



VisitBritain/Andrew Pickett

## TOURISM AND GLOBAL BRITAIN

# VisitBritain's response to the proposed Soft Power Strategy

## A FOREWORD FROM OUR CEO SALLY BALCOMBE



This report - Tourism and Global Britain – is part of VisitBritain’s response to the Government’s Soft Power Strategy. VisitBritain has engaged with the ongoing development of this work. Tourism is one lever which can be used effectively and swiftly to help deliver Global Britain’s aim of promoting Britain as an open, inclusive and outward facing free-trading global power.

VisitBritain have taken part in a number of FCO workshops covering global geographic regions, and submitted written evidence. The Tourism Minister, Michael Ellis MP, has also asked DCMS’ arms-length bodies to answer 10 questions on Soft Power to feed into the Department’s input into the Strategy. VisitBritain have provided evidence to this consultation.

Those who come and experience Britain at first hand are not only more likely to tell their friends and relatives to do the same, but they are more likely to want to invest and do business here in the future. Britain’s Soft Power has never been more important, and as this strategy develops, I am clear that Tourism is an important and ongoing element to help drive success.

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## RECOMMENDATIONS

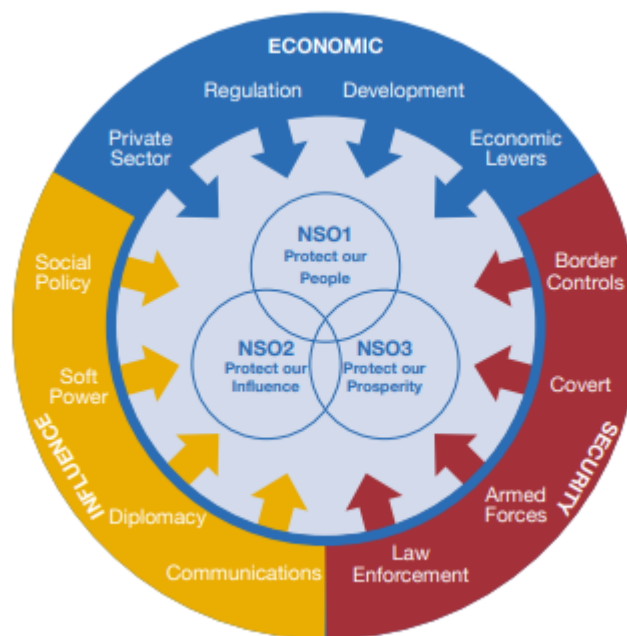
- 1. Recommendation:** Inbound tourism promotion should be included in the Government's Soft Power Strategy.
- 2. Recommendation:** Improve and expand UK visa services to increase Britain's welcome at the beginning of the passenger journey.
- 3. Recommendation:** A customer focused Border Force that is resourced to process inbound visitors with minimal delays.
- 4. Recommendation:** The Government must ensure that after leaving the EU, EU citizens are able to travel to the UK without visas required for holidays, business trips or visits to see friends and family, and any new system of entry to the UK for EEA visitors must be efficient and customer friendly.
- 5. Recommendation:** VisitBritain should be included in cross-government bodies involved in policy and decision-making that is relevant to tourism.
- 6. Recommendation:** VisitBritain's research and insights should inform the UK's Soft Power Strategy and VisitBritain should be a key delivery body for the Strategy.
- 7. Recommendation:** A Sector Deal for Tourism as part of the Government's Industrial Strategy in support of the Fusion Doctrine.
- 8. Recommendation:** Connectivity and tourism should form a key part of UK trade policy.

# THE NATIONAL SECURITY CAPABILITY REVIEW

In March 2018 the UK Government published the National Security Capability Review (NSCR), which will maximise the collective effect of the UK's national security capabilities to support in the implementation of the 2015 Strategic Defence and Security Review (SDSR).

Included in the NSCR is a new national security doctrine, the Fusion Doctrine, the principle of which is to “deploy security, economic and influence capabilities to protect, promote and project our national security, economic and influence goals”. It is a whole-of-government approach to national security.

## The Fusion Doctrine



Source: National Security Capability Review, March 2018

Tourism is a major service export for the UK and positively influences global perceptions of Britain. Tourism is currently worth £126.9 billion to Britain's economy. It is Britain's third largest service export, with inbound tourism contributing £27.6 billion a year to the economy, is around 9% of GDP and incorporates more than 200,000 SMEs. It is expected to grow by 3.8% a year by 2025 – faster than the digital industry.

