

## Tourism in England

The need to set ourselves apart

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**The message is constant -  
Tourism is a force for good**



- The industry is currently worth £97bn
- It provides 2m jobs
- Tourism cannot be off shored
- It benefits every part of the country

**Tourism adds  
local value**

**It helps protect  
and preserve  
our heritage**

**It typifies new  
localism!**



## Understanding the economic value of Tourism?

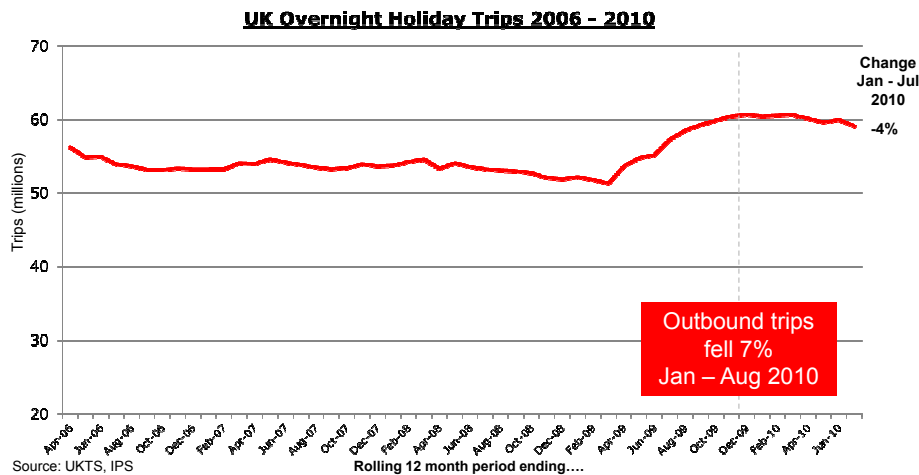
- Last year in England there were
  - 103 million overnight domestic trips, worth £17bn
    - Over half of this spending came from people taking holidays within England (the remainder is business travel and people visiting friends and relatives)
  - 25 million inbound visits, worth £14bn
  - 870 million tourism day trips, worth some £40bn

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**'Holidaying at Home' – Domestic tourism is back in vogue People are discovering there is real quality at home**

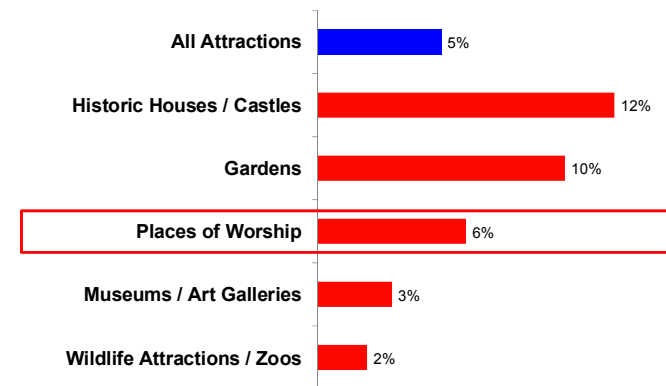
## Last year's "staycation" effect saw holiday travel increase to historically high levels



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## Visitor attractions also benefitted from the trend towards holidaying at home

Changes in Visitor Numbers 2008 - 2009



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## The future of the "Staycation"

- Over the past two years, around 1 in 4 of the population have changed their behaviour to contribute to the uplift in domestic tourism
  - Either taking a domestic break in place of an overseas holiday to save money
  - ...or just taking more domestic holidays because they want to
- Most people really enjoy the experience of holidaying at home and this has shaped their expectations of the future
  - 84% of 2010 breaks described as "very good" or "excellent"
- In the longer term, over 40% of the population think that they'll take more domestic breaks in future than they did pre-recession

*There's a lot to enjoy in the UK and it has taken a restriction on finances for people to realise this*

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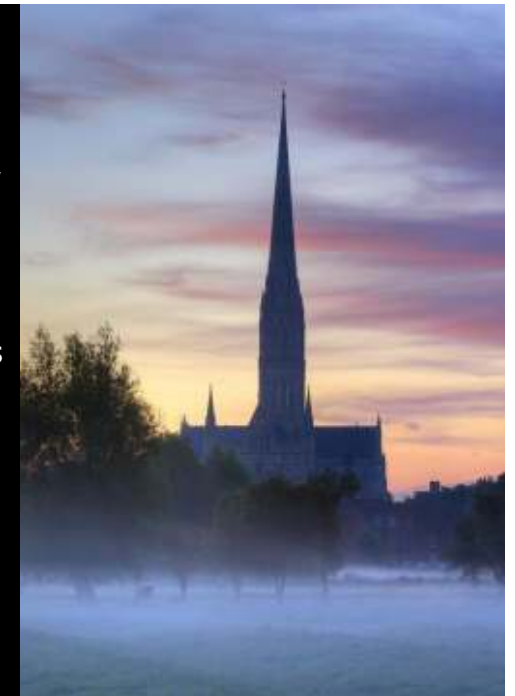


## Strategic Framework objectives

- Increase England's share of global Visitor Markets
- Offer visitors compelling destinations of distinction
- Champion a successful, thriving tourism industry
- Improve connectivity between the visitor and experience

## New Opportunities

- Cross Government policy emerging
- Prime Minister's endorsement
- New Government targets
- 2012 Olympic and Paralympic Games
- Cultural Olympiad and Torch Relay
- Decade of Sport



## It won't be easy

- Post RDA landscape of Local Economic Partnerships (LEPs)
- National public sector cuts
- Local public sector cuts

## Working with Government

- New Government strategy
- White Paper - Local Growth: realising every place's potential
- A national marketing fund

## Our future focus

- on the unique
- on quality of offer

## A new landscape for tourism

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- Marketing and oversight of National Tourism Marketing Fund
- Research and intelligence
- Coordination
- Quality (VAQAS, PIQAS)

### Destination Management

- Local networks
- Marketing
- Customer care
- Sense of place

## Visitor Attraction Quality Assessment Scheme

- Launched in 1998
- 950 attractions – 24%
- Experienced assessment team
- Currently 33 churches/cathedrals in scheme (plus 56 signed to Code of Practice)

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## Succeeding in a new landscape



- Making sure the focus is on the destination
- Securing connectivity between local and national
- Providing national economies of scale
- Competition requires focus on quality and uniqueness!