The Social Value of Tourism

May 2025

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EXECUTIVE SUMMARY

This report explores the wide-ranging social, cultural, and community impacts of tourism, particularly through the lens of local communities, whose lives it directly impacts. Drawing on polling data, case studies, and statistical analysis, it reveals how tourism contributes to community pride, well-being, and regeneration, while also highlighting the importance of sustainable and inclusive practices.

Key Findings

1. Community Roots – Pride, Identity, and Empowerment
- Host communities, specifically the people who live and work in the communities most impacted by tourism, consistently report higher levels of local and national pride.
  - 72% of the British public are proud that visitors come to the UK from around the world, and that goes up to 79% of people living in host communities.
- Social cohesion is notably stronger in host communities, where residents feel more connected to their community and protective of their local identity.
  - 58% of those in host communities feel connected to their community, while only 35% in non-host communities feel that community connection.
- The Resident Empowerment Index, an original scale we develop to measure pride, connectedness, and agency, shows statistically significant higher scores in host communities.
  - Host communities scored 20% higher on this index than non-host communities.
- Case Study: Eurovision 2023 in Liverpool illustrated how community spirit and cultural pride can elevate a major tourism event into a model for engagement and cultural exchange.

2. Shared Spaces – Nature, Culture, and Everyday Benefits
- Tourism improves access to cultural amenities, green spaces, and local businesses—enhancing the daily quality of life for residents and visitors.
  - Over half of host communities residents consistently report living within 5 miles of cultural institutions, heritage sites, museums, arts venues, waterways, beaches, and other aspects of nature, with non-host communities consistently reporting longer distances.
- Case Study: Programmes like Generation Green 2 connect disadvantaged youth with nature, showcasing tourism's role in social inclusion.
- Host communities report better infrastructure and institutions, driven by local business engagement and cultural participation.
  - Half of host communities rate their cultural institutions positively, compared to only 25% in non-host communities.
- Case Study: Bath's Visitor Economy shows how tourism enables local economies and culture to thrive.

- Transport investments in Cornwall, Yorkshire Dales, and Thanet exemplify infrastructure improvements that benefit both visitors and residents.

3. Future Pathways – Growing, Regenerative, and Inclusive Tourism
- Tourism can act as a catalyst for social regeneration, providing funds which can be re-invested in the community.
  - Case Study: The National Forest demonstrated how environmental restoration and sustainable tourism can go hand in hand.
- Host communities have strong business, cultural, and social networks, which we measured using the Social and Cultural Strength Index.
  - This original index captures the relative strength of communities' business districts, cultural offerings, and identities. Using regression analysis, we found it is positively and significantly correlated with levels of tourism.
- The visitor economy offers a range of employment opportunities and diverse entry routes, including for young people and those with varied educational backgrounds.
  - For instance, of the 4,220 apprenticeship starts focused on subjects linked to Leisure, Travel and Tourism in 2023/24, 55% were undertaken by people under 19 and 85% by people under the age of 24. This compares to only 23% and 52% respectively for apprenticeships across the whole economy.
- Case Study: The Visitor Economy Network Initiative (VENI) highlights tourism's potential for workforce development and civic pride, especially for underserved populations.
- There is a clear appetite within the British public to travel in a regenerative way that is both good for communities and the environment.
  - Nearly 60% of the public say that when they travel, they try to leave the place better than they found it.

INTRODUCTION

The impact of tourism extends far beyond the economic benefits evident in communities across the UK. For both travelers and communities frequented by visitors, tourism offers a diverse range of experiences and advantages. This report explores the wide-ranging social and cultural impacts of tourism in the UK, particularly through the lens of local or host communities, whose lives are directly impacted by the industry. Drawing from polling data, economic analysis and modelling, it reveals how tourism contributes to community pride, well-being, and regeneration, while also highlighting the importance of sustainable and inclusive practices.
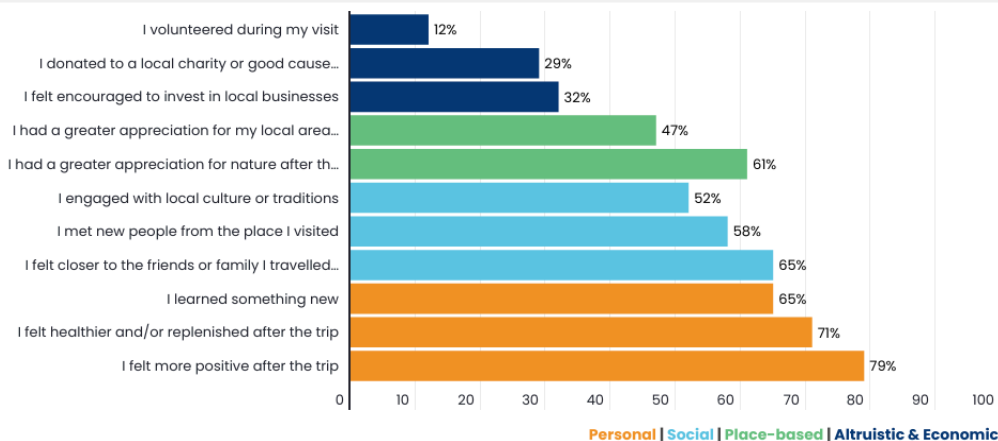
While much of this report focuses on the communities directly impacted by and benefiting from tourism, there are also clear benefits for the travellers themselves.

- About 8 in 10 people felt more positive after traveling in the UK, and 7 in 10 felt healthier and more replenished.
- A majority of people also felt closer to the people they travelled with, met new people, or engaged with local communities, cultures, and traditions.
- About 6 in 10 had a greater appreciation for nature after their trip, and a third felt encouraged to either support local businesses or donate to local charities or good causes while they travelled.

The multifaceted benefits of travel extend beyond leisure - they foster personal growth, social connections, and environmental awareness.

Thinking about the holidays you have gone on within the UK in the past year, did you do or experience any of the following?
Public First | UK Adults | Sample Size: 3,017| Fieldwork 31st Oct – 11th Nov 2024

Category	%
I volunteered during my visit	12%
I donated to a local charity or good cause…	29%
I felt encouraged to invest in local businesses	32%
I had a greater appreciation for my local area…	47%
I had a greater appreciation for nature after th…	61%
I engaged with local culture or traditions	52%
I met new people from the place I visited	58%
I felt closer to the friends or family I travelled…	65%
I learned something new	65%
I felt healthier and/or replenished after the trip	71%
I felt more positive after the trip	79%

Personal | Social | Place-based | Altruistic & Economic
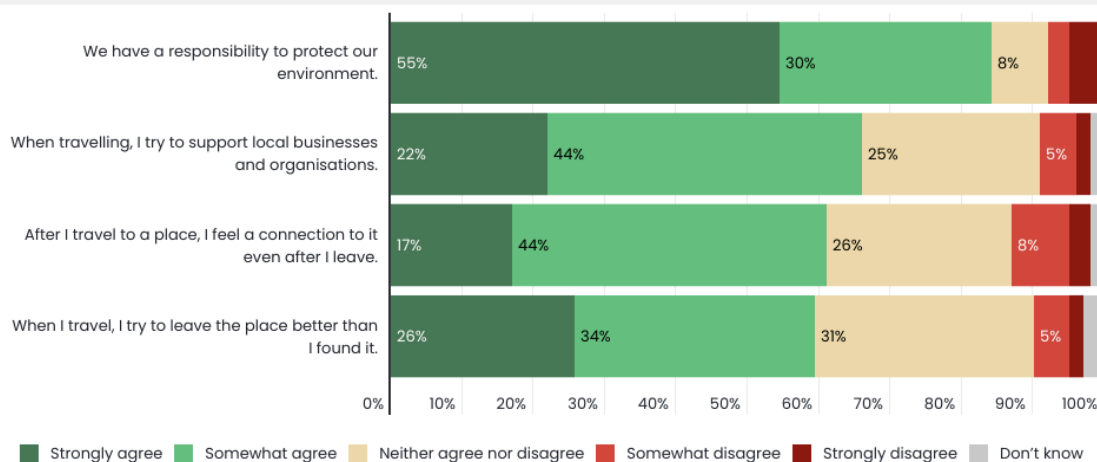
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By deepening connections to nature, culture, and people, travel can inspire a sense of responsibility and a desire to give back, making it a powerful catalyst for positive change.

Importantly, the British public has a distinct desire to be a part of that improvement.

- A majority of Britons want to have a positive impact on the local communities and environments while they travel.
- Most want to leave the place better than they found it and feel a connection to a place even after they leave.
- Two thirds of people try to support local businesses and organisations when they travel, and an even stronger majority of 85% agrees that we have a responsibility to protect our environment.

To what extent do you agree or disagree with the following?
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct - 11th Nov 2024

The British public has a clear commitment to the positive potential of travel as well as the potential benefits of tourism in our communities and environment. These perspectives echo the priorities of an emerging concept, called regenerative tourism.

Regenerative tourism is an approach which reimagines the tourism industry as a force for sustainability, inclusivity, accessibility, and genuine hospitality. Regenerative tourism aims to leave a place in a better condition than if it did not have tourism. Rather than maintaining or sustaining a place, regenerative tourism seeks to improve a place through tourism.

The regenerative approach goes beyond goals of previous decades, prioritising not only environmental stewardship but also the lasting well-being of local communities, economies, and cultural heritage. This proactive, forward-thinking approach views tourism as a tool for tackling economic, social, and especially environmental challenges, aiming to rejuvenate and restore rather than capitalise on the places and people that make tourism possible. By putting the needs of host communities and visitors at the forefront, regenerative tourism fosters a sustainable balance that benefits everyone. Ultimately, this model creates opportunities while reducing risks, ensuring tourism contributes positively to people, places, and shared prosperity for generations to come.

A number of regions and organisations in the UK are leading the way on regenerative tourism.

CASE STUDY:

North East Regenerative Visitor Economy Framework

In the North East of England, a world-leading regenerative visitor economy framework designed by local organisations is helping to guide the future of tourism and its impact on the region.

In 2024, Destination North East England published a new regenerative visitor economy framework for the region, one of the first of its kind in the world.

This will underpin the region's plans to double the size of its visitor economy by 2034 - growing its economic impact to over £10bn - by ensuring this is done in a way that ensures its long-term viability and benefits for communities, businesses and the environment.

From the outset, a key aim of the framework was to move beyond only looking at sustainability as an objective in tourism, which often focuses solely on environmental issues. Instead, the framework is deliberately set out around a regenerative approach, with wider objectives to also create positive economic and social impact.

The framework was created through consultation with over 600 stakeholders, including large sessions and smaller focus groups which engaged local businesses, community organisations, and industry representatives.

A mission statement was co-created early in the process, and principles were refined over time through open dialogue and constructive disagreement. The framework was designed to provide tools for stakeholders to act autonomously rather than relying on top-down political ownership.

This engagement means the framework has been widely supported and its areas of focus are beginning to be adopted across the North East. For example, the new North East Combined Authority referenced the framework in a recent tender for a ten year events strategy - helping to ensure its impact will be felt over the longer term.

With the framework in place, Destination North East England is now focused on how it can measure its impact and support more organisations, especially businesses, to use the framework as a guide for how to adopt regenerative practices themselves, for example by rethinking transport and supply chains.

Its status as a framework, rather than a strategy, means the authors also hope it can provide principles and a model for other areas to adapt and implement, according to their unique contexts and needs.

> *We want the framework to be a living document, which helps promote tourism for good here in the North East but also helps inform the work of others across the UK and the world.*

Ian Thomas
Chief Operating Officer, Newcastle Gateshead Initiative

Among the positive impacts, we also identify a number of opportunities for the tourism industry to improve and grow their positive impact. In this report, we detail the impact on communities and spaces, highlighting the potential future pathways for growth and regeneration.

Summary of Methodology

We at Public First conducted research on the public opinion as well as the societal impact of tourism in Britain today. In addition to a series of case studies and interviews, the primary source of this original research is a survey of 3,017 British adults, conducted between 31 October and 11 November 2024. We designed this poll to directly measure key attitudes related to tourism and its impact on communities. The poll also augmented our ability to model key perceptions of tourism so that we are able to combine that public opinion insight with public data to produce detailed findings and modelling for communities throughout the UK. We fleshed out this quantitative analysis with case studies and spoke with leaders from across the visitor economy, including those representing national and local government, destination partnerships, tourism bodies, national parks, the heritage sector, hospitality, and more.

A core aspect of this research focuses on the people who live and work in the communities most impacted by tourism. We investigated how life in these "**host communities**" differs from elsewhere in the country. To ensure that we include everyone who lives in these communities, but might not work in the industry itself, we define this group by those who see tourists or

people visiting their local area relatively frequently in their normal day-to-day life. This ensures that we include people who might not live in the busiest districts of their local area or who are unable to leave their homes multiple times a day. To confirm that the impact reported is robust, all effects have been analysed and confirmed among those who have the most contact with tourists and visitors as well as those who have occasional contact.

Community Roots

Pride, Identity, and Empowerment in Host Communities

KEY FINDINGS

- Host communities consistently report higher levels of local and national pride.

- Social cohesion is notably stronger in host communities, where residents feel more connected to their community and protective of their local identity.

- The Resident Empowerment Index, an original scale we develop to measure pride, connectedness, and agency, shows statistically significant higher scores in host communities.

- Case Study: Eurovision 2023 in Liverpool illustrated how community spirit and cultural pride can elevate a major tourism event into a model for engagement and exchange.
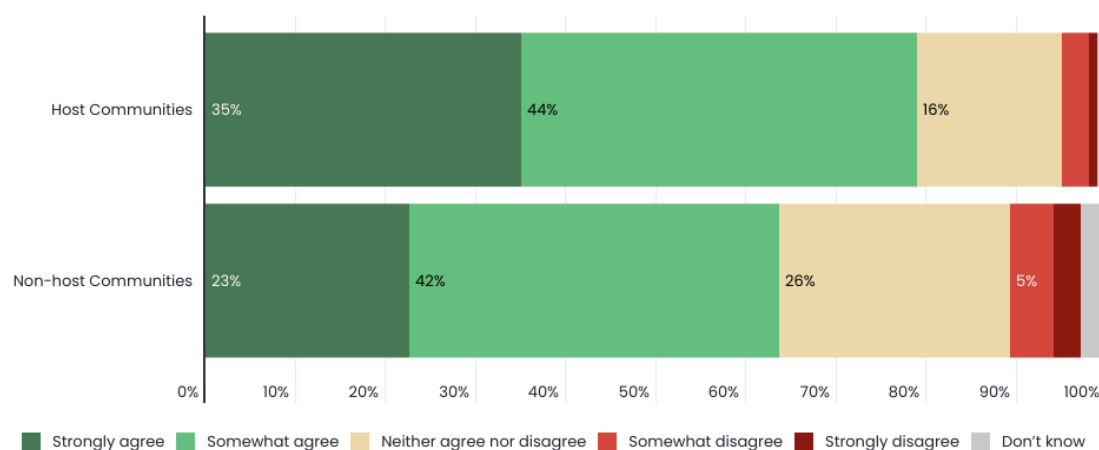
FINDINGS & ANALYSIS
Pride

In our polling, we assessed and measured the many different ways that pride manifests itself. When it comes to how we view Britain on the global stage, the British public is very proud to be a destination for international tourism, and those who live in areas with more tourism are especially proud. 65% of people in non-host communities are proud that visitors come to the UK from around the world, and that goes up to 79% of people living in host communities.

