

Annual Review 2022/23



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“VisitBritain/VisitEngland generated an additional visitor spend of £673 million as a result of our activities from April 2021 to June 2022.”





Chairman's Statement

2022 has been a year of change, for VisitBritain/VisitEngland, for tourism and for our country.

The refreshed GREAT campaign is seeking to shift perceptions of Britain, from a country to visit one day, to a country to visit today. The events of 2022 have certainly laid the groundwork required to shine the spotlight on Britain's dynamism and diversity.

We began the year preparing for the Commonwealth Games. The event would not only see sporting achievements beamed across the globe, but also inspire a new audience to visit Birmingham and the West Midlands. Led by the now iconic animatronic bull, we were treated to a cultural history of the region during the opening ceremony, which I had the pleasure of attending alongside travel trade from Canada, Australia, and India.

Britain's reputation as a host of world class events was further exemplified by the Jubilee celebrations for our late Queen. Throughout the festivities we truly saw the best of modern Britain seamlessly complementing the pomp and pageantry of royalty.

These events were not only much needed by the public following two years of restrictions, but also by the tourism industry which had

been so impacted by the pandemic. The additional bank holiday, good weather and international attention on Britain provided a much needed boost which saw the sector reach 73% of 2019 inbound visit levels.

The theme of change has also been seen within the British Tourist Authority (BTA) itself. In April, Sally Balcombe stepped down as CEO after more than seven years leading the organisation, and we welcomed Patricia Yates into the role after a rigorous recruitment process. Patricia brings with her a wealth of experience and has already begun to shape and reform the organisation to make it fit for the post-pandemic world.

As interim Chair, Dame Judith Macgregor used her diplomatic credentials to be an advocate for tourism's role in Britain's soft power agenda. In Dubai, Dame Judith oversaw the launch of our first international post-COVID campaign alongside Secretary of State Nadine Dorries, before travelling to Paris and Milan in the summer to host discussions with top-level diplomats.

In taking on the baton of Chair of the BTA I hope to continue Judith's efforts, being an advocate for Britain's visitor economy both domestically and internationally. Such advocacy is increasingly important, especially as change is also afoot in the English tourism landscape.

The government's decision to pilot Local Visitor Economy Partnerships (LVEP) accreditation and Destination Development Partnership (DDP) status is momentous, and provides an opportunity to test and refine the model set out in the 2021 de Bois Review. The North East provides a perfect test bed – a region tapped with potential and iconic assets which has been too often overlooked by visitors. The North East's inevitable success will also have the effect of solidifying the visitor economy's reputation in delivering the Government's levelling up agenda, and strengthening the case for further industry investment.

During this period of recovery we have been focused on the economics of tourism – reviving our sector in the face of bleak outlooks – but we must not lose sight of the driving force behind our sector's work - providing an

environment in which visitors can - to steal a phrase - 'escape the everyday'.

So as we look ahead to 2023/24, with its own set of new challenges and opportunities, I am heartened by our ability to adapt and create positive change.

Finally, I would like to show my appreciation to the BTA Board, whose support and advice has been invaluable in navigating these changes, and in particular Dame Judith for her leadership and gracious guidance to me as I took up this role. I would also like to thank Patricia Yates and the senior leadership team at VisitBritain/VisitEngland for their tireless work, and of course the staff across our 22 markets for their dedication to our success.

My final thanks go to Fiona Pollard and the VisitEngland Advisory Board, whom I have seen provide a strong voice for England within the BTA, and are now tasked with overseeing the shift towards a new model for our domestic tourism landscape.

Nick de Bois CBE
BTA (VisitBritain/VisitEngland) Chairman





CEO Foreword

While this report reflects on the achievements of the teams at VisitBritain and VisitEngland over the past year, it also marks my first year as Chief Executive of the British Tourist Authority.

I took on the role eager to adapt the organisation and make it fit for a post-pandemic world – delivering for both the sector and government.

We have shifted the organisation to be more externally focused, listening to our stakeholders and implementing clear corporate priorities that had tangible outputs. To support this I have also prioritised a focus on organisational culture to ensure every member of our team understood their role in delivering on our priorities. This report is now a chance to reflect on the past 12 months and consider our progress.

Rebuild international visitor value

Position Britain as a dynamic, diverse, sustainable and inclusive destination, prioritising regional and seasonal dispersion and improved productivity.

