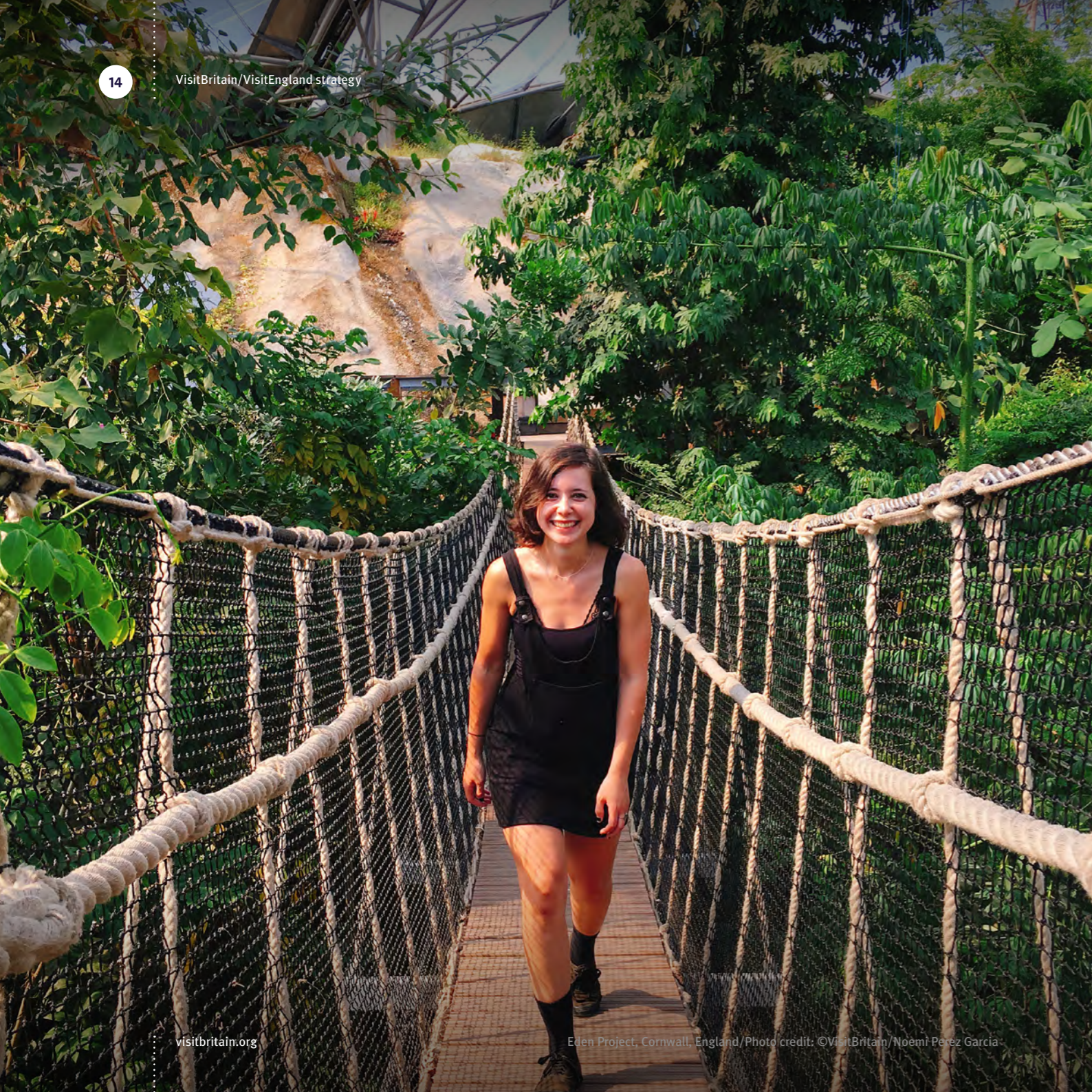
Grow value

Through stepping up our domestic marketing activity, we will address the balance of trade deficit and encourage more people to holiday at home. We will focus on younger customers (aged 18-34), whose domestic tourism activity is in decline, and families, who are both essential for the long term growth of the industry. Through developing our customer segments for the domestic market, we will ensure we reach the right customers with the right content. Ireland will also be considered as a target market within our activity. Through our work in the delivery of the Tourism Sector Deal, we will support Government's ambition to make the UK the most accessible destination in Europe.