To what extent do you agree or disagree with the following?
I'm proud that visitors come to the UK from all around the world.

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024

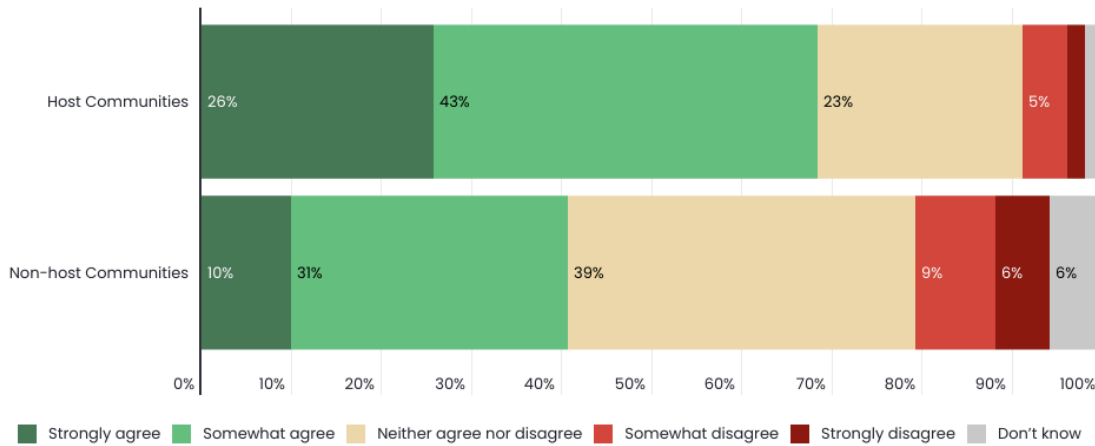|	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Host Communities	35%	44%	16%			
Non-host Communities	23%	42%	26%	5%		

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People who often encounter tourists where they live or work are more likely to be proud of their local area as a tourist destination than people who live in non-host communities. Nearly 70% of those in host communities would recommend that people visit their local area and are proud that people want to visit their local area. An incredibly small number (6%) of people in host communities do not feel proud that people want to visit their local area, but elsewhere in non-host communities, that number is as high as 15%.

To what extent do you agree or disagree with the following?
I'm proud that people want to visit my local area

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024

Host Communities: 26% | 43% | 23% | 5%

Non-host Communities: 10% | 31% | 39% | 9% | 6% | 6%

Legend: Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know
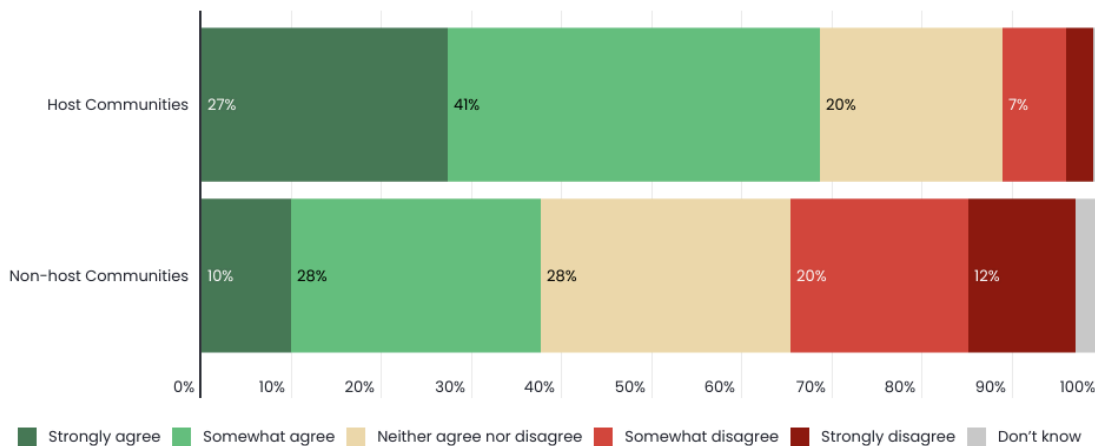
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People in host communities are much more likely to recommend visiting their local area than those in non-host communities with 68% of host communities versus 38% elsewhere.

To what extent do you agree or disagree with the following?
I would recommend visiting my local area to others.

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024

Host Communities: 27% | 41% | 20% | 7%

Non-host Communities: 10% | 28% | 28% | 20% | 12%

Legend: Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know
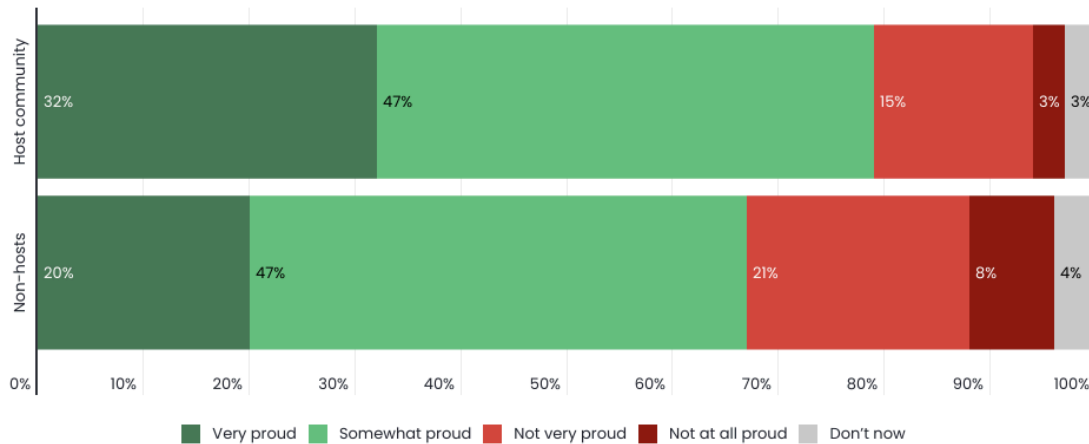
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When we asked specifically about local pride, the results were even more striking. Nearly 80% of people in host communities expressed pride in living in their local area, with one-third stating they feel very proud. Host communities consistently scored approximately 10% more positively than the general population.

How proud are you of living in your local area?

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024

Host community: Very proud 32% | Somewhat proud 47% | Not very proud 15% | Not at all proud 3% | Don't now 3%

Non-hosts: Very proud 20% | Somewhat proud 47% | Not very proud 21% | Not at all proud 8% | Don't now 4%

Legend: Very proud | Somewhat proud | Not very proud | Not at all proud | Don't now

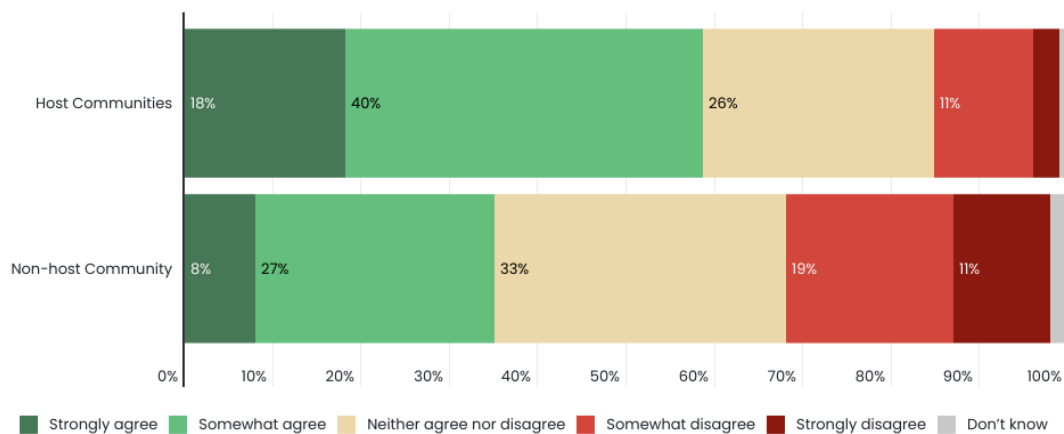VisitEngland®   PUBLICFIRST

Social Cohesion

We also measured a sense of social cohesion, or the feelings of connectedness with the people around us, again finding a strong sense of connection in host communities. Among the entire British population, almost half of the country feels connected to their community, but that number is being driven by host communities.

- Nearly 60% of those in host communities feel connected to their community.
- Only 35% in non-host communities feel that community connection.

To what extent do you agree or disagree with the following?
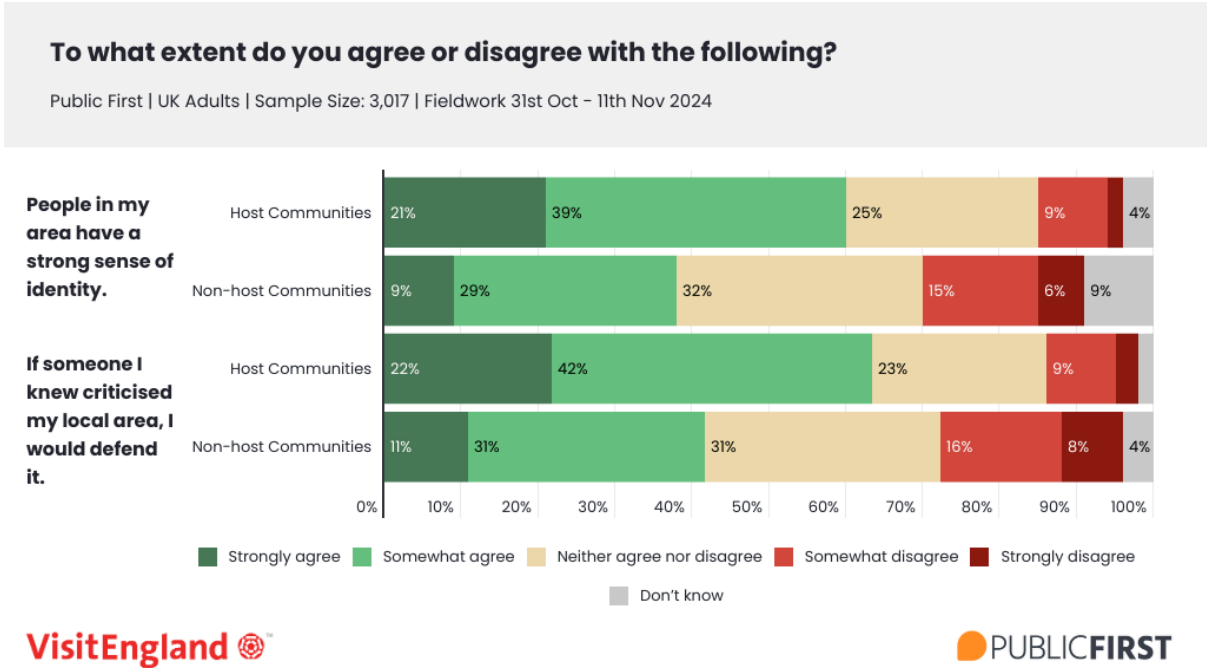**I feel connected to my community.**

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024

Host Communities: Strongly agree 18% | Somewhat agree 40% | Neither agree nor disagree 26% | Somewhat disagree 11%

Non-host Community: Strongly agree 8% | Somewhat agree 27% | Neither agree nor disagree 33% | Somewhat disagree 19% | Strongly disagree 11%

Legend: Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know
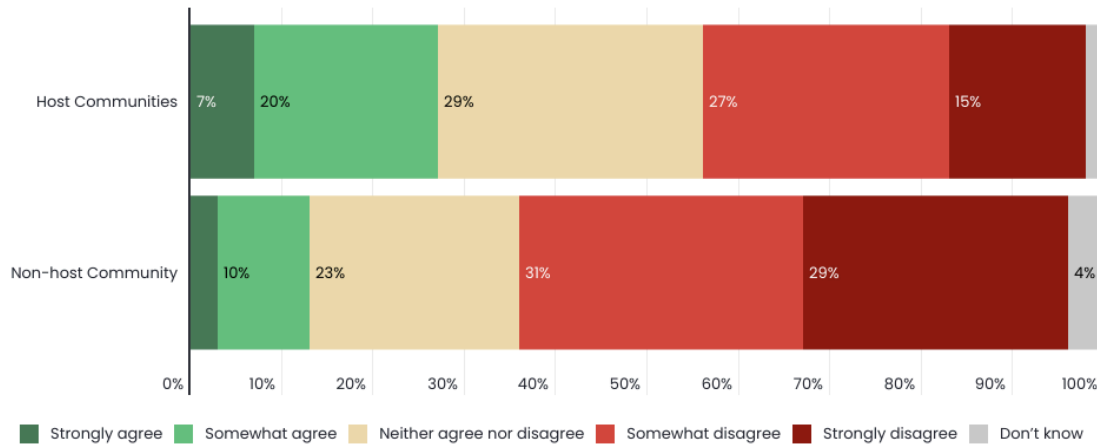
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Another relevant metric for this sense of community relates to our local identity as well as how protective we feel towards our local areas. Again, we find that people in host communities are more likely than the general population to express a strong sense of identity related to their local area. They are also more protective of their local area and more likely to stand up to criticism of it. With these two metrics, we consistently observed host communities to be approximately 10% more positive than the general population.

To what extent do you agree or disagree with the following?

