Chairman’s Foreword

The past year was a landmark moment for UK tourism. The British Tourist Authority celebrated its 50th year of selling Britain around the world, bringing billions of £'s in revenue to the country and helping to support one of the UK’s fastest growing and important sectors. In those 50 intervening years, tourism has become the third largest service export, and a major part of British trade. But perhaps more importantly than the hard economic facts, tourism has continued to be the driver for how people around the world see Britain. Many hundreds of millions have come here since the 1960s, leaving with positive memories of time spent experiencing the very best of British hospitality – and that’s why we continue to lead in the soft power rankings, making tourism a true powerhouse. Throughout the world, the BTA team work in 21 offices, and in 2018/19 achieved an additional spend of £951 million – meaning that the BTA achieved a 23:1 return on investment.

With this backdrop, it is fitting of course that the UK Government confirmed the Tourism Sector Deal. I have been incredibly proud to lead the charge for getting this Deal, and for the work of the many hundreds of organisations who have helped to shape this significant piece of work. The recognition this Deal provides cannot be understated; it means significant political influence across Whitehall, and a coordination and strategy for growth not previously seen. The Deal means we can now achieve major shifts in productivity, in understanding customers and in working with business in new and innovative ways. I would like to thank the industry and everyone who was involved in helping us secure the Deal. The British Tourist Authority will continue to support this Deal, and to help provide the coordination in which all partners can continue to work for the advantage and growth of the whole industry.

Our figures for 2020 look set to be strong. We are predicting over 39 million international visitors, spending £26.6 billion. This is encouraging, particularly as Britain leaves the EU and looks to the wider world. We continue to monitor sentiment through our global network, and our team of dedicated professionals continue to build a strong brand overseas for Britain. Investing in tourism is a key priority, both in terms of product, and marketing, and this case is being made strongly to the new government.

In the year ahead, there are so many exciting opportunities. In the domestic market, we see another year of the Discover England Fund. The 60 plus projects already in operation give visitors a new lens in which to see England, and an added incentive to travel for brand new and unique experiences. The new booking platform TXGB complements this innovation bringing businesses across the country, no matter their size, that step closer to new and untapped markets and customers. I am delighted that the BTA continues to innovate and another step for us will be the landmark Data Hub which will give new insight and an added role in advising both government and industry. Tourism offers an important route to rebalancing the UK economy, driving growth to the nations and regions and delivering £m's of investment. Every single local authority has people working in tourism, and this industry will continue to be the one innovating, driving new growth and delivering a positive image to international visitors.

I am also clear that we need to tackle another area of policy, that of sustainability. Destinations and countries around the world are grappling with the global growth in tourism and the UK is no different. Whilst I believe we are a long way from over tourism, I want the BTA to help collaborate with the whole industry in building a resilient response to the environmental and climate change pressure that we all face.

As Britain looks towards an even more global future, it’s important to highlight global successes like tourism. This industry is Britain’s shop window to the world, and I believe that investment in this sector and the BTA, delivers long-term investment throughout our country.

As we celebrated a key milestone for the organisation I am proud of the achievements of the BTA, I would like to thank the BTA Board and VisitEngland Advisory Board, for their strategic guidance and support and especially to those who have stepped down, Ian McCaig, John Lindquist, Angela Bray, John Hoy, Sarah Stewart OBE and Suzanne Bond. My thanks also to Sally Balcombe and the VisitBritain/VisitEngland team here and across the world whose passion for growing tourism drives the organisation and the DCMS team who supports us.
Chief Executive’s Statement

This year, in our mission to make tourism one of the most successful and productive sectors for the UK economy, I am pleased to say our activity has achieved an additional £951 million for the economy, which means for every £1 that the Government invests in us we deliver £23 to the British economy. We leveraged Government investment by attracting £11.5 million of private sector investment in cash and in-kind and raised our own revenue though the VisitBritain Shop, with £1.9 million in net profit being reinvested in international marketing.

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Over the last year, we have focused our efforts and resource, to drive economic growth across the nations and regions of Britain, in four ways.

