

england

A Strategic Framework
for Tourism 2010-2020
(Revised edition 2011)



The pebbled beach and white chalk cliffs, Birling Gap, East Sussex

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Foreword by the
Chairman of
VisitEngland



Tourism in England is an energetic and entrepreneurial industry offering a wide range of authentic destinations and world-class experiences – from the dramatic scenery of the Lake District to the beaches of the south coast, from historic houses, villages and towns across the country to iconic cities such as London and Liverpool.

The success of tourism makes it a key contributor to England's economic and social wellbeing. The visitor economy is now worth £97bn a year and employs in excess of two million people. It supports thousands of businesses, both directly and indirectly, and has an interdependent relationship with a range of sectors including farming, transport, retailing, sport, museums, galleries and the arts.

Despite tourism's crucial contribution to the national economy, England was without a dedicated tourist board from 2003. A key recommendation of the 2008 British Tourism Framework Review (BTFR) was the creation of a 'new English tourism lead body'.

VisitEngland was established in April 2009 with the priority to develop and drive forward a new collaborative strategy for England's tourism industry. This Strategic Framework was launched in March 2010 - it is the product of extensive consultation, setting out the ways in which the tourism industry can work together to realise continuous improvements in key areas and a headline ambition of 5% growth in value, year on year, over the next decade.

Achieving 5% growth, as identified in the 2010 Deloitte report 'The Economic Contribution of the Visitor Economy: UK and the Nations', is an ambitious target given that we operate in a highly competitive market place and that England is a mature destination compared to the new and emerging destinations around the globe. However, this Framework is both realistic and objective in its appraisal of England's strengths and weaknesses; identifying where further work is needed and providing a timeframe for its completion. I am confident that this target, which will lead to an additional £50bn in expenditure and the creation of some 225,000 jobs, is within England's grasp.



Albert Dock towards Liver Building, Liverpool

“This Strategic Framework is the basis for the public and private sectors to continue to enhance the quality of product on offer and for Government at all levels to encourage such investment”

chairman's
foreword



Victoria Quarter Shopping Centre, Leeds

“Tourism needs and deserves greater recognition for its positive impact”

The VisitEngland team has worked with a wide range of industry partners and many colleagues from both the public and private sectors to develop this Strategic Framework and associated Action Plans. These have been created to ensure that England's tourism industry maximises its contribution to the economy, employment and quality of life in England through operating in an increasingly coordinated and sustainable manner.

At national level, a collaborative England marketing plan is in place which builds on demonstrable best practice to get the highest returns for England from public and private investment. This focuses on a strategy of 'attract and disperse' – using England's long established and world famous 'attract' brands such as London, the Lake District and the Cotswolds and our exceptional cities and towns alongside well-known themes, such as walking, heritage and sport, to attract visitors and encourage them to travel and spend more widely in the country.

Tourism needs and deserves greater recognition for its positive impact. As a major foreign exchange generator, tourism is an 'invisible export industry' and it makes substantial tax contributions. It is an excellent route into employment at all levels and across the country. It is fertile ground for entrepreneurs and with continued growth, tourism is one of the few industries that will create new employment opportunities. It provides many economic and social benefits to local communities. It has a key role to play in shaping both national and international opinion of England, which is particularly relevant as the nation prepares to host the London 2012 Olympic and Paralympic Games, the Cultural Olympiad and helps to showcase to the world England's vibrant cultural and historic assets.

As well as identifying opportunities, this Strategic Framework with associated Action Plans is designed to face challenges – from factors outside our control: exchange rates, extreme weather and geopolitical events, to those that we can and need to address: coordinated marketing, competitiveness, the continuing improvement in the quality of facilities, service standards, accommodation, ease of access and skills – leading to a growing and sustainable industry in every sense. It is an ongoing process but for the first time in many years England now has a platform to enable the stated objectives to be constantly reviewed, to address new challenges, new opportunities and changing priorities. This revised edition of the Framework takes into account recent changes in the political landscape and new budget challenges. We will also continue to review the Action Plans and report annually on progress.