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct – 11th Nov 2024

People in my area have a strong sense of identity.
- Host Communities: 21% Strongly agree, 39% Somewhat agree, 25% Neither agree nor disagree, 9% Somewhat disagree, 4% Strongly disagree
- Non-host Communities: 9% Strongly agree, 29% Somewhat agree, 32% Neither agree nor disagree, 15% Somewhat disagree, 6% Strongly disagree, 9% Don't know

If someone I knew criticised my local area, I would defend it.
- Host Communities: 22% Strongly agree, 42% Somewhat agree, 23% Neither agree nor disagree, 9% Somewhat disagree
- Non-host Communities: 11% Strongly agree, 31% Somewhat agree, 31% Neither agree nor disagree, 16% Somewhat disagree, 8% Strongly disagree, 4% Don't know

Legend: Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know

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Despite the positive sense of identity, connection, and pride observed in these communities, both the general public and host communities often feel they lack the power to effect change or improve their surroundings. Approximately a quarter of people in host communities feel like they have the power to change something in their area, while considerably more (42%) feel they do not have that power. While this perceived lack of agency is higher in non-host communities, this sentiment highlights a potential opportunity for improvement, which could unlock the full potential of community resilience and growth. Regenerative approaches to tourism aim to do just that, empowering local communities and centring their voices in decisions that affect their lives.

To what extent do you agree or disagree with the following?
If I didn't like something in my area, I feel I have the power to change it.

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct - 11th Nov 2024

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Host Communities	7%	20%	29%	27%	15%	
Non-host Community	10%	23%	31%	29%		4%

The Resident Empowerment Index

To explore the collective sense of empowerment seen in host and non-host communities, we constructed the *Resident Empowerment Index* to measure pride, connectedness, and empowerment. Using the six statements below, we combined and averaged responses to generate this index, which ranges from 1 to 5.

Resident Empowerment Index: survey items

PRIDE	"I'm proud that people want to visit my local area"
	"I enjoy showing my friends/family around my local area"
CONNECTEDNESS	"I feel connected to my community"
	"People in my area have a strong sense of identity"
AGENCY	"If I didn't like something in my area, I feel I have the power to change it"
	"If someone I knew criticised my local area, I would defend it"

Host communities scored higher on this index than non-host communities, a statistically significant finding indicating higher levels of empowerment.

Resident Empowerment Score

Constructed using a survey of UK Adults | Sample Size: 3,017| Fieldwork 31st Oct – 11th Nov 2024
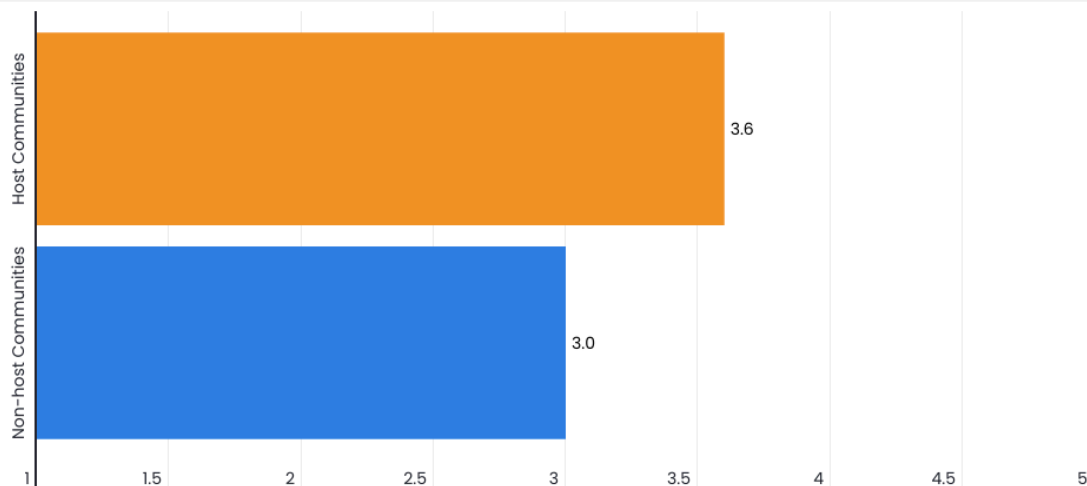
CASE STUDY:

2023 Eurovision Song Contest

Liverpool's hosting of the Eurovision Song Contest in 2023 brought together local residents, businesses and culture to welcome visitors and showcase the city

When it became clear that the 2022 winners of the competition, Ukraine, would not be able to host the event, Liverpool was able to step in.

This event was an exemplar of cultural exchange, bringing together Ukrainian and Liverpudlian culture in every possible facet of this event. Over the course of

the expanded nine-day event, Liverpool hosted over 500,000 visitors, including 200 Ukrainian artists and performers.

Hundreds of local artists were commissioned to contribute to various facets of the event, and 63 grants were given to community and neighbourhood groups, housing associations and others to enable involvement with Eurovision in a way that was meaningful to their priorities and community. One group made Ukrainian dumplings in a cooking workshop, and another planted sunflower seeds for Ukraine. A group of local school children learned the Ukrainian national anthem and sang it for the country's ambassador.

This event exemplifies how local pride and community can serve as the foundation for a cultural event, bringing in thousands of visitors, millions of pounds, and countless opportunities for cross-cultural exchange.[1]

"As a city, we wanted to do Eurovision justice. The reason hosting it worked is because the people of the city were behind it. Getting residents on board and making them feel proud of it meant they acted as ambassadors for the city."

Claire McColgan CBE
Associate Director of Culture for the Liverpool City Region Combined Authority

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[1] The full case study of the 2023 Eurovision competition in Liverpool can be found in Appendix 1.

Shared Spaces

Nature, Culture, and Everyday Benefits of Tourism

KEY FINDINGS

- Tourism improves access to cultural amenities, green spaces, and local businesses—enhancing quality of life for residents.

- Case Study: Programmes like Generation Green 2 connect disadvantaged youth with nature, showcasing tourism's role in social inclusion.

- Host communities report better infrastructure and institutions, driven by local business engagement and cultural participation.

- Case Study: Bath's Visitor Economy shows how tourism can benefit local councils as well as the local community.

- Transport investments in Cornwall, Yorkshire Dales, and Thanet exemplify infrastructure improvements that benefit both visitors and residents.

FINDINGS & ANALYSIS
Access to Shared Spaces & Quality of Life

The benefits of shared community and green spaces depend on our ability to access them. We investigated relative levels of access by asking respondents about the proximity of various amenities and facilities. Our analysis found that living in a host community provides easier access to cultural and heritage institutions like museums, historical sites, and theatres. While we might expect host communities to have greater access to such amenities, tourism - especially regenerative approaches - can actively improve the offer for residents and sustain institutions that might otherwise not be viable. These institutions not only offer opportunities for new experiences and learning as well as relaxation, they also provide physical space for local identity and history to flourish. Researchers have also found that tourism often supports the preservation of heritage and stimulates cultural activities like festivals and local arts.[2] The availability of all these institutions supports and encourages a sense of local identity, pride, and connectedness, illustrating the virtuous circle of tourism benefits.

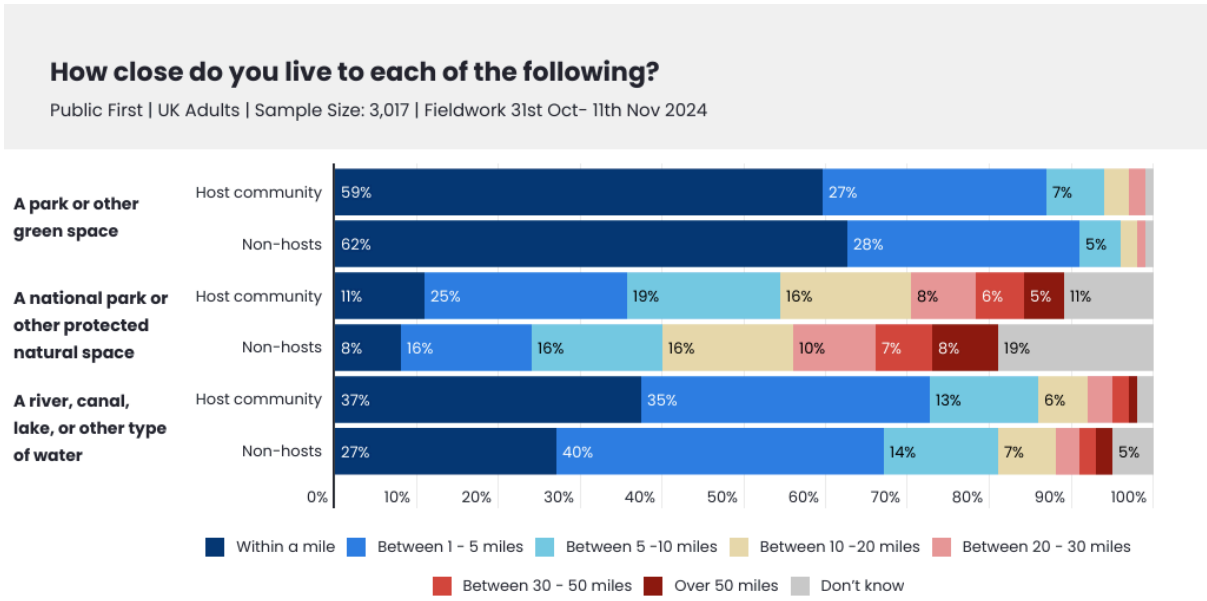**How close do you live to each of the following?**
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct- 11th Nov 2024
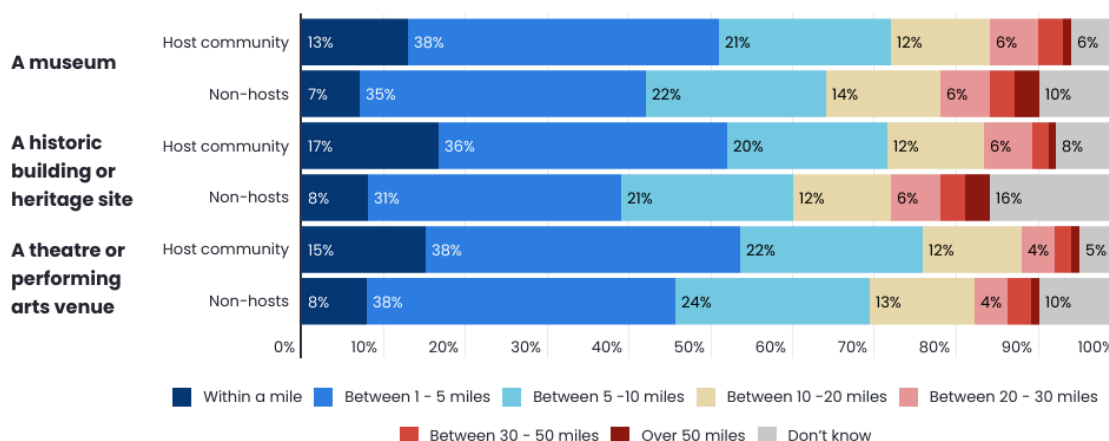
We also asked respondents about the proximity of various green and blue spaces and found that living in a host community provides easier access to waterways and national parks, which is expected since this proximity drives tourism. Given the importance of nature and the outdoors to the British population, accessibility of these natural resources is key. In fact,

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[2] For a summary of this research, see studies such as Residents' perceptions of the cultural benefits of tourism and Problematising 'Festival Tourism': Arts Festivals and Sustainable Development in Ireland.

extensive research highlights the health benefits of access to nature and the outdoors. Studies link tourism and green spaces to improved mental and physical health, reduced stress, and enhanced social cohesion.[3]

How close do you live to each of the following?
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct- 11th Nov 2024

CASE STUDY:

National Parks England

England's National Parks, and the people who visit them, play a vital role in supporting conservation, the prosperity of rural communities and youth engagement with nature.

Spanning iconic landscapes such as the Lake District, Peak District, and South Downs, England's National Parks enable nearly 90 million visitors each year to connect with nature.

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[3] For a summary of this research, please see studies such as Nature tourism and mental health: parks, happiness, and causation and Access to Green Space in Disadvantaged Urban Communities: Evidence of Salutogenic Effects Based on Biomarker and Self-report Measures of Wellbeing

75 years since the enactment of the 1949 National Parks and Access to the Countryside Act, there is a renewed commitment from both the National Parks' management and the government to ensure these landscapes continue to thrive.

While the different National Parks vary in size, landscape, ecosystem and visitor numbers, all aim to strike a balance between visitor access and environmental protection. For example, across the national parks, there are various initiatives to restore peatland, create new woodlands, temperate rainforests and ponds, improve waterways and water quality, and protect species as part of nature rich, more biodiverse landscapes..

In August 2024, the National Parks introduced a new vision for regenerative tourism, shifting the focus away from 'doing less harm' towards 'helping give back more than it takes'. The strategy is not just limited to the natural environment and protected landscapes. It also encompasses better support for host communities and resilient local businesses. For example, initiatives in the Lake District support communities to develop affordable housing, and transport to ensure that residents who work in the tourism sector can afford to live nearby and get to work.

Various national parks have also introduced support initiatives for local businesses. In partnership with Green Tourism, South Downs National Park Authority has also developed Green South Downs, a sustainability certification scheme aligned with UN sustainable development goals, to give support and recognition for local businesses on their sustainability journeys. Additionally, in the Yorkshire Dales and North York Moors, a Food Tourism Toolkit was developed jointly to celebrate and promote local food suppliers to businesses and consumers.

Programmes such as Generation Green also ensure that the national parks offer outdoor experiences to young people, particularly those from urban or socio-economically disadvantaged backgrounds. Following the success of the first programme, Generation Green 2 connects over 25,000 young people to nature through 41,500 day and overnight experiences in National Parks, such as starry-night events and farm visits. Supported by DEFRA, and delivered by the Access Unlimited Partnership, the program fosters nature connection, well-being, and environmental stewardship among young people.

