

Summary of Consultation Responses

An overview of responses to VisitBritain's Consultation:
*Delivering a Golden Legacy: A Growth Strategy for Inbound Tourism to
Britain from 2012 to 2020*



VisitBritain

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Executive Summary

Background

In October 2012, VisitBritain launched a consultation on a growth strategy for inbound tourism to Britain. Seeking to improve the competitiveness of Britain's tourism industry in the global race, it set an ambition to attract 40 million visitors and earn £32 billion from international tourism a year by 2020.¹ It also seeks to capitalise on the positive coverage of the London 2012 Olympic and Paralympic Games and the improved perceptions of Britain it generated.

Scope and respondents' themes

We engaged with a high number of individuals and organisations with a stake in Britain and the tourism industry both in the UK and overseas. We received nearly 300 responses - the most discernible groupings and common themes are as follows:

- Public diplomacy partners² – The strategy and the market plans are welcomed by this group, many of whom use their consultation responses to ask for sharing agendas and closer alignment with VisitBritain and the industry. Common themes in responses from FCO posts include building on the 2012 legacy, visas and aviation (connectivity and capacity). Responses from the UKTI focus on aviation, growing trade, business tourism and extenders. The British Council's responses touch on education, student visas, VFR and culture.
- Commercial partners – VisitBritain's commercial partners are keen to deepen existing relations and engage on the development of market plans. Key points in their responses include support for the GREAT Britain campaign and a Britain-level business tourism strategy; working together to extend the industry's overseas reach; reinforcing each other's use of social media; the importance of addressing aviation capacity constraints; and proposals to improve the visa regime.
- Destinations and the national tourist boards – This group are also supportive of the target and strands. They support a focus on high-value markets and the BRICs (Brazil, Russia, India and China), and taking a London+ approach where London is used as a hook to promote the rest of Britain. Business tourism, the redefinition of luxury around Britain's product and experience are other strong themes. The national tourist boards and DMOs are also keen for more engagement and education at a local level.
- Domestic trade – Similar themes come through in responses from trade associations and tourism businesses– for example, support for the strategy's strands and a focus on business tourism. This group largely endorse the higher target of 42 million visits by 2020. Although they support a focus on high value markets and the BRICs, they suggest flexible monitoring of markets to accommodate changes in the geopolitical context. Taxation is a common theme: respondents urge reform of VAT, APD (Air Passenger Duty), beer duty and the Tour Operators' Margin Scheme. This group would like VisitBritain to take a leadership role in overseas markets, bringing the public and private sectors together to work towards common goals.
- Overseas trade – The level of engagement with overseas respondents as part of this consultation exercise was unprecedented for VisitBritain, with responses received from British Ambassadors in market, commercial partners, industry and the media. Broad support for the strategy and its ambitions is expressed by respondents.

The four strands

- Building on Britain's Image – Respondents endorse a more bespoke approach to marketing, targeted by segment and market. They support the development of a broader cultural story post Games, building on the

¹ Modelling carried out for VisitBritain by Tourism Economics underlines this ambition. Tourism Economics is an Oxford Economics Company with expertise in the field of tourism and forecasting, undertaking analysis for leading global tourist boards, WTTC and Discover America Partnership.

² The Foreign & Commonwealth Office, individual overseas posts/Ambassadors, UK Trade and Investment and the British Council.

GREAT Britain campaign and an emphasis on value for money. Greater use of social media, digital platforms, global British brands/icons and local celebrities is also encouraged, as is continuing work to personalise the offer.

- Work with the Travel Trade in Key Markets – There is strong support for more engagement with the trade in market both at the frontline and strategic level. Building product knowledge amongst the overseas trade and building knowledge of overseas requirements amongst the UK trade, including ways of doing business, are common themes in responses.
- Improving the range of product – Responses highlight that quality, service and value are areas where Britain needs to improve its product offering. Building London+ packages, the promotion of the ease of travel within the UK, better matching of product to target segments/markets and encouragement of off-peak travel are common themes. The need to review key segments (family, youth, luxury and experiential) is also highlighted. It is also predicted that Britain's hotels will need demand to grow more than forecast to keep up with the current growth of supply.
- Making it easier to get here – Respondents welcome the inclusion of policy areas in the strategy. These include support for visa reform, maintaining and generating additional hub capacity, route development, promoting and using regional airports as gateways to the regions and an integrated transport policy within Britain.

The market plans

Respondents are keen to work with VisitBritain on the development and delivery of market plans. There is broad support for in-country targets. Several responses include additional information on specific aspects of the market plans, which will be used by VisitBritain in due course.

Balance of markets

Responses endorse a more flexible approach to targeting overseas visitors, arguing that one size does not fit all. There is no consensus on priority markets, but many respondents identify established markets that can deliver quick returns as their priority yet recognise the long-term importance of emerging markets. There is support for targeting cities over markets, where appropriate.