This Strategic Framework is the basis for the public and private sectors to continue to enhance the quality of product on offer and for Government at all levels to encourage such investment. A successful visitor experience lies in the hands of many and we will continue to work with England's tourism industry to deliver this.

Penelope, Viscountess Cobham
Chairman, VisitEngland

Tourism Today

Tourism is one of England's largest industries. A study of the visitor economy undertaken by Deloitte in 2010 estimates that England's visitor economy is worth £97 billion in total. This takes into account both direct contribution through visitor expenditure and indirect contribution, such as capital investment by tourism related businesses.

The industry employs in excess of two million people and continues to provide new opportunities for employment across the country, including areas where other employment opportunities are limited such as rural communities.

and most recently an increase in leisure short stays. However, there have been setbacks and, overall, England's position as an inbound destination has slipped against global competitors, and until 2009 there had also been a year-on-year decline in UK domestic visitors. This can be attributed to many factors including the growth of budget airlines and an increase in outbound travel from the UK, fluctuations in exchange rates and the perception that England does not offer value for money.

Tourism in England is currently operating significantly below capacity but it has real growth potential. This was clearly demonstrated by the 'Staycation' phenomenon of 2009, generated by the depressed economic climate and substantial media coverage focusing on the benefits of holidaying at home. To thrive and secure a stronger global position, the tourism industry must remain competitive in terms of cost and ease of access and must offer visitors great experiences in great destinations.

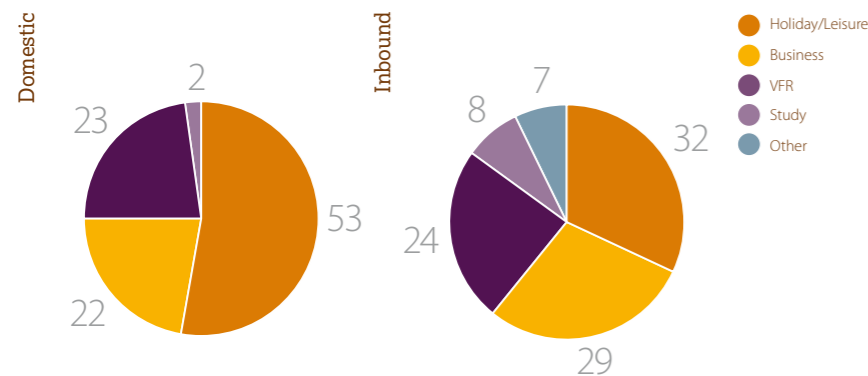
The last decade has been a period of growth for global tourism, with worldwide arrivals reaching 922 million in 2008 and, despite the recent economic climate, this growth is set to continue. England's visitor economy has also enjoyed periods of growth during this time, with increases in business tourism

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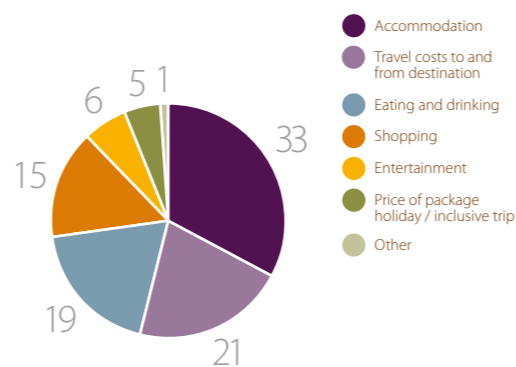
In 2008 there were:

- 95.5 million domestic overnight trips in England, generating a total spend of £16.4bn
- 27.3 million inbound visits, together accounting for £14.3bn in expenditure
- 872 million tourism daytrips, with estimated spending of £39bn

Share of Tourism Spend by Purpose



What do visitors spend their money on?



tourism today



Thurne Dyke Wind Pump, Norfolk Broads

towards 2020

The next decade offers the tourism industry some significant opportunities equally matched by a number of challenges.