> *Spending time in nature can be life-changing for young people, especially those who may not usually have easy access to green spaces. Here in the North York Moors, we see how being outdoors builds confidence and resilience, inspires curiosity and helps young people feel that they belong in these spaces, and they have a role in protecting them for the future.*
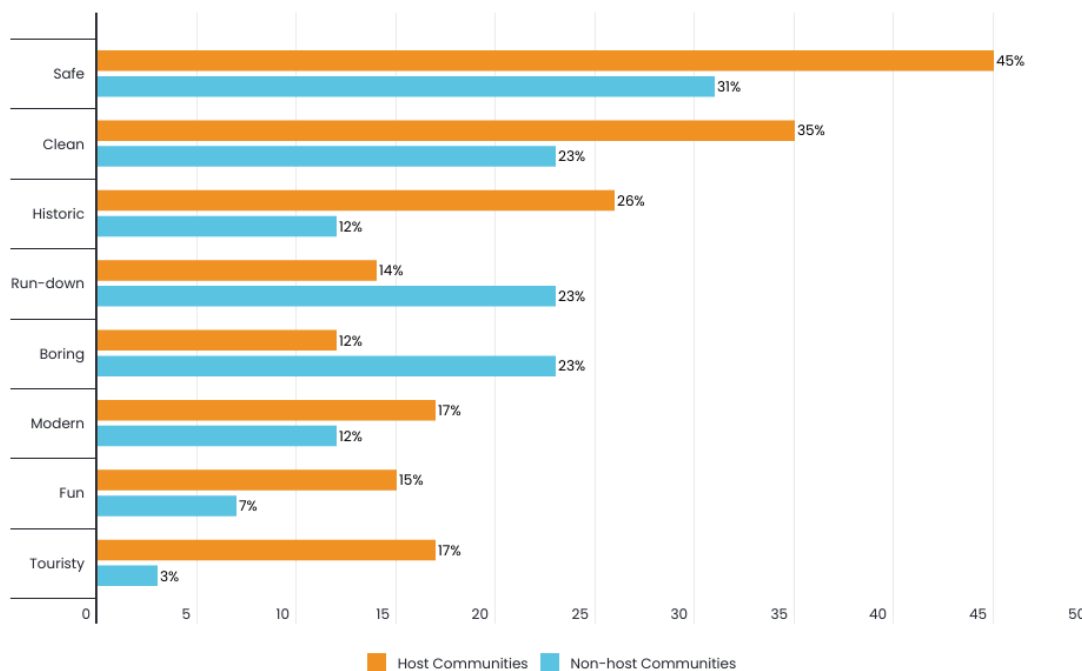
Heather McNiff
Head of Engagement and Wellbeing at the North York Moors National Park Authority

Better Infrastructure & Amenities

Host communities report better infrastructure and higher quality services and shared spaces. In fact, we found that host communities described their communities more positively overall, especially in terms of safety, cleanliness, history, and fun.
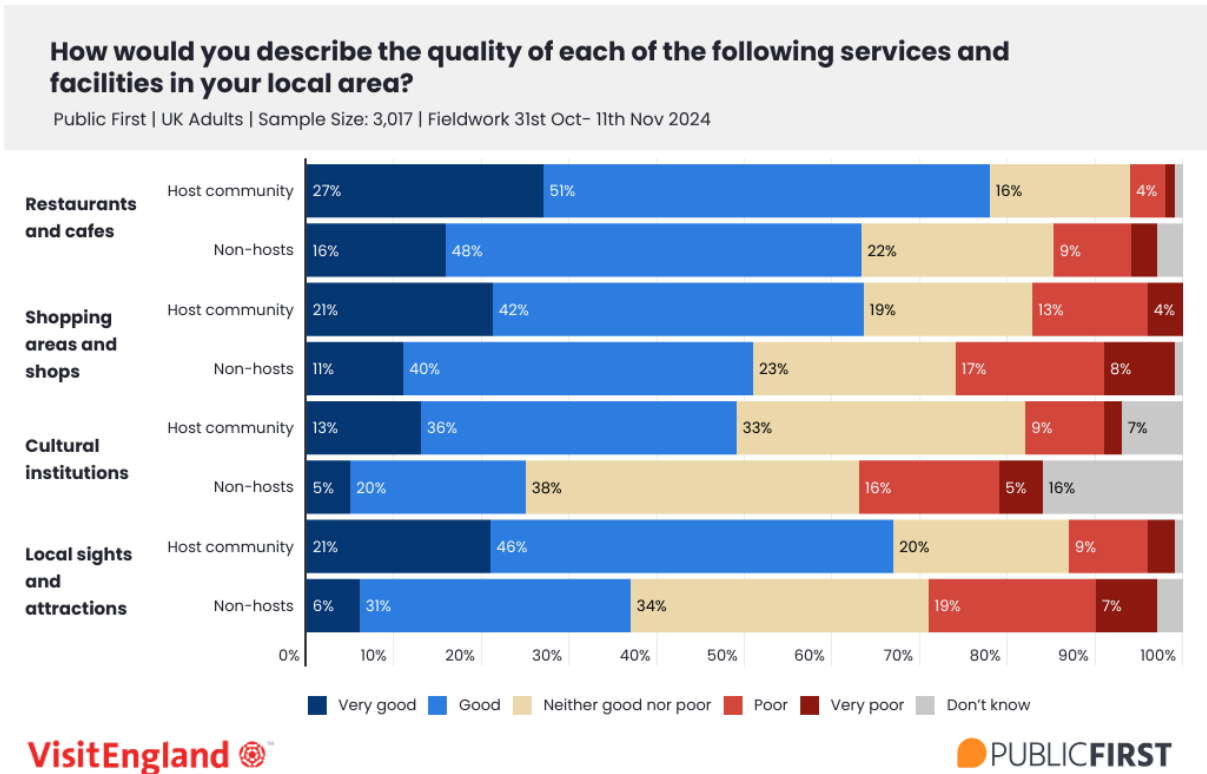
Which of the following words best describe your local area?

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct- 11th Nov 2024

Word	Host Communities	Non-host Communities
Safe	45%	31%
Clean	35%	23%
Historic	26%	12%
Run-down	14%	23%
Boring	12%	23%
Modern	17%	12%
Fun	15%	7%
Touristy	17%	3%

People in host communities were less likely to describe their area as boring and run-down, but unsurprisingly, they were more likely to describe it as touristy. These attributes paint a picture of warm, vibrant, well-maintained communities.
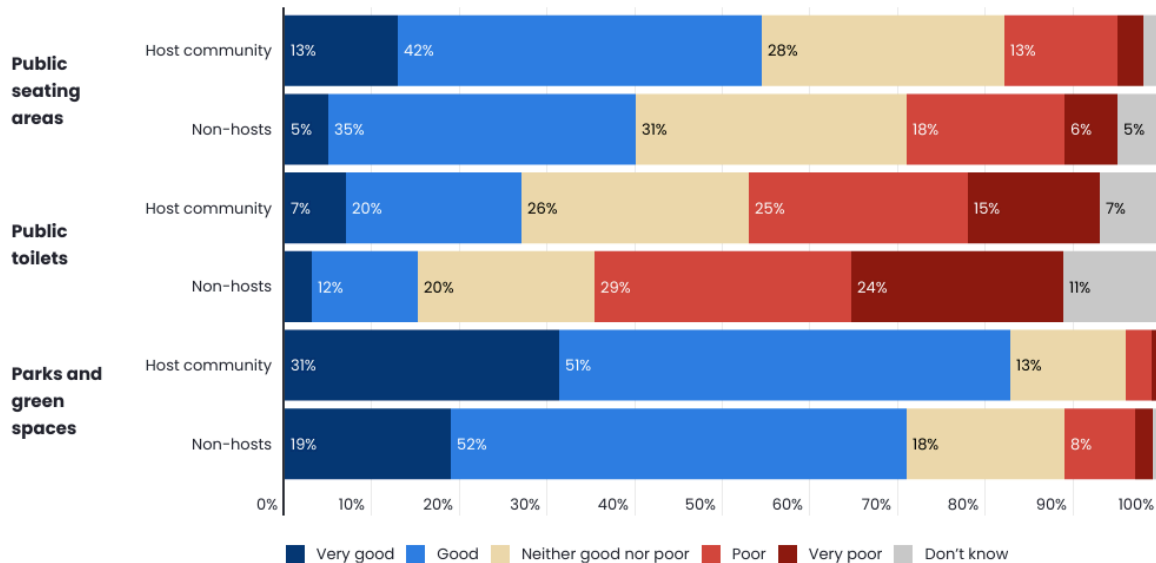
Across the board, those in host communities report higher quality amenities, such as cultural entities like local sights and attractions, as well as businesses, such as restaurants and shops.

How would you describe the quality of each of the following services and facilities in your local area?

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct– 11th Nov 2024

		Very good	Good	Neither good nor poor	Poor	Very poor	Don't know
Restaurants and cafes	Host community	27%	51%	16%	4%		
	Non-hosts	16%	48%	22%	9%		
Shopping areas and shops	Host community	21%	42%	19%	13%	4%	
	Non-hosts	11%	40%	23%	17%	8%	
Cultural institutions	Host community	13%	36%	33%	9%	7%	
	Non-hosts	5%	20%	38%	16%	5%	16%
Local sights and attractions	Host community	21%	46%	20%	9%		
	Non-hosts	6%	31%	34%	19%	7%	

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Additionally, when looking at the quality of parks, public spaces, and public services, we found that people who live in areas with more tourism generally think these shared spaces are in better condition than those who live elsewhere.

How would you describe the quality of each of the following services and facilities in your local area?
Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct– 11th Nov 2024

		Very good	Good	Neither good nor poor	Poor	Very poor	Don't know
Public seating areas	Host community	13%	42%	28%		13%	
	Non-hosts	5%	35%	31%	18%	6%	5%
Public toilets	Host community	7%	20%	26%	25%	15%	7%
	Non-hosts		12%	20%	29%	24%	11%
Parks and green spaces	Host community	31%	51%	13%			
	Non-hosts	19%	52%	18%	8%		

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We confirmed this overall finding with additional analysis, using objective measures of tourism. This analysis determined whether or not communities with more tourism are currently experiencing more strain on their local resources. We found that there is not a consistent link between tourism levels and perceived strain on public services and resources. The amount of tourism in a local area does not predict how positively or negatively someone rates their public amenities and services. In other words, tourist footfall does not correlate with perceptions of resource strain when it comes to key public goods like roads and waste management, nor local attractions like parks, shopping areas, and restaurants.

In fact, many host communities reported better infrastructure and public goods. Regenerative tourism strategies which explicitly balance the tourist and host experiences and consider the capacity constraints of local businesses and government is therefore key to preventing systematic 'overtourism'.[4]

Two thirds of Britons prefer to support local business when they travel, and residents of host communities are especially more likely to support local businesses, both at home and when traveling. We compared how often people from host and non-host communities engage with local businesses in their area and while traveling in England. Those who live in host communities were consistently more likely to report visiting, eating at, and buying from locally owned businesses in their regular life.

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[4] More detail on these methods and findings are available in the technical report in Appendix 2.

How often, on average, would you say you do each of the following in your regular life? (% who responded "once a month" or more frequently)

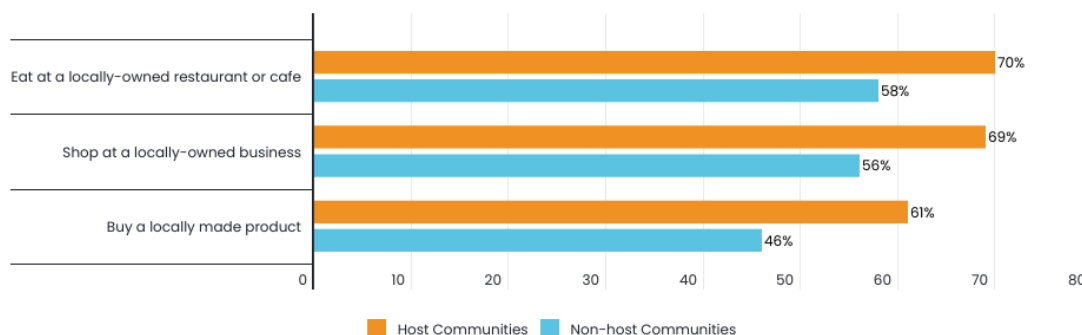Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct- 11th Nov 2024

	Host Communities	Non-host Communities
Eat at a locally-owned restaurant or cafe	61%	44%
Shop at a locally-owned business	72%	59%
Use a local pub or bar	59%	45%
Buy a locally made product	52%	33%
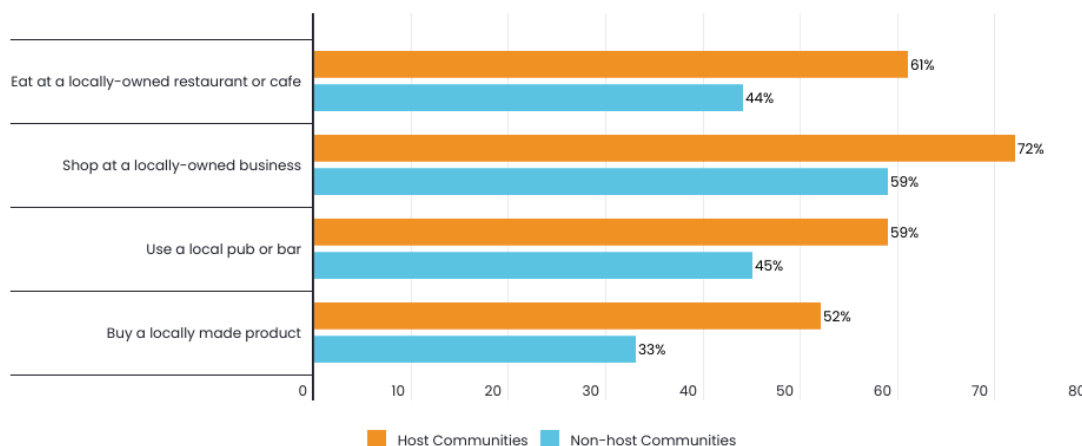
VisitEngland | PUBLICFIRST

Those living in host communities were also more likely to report visiting local businesses at least once per trip when travelling around the country.

How often, on average, would you say you do each of the following while on holiday in England? (% who responded at least once or more per trip)

Public First | UK Adults | Sample Size: 3,017 | Fieldwork 31st Oct- 11th Nov 2024

	Host Communities	Non-host Communities
Eat at a locally-owned restaurant or cafe	70%	58%
Shop at a locally-owned business	69%	56%
Buy a locally made product	61%	46%

VisitEngland | PUBLICFIRST

These key metrics about the support and value of local businesses suggest those in host communities have strong habits of supporting local businesses whether they are at home or travelling. This contributes to the broader illustration of host communities as strong local communities, which provide cross-cultural opportunities, celebrate history and heritage, and support local entrepreneurs and business owners.

CASE STUDY:

Bath's visitor economy

The way Bath manages its visitor economy demonstrates how tourism can both inspire visitors and directly support local people.

A double inscribed UNESCO world heritage site, Bath is recognised around the world as a visitor and cultural destination, as it has been for 2000 years: from Romans, to Georgians and Jane Austen's novels to *Bridgerton*.

The city attracts over 6 million visitors a year, generating nearly half a billion pounds for the local economy and supporting thousands of local jobs.