The tourism sector and the British Tourist Authority should therefore be considered an important part of the Fusion Doctrine.

# Soft Power Strategy

## TOURISM AS SOFT POWER

**One of the key recommendations within the Global Britain section of the NSCR, was the creation of a cross-government soft power strategy.**

Power, as defined by the philosopher Bertrand Russell, is the ability to produce intended effects. It was Professor Joseph Nye in the 1990s who conceptualised power as a spectrum with Soft Power as “The ability to get what you want through attraction rather than [the Hard Power of] coercion or payments”.

Tourism is an important component of soft power – the ability to influence the preferences of international actors and affect foreign policy outcomes through the attractiveness of your culture and values and through growing emotional connections. As the national tourist board, VisitBritain is a key pillar in Britain’s influence overseas.

Travel connects people and places whilst immersing the traveller in another society and culture. It influences the perceptions of foreign audiences and communicates the cultural and governance attributes that make a country admirable and worthy of emulation. This is particularly true for a country such as Britain, where cultural attractions remain the top reason to visit Britain, with 42% of visitors citing this as a key reason for visiting.<sup>1</sup>

Tourism connects global audiences with some of our strongest soft power resources, exposing them to our cultural destinations and people whilst supporting the economy. The British Council’s As Others See Us report found that the main characteristic that make countries attractive to overseas audiences are cultural and historical attractions.<sup>2</sup> These things can only truly be experienced by a visitor to this country.

Connecting overseas audiences with our culture digitally will never match the depth of engagement that can take place when people visit this country and experience the creative buzz of the Edinburgh International Festival, the majestic coastline of Wales, or explore the life of the Bard in Shakespeare’s England, for themselves. The Cold War era Director of the US Information Agency [Edward R. Murrow](#) noted that, “The real crucial link in the international exchange is the last three feet, which is bridged by personal contact, one person talking to another.” VisitBritain therefore plays an important role in deepening global engagement with UK culture.

Previous reviews of the UK’s soft power have concluded that inbound tourism is important to the UK’s influence overseas. The House of Lords Select Committee on soft power and the UK’s influence’s 2014 report, *Persuasion and Power in the Modern World*, concluded that inbound tourists “contribute so

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<sup>1</sup> <https://www.visitbritain.org/understanding-international-visitors>

<sup>2</sup> <https://www.britishcouncil.org/sites/default/files/as-others-see-us-report-v3.pdf>

much to both the UK's economy and the UK's international standing" and proposed "that the Government use GREAT Campaign funding and advertising resources to promote specific cultural activities that are likely to increase inbound tourism."<sup>3</sup>

**Recommendation: Inbound tourism promotion should be included in the Government's Soft Power Strategy.**

The success of inbound tourism is a key measurement of a nation's soft power. The UK was ranked 1st in Portland's 2018 Soft Power 30 Survey, which uses inbound visitor numbers and museum attendance as one of its measures of success.<sup>4</sup>

VisitBritain subscribes to the Anholt Nation Brands Index (NBI), an annual study amongst 20,000 consumers in 20 panel countries around the world. Respondents score 50 nations on a raft of attributes including some relating to tourism, culture and welcome as well as those relating to exports, governance and immigration. Global perceptions of Britain are positive. The UK was ranked third overall and 4<sup>th</sup> for tourism in the 2018 NBI, which ranks perceptions of 50 global nations (see table 1).

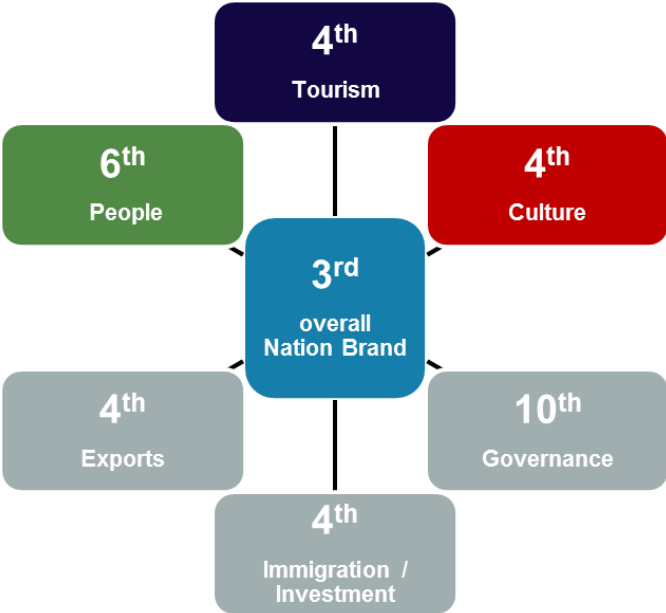


Table 1: Anholt Nation Brands Index: How the UK's nation brand ranks in 2018

<sup>3</sup> <https://publications.parliament.uk/pa/ld201314/ldselect/ldsoftpower/150/150.pdf>