In line with the Tourism Recovery Plan's ambitions, and the industry's need for cash flow, we have focused our international marketing in those markets that showed the greatest propensity to travel to Britain.

The 'Welcome to Another Side of Britain' campaign was launched in early 2022, just as international travel restrictions began to be lifted.

Corporate and trade partnerships are key to turning inspiration into bookings so our campaign collaborations with British Airways and TripAdvisor have been highlights in the US and Europe respectively.

Meanwhile, our international teams have built connections in market to ensure that Britain is sold, strengthening trade connections, getting high value PR coverage and using social media

to keep Britain top of travel wish lists to further support the recovery of visitor value.

Our forecast this year shows that we are set to surpass 2019 spend levels, reaching 104% of 2019 spend, while visits are due to reach 86% of 2019 levels; driving this is the US market which is recovering particularly rapidly.



Build the English visitor economy

Lead and enable a sustainable and resilient visitor economy in England.

Tourism can provide local economic investment and careers for every region, but it needs the right holistic structures to support it in doing so.

Since the publication of the Government's response to the independent review of Destination Management Organisations (DMO), VisitEngland has been working to deliver reforms to the DMO landscape designed to maximise the investment and visitors they can bring to the regions.

We have collaborated closely with sector

stakeholders in getting this process underway, and are now beginning to accredit the first of the Local Visitor Economy Partnerships (LVEPs) and have our first pilot Destination Development Partnership (DDP) in the North East.

VisitEngland has also been delivering for SMEs in the sector, providing advice and training on selling product internationally, improving accessibility, and developing England's sustainable offering.

Build our influence

Be the trusted voice in tourism. Support growth by shaping policy and providing insights.

VisitBritain/VisitEngland has continued to highlight the economic importance of tourism and the needs of the sector to Government and other policy makers throughout a turbulent year in Westminster.

We have contributed to Select Committee inquiries, on topics including Promoting Britain Abroad and the promotion of both Wales and Scotland as international tourist destinations. In line with our statutory duty to advise the government on tourism policy, we have also developed policy papers

and briefings on topics including border competitiveness, short-term lettings and the Common Travel Area. These documents will continue to advise our senior leadership team's work.

In March, we enjoyed another successful English Tourism Week, showcasing the importance of the sector to Parliamentarians, including supporting visits to constituency attractions and securing statements of support for the sector on social media.



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Build our future

Transform the way we work to compete in a digital world, build our strengths in data and diversify our funding.

To deliver the innovation required to grow the visitor economy, and deliver on our objectives, we must be fit for the future. Digital and technological transformation are the enablers for this work.

As well as creating a more efficient organisation that can re-focus resource on delivery, transformation will mean improvements including modernised digital

channels with more dynamic content; transformation of the way the BTA uses data and a new e-learning platform.

We are already making progress on our digital channels with a new improved consumer site that puts destinations at its heart, and a new industry facing website to follow later in 2023.

Build our team

Work as a global team. Ensure our structure and skills best deliver on the strategy.

A successful transformation strategy is dependent on a highly skilled and resourceful global team.

I have already made significant changes to our senior leadership team in order to encourage a more collaborative approach across teams, as well as give new focus to building external partnerships.

We will continue to build a one global team ethos, to ensure colleagues across the 22 markets where we operate are all united in working towards the same goals while fostering talent and promoting creative and innovative decision making.

Finally, I would like to convey my thanks to the whole team at VisitBritain/VisitEngland for their commitment and hard work over the past year, to our colleagues in the tourist boards of Scotland, Wales, London and Northern Ireland for their collaboration; to officials and ministers at the Department for Culture, Media and Sport (DCMS) for their support of the BTA and tourism more widely; and of course to the BTA's Chair and Board for all of their support and guidance. I look forward to working with you all in the coming year as we continue to drive growth in British tourism and support our sector to thrive.

Patricia Yates
Chief Executive, VisitBritain/VisitEngland

Rebuild international visitor value

Rebuilding visitor value as quickly as possible.

2022 was a historic year for the UK, packed with high-profile celebratory occasions such as the late Queen's Platinum Jubilee which marked 75 years of her reign and the Birmingham 2022 Commonwealth Games, which attracted huge interest from around the globe.