Towards 2020

A Decade of Opportunity

The greatest opportunity for tourism continues to be the destination itself – England. It remains a highly attractive place to visit with a range of historic towns and cities, such as York, Cambridge, Oxford, Bath and Canterbury; established seaside destinations such as Brighton, Bournemouth and Blackpool through to distinctive countryside, with ten national parks and over 5,000 miles of coastline. There is also the endless vitality of England's largest cities – London, Birmingham, Manchester, Leeds and Liverpool – where cutting-edge culture sits alongside rich history. The variety and intrinsic strength of the English tourism product is difficult to match anywhere.

Over the last decade England's appeal has increased with the creation of an exciting range of new and improved attractions such as the London Eye, the O2 Arena in Greenwich, the BALTIC Centre for Contemporary Art and the Sage Gateshead. The redevelopment of existing attractions, including the new Darwin Centre at the Natural History Museum, and continued investment by the private sector on ever more exciting rides at world-class theme parks such as Alton Towers and Blackpool Pleasure Beach, as well as improved interpretation at hundreds of historic properties, continues to add to the richness and variety of experience available. The regeneration and enhancement of town and city centres has opened up new destinations and experiences to visitors and residents alike and, as ever, England has an incredible cultural offer with world-class theatre, museums and galleries, events and festivals. The market for health and well-being has grown with renewed interest in health spas and country hotel weekends. Locally sourced food is increasingly celebrated and England now boasts over 100 Michelin starred restaurants. The reputation for good food and drink has raised visitor numbers in destinations from the west country to the east coast. Smaller, independent operators have invested in their businesses and play a fundamental role in shaping visitors' perceptions of holidaying in England. The facilities for business visitors and conference organisers have also improved dramatically, with centres like the NEC/ICC in Birmingham, Manchester Central, and ExCeL in London being developed to support international conventions and conferencing.

The London 2012 Olympic and Paralympic Games and the associated Cultural Olympiad are an unrivalled opportunity to showcase England to a wider global audience. With the 'eyes of the world' focused on London, the UK and the Olympic venues, England's tourism industry must ensure that its rich assets are backed up by first-class customer service, quality in all levels of accommodation and ease of access.



Waiter with cream tea and cakes, Flackley Ash Hotel, East Sussex

Towards 2020

Maximising the strength of the tourism offer will improve England's competitiveness globally. To be truly competitive, England's tourism industry must also anticipate and respond more cohesively to shifting market forces. England's visitor economy faces significant challenges, some of which are the result of global economic trends while others relate to long-term infrastructure issues and negative perceptions about quality and value for money.

A Decade of Challenge

There are a number of financial constraints that must be faced. In a challenging economic climate, public sector support for the industry will be less readily available and in the short to medium term, the industry's private sector will operate under tighter budget constraints affecting capital investment in tourism products. The industry needs to improve efficiencies and economies of scale and greater collaboration in marketing England's destinations is required. England also remains a relatively expensive option caused partly by unsympathetic trading and fiscal measures such as high VAT and, for inbound visitors, the high cost of visas and the Air Passenger Duty.

There are challenges regarding perceptions and understanding of the visitor economy. It suffers from a lack of visibility at various levels of Government resulting in a legislative framework unsupportive to its development, for example, the restrictions imposed by planning legislation. Communications from the industry also need to be improved, emphasising with consistency the importance of tourism, the challenges it faces and the opportunities it has to grow.

The industry must improve its professionalism, product and performance. Standards of service and customer care are not consistently

high across the industry and, in some cases, the need for improvement is not recognised leading to inertia. There is still a poor perception of tourism as an employer and there are significant skills shortages in some key areas such as chefs, customer service staff and hospitality management. Transport infrastructure for visitors is improving but falls below the standard of international competitors and cleanliness, quality and the design of public places is still inconsistent.