<sup>4</sup> <https://softpower30.com/>

The NBI shows that tourism influences whether people choose to invest and trade with British companies and positively influences their views on key export, governance and cultural attributes, – with those who have visited 11% more likely to invest in British business. (See table 2).

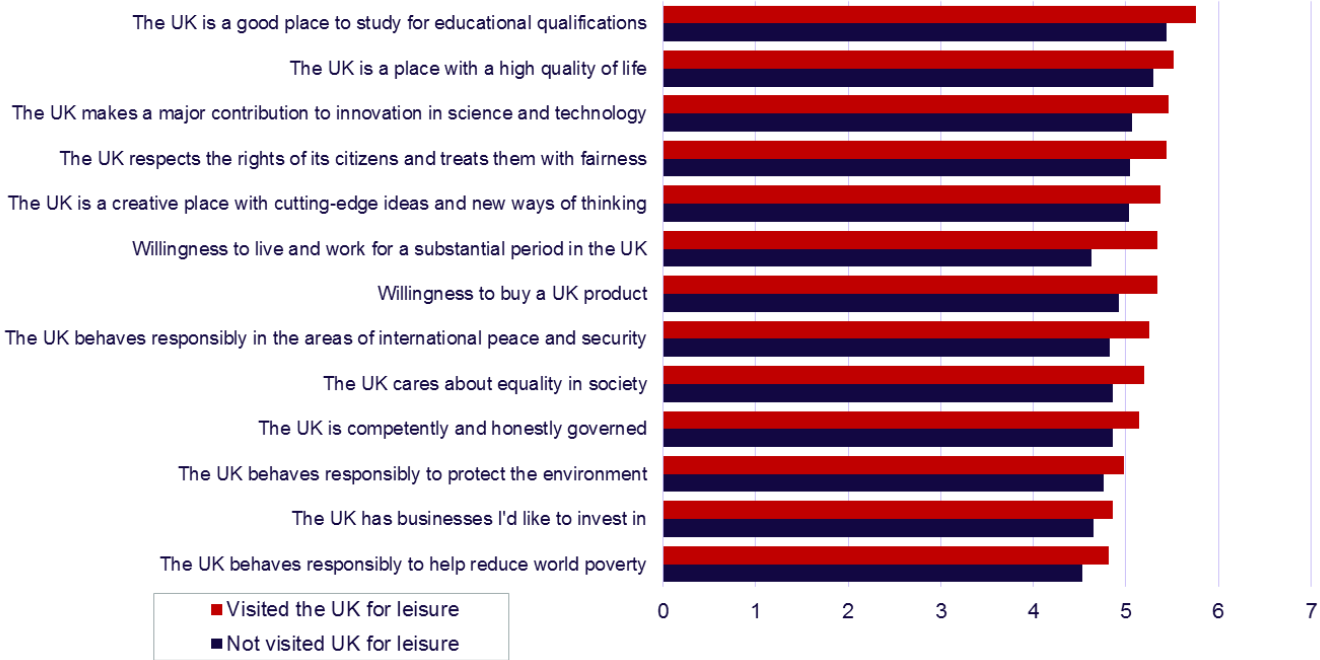


Table 2: 2018 Anholt Nation Brands Index Affinity with the UK

**Britain’s Welcome**

The Government’s Global Britain agenda seeks to position the UK as an outward looking, responsible and engaged member of the international community which is open for business. It is intended to counter perceptions that leaving the European Union would result in Britain isolating itself internationally.