First, by building demand in international markets.

This year we continued to tell the story of the nations and regions of Britain in a new and refreshing way. Our award-winning global ‘I Travel For...’ campaign inspired international visitors, focusing on the passions that visitors have to travel. In Europe we stepped up our activity, in light of Brexit, with messages of welcome and reassurance to EU nationals in partnership with easyJet.

Domestically, we tackled the youth market, in partnership with VisitScotland, Visit Wales and Northern Ireland Tourist Board, by establishing a new travel trend – Microgapping – which encouraged young Brits to take a short break at home with all the enriching and fulfilling experiences of a gap year.

As a result, we generated thousands of pieces of media coverage overseas and in Britain, reached millions of visitors across social and digital channels, driving additional visits and spend across the nations and regions.

Our work in increasing demand didn’t stop there. We continued to position Britain as a global hub for business events, helping to secure two large association conferences - the 10th International Congress on Glaucoma Surgery 2020 and the Relais and Chateaux annual meeting in 2019 – and supporting a further 25 large events in the areas of technology, health, sport and engineering through our Business Events Growth Programme. Alongside this, our training workshops, market intelligence and events armed the UK industry with additional tools, skills and platforms to win more international business and grow existing events to an international audience.

Second, we focused our efforts for the year on supporting the growth and development of the industry.

This year was the third year of the £40 million Discover England Fund. Over 60 projects have now been supported through the Fund, providing a step-change in bookable English tourism product. This has resulted in a wealth of exciting experiences for the international visitor alongside world-class accommodation and transport options, creating a variety of new reasons to visit England.

A marketing programme aligned to ‘I Travel For...’ has helped take these projects to market as well as the piloting and roll out of TXGB, a digital solution linking suppliers seamlessly with global distributors, and the production and launch of ‘Taking England to the World’ Inbound Tourism Toolkit to support tourism businesses and product suppliers in reaching international consumers.

Third, we continued to provide expert advice and support to UK Government and industry.

“Our award-winning global ‘I Travel For...’ campaign inspired international visitors, focusing on the passions that visitors have to travel.”
Chief Executive’s Statement

As the UK prepares to leave the European Union, we provided advice to both Government and industry and supported the Home Office and other government departments in developing reassurance messaging and travel information for potential visitors from Europe. We facilitated the Tourism Industry Emergency Response Group (TIER), which provided a coordinated forum for discussion and response planning for industry and advised on issues affecting welcome, through the ‘Welcome to Britain’ stakeholder group and Brexit’s impact on tourism.

Accessibility and inclusivity remained a priority, with us leading on convening England’s Inclusive Tourism Action Group and the production of a new guide for tourism businesses in partnership with the National Autistic Society.

Our England Business Advice Hub, which provides free resources, advice and toolkits to help tourism businesses grow, was re-developed to provide improved signposting as well as new resources.

Finally, we continued to build our commercial activities and partnerships to support our mission.

Our work with commercial partners ranging from airlines, carriers, tour operators and OTAs helped us leverage our Government income to reach a broader base of customers with targeted content to drive conversion. To encourage dispersal of visitors and economic benefit across the country we partnered with regional gateways including Birmingham Airport, The West Midlands Growth Company and Marketing Manchester.

Our VisitBritain Shop generated £26.9 million revenue in 2018/19, £1.9 million net profit of that was then reinvested back into the organisation. Furthermore, we encouraged more visitors to explore Britain’s nations and regions by increasing the range of products located outside London.

Looking forward, as ever there are challenges and opportunities. We need to ensure our European visitors continue to see Britain as a welcoming destination and book their visits here this year. We will be launching a European campaign this year focusing on our welcome, people and places that we would love the industry to support and amplify.

The Tourism Sector Deal set a new benchmark in Government and industry engagement. We want to take forward the ideas in that around tourism zones and the tourism data hub to enable the industry to know even more about our best customer prospects. By continuing to work together, we will ensure that tourism becomes one of the UK’s most successful and productive industries. Our ambition is for inbound visitor spend to grow to £35 billion by 2025, attracting 49 million visitors.