Support productivity

Our priority will be to support the development of England product, this will extend the season for an international and domestic audience and enable the distribution of this product in international markets building on the success of the Discover England Fund. By helping the industry build digital skills, we will ensure the that product is researchable and bookable online. Our focus on winning business events for England will see us work closely with venues and locations and matching them with international opportunities, providing them with platforms to meet international buyers and supporting them through the bidding process.



Drive regional dispersal

Working in partnership with Destination Management Organisations (DMOs), we will grow visits and value of our leisure and business travel across England. This will be supported by the development of regional product that addresses domestic and international market gaps and address product gaps through the distribution platform Tourism Exchange Great Britain (TXGB). In addition we will build our partnerships and expertise in route development to grow connectivity to regional England. Through our work on the delivery of the Tourism Sector Deal we will identify new Tourism Zones, supported by central Government, and a biddable funding process, to drive visitor numbers across the country, extend the season and to tackle local barriers to tourism growth.



Be the expert

We will ensure that VisitEngland is seen as a trusted partner in delivering on the Government agenda and provide and distribute statutory research, data and analysis that informs our own, industry and Government decision-making. Supporting and working together with DMOs and the wider England industry our assets, market plans and intelligence will be shared for national benefit. We will also provide platforms and events that enable us to share best practice and celebrate business excellence across English tourism.

Our market strategies

Our customers will continue to sit at the heart of everything we do. Focusing on the most valuable visitors to Britain and those with the highest propensity to travel we will grow the value of tourism to Britain, both leisure and business, through our new market strategies.



Our customers

Our global segments, nuanced by markets, are:

- **Buzzseekers** – younger, free-spirited and spontaneous, they like holidays full of action and excitement
- **Explorers** – older, they enjoy the outdoors, sightseeing and embracing local culture at a more relaxed pace
- **Culture buffs** – image and brand-conscious, travel is seen as a status symbol; they like well-known safe destinations
- **Free and easy mini-breakers** – similar to buzzseekers, this younger domestic audience love the opportunity to take short breaks where they can either let loose or unwind

Our markets

We operate in a mix of markets that deliver short and long term growth in value and regional dispersal overlaid with Government priorities.

Our most beneficial market by some distance, and the market showing the most profitable growth, is the USA, followed by value growth from China. These are two of our markets that we uplift investment in using the GREAT funds – we add to that Australia, France, Germany, GCC, India and UK.

Our secondary markets for value include the rest of Europe, Canada, Brazil and South Korea. Lower growth (among our core markets) is projected from Hong Kong, Japan, Russia and Austria. For each market we have developed and refined a market strategy that focuses on the best prospects for driving tourism growth.

UK

- England
- Scotland
- Wales
- Northern Ireland



UK Domestic

Drive regional and seasonal dispersal increasing volume and value of short breaks in the shoulder season. Increase focus from one to two target audiences to address long term growth and short term opportunity.

We will deliver this by:

Continued focus on Free and Easy Mini Break segment (millennials 18-34) to increase awareness and consideration of experiences in regional England.

- Continue Microgap campaign with focus on four themes which resonate best with the target audience; Give Back, Go Wild, Learn More & Switch Off
- Partner with brands and ambassadors who are trusted by this audience to extend the reach of our messaging
- Staff microgap scheme continued to develop staff product knowledge and deliver more regional and seasonal content

Develop a campaign focused on the family audience to encourage them to take additional short break in the shoulder season.

- Focus on pre-school families who have more capacity to travel outside of main school holiday periods
- Deliver a campaign which focuses on the memories and special moments which can be easily had on a short break in England

Engage with the industry to better understand how we can work together and move towards an enabling role.