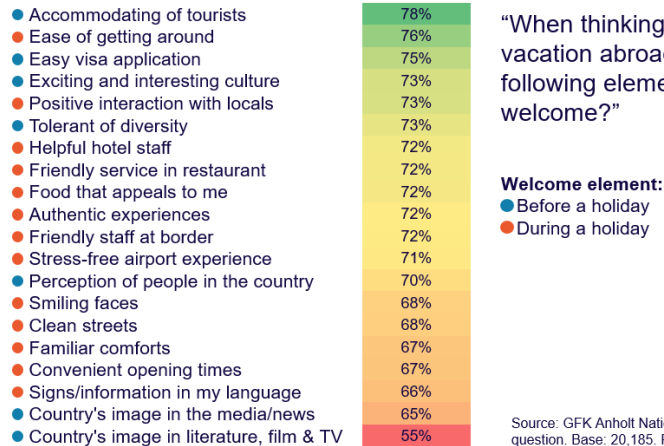
VisitBritain Chairs the ‘Welcome to Britain Group’ which brings together representatives of government, government agencies, tourist boards and other industry stakeholders whose activities have an impact on visitors’ first impressions of Britain. The Group covers the experience of welcome overseas (for example, visa procedures), at points of entry/exit (such as border checks) and in country (like the use of the transport network). Insights from these meetings inform VisitBritain’s understanding of “welcome.”

“Welcome” is an area of relative weakness for the UK, according to the NBI. Overall ranking of the UK’s welcome attribute – if visited, the people would make me feel very welcome – has jumped around since the record highs of 2013 where Britain held 10<sup>th</sup> place. Since 2015, there has been a steadily decline of one ranking place each year, with the UK holding 15<sup>th</sup> in 2018, compared with 3<sup>rd</sup> place overall.



Welcome is an important factor in holiday decision making for those planning a trip outside their own country and being likely to recommend visiting a destination to others. Being seen as accommodating of tourists and maintaining a competitive

UK visa offer is important if we are to prevent Britain losing its share of the inbound tourism market, particularly in high value markets. The ease of getting a visa ranks highly among potential visitors as a factor impacting upon welcome (see table 3).<sup>5</sup>



Source: GfK Anholt Nation Brands Index 2017, VisitBritain sponsored question. Base: 20,185. Results ranked by Overall strength of factor score.

Table 3: Ranking of welcome elements

Whatever the nature of the UK's future relationship with the EU, revised immigration status and entitlements of EU citizens – whether across the board or in particular countries – will significantly affect the workload, and therefore the resourcing, of UKVI and Border Force. We hope that both agencies will be given the additional support and funding they will need to ensure safe and welcoming journeys to Britain for all travellers once we leave the EU.

Border Force's target is for 95% of EEA passengers to pass through security in under 20 minutes and for non EEA passengers to get through in 45 minutes; airports say these targets are being exceeded across the board and that a 45 minute target is excessive in any case. Airports are seeing record passenger numbers and do not have confidence that Border Force takes this growth into account when planning the allocation of its resources.

**Recommendation:** A customer focused Border Force that is resourced to process inbound visitors with minimal delays.

As the NSCR notes, "We must balance our security and prosperity objectives at the border". The NSCR announced that the Government will develop options to improve visa service delivery through the FCO and Home Office.

**Recommendation:** Improve and expand UK visa services to increase Britain's welcome at the beginning of the passenger journey.

Europe is the UK's most important market for inbound tourism. In 2017, 65% of inbound visits to the UK and 41% of spend in the UK was from EU member states; 8 of our top 10 inbound markets by volume are EU

<sup>5</sup> [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight\\_159\\_nbi\\_welcome.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_159_nbi_welcome.pdf)

member states. Proximity matters in tourism and Europeans will always be important visitors because Europe is our only short-haul source market.

Addressing negative perceptions of Britain's welcome exacerbated by the result of the EU referendum will be important if we are to continue to attract international visitors and investment. Positioning Britain as a welcoming place to visit should be a key component of HMG's Soft Power Strategy.

Following on from the EU referendum VisitBritain commissioned a survey across 9 markets into consumer perceptions of Britain. There have been 5 waves of research conducted in 7 European markets (Germany, France, Italy, Netherlands, Poland, Spain, Sweden), as well as China and the USA.<sup>6</sup>

Most travellers continue to see Britain as a destination which is welcoming to visitors with little overall change in this indicator over time. Whilst the net balance of likelihood to visit Britain remains positive, Britain's net reputation is slightly negative in the international total and remains negative for Europe in the latest wave in November 2018.

**Recommendation: The Government must ensure that after leaving the EU, EU citizens are able to travel to the UK without visas required for holidays, business trips or visits to see friends and family, and any new system of entry to the UK for EEA visitors must be efficient and customer friendly.**

## Competitive Environment

Competitors from across the globe continue to prioritise Tourism. Over the past five years, we have seen significant spending increases from a breadth of markets, while we have to be active in 20 markets when Australia for comparison, needs to be active in just five to reach 75% of our international visitors. Australia is funded to the tune of £139m a year, and the US tourist board, Brand USA receives £120m of government money.