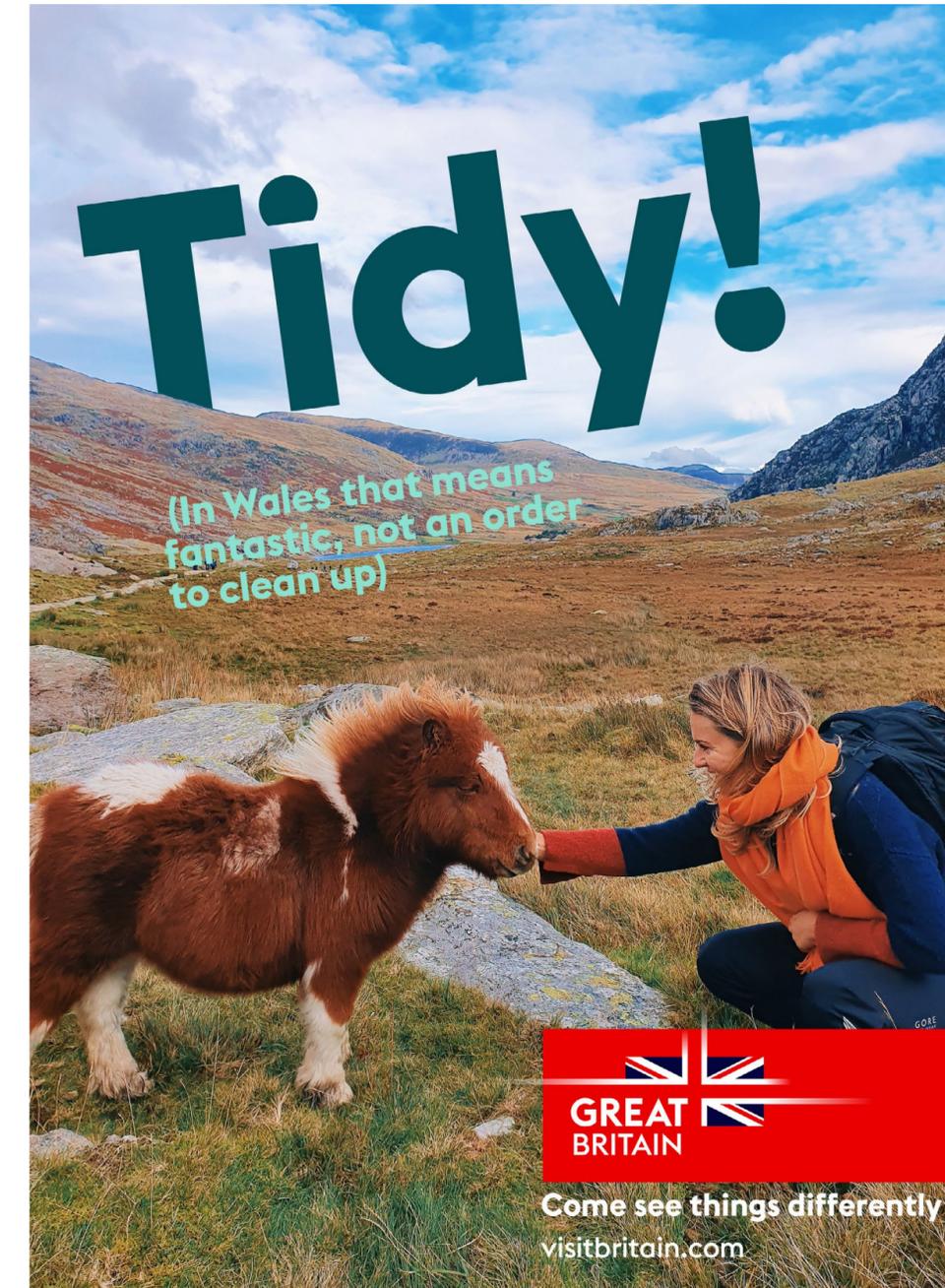
These events provided ripe opportunities to amplify our inbound tourism message by creating celebratory content promoting Britain globally during the year to highlight our warmth and welcome to the world, and encourage visits and spend by international visitors.

2023 promises another year of spectacular events including the Coronation of His Majesty The King and Her Majesty The Queen Consort celebrations across the nation, and the Eurovision Song Contest final which will be held in Liverpool this year, on behalf of last year's winners Ukraine. These events will once again put Britain in the global spotlight, encouraging visits and spend by international visitors.