Tourism brings positive economic benefits along with the potential for negative social and environmental impacts. The industry faces a political imperative to manage carbon output and therefore must manage to grow the visitor economy within limitations that are increasingly challenging while making the experience appealing to visitors.

With the creation of VisitEngland in 2009, the industry now has a dedicated body to provide the leadership to market England, drive forward developments in quality, ease of access and sustainability and to improve data collection and market intelligence. This Strategic Framework provides the mechanism for collaborative working across the tourism industry to achieve shared objectives.

Targeting 5% Growth

The World Travel and Tourism Council (WTTC) forecast for annual global growth in tourism has been estimated at an average 4% per annum over the next ten years in real terms. The 2010 Deloitte study forecasts real growth of 3% per annum for England with strong growth anticipated particularly over the post 2012 period. This is equivalent to 5% annual growth including inflation. The forecast is based on a number of factors, including the relatively low value of sterling, the continuing attractiveness of the England tourism product (including improved quality and renewed interest in domestic tourism), growth in GDP at national level, forecast increases in consumer spending and further investment in the sector.

If achieved, the cumulative increase in the size of the England market will be 64% by 2020. This would result in an additional £50 billion in expenditure and the creation of 225,000 jobs. This would significantly outstrip the performance of other major sectors of the national economy such as manufacturing. If no growth were achieved the result would be significant job losses and the demise of a wide range of tourism businesses.

This Strategic Framework provides the coordinated approach needed for the public and private sector tourism industry to work together on four key objectives. These will be the foundations for achieving the collective vision of maximising tourism's contribution to the economy, employment and quality of life in England.



York Minster, York



The London Eye

towards
2020

The Vision

To maximise tourism's contribution to the economy, employment and quality of life in England.

The Objectives

This Strategic Framework aims to achieve four interdependent objectives. These have been developed through wide consultation with the industry and are designed to address the opportunities and challenges for England's visitor economy.

- Objective 01** To increase England's share of global visitor markets.
- Objective 02** To offer visitors compelling destinations of distinction.
- Objective 03** To champion a successful, thriving tourism industry.
- Objective 04** To facilitate greater engagement between the visitor and the experience.

Action Plans

To achieve these objectives, a series of Action Plans have been developed by cross industry groups. These focus on the priority actions to be implemented by partners. The Action Plans in the first phase of implementation are:

National Marketing Strategy	Accessibility
Rural Tourism	Wise Growth
Seaside Resorts	Destination Management
Modernising Visitor Information	Welcome
Business Tourism	Research and Intelligence

The Action Plans will be monitored and reviewed regularly to highlight progress, showcase successful delivery by partners and demonstrate impact. The Plans are dynamic documents that will change during the life of the Strategic Framework. The latest versions can be accessed at www.visitengland.org

Delivering the Framework

The Strategic Framework will be driven forward and monitored by VisitEngland, but its success will depend on delivery by a range of strategic tourism partners and its adoption by the appropriate constituents in the public and private sector.

Ultimately the Board of VisitEngland will be responsible for setting and overseeing the success of the principal target areas of the Framework and its ambition of an annual 5% growth, with key partners taking responsibility for delivery and reporting progress through agreed mechanisms.

The Action Plans outline the activity and the partners needed for delivery across the four objectives. Customer demands, our competitors' offers, organisational structures and available budgets will change so the Framework and the programmes within it will adapt and evolve over time as other partners come on board and activity starts to take shape and be delivered.

This Framework is owned by stakeholders with a vested interest in the prosperity of England's visitor economy. It represents organisations, businesses and operators from the public and private sector. It aims to create a shared sense of purpose through agreed priorities for joint action and delivery.

Successful delivery is dependent on a dynamic partnership across the industry that places a strong emphasis on effective engagement and communication at national, regional, sub-regional and local level, identifying opportunities for economies of scale.