- Programme of workshops to engage DMOs and local businesses so that they can support and feed into campaigns
- Series of webinars on key marketing topics

Europe

- France
- Germany, Switzerland & Austria
- Netherlands & Belgium
- Spain & Italy
- Nordics
- Russia & Eastern Europe



Given its highly regional and seasonal characteristics, Europe is best placed to deliver growth around dispersal and stretching the season, with value a secondary consideration. We will have two main areas of focus:

- Regional: city breaks to regional cities, short breaks and touring holidays to regional destinations (eg North of England), business events in regional cities
- Seasonal: driving visits to London in shoulder and off-peak seasons, extending the season in popular regional destinations (e.g. South-West England), off-peak city break travel, events in low season

We will deliver this by:

Focusing on reasons to travel now throughout the year to drive immediacy.

- Delivering the right content and product at the right time to influence incremental visits
- Winning business events for future years

Building regional England proposition for European customers.

- Raising awareness of regional England brand
- Building regional product for future competitiveness
- Maximising air connectivity from regional gateways to Europe

Informing visitors about changes to UK departure following the EU.

- Working with partners to keep Britain an open and welcoming destination

Americas

- USA
- Canada
- Brazil



USA

Our focus will be on leisure/holiday visitors as well as business events.

- Greater emphasis on the older holiday segment, currently representing the most sustainable target audience for the long term as well as best prospects for regional dispersal and extending the season
- Building contacts with buyers to win business events
- Increased focus on the West Coast and the top ten performing states from where the greatest volume of US visitors depart
- Sustaining key routes working with airlines

Canada

Our focus will be on leisure/holiday in shoulder season when Britain's value proposition is better.

- Driving dispersal by focusing on touring routes with cultural/countryside, historical themes
- Working on shoulder/low season content when prices offer better value
- Protecting current routes into London while seeking to grow regional routes to help dispersal

Brazil

Our focus will be on leisure/holiday with a luxury angle.

- Luxury holidaymakers provide an opportunity to grow value and regional dispersal
- Propensity to increase travel between October and April for seasonal stretch
- Building connectivity by partnering and supporting new routes

North East Asia

- China & Hong Kong
- South Korea & Japan



Airline partnerships are key in this region.

- Given the volatility of routes in the region it is important to protect key routes from Japan and South Korea as well as support airline growth strategies from China

China and Hong Kong

Focus on group holiday/leisure, premium and study abroad/VFR.

- Group travel is popular – we will work with the trade to encourage regional dispersal and extend the season
- Focus on extending the season for holiday visits, particularly for premium (high value) travellers
- China is one of our most important student markets – we will work with British Council to target visiting friends and relatives (VFR)
- Working with UK Visas and Immigration (UKVI) to address visa perception issues in market and feed back intelligence to aid Government policy discussions

South Korea and Japan

- Working with the trade to focus on group travel and supporting regional dispersal and seasonal stretch

Asia Pacific, Middle East & Africa

- GCC
- Australia
- India



GCC

Focus on high net worth earners and expatriate communities with luxury product. Some of our highest spending per head and most loyal visitors come from these markets.

- Extending length of stay and spend per visit by focusing on major events and luxury retail
- Expanding distribution network to entice repeat visitors, new leisure travellers and VFR for the expat market
- In the short term protect routes in Saudi and UAE and grow Qatar and Kuwait for long term sustainability

Australia

Focus on leisure/holiday and VFR.

- Working to extend dispersal beyond key gateways (London, Edinburgh, Manchester) and build seasonal spread for the VFR market (43% of inbound visitors)
- Protecting connectivity to these hub cities

India

Focus on leisure/holiday. Visas are key.

- Primary focus on holiday and VFR travellers to London with easy trips from London to grow dispersal and repeat visits
- Stretching seasonal travel where Indians embrace the cooler climate of Britain
- Protecting new routes to Manchester and grow routes to Edinburgh and Birmingham
- Working with UKVI to address issues of visa perceptions in market and feed back intelligence to aid Government policy discussions

How we will deliver

These principles will run through all our activity.