States are in a highly competitive environment when it comes to the comparative strength of their national brands and in influencing the global narrative in relation to their foreign policy. Many other countries already include tourism in their soft power strategies. In its 2017 Foreign Policy White Paper, the Australian Government recognised the importance of its tourism offer to its soft power, pledging to “develop a stronger nation brand that better positions Australia in the eyes of the global community.”<sup>7</sup> In August 2018 the Australian Government launched review into Australia's soft power and have included tourism within the scope of the review.

Both China and the Kingdom of Saudi Arabia have escalated their international engagement and public diplomacy in recent years. In March 2018 China created a new Ministry of Culture and Tourism with the aim of enhancing the country's soft power and cultural influence.<sup>8</sup>

In June 2018 The King of Saudi Arabia, in support of the Vision 2020 goals, issued a Royal Decree establishing a Ministry of Culture. The new Culture Minister, Prince Badr said that the “Ministry Culture is part of the soft power which we hope to cultivate in service to country and national identity”.<sup>9</sup>

The Federal Government of Germany also recognises the importance of tourism in positively influencing global perception as it “throws a positive and friendly light on our country. Being good hosts at home as well as

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<sup>6</sup> [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer\\_sentiment\\_research\\_for\\_website.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/consumer_sentiment_research_for_website.pdf)

<sup>7</sup> <https://www.fpwhitepaper.gov.au/foreign-policy-white-paper/chapter-eight-partnerships-and-soft-power>

<sup>8</sup> <http://en.people.cn/n3/2018/0313/c90000-9436384.html>

<sup>9</sup> <https://thearabweekly.com/saudi-reforms-continue-new-culture-ministry>

receptive and willing to experience new things abroad is a hallmark of tourism in our country, and fosters friendly relations with other countries and their populations.”<sup>10</sup>

The Government of Canada’s Tourism Vision notes that “Tourism builds people-to-people connections, supports cultural exchange, expands trade opportunities and foreign direct investment, while helping Canadians and people from around the world better appreciate and understand each other.”<sup>11</sup>

## THE ROLE OF VISITBRITAIN

VisitBritain is the strategic body for inbound tourism and is responsible for promoting Britain and its nations and regions to international visitors. VisitBritain aims to grow export earnings from inbound tourism and deliver jobs and growth across Britain. We are key players in the GREAT Britain campaign, along with the Department for International Trade, Foreign & Commonwealth Office and the British Council.

VisitBritain has an overseas network, based predominantly in UK embassies and consulates as part of One HMG Overseas, which connects us with a global audience across four regions - Europe, the Americas, Asia Pacific/Middle East/Africa (APMEA), and China and North East Asia. We implement differentiated marketing strategies to maximise return in all of them, based on our customer insight, motivators for travel, our knowledge of the barriers to inbound tourism growth and our solutions for addressing them.

### Falling Through the Gap

The policy levers that affect inbound tourism are held across government departments, such as rail and aviation in the Department for Transport, borders and visas in the Home Office, and export strategy in the Department for International Development. As a trusted adviser to Government VisitBritain engages across Whitehall to advise on policy affecting the UK’s international competitiveness.

However, VisitBritain is currently not included on a number of cross-departmental groups relevant to the tourism sector. VisitBritain is a key part of One HMG overseas and yet is not a member of the Global Britain Board and is not included in the Department for International Trade’s Export Strategy despite being the UK’s third largest service export, worth £27.6 billion in 2017. There are a number of cross-departmental bodies that relate to tourism that do not currently have VisitBritain representation or input such as the Global Britain visas board in the FCO and the aviation Strategy board in the Department for Transport.

**Recommendation:** VisitBritain should be included in cross-departmental bodies involved in policy and decision-making that is relevant to tourism.

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<sup>10</sup> [https://www.bmwi.de/Redaktion/EN/Publikationen/federal-government-report-on-tourism-policy.pdf?\\_\\_blob=publicationFile&v=4](https://www.bmwi.de/Redaktion/EN/Publikationen/federal-government-report-on-tourism-policy.pdf?__blob=publicationFile&v=4)

<sup>11</sup> <https://www.ic.gc.ca/eic/site/095.nsf/eng/00002.html>

## Promoting Britain as a GREAT Destination

Britain is one of the best known cultural forces in the world. However, VisitBritain research suggests that foreign travellers feel they already know exactly what to expect from Britain and therefore there is less urgency to discover in further. To maintain Britain's competitiveness as a tourism destination is challenging this perception by making Britain feel like a place bursting with things to experience now, rather than a museum of things to see one day. VisitBritain therefore has an important role in connecting international audiences with Britain's cultural destinations.