In February 2023, we launched our new multi-million pound international GREAT campaign to drive tourism to Britain. 'See Things Differently' will run until June to position Britain as a dynamic,

diverse and welcoming destination and will focus on countries where we are seeing strongest recovery including the US, Canada, the Gulf Cooperation Council (GCC) countries, France, Germany and Spain.

In Europe and the GCC the campaign plays on Britain's affinity with tea. 'Spill the tea' taps into motivations for immediate travel based on our latest research. In Canada and US we showcase Britain's regional diversity, sharing a warm welcome in a range of regional accents, encouraging visitors to come and explore these destinations for themselves.



To amplify and build the success of the campaign, we introduced the Gateway Innovation Fund that will run in parallel to the core campaign. The Fund encourages collaboration between local destinations and industry in the promotion of gateway destinations or regions

to develop international consumer marketing campaigns that showcase the very best of a region, motivating travel in 2023. Successful partners include Newcastle Gateshead Initiative and Wego targeting visitors from the Gulf Cooperation Council (GCC) countries; Brittany

Ferries, Destination Plymouth and other South Coast Destination Management Organisations (DMOs) targeting the French market; and London & Partners, Expedia Group Media Solutions and VisitScotland will be targeting US travellers.



VisitBritain/Simon Jarratt



VisitBritain/Pawel Libera



VisitBritain



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VisitBritain/NGI/Michael Baister

Results from our international activities



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 £16,790,111, we generated an incremental value of £190,593,728 for the British economy. This is equivalent to 193,712 additional international visitors, and over 3,500 jobs created



Our 11 content pages on top 2022 events had 286k page views



We achieved 304 international PR press articles with combined OTS of 10.3 million



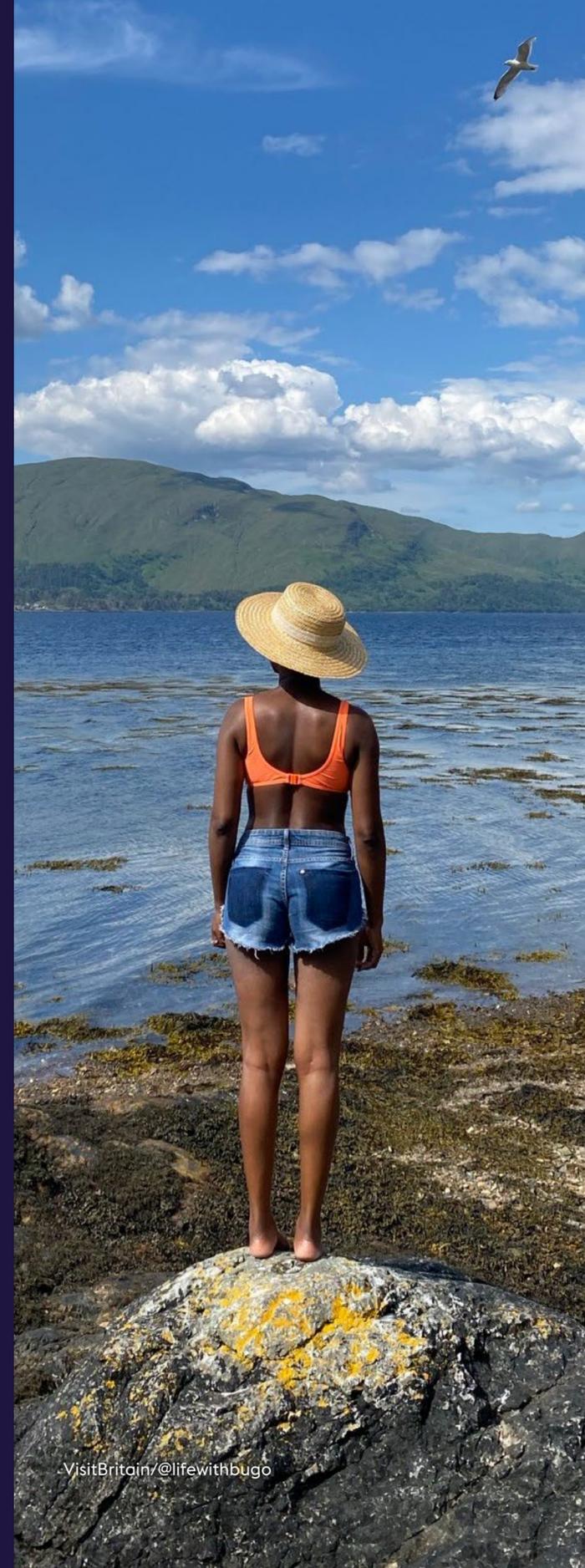
In 2022, we hosted 12 Queen's Platinum Jubilee events with the British Embassy, leading to 2.7 million impressions on social media and a global social media reach of 43 million



Our global group press trip for seven top tier international media resulted in a combined social reach of over 21 million



150 global social posts achieved more than 1.8 million reach and over 72k engagements



Growing business through B2B activity and enabling connections internationally

Our international network is fundamental to our global B2B strategy, partnership activity and building connections with trade and press.