A partnership organisation

We will deepen and integrate our partnership activity to leverage reach, innovation and value, at the same time as working with our strategic partners – VisitScotland, VisitEngland, Visit Wales, and London & Partners – to ensure collaboration wherever possible to deliver on our joint agenda to drive tourism growth.

As a high delivery partner in the GREAT campaign working with the Foreign and Commonwealth Office (FCO), British Council and Department for International Trade (DiT), we will promote Britain in international markets and jointly address issues that limit tourism growth. Meanwhile our work with commercial partners will leverage our Government income and enable us to reach a broader base of customers with targeted content and driving conversion.

An enabler

We will move from primarily doing to also co-ordinating, facilitating and enabling, for example moving from creating content to providing platforms enabling content curation and sharing. By providing assets and tools we will enable other organisations and businesses to work more effectively and add to our impact.

Customer and market-focused

At the heart of our expertise is our understanding of international markets and customers and Britain's competitive position. Our teams in international markets, usually nationals of the market concerned, give us insight and local connections that enable us to advise the industry.



A problem solver

- We will look at where our interventions will have most impact in growing tourism value. So, for example, as well as driving the aspiration to travel to Britain through our marketing, we will support route development to increase capacity and regionality.

Data-driven decisions

- All our decisions and investments will be based on insight, real time quantitative analytics and qualitative research with a key focus on performance measurement. We will ensure that as an organisation, we can be flexible and agile to our activity and deliver return on investment.

A learning organisation

- Working in a fast-moving digital world we need to have the agility to be able to test and learn in our activities and strive for continuous improvement. That mindset will extend to the development of our staff where we will work across the organisation to develop skills and talent and offer the opportunities of working in a global organisation.

Effective and efficient

- We will use our Government funding in the most effective way, regularly reviewing our processes and procedures that underpin organisational excellence and driving efficiencies across the business.

Key enablers to success

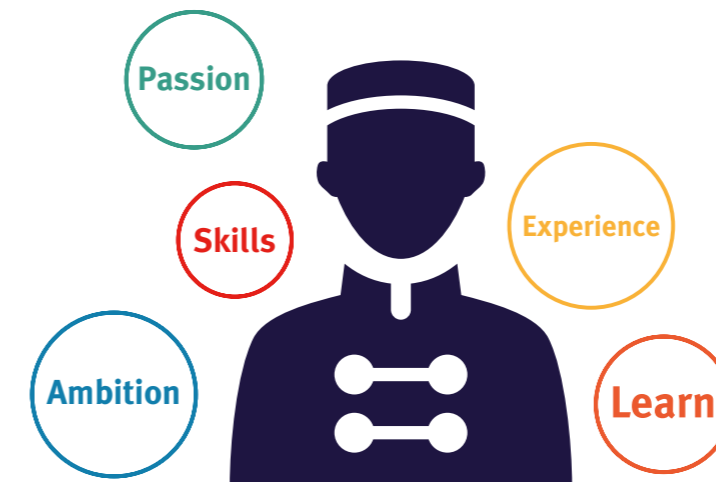


Brand Britain and GREAT

We are lucky to work with the one of the best brands in the world, one that inspires our teams and international audiences. We have been instrumental in the GREAT campaign since its inception and are one of the largest beneficiaries in funding because of our excellent return on investment. We use the GREAT brand across all our activity. We will continue to work as a GREAT partner and support the development of the campaign.

Great people

In a competitive and fast moving industry, we need to recruit and retain people with ambition, skills and experience with the ability to learn and adapt and have a passion for Britain. To drive excellence, we recognise that we need a strong leadership capability and an enabling culture.





Our organisational values

Our strategy will be underpinned by a revised set of organisational values that set out how we will work together to deliver the strategy. All of our team will be encouraged and incentivised to demonstrate these values in their activities.



Accountable for both our delivery and behaviour



Collaborative, open and give trust



Customer-led



Global and celebrate diversity



Ambitious and strive for excellence



High-energy and passionate about working in British tourism



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