These visitors help to fill the 'viability gap' between what locals can spend and the economic activity needed to support amenities - giving residents a much richer choice of shopping, eating and cultural opportunities as a result.

They also underpin wider economic activity, such as the strong link in Bath and North East Somerset and the West of England between the visitor economy and the creative industries.

And they support the civic life of the city - enabling locals to benefit from mixing with a huge variety of people and cultures, and to experience the pride that comes from others wanting to visit your place.

Managing this volume of visitors in a small, historic place, however, brings obvious challenges in terms of overcrowding, housing, and pressure on local infrastructure and services.

Bath and North-East Somerset Council takes a proactive approach to these pressures, in particular, through its management of the historic Roman Baths, which attracted over a million visitors in 2023 and have generated around £12 million in profits in recent years.

The council is now looking to find new ways to build on this approach. The recent support for the Visitor Economy in the Devolution White paper was welcomed, especially as the West of England Mayoral Combined Authority, of which B&NES is part, has now taken an ownership stake in 'Visit West' - the Local Visitor Economy Partnership.

This multi-million pound commitment will underpin Visit West's financial position and help to ensure the visitor economy is properly integrated into local economic development via the Local Growth Plan currently under development by the Mayoral Combined Authority.

Visitors are a huge driver of prosperity for places like Bath but we need to show how tourism gives back to local people. Ideally we want provision for tourists and residents to blur into one; there is no reason that the businesses and offer of a destination can't work for both groups if they are carefully planned.

Robert Campbell
Head of Culture and Heritage Services · Bath & North East Somerset Council

The Value of Shared Green Spaces

Natural landscapes, like protected national parks and forests, are critical for environmental and cultural preservation, fostering a thriving sense of place and connection for those who visit. Much of this land, although protected, is accessible to the general public for free, which makes it challenging to put an economic figure on their value. However, using our public opinion polling, we did just that. We asked people how much they would have to be paid to lose access to National Parks and Forests for one year and calculated the consumer surplus of these destinations to the British public.

From this, we estimate that on average, Britons would have to be paid £2,636 for one year - meaning that they value visiting these protected landscapes more than accessing search engines (£1,599), social media (£610), or online news (£241). Overall, this equates to an estimated total value of £4bn a year for National Parks and Forests.

£2,636

How much on average members of the British public would have to be paid to forgo access to National Parks and Forests

Transport Investment

In places of high tourist footfall, we also see examples of expanding bus and rail services, more specifically to enable visitors to get around.

- **Cornwall** - In 2022, the St Ives Branch Upgrades provided an additional 2,000 daily seats on the mainline during peak summer days, taking daily capacity to 10,000 passengers. The £1.14m investment involved lengthening the station platforms at Lelant and St Erth to allow longer trains to operate on the track. The upgrades were made specifically to accommodate the thousands of tourists who visit Cornwall in the summer months.

- **Yorkshire Dales** - To boost visits to the Dales, a new rail service, known as the Yorkshire Dales Explorer, has been running between Rochdale, Greater Manchester, and Ribblehead twice a day on Saturdays. In April 2024, the Keighley Bus Company announced it would be doubling bus services on two routes to make the Dales more accessible to visitors. Thousands have traveled on this service since it launched in June 2024, and the timetable has been improved so that the services run every hour rather than every 2 hours.

- **Thanet (Kent)** - The Thanet Loop is the principal bus service in Thanet and gets more than 10,000 users per day. The service covers all major tourist attractions in the area. Improvements to the service made it 25% more frequent from June 2024.

These examples show how public transport infrastructure can improve to meet visitor needs while also benefiting residents.

Future Pathways

Building a Regenerative and Inclusive Tourism Sector

KEY FINDINGS

- Tourism can act as a catalyst for social regeneration, providing funds which can be re-invested in the community.

- Case Study: The National Forest demonstrated how environmental restoration and sustainable tourism can go hand in hand.

- Social and Cultural Strength Index and regression analysis confirm a positive correlation between tourism and socially and culturally strong communities.

- The visitor economy offers a range of employment opportunities and diverse entry routes, including for young people and those with varied educational backgrounds.

- Case Study: The Visitor Economy Network Initiative (VENI) highlights tourism's potential for workforce development and civic pride, especially for underserved populations.

FINDINGS & ANALYSIS
Regenerative Tourism

Beyond economic impact, tourism can also act as a catalyst for social regeneration, breathing new life into communities and fostering their revitalisation in meaningful ways. Existing research confirms that tourism generates considerable economic output, particularly in rural and coastal communities which otherwise report higher levels of deprivation and unemployment. Additionally, tourism has provided a strategy for re-building and resilience after the pandemic, with English tourism businesses innovating to return to 'business as usual' faster than comparable sectors like retail or personal services and domestic tourism fuelling new cultural scenes on the coast.[5]

It is important to consider regenerative approaches to tourism, where the interests of the host community, tourists, and local businesses are centred, the benefits are distributed equitably and the sector actively seeks to create more well paid, secure employment. Another important way communities can balance the pressures and benefits of tourism is by utilising funds brought in by tourism to benefit local services and facilities.

CASE STUDY:

The National Forest

The National Forest is a pioneering example of how regenerative tourism can transform landscapes, communities, and economies.

Spanning 200 square miles, the National Forest demonstrates how tree planting, innovative planning, and local partnerships create a model for responsible tourism development that supports ecological recovery.

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[5] Ntounis, N., Parker, C., Skinner, H., Steadman, C., & Warnaby, G. (2022). Tourism and Hospitality industry resilience during the Covid-19 pandemic: Evidence from England. Current Issues in Tourism, 25(1), 46-59.

Over the past three decades, millions of new trees have revitalised the area, improving biodiversity and creating a distinct sense of place. As a result, tourism has flourished and exceeded initial growth estimates - generating over 5,000 new jobs, supporting the ongoing regeneration of the local area and underpinning further efforts to improve biodiversity

As the Forest has matured and tourism has expanded, the National Forest Company has collaborated with local authority partners to ensure the planning system aligns with the Forest's vision, including the development of regenerative tourism. This has been achieved by ensuring that all new tourist accommodation is in keeping with the Forest's character, for example by using local timber, and by sharing the economic benefits of visitors with local businesses supporting each other.

The National Forest Design Guide is central to this transformation. This innovative tool offers seven sustainability principles tailored to diverse tourism development types, from new builds to retrofits. Developers are encouraged to prioritise energy efficiency, waste management, biodiversity, and community connectivity, ensuring tourism aligns with environmental goals and enhances a sense of place. These principles not only deliver ecological benefits but also help landowners future-proof their developments, reduce costs, and navigate the planning system more smoothly. Two local authorities are already updating their policies to align with the guide.

Biodiversity has flourished as a direct result of the forest's holistic planning approach. While national wildlife trends often show declines, the National Forest has recorded increases in woodland bird abundance (48%), butterfly populations (14.8%), and forest-dependent species such as the sparrowhawk (up 63.7%) and brown long-eared bat (332%). Tree planting requirements for developments - a minimum of 30% for larger sites - further integrate nature recovery into tourism growth.

Through its collaborative planning framework and commitment to sustainability, the National Forest exemplifies how tourism can thrive in harmony with nature and local communities. Its model offers a blueprint for regions worldwide seeking sustainable, inclusive development.

We can demonstrate that sustainability is achievable here in the National Forest and, like the trees in the forest itself, we all work together as one.

Richard Drakeley
Tourism Lead at the National Forest

Social & Cultural Strength

In this next analysis, we used the combined cultural, business, and social aspects of local areas to create a Social and Cultural Strength Index. Taken together, these factors assess the potential of making regenerative growth sustainable in these local areas. This index captures the relative strength of those multifaceted aspects of social, business, and cultural factors.

Social and Cultural Strength Index: survey items
- A score representing the density of nearby cultural, recreational, and heritage sites, including parks, gardens, monuments, and historical sites.
- The density of businesses locally, as well as the density of arts, entertainment, and recreation businesses locally.
- The self-reported strength of national and regional identities, constructed from asking respondents in our poll to rate the strength of their English and regional identities.

We found that the level of tourism is positively connected with the Social and Cultural Strength Index. This means that people who live in areas with higher levels of visitors or with higher levels of visitor spending are also more likely to have stronger national and relational identities, to have access to more cultural and heritage sites, and to benefit from more local businesses.

Our results indicate that this positive relationship between the volume of tourism experienced by local communities and the level of social strength exhibited is robust. Regardless of the type of tourism measurement we used and whether or not we included outliers, such as London, we observed this same strong relationship.

This suggests that domestic tourism is associated with higher levels of national and regional identity, a higher local density of business, and a greater concentration of sites being recognised as culturally or historically significant. More specifically, a 10% increase in domestic tourism is associated with a corresponding 1% - 3% increase in social regeneration in each community, depending on which measure of tourist volume is used. In substantive terms, this means that an additional £243 million of spending by domestic visitors each year in County Durham - or £134 per night spent in the area - could see the community rise by up to four places in a national ranking to attain the same social regeneration score as the Oxfordshire Cotswolds.[6]

While correlation is not causation, this relationship is observable in the existing literature,[7] which is likely because domestic tourism both plays a role in strengthening regional identity and pride while also introducing linkages between different areas of the country. Evidence from coastal England demonstrates that domestic tourism has a positive impact on local economies by diversifying the viable range of businesses and constituting an additional source of revenue and economic value to regions otherwise underserviced by major English industry sectors.[8]

A key, but sometimes overlooked, aspect of the social regeneration and prosperity made possible by the tourism sector relates to business tourism. These efforts within the sector drive investment and new business opportunities.

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[6] Communities involved in this analysis are involved in the VisitBritain & VisitEngland's Local Visitor Economy Partnership (LVEP) Programme and are referred to as LVEPs at times within this document.

[7] Studies such as Understanding tourism's impact on community wellbeing and Residents' perceptions of the cultural benefits of tourism, Annals of tourism research are representative of the broader literature.

[8] Hutton, G, M. Ward, P. Brien, & M. Keep. 2024. Research Briefing: Fiscal support for tourism and hospitality in coastal areas. House of Commons Library; National Coastal Tourism Academy. 2018. Statistics and Research on Coastal Tourism in the UK.

CASE STUDY:

Marketing Manchester

Marketing Manchester, a partnership-led organisation charged with raising Greater Manchester's profile, has played a key role in developing the region's thriving visitor economy - reshaping perceptions of the city for tourists and residents alike.

Cultural attractions, world class sport and major events have solidified Manchester's reputation as a tourist destination, with tourism contributing £8.7 billion to Greater Manchester and 4.2 million domestic staying visits in 2022.

A key, but sometimes overlooked, aspect of this has been business tourism, with conferences and meetings generating an estimated 4.4 million trips to Greater Manchester and £904m to the region's economy in 2017.

These visits support the local economy through visitor spending on hotels, restaurants, and shops. But they also offer a more profound opportunity to elevate the profile of the city and encourage people to consider it as a place to visit, study, do business, or move to.

Marketing Manchester aims to seize this by working closely with economic development teams - carefully planning the region's business tourism offer to ensure it builds on the strengths of the city itself and aligns with local growth plans.

For example, scientists conducting groundbreaking research at the region's universities are involved in selecting and securing conferences and expert speakers related to their work, whilst delegates are supported to connect with businesses and academics when visiting the city.

Programmes like Greater Manchester Legacy also help to connect events to the community so that local people benefit too - for example by giving local school children the opportunity to hear from scientists and experts visiting the city.

Building on this success, Greater Manchester's new Visitor Economy Strategy aims to cement its role as a 'gateway to the North' while maintaining its unique cultural identity both as a destination and as a home.

The Strategy sets ambitious goals for growth - aiming to increase the economic impact of the visitor economy locally to £15 billion by 2030 - but also keeps a focus on how this benefits local people, for example through a commitment that all employees in the visitor economy should earn the Real Living Wage, and that Manchester will rank as the most sustainable city in England.

We want to connect business visitors with Manchester's intellectual capital and introduce them to everything else that the city has to offer, whether that's engaging with the newest scientific discoveries at the university, experiencing its cultural scene or expanding their network.

Nick Brooks-Sykes
Director of Tourism, Marketing Manchester

Employment and Opportunity

The tourism sector and the wider visitor economy also offers a wide range of employment opportunities - supporting growth, development and social mobility in host communities.

To capture the wider impact of employment in the tourism industry, we analysed a variety of employment datasets,[9] which provide a richer measure of the quality of employment it offers - looking beyond traditional metrics such as pay and productivity. The tourism sector performs especially well on some of these criteria compared to others, for example, ranking 4th out of 21 sectors for gender equality in pay.

Overall, we find that tourism offers higher quality employment than other industries whose workforces are qualified to a similar level - such as retail and administration. Despite average wages in the sector being below the national average, the tourism sector actually outperforms comparable industries on a range of indicators linked to job quality, such as opportunities for progression and employment volatility.[10] Tourism also offers better returns on qualifications with regards to employment quality than some sectors with more educated workforces, such as education and real estate.

The tourism industry provides employment for young people and those from a wide range of educational backgrounds.[11] This is especially important within rural and coastal communities, where opportunities to enter or re-enter the labour market, career progression and social mobility are often more limited. It is also supported by the tourism industry's increasing focus to move beyond its traditional seasonal pattern to more of a year-round offer, which helps provide more stable employment.

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[9] Office for National Statistics. 2022. 'Earnings and hours worked, all employees: ASHE Table 16; International Monetary Fund. 'UK: Gross domestic product, current prices'. World Economic Outlook Database: October 2024; Office for National Statistics. 2024. Broad Industry Group (Standard Industrial Classification) – Business Register and Employment Survey (BRES): Table 1; Office for National Statistics: Census 2021. 'How qualified are the people in my industry?

[10] We conducted regression analysis to identify the economy-wide relationship between qualification levels and quality of employment, comparing this national relationship to each sector in the economy individually. We did so by identifying the gap between actual returns to qualifications in each sector and those modelled by our regression. For more detail on these findings and analysis, please see the technical note in Appendix 2.

[11] See this report from Visit Britain, Oxford Economics, and Deloitte: The economic contribution of the tourism economy in the UK.pdf and this report from UK Hospitality: Workforce Commission 2030 - Web version.pdf

CASE STUDY:

Blackpool's visitor economy

Blackpool has long been associated with summer holidays but in recent years the town has consciously transformed itself into a year round attraction, which offers a range of highly skilled, well paid employment opportunities.