In February 2018 VisitBritain launched a new global marketing campaign 'I Travel For...' to boost inbound tourism to Britain. The campaign uses short films and story-telling to highlight unexpected experiences and less explored destinations in Britain, as well as its globally renowned and iconic landmarks and attractions. As part of the global campaign, we are also working with commercial partners, including BA and Expedia, across its key inbound visitor markets to convert the inspiration to visit Britain into bookings.

The campaign has been developed based on our global research into people's motivations, passions and inspiration for travel including adventure, fun, relaxation, discovery, culture, food and drink and the unexpected. The campaign uses these motivators to create tailored content for target audiences, which is then shared on Facebook and Instagram globally.

## Connecting overseas audiences with cultural destinations beyond London

Through the £40 million Discover England Fund, VisitEngland is improving English tourism products and facilitating collaboration between cities and regions to help them deliver world-class bookable tourism products which join-up across geographies or themes. For example England's Heritage Cities tells the stories of 15 of England's premiere Historic Cities and for the first time presents them as one product for US visitors. The project focuses on people and events and uses augmented reality to bring the cities and their stories to life, inspiring younger visitors to explore regional England. A set of itineraries links the cities by rail so that visitors can plan a multi-destination visit and a hub will suggest places to eat, trips, tours and in-destination travel options.

## VisitBritain works with leading British brands

As well as forging links with leading travel sector brands, we extend our reach through partnerships with non-tourism global brands. Collaborations surrounding movies such as the Harry Potter and Paddington, TV series such as Downton Abbey and Games of Thrones, alongside high-profile brands such as the BBC and The Premier League, have all helped us to celebrate and promote the range of amazing moments on offer in the nations and regions of Britain, as well as helping to extend VisitBritain's reach.

## Authentic Voices

VisitBritain are a digital first agency and this is at the heart of our marketing for Britain. Our marketing insights hold lessons for digital diplomacy and VisitBritain's digital influencer campaigns allow us to engage foreign publics online, tell positive stories about British society and culture and convert aspiration to travel into actual bookings.

People increasingly respond to their peers, influencers, and non-establishment figures, rather than more traditional sources of news and authority. Although digital platforms have opened up huge opportunities for information sharing, in some cases it has created silos in which people receive only news that reinforces pre-existing beliefs and can filter out and block information sources that they may disagree with. Four of the five most popular social platforms worldwide are closed-loop messaging apps. This provides a challenge for digital diplomacy as diplomats have to gain cut-through into these closed-loops.<sup>12</sup>

Tourism is a major player in the digital market place with 85% of international visitors to Britain booking their travel online. VisitBritain creates compelling digital campaigns that tell Britain's story, and uses commercial partnerships with major online travel agents such as Expedia to extend our resources and reach more potential customers.

VisitBritain works with social influencers, like journalists, bloggers, vloggers and YouTube stars to maximise our global PR reach. Harnessing the power of popular social media personalities, we promoted Britain to visitors through the content and platforms they already use. For example, in 2015 we organised a press trip for 8 Russian influencers, in partnership with the FCO, themed around the 800<sup>th</sup> anniversary of Magna Carta. The visit included a Russian language tour of Parliament, followed by a chance to watch Prime Minister's Questions. The influencers also enjoyed a tour of the British Library and Salisbury Cathedral. By attracting the Russian media's attention to destinations and attractions based on British heritage, and by using authentic voices, we were able to support the FCO in delivering messages about Britain's political values through cultural channels.

Effectively engaging with international audiences requires the right mix of local reinforcement and global connectivity. VisitBritain's digital campaigns provide consumers opportunities to share their experiences with their peers through their social media channels. Globally, the biggest influence on destination choice is word of mouth, with talking to friends and family key for 40% of visitors and considerers. Also, 26% of those surveyed found recommendations from friends and family online are important in the decision making process. International visitors talking about their time in Britain, sharing videos, pictures and experiences online are acting as ambassadors for Britain - helping to promote the UK overseas and creating a "Halo Effect".<sup>13</sup>

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<sup>12</sup> <https://uscpublicdiplomacy.org/blog/new-network-effect-model-influence-0>

<sup>13</sup> [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight\\_150\\_-\\_researching\\_and\\_planning\\_v2.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/foresight_150_-_researching_and_planning_v2.pdf)

## Public Diplomacy Partnership

VisitBritain also provides public diplomacy support for HMG overseas through hosting trade events and providing content for UK Embassy and diplomat's social media platforms.