Through our activity we create opportunities to help UK suppliers increase their profile, build relationships and boost awareness of their product with overseas travel trade. We also provide educational opportunities for international trade and media to experience products first-hand.

Over the last year we held a number of regional travel trade events including Meet the Trade France, Meet the Trade France and Meet the Trade Nordics, as well as multi-city roadshows in India and Spain to enable UK suppliers to meet and promote their business to local markets.

In partnership with the West Midlands Growth Company, in July and August, we hosted over 40 top travel buyers, tour operators and travel media from Australia, Canada and India on educational visits to Birmingham and the West Midlands during the Commonwealth Games. During the visit, the international buyers met with British travel trade

suppliers and destinations as part of a dedicated 'Tourism Day' on 5 August.

In September, we facilitated 2,000 business meetings between British suppliers and US/Canadian buyers at our Destination Britain North America event in Washington D.C.

As part of our GREAT funding for innovation and commercial strategy, we launched a test pilot cooperative marketing programme in the USA, seeding the pilot with £250k investment. To further drive US bookings to Britain, we offered tourism industry partners a new way to target the American consumer at a range of investment levels through a collaborative digital platform. This approach leveraged our media partnerships and the visibility of our brand activity to amplify impact and allowed us to use a completely different paradigm to deliver consumer marketing, working at a granular level with a cross-sector of industry.

Kicking off in March and running until 31 May 2023, the 'Come See Things Differently' cooperative campaign will deliver value to industry by generating awareness, consideration and conversion to visit Britain amongst travel intenders. Twelve industry partners have contracted to invest £290k collectively, representing a wide variety of businesses, resulting in a joint investment total of £540k. Based on the 30+ expressions of interest and private sector investment, there is potential to expand this programme in additional markets in 2023/24.

In February-March 2023 we held our flagship tradeshow, ExploreGB Virtual. The event facilitated over 4,000 online business meetings between 320 tourism industry suppliers and destinations from across Britain, and more than 200 global buyers from markets including Australia, China, the Gulf Co-operation Council (GCC) markets, France, Germany, Italy, Spain and the US, to promote their products and forge valuable business connections.



Ahead of this, we held Showcase Britain, our new B2B initiative which brought together a number of activities to update over 120 international leisure trade buyers and trade media, who were attending the ETOA Britain and Ireland Marketplace on what's new in Britain.



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This included a special event to provide buyers with product updates from across Britain, as well as a buyers' consultation workshop with our partnerships.

Finally, our online trade education programme of market update webinars ran from August to



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December, covering France, Germany, Spain, India, the Netherlands, Nordics, GCC and Italy. Over 600 delegates registered from across the industry, at all levels of trade readiness and from all nations of the UK with hugely positive feedback.



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Results



New US cooperative pilot programme has attracted £290k industry partner investment resulting in collaborative £540k campaign



2,000+ B2B meetings took place at Destination Britain North America



600 delegates signed up for the Market Update webinars



4,000 online business meetings between UK suppliers and international trade were facilitated at ExploreGB Virtual 2023



VisitBritain/Aron Holdon

Boosting the growth of business events

Promoting Britain as an attractive host for international events, business meetings, exhibitions and conferences is a core aspect of our priority to rebuild the visitor economy across the country.

To this end we redeployed our Business Events Growth Programme (BEGP) to strategically engage with the sector and increase the number and quality of international business events in the UK, across a wide range of sectors including life sciences, medical, technology, finance, culture and transport. Altogether, 27 applications were approved for events in 12 cities, with a collective potential value of £57 million.

We continued to develop our influence in the business events space through our work with key stakeholders such as the government, Events Industry Board, UKEvent and the Business of Events, and providing resources and opportunities to support Destination Management Organisations (DMOs).