Partnerships

The submissions endorse an approach where the government, industry and agencies work together to achieve the strategy's ambitions. There is strong support for greater cooperation across the tourism industry and respondents demonstrate a real appetite to work with VisitBritain in this vein, with some stressing that there is real leadership role for VisitBritain in setting out a framework for public sector agencies.

New areas of activity and markets to explore

- New markets – Some responses, particularly those from public diplomacy partners and VisitBritain's commercial partners, suggest ways that the industry can extend its reach to a wider range of markets.
- New policy areas – A number of additional policy areas are suggested for inclusion in the final strategy. Those mentioned frequently include taxation policies that impact value for money, deregulation and licensing, welcome and border controls.
- New market segments – A notable proportion of submissions support a Britain level business tourism strategy. There is also strong support for growing the youth/student and luxury sectors.

Next steps

VisitBritain will publish the final version of the strategy in due course.

Introduction

Background

In October 2012, VisitBritain launched a consultation on a growth strategy for inbound tourism to Britain, with an ambition to reach 40 million visitors and earn £32 billion from international tourism a year by 2020.³

The Britain tourism strategy builds on the Government's Tourism Policy and VisitBritain's competitive assessments. It seeks to capitalise on the positive coverage of the London 2012 Olympic and Paralympic Games and its role in improving perceptions. It also aims to increase Britain's tourism industry's competitiveness in the global race. This consultation asks 'what next?' and 'how can we get there?'

Reaching our 2020 ambition would represent a significant increase in tourism to Britain, and deliver £8.7 billion in additional visitor spending at today's prices, and support more than 200,000 additional jobs.

The draft strategy identifies four key strands of activity, necessary to achieve Britain's growth potential:

- **Enhancing Britain's image by playing to Britain's strengths** – heritage, traditional and contemporary culture – and addressing perceived weaknesses such as natural beauty, food, value and welcome
- **Ensuring Britain is on the shelf** by working with the travel trade in key markets to ensure Britain is packaged and sold
- **Building on Britain's strong product offer** to ensure that destinations can be easily packaged and that Britain continues to meet the expectations of new visitors from growth markets
- **Making it easier to get here** by addressing barriers to growth such as aviation capacity and the visa regime

It also considers wider factors affecting Britain's competitiveness, including the global population shift to cities, the balance between targeting volume or value, and how to reverse the decline in major source markets such as the USA whilst also ensuring that Britain captures its share of the growth from emerging economies.

22 market plans were published alongside the strategy. These are a set of proposals to improve Britain's performance in each of VisitBritain's overseas markets, which make up the lion's share of Britain's inbound tourism numbers.

The strategy and market plans were open for consultation between 10 October and 9 November 2012.

Consultation Responses

There were no formal consultation questions as we wanted to encourage an open dialogue with a range of partners. There were however, a few key points for respondents to consider:

- Do you agree with the four strands of the strategy?
- Supply-side issues are not addressed in this strategy – what are the challenges/opportunities for the supply-side?

³ Modelling carried out for VisitBritain by Tourism Economics underlines this ambition. Tourism Economics is an Oxford Economics Company with expertise in the field of tourism and forecasting, undertaking analysis for leading global tourist boards, WTTC and Discover America Partnership.

- Which would you consider to be an appropriate balance of markets and activity now and in 2020?
- Are there markets that should receive more or less focus?
- Are there additional policy areas that should be considered?
- Where are there opportunities for partners to work more with VisitBritain?

Scope

VisitBritain launched the consultation at an event attended by over 150 tourism industry and media representatives at Kings Place, London on 10 October 2012. During the consultation period we consulted with a high number of organisations and individuals, both in the UK and overseas:

- Information about the consultation was included in three of VisitBritain's industry newsletters, each of which is sent to over 10,000 recipients. Over 200 recipients clicked through to find out more about the consultation. In addition, the consultation was available to download from our corporate website, LinkedIn page and our corporate twitter feed.
- Over 300 letters were sent to VisitBritain's public diplomacy, strategic and commercial partners; destination management organisations; the industry and other domestic stakeholders.
- We presented the strategy to the All Parliamentary Party Group for Tourism in addition to a number of major industry groups including the British Tourism Industry Group⁴, the Association of Leading Visitor Attractions, the DMO Visitor Forum and the Welsh Tourism Alliance.
- We hosted a number of meetings with key individuals in the UK, including UKTI Chief Executive Nick Baird; Julia Smith, International Airlines Group Chief of Staff; Paul Simmons, Easyjet's UK Director; Michael Rooney, Chief Operating Officer at London First; John Holland-Kaye, Capital Director of BAA; Emma Hudson of STA Travel; Michael Hirst, President of the Tourism Alliance and Mary Rance, Chief Executive of UKInbound.
- We also hosted a number of meetings overseas – Minister for Sport and Tourism Hugh Robertson hosted a panel discussion with industry stakeholders in Russia and roundtable discussions also took place in the UAE, USA and Canada. We also met with James Bevan, the High Commissioner for India.
- Overseas, contact was made with over 300 industry individuals and organisations. These included VisitBritain's commercial partners, trade associations, hoteliers, transport carriers, tour operators and the media. In addition, letters were sent to the Ambassador or High Commissioner in each of VisitBritain's 22 overseas markets.