For example VisitBritain launched the Love is GREAT campaign in 2014 to welcome the new same-sex marriage law in England, Wales and Scotland. The campaign highlights Britain as an all-embracing holiday choice for LGBT visitors. As part of this campaign VisitBritain have been supporting FCO posts in participating in local Pride events in 26 cities across the Americas (including the US, Mexico, Canada, Brazil, Uruguay, and Chile).

VisitBritain contributes to the government's Global Britain communications programme and is a member of the Cross-Whitehall Group. We have helped develop the Global Britain core narrative, fed into global perceptions research and developed public diplomacy toolkits around the Royal Wedding for use by Posts to engage with audiences in-country

### Attracting business events

One of VisitBritain's priorities is to grow the UK's valuable business events sector by promoting its world-class destinations and venues, and driving more targeted international business events into the UK. Business Events is an important sector for the UK, in 2017 Business visits accounted for 22% of all visits and contributed £5.3 billion in spend.

VisitBritain promotes business events worldwide, under the Events are GREAT brand, part of the Government's GREAT Britain campaign. Helping destinations successful bid for international conferences, events and trade fairs, gives a platform for British businesses, products and destinations, helping to place Britain as a global knowledge hub and a world leader in science, innovation and academic excellence.

For example, the EuroScience Forum in Manchester was a resounding success and attracted more than 3,500 delegates and media to the city. VisitBritain's Event Support Programme funded a 5-week billboard campaign in the arrivals area of Terminals 1 and 3 at Manchester Airport as well as the distribution of brochures from a welcome booth in Manchester Piccadilly train station. This support helped raise the profile of the North West as a leading area for scientific research and facilitated opportunities for businesses looking to invest and develop their products in Manchester.



UK Consulate General San Francisco, @UKin\_SF, 24 June 2018

## A Global Thought Leader on Tourism

VisitBritain has a statutory role to advise government on matters relating to tourism. In line with this statutory role we are regularly called upon to provide briefings and expert advice for foreign governments and tourist boards, many of whom qualify for Official Development Assistance, on tourism policy and nation branding. Tourism is widely considered as an effective contributor to socio-economic development, particularly in less developed countries and VisitBritain, as a world-leading and globally respected tourist board, can provide advice for foreign governments, in-line with Government foreign policy priorities, as long as it has the resources to do so. As the UNTWO notes, tourism has the potential to contribute, directly or indirectly to all of the United Nations' Sustainable Development Goals (SDGs).<sup>14</sup>

### **VisitBritain is often overlooked a Soft Power asset.**

The BBC World Service and British Council are commonly cited as the UK Government's soft power instruments. However, VisitBritain, as the national tourist board, should be considered a soft power instruments along with the national broadcaster and the UK's international organisation for cultural relations. *The Price of Freedom*, a recent report<sup>15</sup> from the British Foreign Policy Group noted that:

*“Bodies such as VisitBritain, hitherto little recognised as foreign policy actors, play an enormously important role in developing the relationships and understanding of the UK that are prerequisite for the success of traditional diplomacy.”*

### **Public Diplomacy Paradox**

It is widely acknowledged much of the UK's soft power lies outside the control or reach of Government.<sup>16</sup> This provides a challenge for governments in projecting influence overseas and managing soft power strengths in a strategic manner.

Direct government control over activities or institutions that could influence foreign publics can invite suspicion. Soft power activity is quickly undermined if it comes across as lacking in authenticity or as government propaganda. Attempting to centrally control public bodies involved in soft power for political gain can distort their operational efficiency and prevent them from delivering the public goods that makes them soft power assets in the first place.

In addition, governments simply cannot compete with popular culture and with global networks of individuals and organizations exchanging knowledge, art, ideas and experiences. As Professor Joseph Nye notes on the Soviet Union's attempts to centrally promote its cultural superiority during the Cold War, “Soviet state-run propaganda and culture programs could not keep pace with the influence of America's commercial popular culture in flexibility or attraction.”