Wastwater, The Lake District

Objective 01

Marketing must build the profile of the England brand in the world marketplace. Informed by a thorough understanding of the visitor's motivations across target markets, it will focus on England's most attractive destinations and experiences.

To increase England's share of global visitor markets

In order to attract a greater share of higher value domestic and international visitors and maximise capacity year-round, England has a re-prioritised marketing strategy. This brings together key public sector players and engages the private sector in a collaborative approach to the marketing of England, encouraging collective investment where it can deliver maximum return. Providing higher returns will be one of the key drivers in achieving a 5% annual growth in the visitor economy.

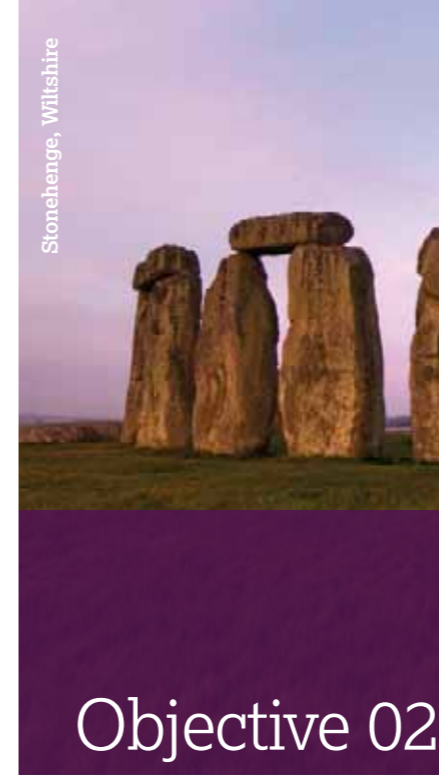
Marketing must build the profile of the England brand in the world marketplace. Informed by a thorough understanding of the visitor's motivations across target markets, it will focus on England's most attractive destinations and experiences. At a national level an 'attract and disperse' approach will see England's world famous and exceptional destinations such as London, the Lake District and the Cotswolds, among many others, used to attract new visitors who can then be encouraged to explore the richness of England. This approach can also be embraced across the country to ensure that the economic benefits are widely felt. Balanced with this, a collaborative cross-destination approach to marketing England's unique attributes can be adopted. This will position and build England's reputation as a destination, which delivers the authentic and world class experiences visitors demand; from internationally renowned built and natural heritage, to the vibrant contemporary culture of England's cities; from adventure to indulgence.

The All-England marketing strategy is based on reliable market insights on the value, volume, potential and requirements of each target market and emerging and future markets, as well as technology trends and an accurate understanding of campaign effectiveness. Better targeting of marketing and resources will help achieve the growth target.

England's tourism industry must be at the forefront of technology and optimising its ever-increasing sophistication to deliver messages and information of value to potential visitors - in shaping their decisions, in linking and packaging 'English destinations' and 'English experiences', in cross-selling, in building loyalty and keeping pace with fast changing consumer trends. Business and events visitors bring considerable economic benefits and other significant advantages. Business visitors travel throughout the year, contribute a higher spend per visitor, are more likely to travel to areas not traditionally known for holiday visits and are more likely to return as high spending holiday visitors in the future.

Events such as Glastonbury, Wimbledon Tennis Championship and London Fashion Week play a major role in shaping the image of the nation. It is crucial that the tourism industry capitalises on the opportunities these events present.

The London 2012 Olympic and Paralympic Games is a major opportunity for England within the 10-year scope of the Framework. London & Partners and VisitBritain are leading on ensuring that the legacy marketing benefits are realised for both London and the nations of Britain respectively. A coherent national approach is required, building on existing work to address the opportunities and challenges and determine additional activity to ensure England is fully maximising the potential of the Games and the associated programmes of the Cultural Olympiad and Torch Relay.