To that end, I would like to thank our Chair of the BTA Board, Steve Ridgway CBE, and the Chair of the VisitEngland Advisory Board, Denis Wormwell, for their support, leadership and guidance, along with all staff, past and present, for making VisitBritain/VisitEngland a world-leading tourist board and an amazing place to work.

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Our impact in 2018/19

£951 million additional visitor spend generated as a result of our activities in 18/19

For every £1 invested in us, a visitor spends £23 in the UK

The VisitBritain Shop generated £1.9 million net profit, all of which is invested back into marketing Britain around the world.

Over 60 projects and 700+ products supported and launched through the three-years of the Discover England Fund.

Our domestic England activity reached 12 million users through Instagram and 3.7 million users through Facebook.

Our international activity reached 75 million users through Instagram and 96 million users through Facebook.

£11.5 million in cash and marketing-in-kind support.

£20 million additional spend was generated as a result of our Business Events activities in 17/18.*

*Business Events evaluation is run two years behind due to longer lead times on activity.
Driving additional visits and spend

Inspiring visitors from overseas to explore Britain.

In 2018/19, we rolled out our new global marketing campaign ‘I Travel For...’ across our priority inbound markets. Thanks to the in-depth customer insight and knowledge of our extensive overseas network, we focused on the most valuable visitors for Britain, based on their value now, projected growth and likelihood to explore the nations and regions.

We used people’s passion for travel to shape our campaign content, developing short films and striking imagery to tell the story of Britain in a new and refreshing way. We amplified the campaign to provide messages of reassurance and welcome to EU nationals in the wake of Brexit.

By targeting the most effective channels for our customers, we reached them with the most appropriate products throughout the customer journey – from inspiration to booking to advocacy. At the same time, we raised awareness of the variety of products and experiences available to visitors across the UK through our digital and social media channels. We also achieved coverage for our destinations and attractions in the international media through our visiting journalist and influencer programme. This resulted in thousands of pieces of coverage and millions of people being reached through social media, driving additional visits and spend.

Our results

- 6,300 pieces of media coverage, resulting in
  - 1.8 billion opportunities to see
- 13 million social media accounts reached through our global influencer programme
- 290+ videos and 210+ campaign assets highlighting Britain’s nations and regions
- 75 million users reached through Instagram
- 96 million users reached through Facebook
Inspiring young people to holiday at home

Setting a #MyMicrogap trend.

In October 2018 we launched our new major domestic marketing campaign, #MyMicrogap. Working in partnership with VisitScotland, Visit Wales and Tourism Northern Ireland, the campaign was developed in response to VisitEngland’s research, which found that fewer 16-34 year olds were holidaying at home.

The £2.5 million campaign promoted the concept of taking short UK breaks that offered enriching “gap year” style experiences to millennials. Working with VICE and subsequently Airbnb Experiences, a series of videos and editorial articles were created showing “microgap” trips across the UK. These exceptional experiences enable young Brits to learn new skills, switch off and support good causes, and were promoted across digital billboards, social media adverts and digital display ads. The activity was supported by our work with our ambassadors and influencers such as Handluggage Only and Wheres Mollie? who went on their own microgaps and shared video and imagery from their trips. This was accompanied by a dedicated microsite, always-on digital assets and PR activity including during English Tourism Week.

Our results

3.7 million
users reached through Facebook

12 million
users reached through Instagram

#MyMicrogap influencer ambassador programme engaged with

1.5 million
users on social media

306 micro-influencers promoted microgap experiences at 13 ‘Instameets’, which reached

2.1 million
users on Instagram

Over
3.2 million
quality visitors reached via VisitEngland.com in 2018/19

VisitBritain/VisitEngland Annual Review
Extending our reach and value through partners

Maximising Government investment and providing strong returns to grow the value of tourism in Britain.

We are a partnership organisation and work with many organisations across the public and private sectors. During the last year, we have continued to deepen and integrate our partnership activity and developed diverse and high profile partnerships, encouraging people to consider Britain as their next holiday destination, driving bookings in innovative ways.