Results



In 2022, 27 BEGP applications were approved for business events in 12 cities with potential value of £57 million



260 enquiries received for business events in England cities



Build the English visitor economy

To lead and enable a sustainable and resilient visitor economy in England.

Over the past year, our core priority to lead and enable a sustainable and resilient visitor economy in England took a new turn with the publication of the Government's response in the summer to the independent de Bois Review of Destination Management Organisations (DMO) in England, published in September 2021.

It gave VisitEngland a remit to redevelop the DMO landscape with a new accreditation scheme along with a three-year £4 million fund to develop Local Visitor Economy Partnerships (LVEP) and Destination Development Partnerships (DDP).

The work to develop the LVEPs began in earnest in autumn, with a series of DMO roundtables in Bristol, London, Warrington,

Newcastle and Birmingham with over 100 delegates, to gather industry feedback.

The first DDP pilot was announced in November 2022 to take place in the North East of England region and DMOs were invited to apply for LVEP accreditation in February 2023.

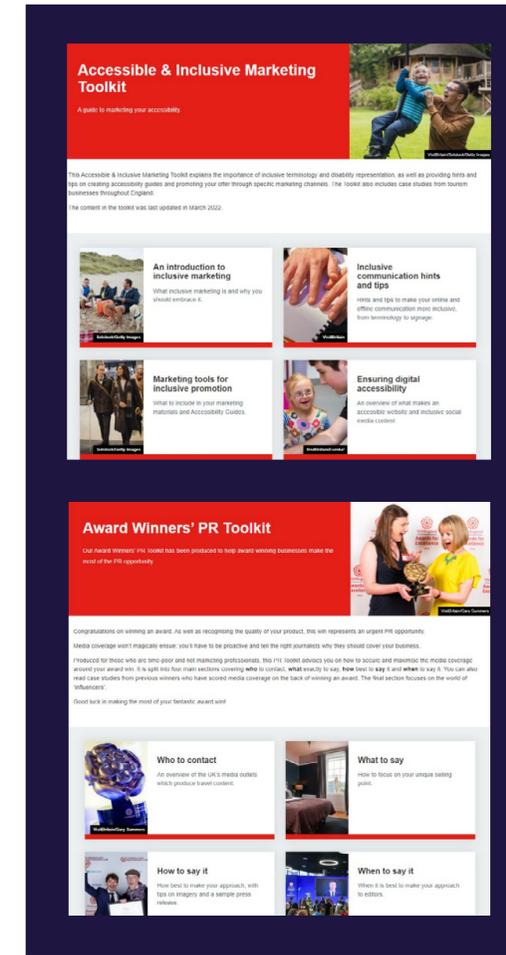
This year, we focused on reconnecting UK suppliers with overseas travel trade buyers through trade events throughout the year to enable them to explore and network with key markets.

We worked tactically to raise the profile of England's venues to international event organisers through our presence at high profile events including IMEX Frankfurt,

IMEX America, The Meeting Show and IBTM World.

Supporting the growth of businesses in England's tourism sector has always been a key element of our work and we boosted awareness of the Business Advice Hub with a paid media campaign. We also added new content including a fully updated Digital Marketing Toolkit, an Accessible and Inclusive Marketing toolkit, and an Award Winners' PR Toolkit, in a new on-page format.

In June, our prestigious VisitEngland Awards for Excellence ceremony took place, which has championed innovation, quality and best practice across the English tourism sector for over 30 years.



We awarded 53 winners in categories spanning experiences, accommodation, attractions, accessibility, sustainability, innovation and more, at a celebratory event at the Library of Birmingham with 200 guests, hosted by Clare Balding CBE.

We have also been building on our commitment to make England the most accessible tourism sector in Europe, as outlined in the Tourism Recovery Plan, by becoming a leading voice on accessibility in tourism and developing and testing accessible tourism itineraries.

Our work on accessibility with North York Moors has continued to support 12 local businesses to become more accessible, providing each with a comprehensive audit, an improvement plan, disability

awareness training, peer mentoring and more.

Our successful training programme, Taking England to the World (TETTW), continued to run this year, educating businesses and DMOs on how to raise their international profile and increase bookings.

Packed with expert-led content, the programme is delivered both virtually via a three-part live session or as an in-person full day workshop which were held in Yorkshire, Liverpool, Buckinghamshire, Worthing, Norwich, Leeds and Birmingham, with 100% positive feedback.