Overall we received just under 300 responses⁵:

- Domestically we received 53 written responses from industry (ranging from tour operators, hotels and airlines to trade bodies), our commercial partners, national tourist boards and other stakeholders. Stakeholder views were also captured through 30 meetings with industry, other stakeholders and public diplomacy partners.
- Overseas we collected 205 responses by email, letter, telephone interviews and meetings. Respondents included commercial partners, industry, the media and public diplomacy partners (the

⁴ The British Tourism Industry Group is VisitBritain's main stakeholder body. The following organisations are members: ACP Rail, AMEX, Association of Leading Visitor Attractions, Airport Operators Association, British Air Transport Association, British Association of Leisure Parks, Piers and Attractions, British Airways, British Beer and Pub Association, British Council, British Destinations, British Education Travel Association, British Ports Association, Business Visits and Events Partnership, British Hospitality Association, Department for Culture Media and Sport, Easyjet plc., English UK, European Tour Operators Association, Expedia, Hilton, Lastminute.com, London & Partners, MADE, National History Museum, Northern Ireland Tourist Board, Passenger Shipping Association, P&O Ferries, Radisson Edwardian Blu London, Scottish Tourism Alliance, STA Travel, Tourism Alliance, UKInbound, Victoria & Albert Museum, VisitEngland, VisitScotland, VisitWales, Wales Tourism Alliance, and Wimbledon Lawn Tennis Museum.

⁵ See 'Full list of Respondents' for more information

Foreign & Commonwealth Office, UK Trade & Industry and the British Council) in VisitBritain's overseas markets.

- Twenty Foreign & Commonwealth Office posts responded to the consultation, including four where VisitBritain is not currently active (Colombia, Indonesia, South Africa and South Korea).

Responses

Direction & Ambition

There is overwhelming support for the strategy and associated market plans. Stakeholders support the direction of the strategy.

Respondents broadly agree with the strategy's objectives and the four strategic work streams outlined, calling it "sound", "comprehensive", "strategic" and "timely". A number of submissions particularly welcome the strategy's objective to build on the Games legacy.

'It's a very comprehensive strategy (which employs) strong intelligence to support the recommendations'

London & Partners

'We welcome this consultation as well as the opportunity to shape the future of UK inbound tourism. With Government, industry and agencies working together on an agreed and clear strategy, we have a great chance of achieving our full potential to facilitate sustainable job creation, regional development and economic growth.'

InterContinental Hotels Group

'We welcome this as an excellent document that addresses many of the problems facing the industry'

ETOA

'Overall I think that the strategy and ... market plan are excellent'

Foreign & Commonwealth Office, China

A number of respondents agree with the ambition to attract 40 million visitors by 2020, noting that it aligns with their own ambitions for growth and independent analyses of inbound tourism's growth potential.

While all respondents welcome the strategy's aspirations, some question whether it is perhaps overambitious. The timescale for delivering on policy areas outside VisitBritain and the Department for Culture, Media and Sport's gift and on-going economic uncertainty are the most commonly cited concerns.

In some instances feedback on individual market plans contests targets. In some markets, for example the USA and Spain, some respondents felt the targets were too high, and in others (for instance Scandinavian markets) the targets are thought to be too low.

One respondent suggests that an explicit target for growing market share, in addition to the target for absolute growth, would provide a helpful benchmark for the industry. It is also suggested that a target for awareness building could be set.

Respondents are keen for the strategy to be implemented as soon as possible and they seek more detail on how the strategy will be delivered, evaluated and refreshed over the eight years to 2020.

The Four Strands

1. Build on Britain's image

'HHA strongly supports the GREAT campaign which was phenomenally successful in presenting a strong, clear image for Britain which can be developed over the long term'

Historic Houses Association

'Clearly there is a great opportunity to use 2012 and the 'GREAT' campaign as a springboard for success'

Yahoo!

Respondents agree that building Britain's image overseas is necessary to ensure that British Tourism achieves its full economic potential. Many submissions note that they would like Britain to further improve its visibility in a crowded international marketplace.

The submissions endorse a more bespoke approach to marketing, targeted by segment and market. They support the use of themes and destinations in priority markets. At a panel discussion in New York, held as part of the consultation exercise, the importance of personalising messages was stressed – participants argued that the messaging used to target potential visitors from one state should vary owing to differing levels of familiarity with Britain, different interests and differing travel triggers. Some submissions support a more nuanced approach to marketing, which differentiate between first time and repeat visitors.