In 2018/19 we worked with established partners including British Airways, American Airlines, SAS, Japan Airlines, Etihad, easyJet, Flight Centre, Expedia and Ctrip, to name a few. We also diversified, working with ESPNcricinfo in India to search for cricket’s biggest fan, and reached 100 million people in China through our partnership with Tencent and their QQ racing game. High profile partnerships including Food52, Refinery 29, Matadaor and Men in Blazers, enabled us to develop compelling content encouraging people to visit our shores.

We continued to work with Destination Management Organisations (DMOs) and Local Enterprise Partnerships (LEPs) across England, to support tourism growth in the regions and share best practice.

Collaboration with our strategic partners, VisitScotland, Visit Wales and London & Partners, has seen us work on a joint agenda to drive tourism growth. We also continued to work with the Foreign and Commonwealth Office (FCO), British Council, Department for Environment, Food and Rural Affairs (DEFRA) and Department for International Trade (DIT), to promote Britain in international markets, delivering the GREAT campaign and jointly addressing issues affecting tourism growth.

Our results

£11.5 million secured in cash and marketing in-kind

New visitors targeted

partnering with British Airways on new routes from Pittsburgh and Nashville in the US and Osaka in Japan

100 million people reached in China through our partnership with Tencent

Best practice shared with 100 Destination Management Organisation staff through our English Destinations Forum
Helping businesses to export and grow

Providing routes to market for British tourism businesses.

In 2018/19 we connected hundreds of UK tourism businesses with international buyers through our sales missions in North America, China and North East Asia. We moved our flagship event, ExploreGB, to May 2019 to highlight Britain at its best to hundreds of international buyers.

Meanwhile, by providing platforms for exhibiting at leading trade shows such as ITB Berlin, we enabled UK suppliers to open up new relationships and business opportunities. Alongside this, we encouraged international travel trade to increase their knowledge of Britain and to feature more British products in their programmes, by providing trade with BritAgent, our online training tool, and featuring itineraries and the UK supplier directory on our trade website.

We encouraged more visitors to explore Britain’s nations and regions by increasing the range of products located outside London to more than 50% on our online shop. British tourism providers were able to promote and sell their products to an international audience through our shop, and by featuring shop products in our B2B and B2C marketing activity, we were able to amplify their reach.

Our commercial activity also raises revenue for the marketing of Britain internationally. This year, £1.9 million of net profit from the shop was reinvested into the organisation.

Our results

The VisitBritain Shop generated £1.9 million net profit, all of which is invested back into marketing Britain around the world.

100 products added to the shop

7,000 meetings facilitated between UK suppliers and international travel trade at three events

580 new suppliers added to the Supplier Directory on our global trade site

20,000 sessions on BritAgent, with users spending on average 20 minutes per session

VisitBritain/VisitEngland Annual Review
Delivering the Discover England Fund

Developing world-class bookable tourism products.

Through the £40 million Discover England Fund, we have supported the creation of a raft of exciting reasons to visit England, addressed product gaps and provided projects with a route to international markets.

In 2018/19, we saw the highest annual investment with £14.3 million channeled into 14 large-scale projects and 11 small scale projects, which generated £5.6 million in match-funding.

To date, more than 700 quality bookable products for overseas visitors have been developed to suit every interest – from food and drink with Gourmet Gardens Trails, coastal activities with England’s Coast, urban escapes such as the North of England City Experience or adventurous activities with the Sheffield Outdoor City and Cycle England - plus many more.

We supported new products through inclusion on our trade website, supplier directory and VisitBritain Shop, and promoted them at trade events including World Travel Market and ITB Berlin. Furthermore, 380 products were showcased to international buyers through educational trips at ExploreGB, and were regularly featured in our international and domestic marketing campaigns.

In addition, TXGB (Tourism Exchange Great Britain), a digital platform to enable tourism suppliers to connect with multiple international distributors, was developed for launch in June 2019.

Following the completion of year three of the Fund, we are delighted to have been successful in securing £5.45 million in funding for another year.
Supporting English tourism businesses

Helping English businesses to grow and build capacity for marketing internationally.