By focusing on its cultural tourism offer, Blackpool has been able to extend its season and attract new audiences, with more than 20 million people visiting the town in 2022.

The resort now offers events over 11 months of the year, from an International Dance Festival in May to 'Christmas By the Sea', which sees the famous Illuminations kept on until early January, to the 'Shazam Festival' of magic and circus acts in February.

Coordinated planning and marketing allows the whole visitor economy to benefit from this programme, with hotels taking extra bookings and restaurants filling up with new diners.

This shift to year-round tourism has had a significant impact. Blackpool's visitor economy is now valued at over £1.7 billion, showing strong growth since the pandemic as more people take the opportunity to holiday at home.

It supports more than 22,000 jobs locally, including a range of well paid, highly skilled employment roles - from the engineers who maintain rides on the Pleasure Beach to commercial, marketing and legal roles.

Recognising that at times these roles can be challenging to fill, employers and Blackpool College have worked in partnership to establish the Blackpool Tourism Academy, which offers bespoke courses, work experience and qualifications for local people.

In an area with significant economic and social challenges, the opportunity to build a career in the visitor economy is an important engine for social mobility. Jobs in tourism can offer an opportunity for those outside the labour market to get back into work and get on, with the nature of many roles naturally helping to develop people's confidence and wellbeing.

Looking to the future, the town is now aiming to bring all parts of the visitor economy - both public and private - together behind a 'One Blackpool' vision, with new structures and initiatives that will allow the sector to collaborate more closely.

The ultimate goal is to make Blackpool a model for how tourism can help drive social mobility, economic inclusion and urban regeneration.

"The beauty of the visitor economy and the employment it offers is that it is a socially engaging and fun environment. That brings great benefits for people's confidence and mental health, especially for young people"

Kate Shane
Managing Director, Blackpool Council Leisure Portfolio

One illustration of the impact tourism has in creating training and employment opportunities can be seen in its use of apprenticeships. Of the 4,220 apprenticeship starts focused on subjects linked to Leisure, Travel and Tourism in 2023/24, 55% were undertaken by people under 19 and 85% by people under the age of 24. This compares to only 23% and 52% respectively for apprenticeships across the whole economy. Whereas most sectors have seen a notable decline in the proportion of apprenticeships being offered to younger people, those under 24 now

make up a *higher* proportion of apprenticeship starts in subjects linked to leisure, travel and tourism than before the Covid pandemic.

4,220

The number of people in England starting an apprenticeship in a subject linked to Leisure, Travel, and Tourism apprentices in the 2023-2024 academic year[12]

A growing number of these apprenticeships are 'Higher' apprenticeships - equivalent to qualifications at Level 4 and above. This reflects a shift within the tourism industry towards more highly skilled roles, as well as conscious efforts to support the workforce, increase skills, and grow careers within the sector, and the VENI Project illustrates this dedication.

CASE STUDY:

The Visitor Economy Network Initiative

The Visitor Economy Network Initiative (VENI) in East Anglia offers a model for how tourism can be an engine for boosting the skills of local people, economic inclusion, and civic pride.

Spearheaded by Visit East of England and the Eastern Education Group of colleges, VENI brings together educators, businesses, the public sector and social enterprises to highlight the vast choice of career paths within the visitor economy, to help more people access them and develop stronger business networks. Participants, including the unemployed and those traditionally excluded from the labour market, benefit from a series of workshops that allow them to kickstart a career in the visitor economy.

[12] DfE Apprenticeship statistics, Historical series

Beyond its economic impacts, the VENI project is also helping to boost civic pride and reimagine the potential of local tourism. Programmes weave local history and attractions into their curriculum, enabling participants, many of whom may have been disengaged from the community, to become ambassadors for the area. The wider collaboration VENI creates between colleges, local businesses and their partners allows them to work together in new ways, deepening relationships and reinforcing their value as anchors within the community[13].

> *We want to highlight all the opportunities in Suffolk and Norfolk's changing visitor economy - showing that it's much more than seasonal tourism and offers year round, highly skilled and well-paid employment.*

Andrew Wheeler
Executive Director - Curriculum Initiatives, Eastern Education Group

Tourism is not only an economic engine—it is a vehicle for social regeneration, well-being, and inclusive development. While overtourism must be managed, a regenerative approach prioritising residents can ensure long-term benefits. By aligning with public values and supporting local services, tourism can be a powerful force for positive transformation.

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[13] The full case study of the VENI Project can be found in Appendix 1.

Appendix 1: Case studies

CASE STUDY:

North East Regenerative Visitor Economy Framework

In the North East of England, a world-leading regenerative visitor economy framework designed by local organisations is helping to guide the future of tourism and its impact on the region.

In 2024, Destination North East England published a new regenerative visitor economy framework for the region, one of the first of its kind in the world.

This will underpin the region's plans to double the size of its visitor economy by 2034 - growing its economic impact to over £10bn - by ensuring this is done in a way that ensures its long-term viability and benefits for communities, businesses and the environment.

From the outset, a key aim of the framework was to move beyond only looking at sustainability as an objective in tourism, which often focuses solely on environmental issues. Instead, the framework is deliberately set out around a regenerative approach, with wider objectives to also create positive economic and social impact.

The framework was created through consultation with over 600 stakeholders, including large sessions and smaller focus groups which engaged local businesses, community organisations, and industry representatives.

A mission statement was co-created early in the process, and principles were refined over time through open dialogue and constructive disagreement. The

framework was designed to provide tools for stakeholders to act autonomously rather than relying on top-down political ownership.

This engagement means the framework has been widely supported and its areas of focus are beginning to be adopted across the North East. For example, the new North East Combined Authority referenced the framework in a recent tender for a ten year events strategy - helping to ensure its impact will be felt over the longer term.

With the framework in place, Destination North East England is now focused on how it can measure its impact and support more organisations, especially businesses, to use the framework as a guide for how to adopt regenerative practices themselves, for example by rethinking transport and supply chains.

Its status as a framework, rather than a strategy, means the authors also hope it can provide principles and a model for other areas to adapt and implement, according to their unique contexts and needs.

We want the framework to be a living document, which helps promote tourism for good here in the North East but also helps inform the work of others across the UK and the world.

Ian Thomas
Director of Visitor Economy, Newcastle Gateshead Initiative

CASE STUDY:

2023 Eurovision Song Contest

Liverpool's hosting of the Eurovision Song Contest in 2023 brought together local residents, businesses and culture to welcome visitors and showcase the city.

As a city that prides itself on its rich history in the arts and a culture of helping others, Liverpool put itself forward to host Eurovision 2023 when it became clear that the 2022 winners of the competition, Ukraine, would be unable to.

Drawing on a track record of delivering successful cultural events, such as European Capital of Culture, the city was determined to go well beyond the usual requirements for hosting Eurovision and ensure it left a deep legacy for the city.

Over the course of a few months, the BBC and Liverpool City Council's, Culture Liverpool team - the department behind Liverpool's major events - 'transformed the city into a stage', highlighting Ukrainian and Liverpudlian culture in every aspect of community life.

Across the competition which lasted nine days rather than the usual three, the city hosted over 500,000 visitors, featured 200 Ukrainian artists and performers, and commissioned 250 local artists - tapping into a cultural sector it hadn't found before.

To make the event accessible for local people and visitors without tickets, organisers created the inaugural 'EuroVillage', as well as delivering on commitments to sustainability and accessibility.

A 'EuroStreets' programme was also initiated, issuing over 63 grants to community and neighbourhood groups, housing associations and others to allow them to get involved with Eurovision in a way that was meaningful to

them - whether through making Ukrainian dumplings in a cooking workshop, planting sunflower seeds for Ukraine or local school children learning the Ukrainian national anthem and singing it for the country's ambassador.

Together, these community events, free art installations, watch parties, and city-wide branding helped to engage locals, build their sense of pride in Liverpool and develop cross-cultural understanding.

Through its successful staging of the event, Liverpool was able to attract a global spotlight, with around 162 million people watching it worldwide, and generate almost £55 million for the city's economy.

But Eurovision has also left a longer term impact. Almost 55,000 people who travelled to Liverpool for the contest are estimated to have returned, boosting the city's economy by an additional £11 million in the last year alone. And the experience has strengthened Liverpool's reputation as a host for high profile cultural events, leading it to being selected as a host for three Taylor Swift concerts in 2024 and future events such as Euro 2028 and the World Boxing Championship.

" *As a city, we wanted to do Eurovision justice. The reason hosting it worked is because the people of the city were behind it. Getting residents on board and making them feel proud of it meant they acted as ambassadors for the city.* "

Claire McColgan CBE
Director of Culture for Liverpool

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Bath's Visitor Economy

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They also underpin wider economic activity, such as the strong link in Bath and North East Somerset and the West of England between the visitor economy and the creative industries.

And they support the civic life of the city - enabling locals to benefit from mixing with a huge variety of people and cultures, and to experience the pride that comes from others wanting to visit your place.

Managing this volume of visitors in a small, historic place, however, brings obvious challenges in terms of overcrowding, housing, and pressure on local infrastructure and services.

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Robert Campbell
Head of Culture and Heritage Services · Bath & North East Somerset Council

CASE STUDY:

The Visitor Economy Network Initiative

The Visitor Economy Network Initiative (VENI) in East Anglia is demonstrating how careers linked to tourism can boost the skills of local people, increase economic inclusion, and instill civic pride.

Spearheaded by Visit East of England and the Eastern Education Group of colleges, it brings together educators, businesses, the public sector and social enterprises to highlight the vast choice of career paths within the visitor economy, help more people access them and develop stronger business networks.

VENI's Skills Academy is delivered in partnership by five Further Education colleges and businesses across the region, from Centre Parcs to the historic Holkham Hall. Participants - including the unemployed and those traditionally excluded from the labour market - benefit from a series of workshops that allow them to kickstart a career in the visitor economy, including by gaining a WorldHost certification.

This both helps address local workforce shortages and can make a huge difference to individuals: in one recent workshop in King's Lynn, two secured employment within weeks, while another leveraged their newfound skills and confidence into creative freelance work.

Beyond its economic impacts, VENI is also helping to boost civic pride and reimagine the potential of local tourism. Programmes weave local history and attractions into their curriculum, enabling participants - many of whom may have been disengaged from the community to become ambassadors for the area.

Local campaigns supported by VENI also allow local residents to take pride in their area's heritage, subtly shifting public perception of the visitor economy. And the wider collaboration VENI creates between colleges, local businesses and their partners allows them to work together in new ways - deepening relationships and reinforcing their value as anchors within the community.

> *We want to highlight all the opportunities in Suffolk and Norfolk's changing visitor economy - showing that it's much more than seasonal tourism and offers year round, highly skilled and well-paid employment.*

Andrew Wheeler
Executive Director - Curriculum Initiatives, Eastern Education Group

CASE STUDY:

The National Forest

The National Forest is a pioneering example of how regenerative tourism can transform landscapes, communities, and economies.

Spanning 200 square miles, the National Forest demonstrates how tree planting, innovative planning, and local partnerships create a model for responsible tourism development that supports ecological recovery.

Over the past three decades, millions of new trees have revitalised the area, improving biodiversity and creating a distinct sense of place. As a result, tourism has flourished and exceeded initial growth estimates - generating over 5,000 new jobs, supporting the ongoing regeneration of the local area and underpinning further efforts to improve biodiversity

As the Forest has matured and tourism has expanded, the National Forest Company has collaborated with local authority partners to ensure the planning system aligns with the Forest's vision, including the development of regenerative tourism. This has been achieved by ensuring that all new tourist accommodation is in keeping with the Forest's character, for example by using local timber, and by sharing the economic benefits of visitors with local businesses supporting each other.

The National Forest Design Guide is central to this transformation. This innovative tool offers seven sustainability principles tailored to diverse tourism development types, from new builds to retrofits. Developers are encouraged to prioritise energy efficiency, waste management, biodiversity, and community connectivity, ensuring tourism aligns with environmental goals and enhances a sense of place. These principles not only deliver ecological benefits but also help landowners future-proof their developments, reduce costs, and navigate the planning system more smoothly. Two local authorities are already updating their policies to align with the guide.

Biodiversity has flourished as a direct result of the forest's holistic planning approach. While national wildlife trends often show declines, the National Forest has recorded increases in woodland bird abundance (48%), butterfly populations (14.8%), and forest-dependent species such as the sparrowhawk (up 63.7%) and brown long-eared bat (332%). Tree planting requirements for

developments - a minimum of 30% for larger sites - further integrate nature recovery into tourism growth.

Through its collaborative planning framework and commitment to sustainability, the National Forest exemplifies how tourism can thrive in harmony with nature and local communities. Its model offers a blueprint for regions worldwide seeking sustainable, inclusive development.

> *We can demonstrate that sustainability is achievable here in the National Forest and, like the trees in the forest itself, we all work together as one.*

Richard Drakeley
Tourism Lead at the National Forest

CASE STUDY:

Chester Zoo

Chester Zoo, a 92-year-old conservation education charity and visitor attraction, exemplifies how tourism can fuel impactful animal conservation initiatives and educational outreach.

With 96% of its income derived from visitor admissions, Chester Zoo operates without government or council funding. This makes tourism essential to its

mission of protecting the natural world and raising awareness of biodiversity loss and climate change; without visitors, none of this work would be possible.

The zoo's conservation programs are internationally renowned. By collaborating with local and national organizations, Chester Zoo has successfully bred endangered species to preserve biodiversity, including snow leopards, Eastern black rhinos, and Komodo dragons. Notably, it has also reintroduced species like Bermuda land snails and Eastern black rhinos into the wild.

Education is at the heart of Chester Zoo's work. Through its Conservation Education Hub, launched in 2023, the zoo inspires over 250,000 schoolchildren annually, offering Ofsted-accredited programs and providing disadvantaged schools with 35,000 free tickets. These initiatives extend beyond the zoo's grounds, with online resources and a network of outreach rangers. Its educational efforts extend to lobbying for conservation topics in the UK's national curriculum.

Chester Zoo also prioritizes sustainability in its operations, aiming to achieve carbon net zero and zero waste by 2030. It is currently constructing a sustainable hotel on-site for visitors, equipped with air-source heat pumps and solar panels, showcasing its commitment to reducing its carbon footprint. Other eco-friendly practices include waste reduction initiatives and expanded plant-based dining options, aligning the zoo's operations with sustainable tourism principles. The zoo also sources materials locally and operates electric vehicles on-site.