Respondents note that the Games showcased Britain's diversity, vibrancy and inclusiveness and provided an opportunity to sell a broader cultural story. Public diplomacy partners are particularly effusive on this point. Some overseas respondents warn, however, that Britain must not be complacent and rely on the success of the Games to attract visitors over the long-term.

Feedback shows that the GREAT Britain campaign⁶ is welcomed by both UK-based and overseas businesses. Many respondents support building on the campaign, and seek more information on how GREAT would develop and evolve. Respondents, particularly overseas trade, are keen to be more involved.

Some respondents advocate greater use of international PR and one respondent sees this as an opportunity for engagement with industry partners. They support leveraging global British brands, icons and television programmes to promote Britain. Respondents also suggest greater use of local celebrities and media in overseas markets. These ideas come through particularly strongly in feedback from European and emerging markets such as Brazil and China.

Greater use of digital, mobile and social media platforms is also favoured. As one respondent notes, mobile platforms have particularly strong growth potential and can act as a powerful tool in engaging young tech savvy audiences. Social media is seen as particularly important channel to reach consumers in emerging markets such as Brazil and China, and European markets such as Spain and Poland.

A number of VisitBritain's commercial partners are keen to extend digital and social media collaboration. This is also expressed in some submissions from public diplomacy partners; the Embassy and UKTI in the Netherlands, for example, are keen to share digital messages and to use and link to twitter/blog messages.

⁶ [The GREAT Britain Campaign](#) is an international marketing programme designed to promote the UK to tourism, business and student markets worldwide, and catalyse the Legacy of the London 2012 Olympic Games.

Yet some respondents note that the deployment of new media should not be at the expense of traditional media. A range of markets including France, Hong Kong, Japan, Poland, Russia and Spain also say that they would benefit from more printed brochures and maps. They argue that although it is necessary to increase online marketing, traditional channels are still effective and remain important when marketing Britain overseas.

Many of the overseas responses felt that destinations across Britain should be promoted more, highlighting that consumers and the trade simply do not know Britain. As one American respondent notes, many visitors are unaware of the short distances between British destinations and attractions. Some suggest that destination specific marketing should highlight the proximity of leading attractions and destinations to the closest international gateway. This would help address low awareness of Britain's geography overseas.

A number of submissions from overseas – Australia and France for example – stress that aspects of Britain's offer, such as our culture and heritage, are unique and remain a draw. They contend that promotion of Britain should continue to draw attention to our unique selling point.

On specific aspects of Britain's image overseas a significant number of respondents, from almost all of VisitBritain's overseas markets, state that more needs to be done to improve the perceptions of British food. Britain's image as an expensive destination is another common theme. A number of markets also state that Britain should continue its work on warmth of welcome.

2. *Work with the travel trade in key markets*

Respondents agree that the travel trade remains a crucial route to market in some countries. This comes through particularly strongly in responses from emerging markets.

A significant number of overseas respondents state that British products and services are not well represented in their markets, compared with competitors. Many also say that it is not clear which British suppliers want to promote Britain in their markets. To resolve these issues, the overseas trade would like more face-to-face contact with the British trade. They argue that this would make it easier for British suppliers to stand out against competitors, as more direct engagement with the overseas trade would increase Britain's visibility and create more opportunities to sell Britain.

Overseas respondents recommend that the British trade build on their knowledge of overseas requirements, particularly ways of doing business. Deposits, contracting cycles and inflexibility around reservations are common themes. Submissions stress that using deposits when signing new contracts is seen as old fashioned. Some note that hotel contracting cycles are out of sync with their market's needs while others report that inflexibility around reservations deter late booking travellers.

A significant proportion of the overseas travel trade express the importance of building product knowledge. Many remark that they do not know Britain and have better knowledge of competitor destinations as competitors are more visible in their markets. The overseas trade want more Britain training. Some, particularly those from emerging markets such as China and India, note that more incentives would encourage sales.

'More direct interactions will create opportunities for the supplier-buyer relationship'

The Outbound Tour Operators Association of India (OTOAI), India

'I see the vendors that come through every day... to sell. I don't see Britain. Face to Face is important'

Select Travel, USA

One respondent suggests that a full analysis of projected growth/decline of the travel trade by market would be a useful addition to the strategy.

Greater VisitBritain engagement with the travel trade, both through direct contact with frontline staff and at the strategic level, is also sought.

3. *Improve the range of product on offer*

Respondents agree that there is scope to improve product packaging, noting that product packaging should emphasise Britain's unique selling points.

Submissions note that Britain lacks sufficient suppliers and ground handlers that can package the whole country. In addition, significant numbers of domestic and overseas respondents argue that more effort must be made to stimulate demand outside of London.