In 2018/19 we launched a new toolkit, Taking England to the World, to help businesses sell their products and services internationally. Due to the popularity of the toolkit, with 6,300 copies distributed since it launched, we developed a training programme for roll out in 2019/20.

Our online Business Advice Hub was fully revamped to provide toolkits, guidance and case studies to help businesses start up, be legally compliant, reach new customers and grow. Other business support initiatives have included a new guide on welcoming autistic customers in partnership with the National Autistic Society, the 10th edition of our popular Pink Book: legislation for tourist accommodation and the relaunch of our online Digital Marketing Toolkit.

Meanwhile, our VisitEngland Quality Accreditation Schemes were opened up to all accommodation and food businesses, and the process of gaining access to the schemes was simplified to support businesses across England.

2018/19 was also the 30th anniversary of the VisitEngland Awards for Excellence, sparking a review of the format of the awards and a new framework for the 2020 competition, aligning local awards with national awards.

Our results

6,300 copies of the Taking England to the World toolkit distributed to businesses and destinations

19,800 unique page views in March 2019 on the Business Advice Hub following a marketing campaign

10,000+ referrals from the new Business Advice Hub to resources since its launch

In 18/19 the VisitEngland Awards for Excellence were modernised, aligning local awards with national awards

Revamped Business Advice Hub launched in October 2018
Informing Government and industry decision-making.

Led by British Tourist Authority (BTA) Chairman, Steve Ridgway, CBE we rallied the industry to secure a Tourism Sector Deal as part of the Government’s Industrial Strategy. This moved Britain's tourism sector to the top table as a leading industry for the Government's economic planning.

Through our English Tourism Week activity, we raised the profile of English tourism to Government and stakeholders, engaging with 39 MPs at our parliamentary event and reaching 3.8 million users through social media.

Our expertise, research and insights advise Government and provide the industry with tools to help them grow and export. In 2018/19 we kept the tourism industry informed on the latest inbound tourism statistics and insights, through regular publications including market profiles and snapshots on inbound markets, International Passenger Survey data and much more. For England, we continued to deliver the Great Britain Tourism Survey, Great Britain Day Visits Survey, Annual Attractions Survey and England Occupancy Survey, alongside insights to support product development.

Our website provided a one-stop shop for tourism businesses and destinations on developing and promoting their products, supported by an industry newsletter and social media activity. As the go-to expert, we secured more than 7,300 pieces of press coverage on the importance of tourism across print, broadcast and online.

As the UK prepares to leave the European Union we provided advice to Government and industry and supported the Home Office in developing reassurance messaging and travel information for potential visitors. We facilitated the Tourism Industry Emergency Response Group (TIER), which provided a forum for discussion and ensured industry asks were communicated with Government.
Building the value of business events

Supporting bids and developing demand for future business in Britain.

In 2018/19 our business events activity saw event wins for Britain. We further developed our business events strategy and helped secure the 10th International Congress on Glaucoma Surgery 2020 and the Relais and Chateaux annual meeting in 2019.

Our MeetGB and MeetGB China events provided UK meetings, incentives, conferences and exhibitions (MICE) suppliers with a platform to reach and build relationships with more than 100 international business events buyers. We raised the profile of venues and destinations in England by exhibiting at IMEX Frankfurt, IMEX America and IBTM World, offering them an opportunity to forge relationships with international buyers.

Through the Business Events Growth Programme, 25 large events in the areas of technology, health, sport and engineering were provided with financial or advocacy support. As a result we secured the One Young World event – a global forum for young leaders – as well as increasing capacity at all other events. Alongside this, our continued training workshops and intelligence armed the UK industry with additional tools and skills to win more international business and expand existing events to an international audience.

Our results

Two
major events secured through our association activity

1,350
leads generated for England through our industry trade show activity

3,500
meetings facilitated between UK business events suppliers and international event planners at our two MeetGB events

25
large events supported through the Business Events Growth Programme

8
expert training workshops delivered to UK business event professionals