Our technology-led approach to help SMEs grow their business internationally, Tourism Exchange GB (TXGB), built new connections with key partners

including Bookalet, Guestline, Staah, Ventrata, Spektrix and more, to help businesses reach more customers. We have also collaborated with Tourism Northern Ireland and VisitWales to assist with dispersal via TXGB.

Work is currently underway with partners in Scotland, Wales and Northern Ireland to improve the value of our Quality Schemes, based on insights that show that international visitors are particularly keen on businesses that include a tourist board rating.

The year was capped off with VisitEngland winning the 'in-house PR Team of the Year' award at the TravMedia Awards, beating stiff competition from British Airways, Kuoni, Saint Lucia Tourism and VisitScotland.



Results



14 TETTW courses delivered by December: seven virtual programmes, and seven in-person sessions



419 businesses attended a TETTW workshop, with 100% positive feedback



National PR on the VisitEngland Awards for Excellence achieved an AVE of £626,000 and a reach of c. 12 million



In February 2022, the Business Advice Hub reached the highest number of tourism businesses since July 2020, with over 58,000 page views



VisitEngland won TravMedia Award for In-House PR Team of the Year

Build our influence

Working in partnership with the industry to support and advise.

As the national tourism agency, we highlight the economic importance of tourism and ensure the sector and the needs of the industry remain at the forefront of decision-making by government, ministers and stakeholders.

We engaged with stakeholders including government, Parliament and ministers, sharing research and insights and developing policy papers on key topics – this year we focused on border competitiveness, short-term lettings, social tourism and the Common Travel Area.

Our CEO and Board Chairs took part in oral evidence sessions and were engaged in the Government’s soft power activities such as UK House Tourism Day. Dame Judith Macgregor (then BTA Chair) visited Dubai for the UK National Day at Dubai Expo, and for the CEO’s trip

with the DCMS Select Committee to South Korea.

We responded to the global challenge of climate change and calls to the tourism sector to address the issue of sustainability and responsible tourism with a Sustainable Tourism Discussion Paper, in consultation with the industry. We created a content hub to help businesses and customers to make environmentally friendly choices and we are leading the Tourism Industry Council’s sustainability working group.

We are also boosting our impact in the sustainability space through working closely with the Core Cities group, bringing together Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle, Nottinghamshire and Sheffield, with each city building their own strategies on performance metrics

around environment, social, supplier and destination management.

This work will enable us to not only showcase excellence, it will enable us to share best practice to champion this work globally.

We are supporting bodies such as the Confederation of Passenger Transport, WRAP and Energy Savings Trust to enable them to amplify the important work they have in place to support industry and build on positive outcomes to improve the visitor journey.

The VisitEngland Business Advice Hub continues to highlight funding opportunities such as the grant schemes for electric vehicle charging infrastructure and great initiatives such as the car-free travel advice and guidance from Good Journey.



We continued to provide our stakeholders with statutory and timely up-to-date research, data and actionable insights on Britain and England, including our monthly consumer and domestic post-COVID sentiment reports to keep industry informed of progress towards recovery of tourism post-pandemic.

This year has also seen the relaunch of the Great Britain Tourism Survey (GBTS). The new methodology has realised efficiencies by combining it with the Great Britain Day Visits

Survey (GBDVS). In addition, we have moved GBTS from face to face to be online, allowing results to be published quicker in the coming months. We are also expanding our range of new data sources to be able to provide more timely and granular data, to give a more immediate picture of how inbound and domestic tourism are performing.

At the end of the year, we published large-scale exploratory research looking at the motivations, influences, decisions and sustainability (MIDAS) of

international visitors, to gain a deeper understanding of them. Fieldwork took place in April 2022 across 29 markets and covered topics such as travel intentions, decision drivers and motivations, destination perceptions, activity and product interests, customer journey behaviours and emerging trends of interest.

We ran two industry webinars on the MIDAS research with 188 attendees in 2022/23 and the report has had over 5,800 downloads from our website.



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VisitBritain/Pete Seaward



VisitBritain/James Relf Dyer



VisitBritain/Nadir Khan

Results



We have supported 28 Parliamentary questions as well as fielded ad hoc questions by DCMS



The #EnglishTourismWeek22 hashtag was the most used by MPs during the week



MIDAS industry webinars saw 188 attendees, with 5,800+ downloads of the research document

Build our future

To innovate, adapt and improve for the future.