Acknowledging London's dominance, some stress this should be exploited. London and regionally-based respondents support a 'London +' approach to packaging product, whereby London is used as a hook and is linked to the best matched regional destinations for each market.

One respondent suggests that VisitBritain develop 'regional specialists' who have a comprehensive understanding of each region's product, which products sell best in particular markets and what would work with local tourism businesses and bodies.

A notable number of respondents state that quality, service and value are still seen as areas of weakness for Britain, relative to competitor destinations. These views come through particularly strongly in feedback from established markets in Europe and the Americas, and are also acknowledged in some domestic responses.

Respondents note that while improving the range of product and experiences on offer is important, this should not be at the expense of quality. They state that in addition to packaging new product, it is important to continually invest in existing product. As one respondent cautions, any reduction in the quality of Britain's offer could have a detrimental impact on repeat visits.

Another respondent stresses that growth must be accompanied by well-resourced destination management, adding that more emphasis should be placed on the quality and value of visitors than volume.

Britain's luxury product is highlighted, and a number of submissions note that Britain's luxury offer ought to be redefined as a more independent, boutique offer. The importance of mid-range accommodation, such as pub accommodation, is also highlighted.

Respondents support building the 'Britain offer' to drive off-peak travel. The overseas trade cautions that our competitors, such as France and Germany, are better at marketing travel during quieter periods and recommend targeted campaigns designed to attract particular segments such as families and couples in off-peak periods.

Respondents support a review of key segments, such as family and youth, to improve product fit. They hold that Britain could better match product to target segments/markets and tap into travellers' existing interests.

Overseas respondents' feedback highlights gaps in Britain product targeted at their specific markets – for example, the continental Europeans would like more activity and touring product while family attractions are important for visitors from the UAE and the USA. Tour operators and transport companies stress that overseas

'The opportunity to use London as a hook hasn't been fully explored and London's dominance is seen as a weakness. We believe there needs to be recognition for London's value and selling power and a clear role for the capital in VisitBritain's marketing activity, especially in any London + activity'

London & Partners

visitors would also welcome more multilingual guides, signage and transport information in their native languages.

A notable number of respondents across most overseas markets report increasing demand for new experiential products for the flexible independent traveller.

Regional tourist boards' membership and advertising charges, the package travel directive and the Tour Operators' Margin Scheme are all mentioned as barriers to improving the range of product.

Respondents welcome more detail on how product improvements can be implemented.

Respondents also commented on supply-side issues, answering the question "how can we accommodate additional visitors." One respondent notes that with slow economic growth forecast in Britain to 2020, hotel businesses would increasingly rely on inbound tourism. However, although there will be a net increase in the supply of hotel rooms during this period, there is little sign that an annual growth rate of 3% will be enough to support British hotels.

VisitEngland's submission notes that supply side issues are addressed in VisitEngland's Strategic Framework for Tourism and Action Plans. They add that the Britain Tourism strategy presents an opportunity to build on work in this area.

4. Making it Easier to Get Here

'ABTA strongly welcomes VisitBritain's call for new airport capacity in the South East, VisitBritain's encouragement of new routes, and a vibrant, aligned schedule of domestic flights for point-to-point transfers. We also strongly support VisitBritain's call for a risk-based approach to the visitor visa regime'

ABTA

'Visa restrictions are... arguably the single biggest issue facing the UK's tourism industry'

Hilton

Many submissions strongly agree that 'making it easier to get here' is a necessary strand in a Britain tourism strategy, and welcome the inclusion of policy in the strategy.

An overwhelming number of respondents state that visa reform should be a priority. A number explicitly support the strategy's position on visas, arguing that further improvements to Britain's visa regime would deliver a competitive advantage. Visas are highlighted in responses from all four of VisitBritain's visa markets as a deterrent to visiting Britain. Documentary requirements, processing times and Britain not being part of the Schengen visa arrangement⁷ are often identified as barriers. One respondent argues that visa issues ought to be addressed before significant investment is made in visa markets.

⁷ The [Schengen visa arrangement](#) allows those wishing to visit 26 countries within the European Economic Area (EEA) (and Switzerland) to travel between these countries using only one visa.

Respondents from some non-visa markets also report difficulties with the process. The process of getting visas for Latin American employees based in Spain, Turkish citizens in Germany and students in Brazil are cited as issues by public diplomacy partners and the trade in these markets.

A handful of responses warn of the dangers of focusing on negative aspects of Britain's visa regime. Some respondents from Britain's visa markets suggest that Britain communicates the positives of its visa process, including improvements, as competitors like the USA have done.