Collaborating with local businesses, the zoo supports Chester's economy by driving tourism-related activities, such as accommodation and the nighttime economy. Marketing Cheshire estimates Chester Zoo is a primary reason many tourists visit the region - and for good reason. The zoo offers a range of attractions to keep visitors coming through the doors, from hosting weddings and corporate events to running a gastropub. By diversifying their income streams, the zoo is able to ensure financial sustainability amidst rising costs and lost revenue post-COVID.

Chester Zoo demonstrates how visitor engagement can drive meaningful change for wildlife and the environment. Its sustainable practices and educational outreach make it a model for conservation-focused tourism that benefits both people and the planet.

> *We are both a conservation education charity and a visitor attraction. Primarily, our charitable objectives are to protect the natural world by preventing extinction but also to educate visitors and others interacting with the zoo. We don't get any government funding or from councils - the majority of the money comes from admissions into the zoo. We depend on visitors for the zoo to survive.*

Jamie Christon
CEO, Chester Zoo

CASE STUDY:

National Parks England

England's National Parks, and the people who visit them, play a vital role in supporting conservation, the prosperity of rural communities and youth engagement with nature.

Spanning iconic landscapes such as the Lake District, Peak District, and South Downs, England's National Parks enable nearly 90 million visitors each year to connect with nature.

75 years since the enactment of the 1949 National Parks and Access to the Countryside Act, there is a renewed commitment from both the National Parks' management and the government to ensure these landscapes continue to thrive.

While the different National Parks vary in size, landscape, ecosystem and visitor numbers, all aim to strike a balance between visitor access and environmental protection. For example, across the national parks, there are various initiatives to restore peatland, create new woodlands, temperate rainforests and ponds, improve waterways and water quality, and protect species as part of nature rich, more biodiverse landscapes..

In August 2024, the National Parks introduced a new vision for regenerative tourism, shifting the focus away from 'doing less harm' towards 'helping give back more than it takes'. The strategy is not just limited to the natural environment and protected landscapes. It also encompasses better support for host communities and resilient local businesses. For example, initiatives in the Lake District support communities to develop affordable housing, and transport to ensure that residents who work in the tourism sector can afford to live nearby and get to work.

Various national parks have also introduced support initiatives for local businesses. In partnership with Green Tourism, South Downs National Park Authority has also developed Green South Downs, a sustainability certification scheme aligned with UN sustainable development goals, to give support and recognition for local businesses on their sustainability journeys. Additionally, in the Yorkshire Dales and North York Moors, a Food Tourism Toolkit was developed jointly to celebrate and promote local food suppliers to businesses and consumers.

Programmes such as Generation Green also ensure that the national parks offer outdoor experiences to young people, particularly those from urban or socio-economically disadvantaged backgrounds. Following the success of the first programme, Generation Green 2 connects over 25,000 young people to nature through 41,500 day and overnight experiences in National Parks, such as starry-night events and farm visits. Supported by DEFRA, and delivered by the Access Unlimited Partnership, the program fosters nature connection, well-being, and environmental stewardship among young people.

Spending time in nature can be life-changing for young people, especially those who may not usually have easy access to green spaces. Here in the North York Moors, we see how being outdoors builds confidence and resilience, inspires curiosity and helps young people feel that they belong in these spaces, and they have a role in protecting them for the future.

Heather McNiff
Head of Engagement and Wellbeing at the North York Moors National Park Authority

CASE STUDY:

Blenheim Estate

The Blenheim Estate is combining a world-leading approach to land management with a world famous visitor attraction for the benefit of tourists, the local environment and the local community.

The Blenheim Estate is a historic site known primarily for its iconic palace as well as around 5,000 hectares of woodland, waterways, and agricultural land in Oxfordshire. In 2019, it set out a historic new land strategy to overcome biodiversity decline and climate change, and become the first estate to demonstrate carbon negative land management.

Blenheim has undertaken ambitious biodiversity projects, including planting one of Southern England's largest new woodlands in the Upper Dorn Valley, spanning 130 hectares. These have been planted, plastic free, with trees selected to be resilient in a warmer world and designed with community cycle paths and permissive access paths so that visitors can explore them while protecting sensitive habitats. The estate is also reconnecting its rivers to floodplains to improve water quality and create dynamic habitats.

These efforts are complemented by habitat creation, and sustainable land management practices, such as a collaboration with Rowse Honey to create over 50 acres of pollinator-rich meadows and introduce 27 log hives to support wild bee populations. Within two years, 11 of these hives have been naturally colonized by bees, with the initiative leading to a notable increase in butterfly species and kestrel sightings, indicating a thriving ecosystem.

Blenheim Palace is building a host of visitor experiences which will offer visitors a new way to experience the wider estate. These will be launched later in 2025 and will give visitors an insight into the conservation and sustainable projects they manage and run. This integrated approach will ensure that Blenheim remains both a cultural landmark and a thriving natural habitat.

The estate works closely with local schools and communities, hosting programs like forest schools, citizen science projects, bat surveys, and tree-planting activities. These initiatives aim to engage residents and visitors in biodiversity conservation while promoting environmental stewardship. Blenheim is also collaborating with organizations like DEFRA and the Forestry Commission to scale its impact through national pilot projects.

We want to lead by example: boosting biodiversity, reconnecting rivers, planting woodlands, and enhancing habitats across the estate to help address the Net Zero emergency and open up active conversations about these issues with our visitors.

David Gasca
Head of Natural Capital, Blenheim Palace Estate

CASE STUDY:

Explore Derbyshire by bus

In Derbyshire, new bus services are changing how people access the beauty of the Peak District and improving transport for local people.

As the Peak District National Park and its partners considered how to revive the local visitor economy after the Covid pandemic, they focused on the need to make its attractions more accessible by public transport.

With the support of a small government grant to improve local bus services, they were able to research and create a number of car-free itineraries and promote them across print and social media.

The new initiative has been supported by partners across the visitor economy. Transport providers have now introduced an open top bus, new 'Peak Sightseer' routes and a 'wayfarer' ticket accepted across all bus services. A number of local attractions now offer discounts to visitors arriving by public transport and local hotels provide information packs to guests, encouraging them to leave their car behind on days out.

Innovative use of social media and the Park's stunning scenery meant the initiative quickly 'went viral', reaching over 600, 000 social media users in 24 hours and 2.9 million overall. Having open top buses driving through the Park - just as they do through in London or Paris - has helped boost its status as a destination.

Whilst this engagement has helped drive new visitors to the Peaks, including hundreds of people using the new transport offer, it has also highlighted the pride local people take in the area and the value of local public transport.

Bus services have been extended to the benefit of local people, for example through a stop being added at a local farm park that is popular with families.

The project has also sparked new conversations between transport authorities, destination management officials and local community groups about how to reduce congestion and overcrowding.

"*The heart of this project has been about finding new ways to enable people to access these special places, whilst protecting them so that generations to come can enjoy them too. By developing bus services for visitors, we have been able to benefit local people too*"

Jo Diley
Managing Director, Visit Peak District & Derbyshire

CASE STUDY:

Birmingham 2022 Commonwealth Games

The Birmingham 2022 Commonwealth Games demonstrated how major events can help bring about significant, positive change for a place and its people.

Held in the wake of the Covid pandemic, the Games were a key part of the West Midlands' efforts to recover from the pandemic, as well as longer-term plans to regenerate areas of the region.

The 11 days of sporting events held during the Games provided a significant boost to the area, engaging 6.9 million attendees, participants, volunteers and employees. Just one year after they were held, the Games were estimated to have delivered £1.2 billion of economic output - significantly above the £778 million of public funding allocated to them.

But from the outset, organisers were determined to ensure that the Games left a deeper legacy. Careful management of the Games' budget resulted in a nearly £70 million underspend, which was all reinvested into community projects benefiting local people.
This impact can be seen in the new infrastructure the Games provided, including new housing, transport and sports facilities for community use, often created in areas of the West Midlands which lacked this.

They also helped improve the skills and employment prospects of local people, both through the almost 21,000 individuals supported through the Games' Jobs and Skills Academy, apprenticeship and volunteering opportunities, and through the estimated 22,380 full time equivalent years of employment which the Games created.

With a global TV audience of almost 835 million, the Games were also a unique opportunity to showcase the West Midlands to the world. A dedicated Business and Tourism Programme was developed to help secure a pipeline of future trade and investment projects for the region, which are predicted to contribute a further £90.7 million in direct GVA to the region by 2027.

Closer to home, they engaged an estimated three quarters of Birmingham residents in some way, including 11,500 volunteers, and boosted civic pride with 74% residents surveyed immediately after the Games saying that the event had a positive impact on how proud they are to live in their area.

And they set to leave a longer-term legacy through their impact on young people and the public's health, with more than 985,000 people engaging in the Games' youth and learning programmes, and 464,000 participating in physical activity and wellbeing opportunities linked to them.

CASE STUDY:

The Yan at Broadrayne

This family-owned hotel and bistro, set on a 17th-century sheep farm in the heart of the Lake District National Park, shows how sustainability and the visitor experience can go hand-in-hand.

Sustainability at Heart: A Generational Commitment

Sustainability is woven into every decision at The Yan but in line with its "no-airs and graces" approach, this is subtly integrated into its approach.

This had led to the hotel installing a biomass boiler to heat the property cost-efficiently, sustainable processes used to build accommodation, and offering off-cuts of sticky toffee pudding for visitors when they check-in rather than pre-wrapped sweets.

Set in a prime destination for walkers, the hotel also encourages people to travel actively and sustainably - either by using the local bus service to reach them or leaving their car parked to get out in the hills.

Tackling Waste: Precision and Pre-Planning

During the Covid lockdown, the hotel's bistro implemented a precise pre-ordering system, to manage social contact. Through partnering with Eco-I North West and Cumbria University, the Yan was able to audit waste patterns and refine their practices further - showing the benefits to the environment and the business.

Large groups and hotel guests are now encouraged to pre-order meals, helping to minimize food waste and allowing the kitchen to operate more efficiently.

All menus are also carbon calculated to help guests make sustainable decisions. This supports a focus on seasonal cooking and use of the fantastic produce available in The Lake District - including lamb, fruit and vegetables from the Yan's own land.

Embracing Community: A Recipe for Collaboration

The Yan has built strong relationships with local producers and local eateries, who collaborate together to boost The Lake District's appeal as a food destination.

During the quieter winter months, the bistro still stays open seven days a week - offering local people a high quality, reasonably priced place to eat, as well as guests.

It also engages deeply with the local community - hosting food stalls at Lakeland Sports days, donating surplus produce to community initiatives and developing staff accommodation to ease local pressure on housing.

CASE STUDY:

Marketing Manchester

Marketing Manchester, a partnership-led organisation charged with raising Greater Manchester's profile, has played a key role in developing the region's thriving visitor economy - reshaping perceptions of the city for tourists and residents alike.

Cultural attractions, world class sport and major events have solidified Manchester's reputation as a tourist destination, with tourism contributing £8.7 billion to Greater Manchester and 4.2 million domestic staying visits in 2022.

A key, but sometimes overlooked, aspect of this has been business tourism, with conferences and meetings generating an estimated 4.4 million trips to Greater Manchester and £904m to the region's economy in 2017.

These visits support the local economy through visitor spending on hotels, restaurants, and shops. But they also offer a more profound opportunity to elevate the profile of the city and encourage people to consider it as a place to visit, study, do business, or move to.

Marketing Manchester aims to seize this by working closely with economic development teams - carefully planning the region's business tourism offer to

ensure it builds on the strengths of the city itself and aligns with local growth plans.

For example, scientists conducting groundbreaking research at the region's universities are involved in selecting and securing conferences and expert speakers related to their work, whilst delegates are supported to connect with businesses and academics when visiting the city.

Programmes like Greater Manchester Legacy also help to connect events to the community so that local people benefit too - for example by giving local school children the opportunity to hear from scientists and experts visiting the city.

Building on this success, Greater Manchester's new Visitor Economy Strategy aims to cement its role as a 'gateway to the North' while maintaining its unique cultural identity both as a destination and as a home.

The Strategy sets ambitious goals for growth - aiming to increase the economic impact of the visitor economy locally to £15 billion by 2030 - but also keeps a focus on how this benefits local people, for example through a commitment that all employees in the visitor economy should earn the Real Living Wage, and that Manchester will rank as the most sustainable city in England.

We want to connect business visitors with Manchester's intellectual capital and introduce them to everything else that the city has to offer, whether that's engaging with the newest scientific discoveries at the university, experiencing its cultural scene or expanding their network.

Nick Brooks-Sykes
Director of Tourism, Marketing Manchester

CASE STUDY:

The Wetlands and Wildfowl Trust

With ten main sites across the UK, the Wetlands and Wildfowl Trust (WWT) welcomes a diverse visitor base that enables them to preserve the environment.

From avid birdwatchers to families and those seeking a good day out in nature, visitors drive the vast majority of WWT's income - funding vital conservation and education initiatives.

WWT's approach differs significantly from other parts of the visitor economy focused on conservation. While zoos care for individual species in controlled environments, WWT prioritises the restoration and management of entire wetland ecosystems, - with each of its sites environmentally significant in its own right.

This ecosystem-centric approach allows visitors to experience fully functioning landscapes, observing migratory birds and native species in their natural habitats and gaining a better understanding of how they interact with them.

A key part of the WWT's mission is to highlight the "superpowers" of wetlands beyond the wildlife they support, including carbon capture, water quality improvement, and flood mitigation. Visitors gain unique insights into these "superpowers," fostering a deeper connection to nature and inspiring action for environmental protection.

Visitor spending makes possible projects focused on restoring and protecting the whole wetland habitat, including salt marsh reclamation supported by collaborations with local farmers and innovative practices like geo-tagged

livestock management. This includes activity at a number of wetland sites which are critical for biodiversity but not visitor attractions themselves.

WWT sites serve as "windows into the world of wetlands", offering immersive experiences that educate and inspire action. Initiatives like the Generation Wild project aim to connect 45,000 children and their families with nature, fostering a lifelong love for the natural world. Award winning accessible facilities and the trial of discounted tickets for those less able to pay are used to ensure people from all backgrounds can benefit from this.

Sites also enable residents to give back to their local environment through opportunities to volunteer on habitat restoration or by supporting visitors.

"The experiences visitors have on sites helps to fund our work but we also want it to inspire action and change from people for wetlands."

Sarah Fowler
CEO, Wetlands and Wildfowl Trust

CASE STUDY:

Blackpool's visitor economy

Blackpool has long been associated with summer holidays but in recent years the town has consciously transformed itself into a year round attraction, which offers a range of highly skilled, well paid employment opportunities.