However, through funding and supporting VisitBritain, the Government is able to create an enabling environment by connecting foreign audiences with British culture and society through tourism without directly

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<sup>14</sup> <http://tourism4sdgs.org/tourism-for-sdgs/tourism-and-sdgs/>

<sup>15</sup> <http://bfpg.co.uk/wp-content/uploads/2018/05/The-Price-of-Freedom.pdf>

<sup>16</sup> <https://publications.parliament.uk/pa/ld201314/ldselect/ldsoftpower/150/15008.htm>

intervening. In addition, by supporting VisitBritain the Government is able to support cultural engagement across the nations and regions of Britain. Other cultural institutions and arms-length public bodies are either focused purely on England or are devolved.

VisitBritain have been members of nearly all previous steering groups that have been tasked with promoting Britain overseas:

- *FCO Public Diplomacy Division 1996–99*
- *Britain Abroad Task Force 2000–02*
- *Public Diplomacy Strategy Board 2002–06*
- *Public Diplomacy Board 2006–09*
- *Strategic Communications and Public Diplomacy Forum (this did not convene in the end)*
- *GREAT Programme Board 2011-present<sup>17</sup>*

**Recommendation:** VisitBritain’s research and insights should inform the UK’s Soft Power Strategy and VisitBritain should be a key delivery body for the Strategy.

## INDUSTRIAL STRATEGY AND GLOBAL BRITAIN

The NSCR will use the Fusion Doctrine to integrate economic goals and capabilities, as outlined in the Industry Strategy, throughout national security. As part of the Government’s Industrial Strategy, VisitBritain has facilitated the industry’s response to the Industrial Strategy with the proposal for a Sector Deal for Tourism. The Tourism Sector Deal was submitted to the Government by Steve Ridgway CBE on 6<sup>th</sup> October. It is absolutely clear in its ambition and wants to deliver the following:

- *By 2025, with a sector deal, the value of tourism will more than double and will be worth 268bn.*
- *Europe’s fastest growing Tourism industry by 2025, with 1.8m additional visits.*
- *A 1% increase in Productivity will deliver an extra £12bn to the UK economy.*
- *An additional 70,000 jobs will be created, taking the total number of people linked to the sector to 3.8m. That’s 10% of the UK workforce, in every local authority.*

The Proposals:

- *A 10-year tourism and hospitality skills campaign to boost recruitment, skills and long-term careers providing the industry with the workforce it needs;*
- *Boosting productivity by extending the tourism season year-round and increasing global market share in the business visits and events sector;*
- *Improve connections to increase inbound visits from more markets by 2030 by making it easier for overseas and domestic visitors to not only travel to the UK but explore more of it;*
- *Creating ‘tourism zones’ to build quality tourism products that meet visitors needs and expectations, extending the tourism season and fixing localised transport issues to improve the visitor experience.*

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<sup>17</sup> <https://www.amazon.co.uk/British-Public-Diplomacy-Soft-Power/dp/3319432397>



Global Tourism is as competitive as it has ever been. Tourism is worth £127bn annually to the UK economy, but could more than double with a Sector Deal in less than a decade. Growth in visitors from around the world, carried by more routes, inspiring marketing and interest mean the UK is well placed to be the best destination in Western Europe by 2025.

**Recommendation: A Sector Deal for Tourism as part of the Government's Industrial Strategy in support of the Fusion Doctrine.**

At a time when the UK is preparing for future trade agreements with countries around the world, and positioning itself as open for business and a champion of free trade, promoting Britain as a welcoming destination can improve our international standing and make us a truly Global Britain.

Tourism doesn't need a trade deal in order to flourish and can help set the groundwork for future trade agreements. A report from April 2016 estimates that a 1% net increase in soft power raises exports by around 0.8% proving that soft power has a direct economic payoff in addition to visitor spending.<sup>18</sup>

Tourism can also help build those cultural and personal exchanges that moves a purely transactional exchange into a deeper bilateral relationship. For example, VisitBritain, supporting DCMS, organised and delivered the Tourism Bilateral at 2017 UK-China High Level People-to-People Dialogue. The Tourism Bilateral was an opportunity for the UK and Chinese Governments to agree areas of mutual cooperation in the area of tourism to foster greater people to people links.<sup>19</sup>

**Recommendation: Connectivity and tourism should form a key part of UK trade policy.**

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<sup>18</sup> <http://faculty.haas.berkeley.edu/arose/Pew.pdf>

<sup>19</sup> <https://social.shorthand.com/DCMS/jyXO7ydrUj/dcms-ministers-strengthen-ties-between-uk-and-china>

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