Domestic and overseas respondents support the strategy's position on aviation, which makes a case for new routes between Britain and overseas regional airports in the short term and an increase in hub capacity in the long term. Some submissions stress the importance of maintaining and augmenting hub capacity, arguing that more hub capacity, not just more generic capacity, is needed. The role of regional airports is highlighted, and a number of responses stress their potential to act as gateways to Britain's regions. Strong support for route development is expressed.

Some respondents note that in addition to making it easier to get to Britain, the strategy should support moves towards an integrated travel network which facilitates sustainable travel around Britain and communicates transport options to inbound tourists clearly.

The Market Plans

VisitBritain's overseas markets were invited to comment on their respective market plans.

Many state that they are keen to work with VisitBritain on their development and delivery. This sentiment extends beyond public diplomacy partners to overseas trade bodies, tour operators, travel agents and transport companies.

'Everyone in the travel industry benefits from healthy growth to the UK and we most certainly want to participate in shaping your strategy'

Brendan Vacations, USA

Respondents generally support the in-country targets, which are based on forecasts by Tourism Economics. Some are queried, notably the American and Spanish targets which are considered too high, while those for Scandinavian markets are seen as too low.

Consistent feedback from many of the markets is that VisitBritain should take care not limit promotion of Britain to too few geographical areas in their market. For example Canadian respondents stress that focusing on Toronto alone is not enough, while many in India state that second-tier cities should also be targeted.

The markets also provide additional information on specific aspects of some of the plans, which will be used as VisitBritain, develops the market plans.

Balance of Markets

Respondents note the importance of maintaining a degree of flexibility in the market portfolio, in recognition that priority markets may change over the strategy's eight year span.

Most submissions identify established markets, such as the USA, France and Germany, that can deliver quick returns as the priority today. It is suggested that among established markets, those that are most economically stable and experiencing growth should be prioritised. The potential to grow short break holidays from short-haul established markets is highlighted.

Most submissions however also recognise the long term importance of the BRICs and other emerging markets. Particular mention is made of the importance and growth potential of the Chinese market. Some feel that this has been overstated while other submissions identify it as a key market.

VisitBritain's role in 'make' markets such as Brazil and China is recognised. As one respondent notes, a publicly funded organisation such as VisitBritain is uniquely placed to develop the 'make' markets since commercial organisations primarily focus on markets which can provide a speedier return on investment. A few respondents suggest that VisitBritain focus exclusively on emerging markets while the national boards focus on established markets. This view is not widely supported in the submissions and, as noted above, many stress the importance of established markets.

Respondents agree that in many markets, cities offer a more defined target for promotional activity than countries and endorse this approach where appropriate.

Partnerships

The submissions demonstrate a real appetite to engage and work in partnership towards the 2020 ambition. Public diplomacy partners, the trade, VisitBritain's commercial partners, destinations and the national tourist boards, non-tourism organisations and brands express strong support for greater engagement.

'There is a real leadership role for VisitBritain to take in setting out a framework for the work of public sector agencies'

Tourism Alliance

Where interests overlap public diplomacy partners suggest joint media, promotional campaigns and events as well as data/research exchange. They are keen to share imagery and branding, discuss opportunities and work together to address issues with a common voice.

Feedback from the trade suggests joint PR/advertising, marketing campaigns, seminars, road shows, missions and familiarisation trips with many suggesting that there is scope to develop more partnerships with British brands. Feedback from VisitBritain's commercial partners supports this approach with many using their submissions as an opportunity to express a desire to continue and deepen existing partnerships.

A number of domestic respondents sought more opportunities for SMEs to be included in work to promote Britain overseas.

Some overseas respondents state that they would like greater engagement with regional British organisations – suggestions include the development of an easily accessible database for eCRM marketing; the provision of a conduit between overseas trade and domestic organisations; and more coordination of partners' negotiations surrounding hotels, local attractions, local transport arrangements and familiarisation trips.

Respondents in several overseas markets voice an interest in collaborating on social media to market and sell Britain.

Some commercial partners and destinations offer to help access the creative industries, celebrities, global brands and film studios.

One respondent notes that the Government needs to demonstrate its on-going financial commitment to the 2020 targets, adding that this would create a stable platform for partnership agreements.

Some submissions note that there is little mention of how the Britain strategy meshes with the National Tourist Board Strategies, DMO activity and key industry organisations.

Respondents note that Britain's sub-national structure is complex and at times confusing for overseas operators and consumers. Strong support for greater co-ordination and collaboration between international, national and regional levels is expressed.

A significant number of submissions strongly support more engagement with VisitBritain. Some note that the strategy provides an opportunity to articulate VisitBritain's role and activities and to clearly define its relationship and align priorities with national boards and DMOs. Regular co-operation to avoid duplication is sought. As one respondent noted, 'there is a real leadership role for VisitBritain to take in setting out a framework for the work of public sector agencies'.