We have made steady progress with our corporate priority to Build our Future, which encompasses interconnected programmes and projects from various areas of the business, including digital, data, marketing, technology, finance, People and Culture which, all together, deliver improved benefits to our stakeholders.

Build our Future is a business transformation programme that will allow us to become a better equipped organisation to thrive in a rapidly changing environment and meet industry trends.

Our ambition is to become a modern, agile organisation that can compete in a digital world and meets the ever-growing expectations of our consumer customers and business partners.

Through developing new and more effective ways of working, and introducing new systems, processes and capabilities, we are transforming

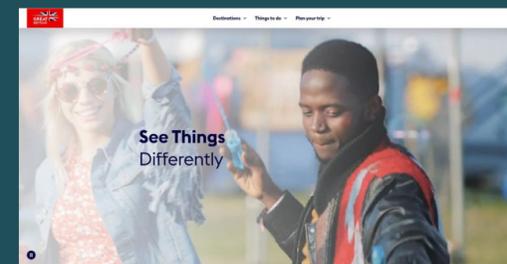
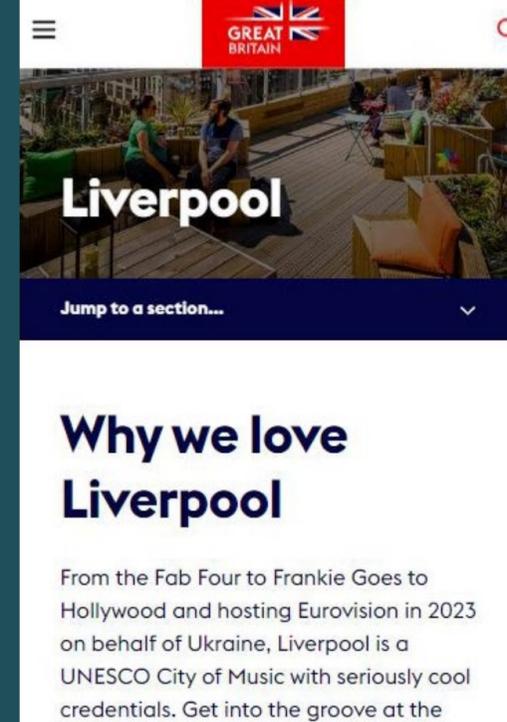
the way we work and serve our stakeholders, seizing opportunities to operate in a global environment that are focused on the customers of the future and growing market value.

We have already successfully launched our new global consumer website, offering visitors a better digital experience, and replaced our digital asset management system, as a part of our Digital Customer Experience Programme (DCxP) to transform our digital estate and enable wider organisational transformation.

In 2023 we will relaunch our industry-facing websites and by the end of the year, we aim to have completed the first phase of our global consumer website to inspire visitors with a better experience to choose Britain, including regional, seasonal and more dynamic content, to meet the changing way people search and consume content.

Our Data Transformation programme seeks to position us as the primary authority for data that will be collected and interpreted from multiple sources to provide actionable insights to government and industry, which will in turn enable them, and us, to make better informed investment decisions.

Our large programmes of data and digital transformation will enable us to target customers with the right content at the right stage in the customer journey, making our activity more cost-effective and enabling us to break into new markets and reach new audiences at a lower cost. We will reduce the total dependence on government funding by building our commercial revenues - by 2025 we aim to be raising half our grant-in-aid (GIA) (i.e. £10 million) from commercial activity. Our commercial and digital capabilities will underpin our ability to embrace innovation, be a test bed for new products and align with industry partners on joint activity.



Build our team

Ensure our structure and skills best deliver on the strategy.

Internally, we focused on developing our organisation through the Build our Future programme, including a refocus on roles at the top of the organisation. This includes adding a new partnerships director, an international director and a global marketing director to our senior team, who are all supported by a new team of deputy directors, to ensure that we are in the best shape to deliver for our stakeholders, business partners and potential visitors.

We will work globally, and be more outwardly focused, embracing the opportunity to adapt to the environment around us and the demands made on us. We will use data to constantly learn what works and give up activity that does not add value to the industry.

We will be using our talented staff wherever they may be located, welcoming change and challenge. We will offer our people the opportunity to learn, develop and use new skills. Our people will have a truly global remit, not working for one department or country but using their skills on projects that help us deliver our future.





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VisitBritain/VisitEngland, 3 Grosvenor Gardens, London, SW1W 0BD