By focusing on its cultural tourism offer, Blackpool has been able to extend its season and attract new audiences, with more than 20 million people visiting the town in 2022.

The resort now offers events over 11 months of the year, from an International Dance Festival in May to 'Christmas By the Sea', which sees the famous Illuminations kept on until early January, to the 'Shazam Festival' of magic and circus acts in February.

Coordinated planning and marketing allows the whole visitor economy to benefit from this programme, with hotels taking extra bookings and restaurants filling up with new diners.

This shift to year-round tourism has had a significant impact. Blackpool's visitor economy is now valued at over £1.7 billion, showing strong growth since the pandemic as more people take the opportunity to holiday at home.

It supports more than 22,000 jobs locally, including a range of well paid, highly skilled employment roles - from the engineers who maintain rides on the Pleasure Beach to commercial, marketing and legal roles.

Recognising that at times these roles can be challenging to fill, employers and Blackpool College have worked in partnership to establish the Blackpool Tourism Academy, which offers bespoke courses, work experience and qualifications for local people.

In an area with significant economic and social challenges, the opportunity to build a career in the visitor economy is an important engine for social mobility. Jobs in tourism can offer an opportunity for those outside the labour market to get back into work and get on, with the nature of many roles naturally helping to develop people's confidence and wellbeing.

Looking to the future, the town is now aiming to bring all parts of the visitor economy - both public and private - together behind a 'One Blackpool' vision, with new structures and initiatives that will allow the sector to collaborate more closely.

The ultimate goal is to make Blackpool a model for how tourism can help drive social mobility, economic inclusion and urban regeneration.

"The beauty of the visitor economy and the employment it offers is that it is a socially engaging and fun environment. That brings great benefits for people's confidence and mental health, especially for young people"

Kate Shane
Managing Director, Blackpool Council Leisure Portfolio

Appendix 2: Technical Note for Modelling

We set out to examine whether the volume of tourism experienced by destinations in England impacts on attitudes towards the adequacy of local services; the degree to which tourism contributes towards social regeneration in host communities, and the quality of employment generated by the tourism sector relative to other industries in the UK economy. We employed a variety of modelling techniques, including regression and residual analysis, in conjunction with industrial and geospatial data. We also conducted a nationally-representative online poll of 3,000 adults in England in October 2024.

Measuring the volume of tourism experienced by destinations in England

We utilised data from the Great Britain Tourism Survey and Great Britain Day Visits Survey (compiled by Visit Britain), aggregating local authority district-level data to the LVEP level. In doing so, we constructed the following measures of tourist footfall for each LVEP:

- Total number of trips undertaken by domestic visitors
- Total number of trips undertaken for a holiday by domestic visitors
- Total number of nights spent by domestic visitors
- Total number of nights spent on holiday by domestic visitors
- Total spending by domestic visitors
- Total holiday spending by domestic visitors

As a robustness check on our findings, we also generated these metrics at the International Territorial Level 2 (ITL2) before repeating the regression analyses below. The results were extremely similar, indicating that our conclusions are invulnerable to the level of geography employed.

Measuring the impact of tourism on attitudes towards resources

We polled respondents across Great Britain, asking them to describe the following on a 5-point Likert scale ranging from 'Very good' to 'Very bad':

We created an overall measure for attitudes towards local services and amenities, using these survey items from our national poll and combining them into one index:

Perceptions of Local Resources Index: survey items

How would you describe the quality of each of the following services and facilities in your local area? *Rated on a 5-point scale from 1 "very good" to 5 "very poor"*	
Local public services	Public transportation Police stations and facilities
Utilities and public goods	Waste collection/disposal Sewage treatment facilities Roads Recycling centres Public toilets
Local attractions	Parks and green spaces Cultural institutions Restaurants and cafes Shopping areas and shops Public seating areas Local sights and attractions

We matched respondents to their local authority district, LVEP, and ITL2 using their postcodes. We then constructed sentiment scores from these results before scaling and aggregating them into an overall index for attitudes towards local services and amenities, with a score for each LVEP.

We ran ordinary least squares (OLS) regressions to test for a link between volumes of tourism and this sentiment score at the LVEP level, rebasing all variables to the same scale for comparability. The table below summarises the main coefficient estimates from this analysis - these signify the strength and direction of the correlation between tourist footfall and sentiment towards local facilities. The table is also furnished with p-values, highlighting the relationships that were found to be statistically significant.

Main regression coefficients and p-values associated with regressing the volume of tourism on our tourist attitudes score.

	Trips undertaken by domestic visitors	Trips undertaken for a holiday by domestic	Nights spent by domestic visitors	Nights spent on holiday by domestic	Spending by domestic visitors	Holiday spending by domestic visitors

		visitors		visitors		
Tourist attitudes score	**0.067** **(0.027)**	0.023 (0.219)	0.0267 (0.265)	-0.003 (0.885)	**0.062** **(0.040)**	0.021 (0.309)
Tourist attitudes score (exc. London & partners LVEP)	0.024 (0.576)	0.006 (0.749)	-0.006 (0.81)	-0.011 (0.604)	0.011 (0.793)	-0.001 (0.975)

As a robustness check on our findings, we ran these regressions including and excluding outliers which realise significantly different scores on our index, to ensure that certain geographies do not exert disproportionate influence over our results. In this case, we conducted this analysis with and without the LVEP 'London and partners' as it scores extremely highly on attitudes towards local facilities relative to other LVEPs.

Measuring the impact of tourism on social regeneration

We constructed a simple index to measure levels of social regeneration across regions of England. Based on the social regeneration literature on host communities, the index consisted of the following:
- A score representing the density of nearby cultural, recreational, and heritage sites, including parks, gardens, monuments, battlefields, and shipwrecks.
- The density of businesses locally, as well as the density of arts, entertainment, and recreation businesses locally.
- The self-reported strength of national and regional identities, constructed from asking respondents in our poll to rate the strength of their English and regional identities on a scale of 0 to 10.

We normalised these results, aggregating them into an overall index of social regeneration, with a score for each LVEP.

Our regression analysis found a consistent relationship between levels of social regeneration and all of our metrics for tourist footfall. This relationship remained statistically significant even when outliers in the data were removed.

We then ran ordinary least squares (OLS) regressions to test for a relationship between volumes of tourism and levels of social regeneration. As above, the table below summarises the main coefficient estimates and p-values from this analysis.

Main regression coefficients and p-values associated with regressing the volume of tourism on our social regeneration index.

	Trips undertaken by domestic visitors	Trips undertaken for a holiday by domestic visitors	Nights spent by domestic visitors	Nights spent on holiday by domestic visitors	Spending by domestic visitors	Holiday spending by domestic visitors
Social regeneration score	**0.228 (0.000)**	**0.163 (0.000)**	**0.214 (0.000)**	**0.201 (0.000)**	**0.251 (0.000)**	**0.192 (0.000)**
Social regeneration score (exc. London & partners and Cornwall & Isles of Scilly LVEPs)	**0.168 (0.032)**	**0.101 (0.003)**	**0.131 (0.010)**	**0.129 (0.002)**	**0.184 (0.024)**	**0.121 (0.003)**

As a robustness check on our findings, we ran these regressions including and excluding outliers which realise significantly different scores on our index, to ensure that certain geographies do not exert disproportionate influence over our results. In this case, we conducted this analysis with and without the LVEPs 'London and partners' and 'Cornwall & Isles of Scilly' as both score extremely highly on our social regeneration index relative to other LVEPs.

Measuring the quality of employment offered by the tourism sector

We constructed a quality of employment index for sectors in the English economy to compare the tourism industry to others. This index included:

- Hourly pay
- Hours worked
- Gender gap in pay
- Volatility / dependence on the wider economy
- Self-reported attitudes towards opportunities for progression, teamwork, and hands-on work

The first three of these five data points were procured from Office for National Statistics (see below), which provides ready-to-use datasets on these metrics at the industry sector level (i.e., the 1-digit Standard Industrial Classification level).

We constructed the fourth using regression and residual analysis; first, we ran an economy-wide regression on the relationship between gross employment levels and GDP. Then, we calculated the fitted values and residuals that would arise from applying this regression to each individual industry sector in the economy, including tourism. We then defined the residuals in terms of total sectoral employment for the latest year in the dataset. This gave as a contextualised metric for the extent to which employment in each sector rose and fell in line with trends in the wider economy. Sectors with comparatively large residuals relative to their workforce size were those where employment was comparatively unaffected by wider economic dynamics, such as education. Those with comparatively small residuals, such as financial services, provided more volatile employment which was more vulnerable to events in the wider economy.

We constructed the fifth variable using our polling data, asking respondents to select their sector of employment from a list of occupations in line with the 1-digit ONS Standard Industrial Classification before asking them to rate opportunities for progression, teamwork, and hands-on work in their sector relative to others.

Finally, we scaled each of the five metrics for comparability before aggregating them into an overall index for the quality of employment provided by each sector in the economy. The table below summarises the scores each sector realises in descending order.

Sectors ranked by score on employment index

Rank (relative to other sectors)	Sector name	ONS sector code	Employment Index score (normalised)
1	Information and communication	J	0.59
2	Construction	F	0.44
3	Human health and social work activities	Q	0.35
4	Mining and Quarrying	B	0.26
5	Wholesale	G 46	0.25

6	Professional, scientific and technical activities	M	0.20
7	Agriculture, Forestry and Fishing	A	0.19
8	Wholesale, retail, repair of motor vehicles and motorcycles	G 45	0.10
9	Manufacturing	C	0.07
10	Public administration and defence; compulsory social security	O	0.04
11	Water supply; sewerage, waste management and remediation activities	E	0.04
12	Financial and insurance activities	K	0.03
13	Electricity, gas, steam and air conditioning supply	D	-0.07
14	Accommodation and food service activities	I	-0.12
15	Education	P	-0.20
16	Arts, entertainment and recreation	R	-0.26
17	**Tourism**		**-0.31**
18	Retail trade	G 47	-0.34
19	Real estate activities	L	-0.37
20	Transportation and storage	H	-0.39
21	Administrative and support service activities	S	-0.59

Additionally, we adjusted for the average levels of employee qualifications across each sector. Utilising a qualification index score created by the Office for National Statistics, we regressed our quality of employment index on this score. We then extracted the fitted values and residuals associated with each sector following this regression, scaling them for comparability. We outline the substantive implications of these residuals, including how to interpret them, in *Prosperity*. For completion, we list the full set of residuals and fitted values in the table below.

Sectors and their residuals (in descending order of residual size).

Rank (based on size of residual)	Sector name	ONS sector code	Fitted value	Residual
1	Construction	F	-0.05	0.49
2	Information and communication	J	0.13	0.45
3	Wholesale	G 46	-0.07	0.32
4	Agriculture, Forestry and Fishing	A	-0.10	0.29
5	Human health and social work activities	Q	0.08	0.27
6	Mining and Quarrying	B	0.06	0.20
7	Wholesale, retail, repair of motor vehicles and motorcycles	G 45	-0.07	0.17
8	Manufacturing	C	-0.04	0.11
9	Water supply; sewerage, waste management and remediation activities	E	-0.07	0.11
10	Professional, scientific and technical activities	M	0.15	0.05
11	Public administration and defence; compulsory social security	O	0.08	-0.03
12	Accommodation and food service activities	I	-0.08	-0.04
13	Financial and insurance activities	K	0.10	-0.07
14	Electricity, gas, steam and air conditioning supply	D	0.07	-0.14
15	**Tourism**		**-0.08**	**-0.23**
16	Retail trade	G 47	-0.07	-0.27
17	Transportation and storage	H	-0.11	-0.28

18	Education	P	0.13	-0.33
19	Arts, entertainment and recreation	R	0.07	-0.33
20	Real estate activities	L	0.04	-0.42
21	Administrative and support service activities	S	-0.09	-0.50

For this analysis, we defined the tourism sector as an aggregation of a specific set of sub-sectors where employees frequently interact with tourists or where tourism provides an essential component of demand for this labour. For each metric in our index, we produced a comparable estimate for the tourism sector by constructing a weighted average of the estimates for these sub-sectors, which consisted of the following 4-digit Standard Industrial Classifications:

- Passenger air transport
- Hotels and similar accommodation
- Holiday and other short stay accommodation
- Camping grounds, recreational vehicle parks and trailer parks
- Other accommodation
- Travel agency activities
- Tour operator activities
- Other reservation service and related activities
- Performing arts
- Support activities to performing arts , Artistic creation
- Operation of arts facilities, Museum activities
- Operation of historical sites and buildings and similar visitor attractions
- Botanical and zoological gardens and nature reserve activities
- Activities of amusement parks and theme parks
- Other amusement and recreation activities

We defined tourism in this manner to ensure that our analysis remains consistent with Oxford Economics' initial 2013 analysis on the tourism sector for Visit Britain.

Data sources

Where we employed public data beyond our proprietary polling, we list the source here.

Measuring volumes of tourism

- Visit Britain, 2024. Visitation of England counties for domestic overnight trips and day visits (April 2021 - March 2023). URL: https://www.visitbritain.org/research-insights/england-domestic-overnight-trips-and-day-visits-subnational-data; Visit Britain, 2024. Visitation of local authorities and other areas for overnight trips (2017 to 2019). URL: Ibid.

Measuring the impact of tourism on social regeneration

- Historic England: Open Data Hub. 2024. 'Scheduled monuments, parks and gardens, wrecks and world heritage sites'. URL: https://historicengland.org.uk/listing/the-list/data-downloads
- Office for National Statistics. 2024. UK business: activity, size and location. URL: https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation

Measuring the quality of employment offered by the tourism sector

- Office for National Statistics. 2022. 'Earnings and hours worked, all employees: ASHE Table 16'. URL: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/datasets/earningsandhoursworkedallemployeesashetable16
- International Monetary Fund. 'UK: Gross domestic product, current prices'. World Economic Outlook Database: October 2024. URL: https://www.imf.org/en/Publications/WEO/weo-database/2024/October
- Office for National Statistics. 2024. Broad Industry Group (Standard Industrial Classification) – Business Register and Employment Survey (BRES): Table 1. URL:https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/broadindustrygroupsicbusinessregisterandemploymentsurveybrestable1
- Office for National Statistics: Census 2021. 'How qualified are the people in my industry?'. URL: https://www.ons.gov.uk/peoplepopulationandcommunity/educationandchildcare/articles/howqualifiedarethepeopleinmyindustry/2023-08-14

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