New areas of activity and markets to explore

New Markets

Some submissions urge VisitBritain to work with partners to extend its reach beyond the markets in which it is currently active. It is suggested that the high profile created by the Games provides a unique opportunity to cut into emerging markets, such as African countries, where early engagement would provide long term benefits.

Four responses were submitted by Foreign & Commonwealth Office (FCO) posts in markets where VisitBritain does not currently have a presence: Colombia, Indonesia, South Africa and South Korea. All caution that Britain may lose out to competitors as tourism from their markets grows in the long term. They express a desire to work more closely with VisitBritain to attract more visitors to Britain from their markets.

'There is a burgeoning middle class in many African nations... My main concern is that the China bubble has the propensity to burst, whereas the slow and steady growth of Africa (North and Sub-Saharan) has the tendency for growth on a good foundation'

GTA, UAE

Some respondents warn VisitBritain not to spread itself too thinly and advocate a reduced market portfolio, which would enable more sustained campaigns.

One respondent stresses the importance of continuing to monitor markets that are not currently part of VisitBritain's portfolio. They suggest that VisitBritain liaises with the UK Trade & Industry's (UKTI) offices to provide basic information and support for Britain's travel trade keen to invest in these markets.

New Policy Areas

Clear support was expressed for the inclusion of aviation capacity and visas in the strategy. A number of submissions argue that constraints on Britain's competitiveness are wider than these two issues and a number of other policy areas should also be recognised in the strategy explicitly.

'Setting more internationally competitive rates would benefit the UK economy because APD is much more than a tax on aviation; it's a tax on exports, business, inbound tourism and families'

Virgin Atlantic, UK

Taxation policies, notably Air Passenger Duty (APD) and, to a lesser extent, VAT (Value Added Tax) and Beer Duty, which impact value for money are mentioned most frequently in responses.

APD is widely criticised as placing Britain at a competitive disadvantage. Many respondents argue that reducing APD would stimulate demand to travel to Britain and some

'Why doesn't the government reduce VAT? We have gone up from 17.5% to 20% in taxes. Ireland has proactively reduced the VAT to help the travel/hospitality industry'

Guoman & Thistle Hotels, USA

respondents report APD avoidance behaviour. This is highlighted by many respondents from Australia: one even states that the trade are encouraging families to end their trip to Britain in mainland Europe, in order to avoid paying APD on their return flight.

A number of domestic submissions argue that a reduction in VAT would foster growth. The majority of American respondents share this view. A number of respondents from China and Australia recommend clearer communication of the VAT refund process.

Deregulation and licensing, border controls, welcome, sustainability and skills were also mentioned by respondents.

New Market Segments

Respondents also stress that a number of sectors should be specifically targeted. In particular:

- A notable number of submissions express strong support for a Britain-level business tourism strategy. Some feel this should also incorporate meetings and events. As one respondent notes, there is a clear opportunity to grow this segment by leveraging the existing VisitBritain network.
- The youth and student market is also deemed as a worthy target. Language schools are also mentioned by a number of respondents in this context.
- Submissions also highlight the need to redefine the luxury segment.
- The family market was also seen as important by respondents.

'I would like to have seen more of a link between business and tourism... There is no doubt that Britain is a draw for senior business people (and their spouses) and many combine a business trip in the UK with a sightseeing weekend'

UKTI, Spain

*'Business tourism **has** to be part of the strategy... To not do so, would be a huge missed opportunity'*

Visit Brighton

A number of other market segments were mentioned in responses, notably:

- VFR travel is suggested as another area that Britain could grow. This is a common theme in responses from a number of European markets and China.
- Several niche sectors, including golf, weddings and ancestral, are also mentioned as motivators by respondents.

Next Steps

VisitBritain will publish a final version of the strategy. This will set out Britain's overall strategy to achieve 40 million visitors a year by 2020, areas of focus under each of the four strands of image, travel trade, product and ease of access, and a one-year work plan which will identify partners that VisitBritain will work with in order to deliver the strategy.

The final strategy will be published with an FAQ section in which we will provide responses to points raised in the submissions.

List of Respondents

Individuals and organisations providing responses include:

Association of British Travel Agents
Accor
Air Canada
Al Bedwawi Businessman Services LLC
Alio Tours
Al Rais Travel
American Airlines
Ancestral Travel Network
Apollo (Kuoni)
Atas
Avanti Destinations
BAA Airports Limited
Beautiful Britain
Boscolo Viaggi
Braztoa (Brazilian Association for Tour Operators)
Brendan Worldwide Vacations
Bristol Airport
British Airways
British Beer and Pub Association
British Chamber of Commerce
British Consul-General, Hong Kong
British Council, London HQ
British Council, France
British Council, Germany
British Council, Hong Kong
British Council, Italy
British Council, Madrid
British Embassy, Beijing (China)
British Embassy, Berlin (Germany)
British Embassy, Berne (Switzerland)
British Embassy, Brussels (Belgium)
British Embassy, Madrid (Spain)
British Embassy, Moscow (Russia)
British Embassy, Oslo (Norway)
British Embassy, Paris (France)
British Embassy, Rome (Italy)
British Embassy, The Hague (The Netherlands)
British Embassy, Tokyo (Japan)
British Embassy, Vienna (Austria)
British Hospitality Association
British Norwegian Chamber of Commerce
BSI Group
Business, Visits & Events Partnership
CAISSA Travel Management Co. Ltd.
Carlson Wagonlit Travel
China Holidays Group Ltd.
China Space Tourism Organization