Stonehenge, Wiltshire

Objective 02

Tourism businesses, alongside destination management organisations, local government and relevant sectors, such as transport, must share responsibility for creating a successful destination experience.

To offer compelling destinations of distinction

There are few places in the world that can boast the variety of cultural experiences, historic environments and natural landscapes to be found in England. These are the tourism industry's key assets and therefore require high standards of management. Local tourism businesses, alongside destination management organisations, local government and relevant sectors, such as transport, must share responsibility for creating a successful destination experience. Effective destination management requires an integrated approach, taking into account both visitors' and residents' needs, opportunities for growth as well as environmental considerations.

Tourism is often a catalyst for regenerating and improving destinations as demonstrated in areas such as the NewcastleGateshead Quayside, Manchester City Centre and London's South Bank. Residents are the main beneficiaries of these developments but they also offer visitors new destinations and experiences. There are still numerous destinations throughout England, primarily in rural and seaside locations, that can benefit from further regeneration and enhancement in order to attract visitors and maximise tourism's contribution to local economies and communities.

England's destinations have to be backed up by world-class accommodation and customer service. VisitEngland, taking into consideration the developments in user generated content and in partnership with the wider industry, will implement a reviewed approach to quality assessment to ensure that visitors have a positive experience throughout their stay in England whatever their budget.

Raising satisfaction levels in the visitor experience and encouraging more UK residents to enjoy the destinations on their doorstep are key elements in increasing visitor spend and contributing to the 5% growth target.



Burghley House, Lincolnshire



Brighton Pier

Objective 03

To champion a successful, thriving industry

The tourism industry must work with a range of Government Departments, authorities and agencies to achieve the full potential of the visitor economy. It must be taken into account in the development of policies and initiatives and emphasised through sustained engagement with Government at all levels through campaigns such as 'Take Tourism Seriously', led by the Tourism Alliance.

Tourism's strengths and potential must be championed to a number of interdependent sectors such as farming, transport, construction, planners and policy makers. Establishing and nurturing these relationships will build national recognition and support. It is crucial that the value of tourism is understood by all those who have a role to play. A thriving tourism industry requires robust data and insights. By developing a national research and intelligence programme the industry will be better equipped to identify the value of specific sectors such as seaside resorts and rural tourism, understand visitor needs and prioritise markets.

A successful tourism industry creates new employment opportunities throughout the country and the success of the industry depends on a skilled workforce. It is critical that the industry can promote itself as a viable career option as well as retain and develop its current workforce. Tourism is a flexible and versatile sector to work in and offers a superb range of entry level opportunities for school leavers, for people without formal qualifications, for those re-entering the workforce and for part-time or temporary employees.

People1st, the Sector Skills Council for hospitality, leisure, travel and tourism, looks to ensure the skills and labour market needs of the sector are addressed. The recently refreshed 'National Skills Strategy for the hospitality, leisure travel and tourism sector in England' outlines progress over the last three years which includes reforming qualifications and apprenticeships, developing a dedicated

website to support employers and job seekers (uksp.co.uk) and the work to develop the World-Class Customer Service solution. Increasing the profitability of tourism businesses through improved performance will ensure sustainability for the visitor economy as profits are reinvested in tourism products, services and skills.