CITS HO
Continuum Attractions Group
Cox & Kings
Cumbria Tourism
CVC
CYTS
Delta
Demlink travel
Dertour GmbH
DFDS Seaways
DH Tour
Discover Travel & Tours
Dudley Council
easyJet Airline Co. Ltd
Edinburgh Tourism Action Group
El Mundo
English Association of Self Catering Operators
English Core Cities DMO Group
English Heritage
English UK
European Tour Operators Association
Europe Express
Europe Rail
Executive Golf Tours and Events
Expedia
Falcon Travel
Fast Future
Flight Centre
Former MD Classic World Travel and former Manager France Tourist Board (individual)
Gaeland Ashling
Gallia
GCBS
Globus Family of Brands
Go West
GTA
Guoman & Thistle Hotels
Hampshire County Council
Hankyu Travel International Co. Ltd.
Heathrow Airport Limited
Hilton Hotels & Resorts
Historic Houses Association
Historic Towns Forum
HolidayM
Hong Kong Sincerity Travel
Hotels & More Ltd.
House of Britain
<http://www.canallondres.tv/>
<http://www.londresparapincipiantes.com/>
Huayuan International Travel Co., Ltd./Byecity.com
International Airlines Group
Idea Grande

InterContinental Hotels Group
IHM Ltd.
Insight Vacations
Insight-Lingua
Intermèdes
JALPAK Co. Ltd.
Ken McDonald (independent)
KMP
Kontiki Saga Reisen
Le Quotidien du Tourisme
Leeds & Partners
Leisure Connect
Local Government Association
London & Partners
London Chamber of Commerce
London First
Lotus Tours
Manchester Airport Group
Marketing Cheshire
Marketing Manchester
Marriot
Mayor of London
Meridian Express
Merlin Entertainments Group Ltd
Miki Tourist
Netherlands British Chamber of Commerce
Oad Reizen
Orient-Express
Otus & Co Ltd.
Outbound Tour Operators Association of India
P&O Ferries
PAC group
Panavisión
Paragon Hotel
Perpetuum Travel
Pharos Reizen
Prestigious Travel UK Ltd.
Prima Reisen GMBH
Quiltour
Radisson Edwardian Blu London
Radisson Edwardian Hotels (USA)
Rail Plus
Resia
Russian Express
Russo-Britain Chamber of Commerce
Sarah Haywood Wedding Design
Satguru Travel & Tourism
Scotland, Ireland and beyond Travel
Scottish Development International, Russia
Select Travel Services
Sendas de Europa

Service Reisen Gießen
Shanghai Airline Tours International
Shanghai China International Travel Service Ltd
Shanghai Jinjing Tours Co. Ltd
Sindbad
Sino-European international travel agency Co. Ltd., Shanghai
SNCB-NMBS Europe
Spies/Thomas Cook Northern Europe
STA Travel
Student Travel Bureau, Brazil
Tema (Fritidsresor)
Temareiser
The Lily Pad Cottages
The Train Chartering Company Ltd
The Westbury
The Tourism Alliance
The Travel Corporation
Ticmate
TMI Consultancy
Tourist Forum
Trafalgar Tours
Transat Holidays
Transrutas
Travel Collection
Travel Expert (anon individual)
Travel Quotidiano magazine
TUI
UK Border Agency
UKInbound
UKTI, London HQ
UKTI, Belgium
UKTI, China
UKTI, Denmark
UKTI, France
UKTI, Iberia
UKTI, Italy
UKTI, Norway
UKTI, Poland
UKTI, The Netherlands
United Airlines
United States Tour Operators' Association
UTAT Viaggi
Utour International Travel Service Co. Ltd
Via Travel
Virgin Atlantic
Virgin Vacations
Visit Brighton
VisitEngland
Visit Surrey
Voyageurs du Monde
Voyages Léonard

Voyages Mayflower
Wales Tourism Alliance
Wandering Duck
Welcome to Yorkshire
Welcome UK (Unicorn Travel)
WelcomeWeb UK
Weldon Travels
Westminster Travel Ltd
Wimbledon Lawn Tennis Museum
Wizz Air
Yahoo!
Yorkshire Dales National Park Authority