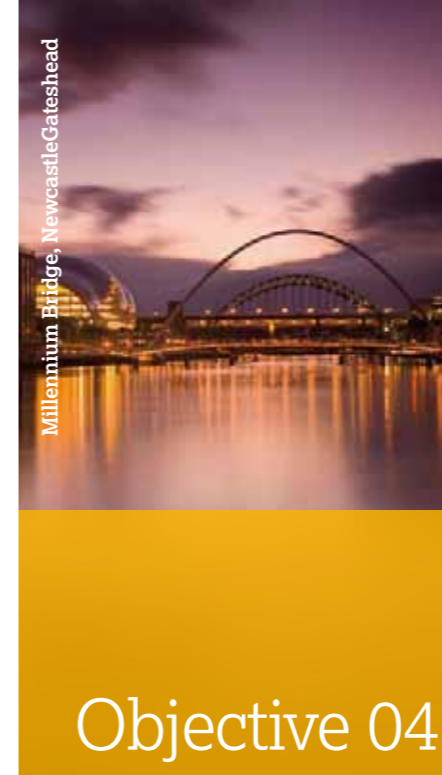
Tourism brings positive economic benefits but with the potential for negative social and environmental impacts. A 'wise growth' approach will help balance the growth aspirations of this Framework with the principles of sustainability, in terms of protecting the environment and cultural heritage, natural and manmade, that makes England so attractive and ensuring long-term economic success.

By embedding 'wise growth' principles across the industry and by advocating the approach to non-tourism decision makers, local communities and economies will have a greater opportunity to thrive. Key benefits would include an improved visitor experience, enhanced productivity, comprehensive support from residents and politicians and a better managed destinations for all stakeholders.

England can be justifiably proud of its strong history in conservation with examples of world-leading organisations in the National Trust and English Heritage; award-winning and pioneering sustainable destinations in The New Forest and South Devon; and, green entrepreneurs with the beach café operators, the Venus Company among many.

The ability to respond to and recover from crisis events outside tourism's direct sphere of influence has improved dramatically over the last decade. The Tourism Industry Emergency Response Group (TIER) established by VisitBritain in 2001 ensures a consistent approach to crisis communications management across the UK and provides a communications blueprint which England can build on.

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Millennium Bridge, Newcastle Gateshead

Objective 04

To facilitate greater engagement between the visitor and the experience

Visitors must have a warm welcome and great service, easy access to information, improved accessibility to tourism facilities and services and a world-class transport infrastructure.

Well-informed visitors will stay longer in destinations, potentially move on to other English destinations and, most importantly, will want to return. The tourism industry must ensure that information provision is modernised, integrated nationally, and keeps pace with advances in technology.

The tourism industry must ensure that information provision is modernised, integrated nationally, and keeps apace with advances in technology.

The welcome at key 'gateways', notably England's airports and seaports needs further improvement through public and private sector collaboration. First impressions count and research shows that England's great destinations are frequently let down at the point of arrival. The principles of improving England's welcome will be embedded across the Framework and the associated Action Plans.

One of the greatest opportunities to improve the visitor experience is to improve England's transport provision. Some changes may take longer than others to implement but in the short term the industry should use the same language and methodology as transport planners when making the economic case for tourism-related transport investment. The role of coaches, local bus services and the need for car travel to many destinations must be recognised as well as identifying where transport capacity is not in line with the capacity of the destination itself. The industry should also campaign for the 7-day railway and changes to maintenance regimes.

Access for people with disabilities must be improved throughout England's tourism offer. Much has been achieved in recent years to coordinate better information about visitor accessibility but there is a long way to go in developing visitor and transport infrastructure. This work should be prioritised for 2012 and beyond. People with accessibility needs represent a growth sector of the market and England should take the opportunity to lead in this field.



Shafesbury Avenue West End, London

To maximise tourism's contribution to the economy, employment and quality of life in England, the industry must increase its share of the global and UK visitor market. A stronger brand for England and a coordinated marketing strategy in priority markets, using better market intelligence and the most persuasive messages, focussing on its most attractive destinations and exploiting the strongest themes of England's tourism offer, will help achieve an annual growth target of 5%.



Arlington Row, Bibury, Gloucestershire

Summary



Tate, St. Ives, Cornwall

To succeed, England's tourism industry must deliver as much as it promises in the marketing – assuring visitors that they will enjoy great experiences in great destinations, with a warm welcome, world-class customer service and high accommodation standards whatever the budget. Growth in the visitor economy is dependent on a coordinated and sustainable approach by the tourism industry working with sectors responsible for infrastructure development.

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