

Written evidence submitted by VisitBritain

Introduction:

Summary of evidence:

- For tourism, sustainability goes beyond environmental impact, the industry also has a responsibility for ensuring that destinations manage success, ensuring destinations are socially and economically sustainable.
- As a growing sector, there are many opportunities for tourism to sustainably support economic growth and regeneration across Britain – supporting local communities, facilitating skilled jobs and boosting productivity.
- The UK currently has a £26bn deficit in outbound visitors. VisitEngland’s domestic marketing and product creation seeks to tackle this deficit and encourage people to holiday at home all year around, in both familiar and unexpected destinations.
- VisitBritain and VisitEngland have a responsibility to ensure international visitors make more sustainable choices whilst they are in Britain. Our work includes the promotion of regional and seasonal spread, the development of products which encourage low carbon transport alternatives and ‘giving back’ during visitors’ trips, as well as playing a leadership and convening role for the sector.
- There is an opportunity to reform the current tax structure for tourism to aid in the offsetting of environmental impact, without the need for new or increased taxation. Britain is already seen as an expensive destination, and we should focus on making visitors feel welcome and converting day visitors to overnight stays.

VisitBritain/VisitEngland is the national tourism agency, with statutory responsibility to advise government. VisitBritain and VisitEngland work to develop world-class tourism products and collaborate with international partners to promote Britain across the world and develop domestic tourism across every corner of England.

VisitBritain/VisitEngland is funded by the Department of Digital, Culture, Media and Sport, and partners with a number of businesses in order to maximise the impact of our investment, which currently has a return on investment of 25:1.

Tourism is currently the UK’s 3rd largest service export, in 2018 overseas visitors spent £22.8bn in the UK. Domestic tourism is also a significant contributor, with 97.4m overnight trips in England, totalling an expenditure of £19bn.

Current forecasts predict the sector will deliver a 23% increase in inbound visitors by 2025, and a domestic increase of 3% per year until 2025.

Tourism and sustainability:

VisitBritain recognise that whilst tourism brings significant economic benefits to Britain, this must be balanced with action to ensure tourism growth is sustainable for the future.

For tourism, sustainability covers two themes which are closely connected. Firstly, environmental sustainability, working towards the reduction or reform of environmentally harmful industry practices and visitor behaviour, so that the sector can play a role in working towards the Government’s Net-Zero target. Secondly, sustainable use of our assets, so communities feel the economic and social benefits of tourism, without unnecessary resource strain.

'Over-tourism' is often overstated in Britain. While it is true a handful of destinations do need assistance in managing success particularly in peak seasons, the issue is not of the same scale seen in competitor destinations such as Venice. On average 22% of hotel bed rooms are empty on any day during the year.

VisitBritain is considering the issue carefully in order to consider how best to manage destination success in a sustainable way.

We believe that a combination of regional and seasonal spread, destination management, research that helps us better understand visitor patterns, and product development can provide stretched destinations with solutions to ease pressure without risking the contribution made by visitors to the local economy and ensures sustainability is a key differentiator of British tourism.

The issue of sustainability as a whole offers an opportunity to consider the structure of the tourism industry and the relationships within it. Strengthened partnerships within the industry as well as improved tourism focus from LEPs and Local Authorities can help to facilitate step-change in policy in this area and offer an opportunity to further sustainable 'placemaking' practices.

(1) What can the Government do to support a sustainable inbound tourism industry in the UK?

1. The Government should allocate funding for Discover England Fund (DEF) 2, in order to support the development of sustainable tourism product by extending the season, and encouraging visits to lesser known destinations.
 - a. Discover England Fund 1 was launched as a three year £40m fund in 2015, with an aim of creating bookable product and market it at inbound visitors. The project has been incredibly successful, with 66 projects funded to date. The fund has now ended.
 - b. By supporting the creation of new bookable products, DEF funding helps to promote regional spread, encouraging visitors to Britain to explore new destinations and attractions, alleviating environmental and social pressure on popular destinations. In addition, many projects seek to promote out of season products, supporting local economies and skills all year around. Sheffield for example, has used the fund to re-brand itself as a year-round outdoor adventure destination, marketing its mountain hiking and climbing facilities to European visitors.
 - c. The fund is also used by many destinations to promote use of the public transport networks, offering lower carbon alternatives to road travel. Projects such as 'The Great West Way' and 'North of England City Experience' link destinations through easy to purchase rail tickets. The Great West Way has also co-ordinated bus and train timetables in order to help passengers travel 'the final mile'.
 - d. Other projects focus on the promotion of local food and drink, reducing food miles while celebrating a key part of British culture. The 'England's Seafood Coast' project includes the world famous Brixham Fish Market, where visitors can tour the market and learn more about the produce available, before enjoying a locally sourced meal.
 - e. The recently launched TXGB (VisitBritain/VisitEngland's B2B distribution platform, funded by DEF) assists suppliers of all sizes reach international customers through localised distributor. The platform will offering greater choice of destinations and

products to international visitors, which in turn will spread the economic load of additional visitors to Britain and limit their environmental and social impact on communities.

- f. A second generation of Discover England Fund, which will form part of VisitBritain's spending review bid, could contain requirements for projects to consider the sustainability of their plans.
 - g. Government Support for a Discover England Fund 2 would aid the further creation of sustainable destinations and itineraries, which in turn promote regional and seasonal spread in addition to supporting local economies and employment.
2. Following the announcement of the Tourism Sector Deal, the Government should use Tourism Zones to facilitate localised fixes that support the UK's sustainable tourism offer.
- a. The Tourism Sector Deal, announced in June 2019, outlined a number of Government and Industry commitments for the Sector. The deal puts tourism at the heart of the Government's Industrial Strategy. As part of the Sector Deal, plans for five pilot Tourism Zones were announced.
 - b. Tourism Zones will bring together local leaders, including LEPs, Local Authorities, DMOs, to focus on delivering increased productivity at a local level by initiatives such as enhancing tourism product, extending the tourism season and investing in skills. Announcement of criteria and expressions of interest are expected in this financial year.
 - c. The criteria for Tourism Zones could potentially contain requirements for areas bidding to become a zone to make provisions to ensure their plans promote sustainable tourism.
 - d. Tourism Zones' ability to provide localised fixes and insight will facilitate world class destination management in order to ease pressure on pinch points, boost productivity, and improve tourism product. Such schemes will support sustainable goals by enhancing or regenerating destinations in order to attract domestic visitors, support the use of sustainable transport via localised infrastructure fixes, and supporting destinations in creating a sustainable visitor economy by supporting year-round employment and income.
3. The Government must continue to support VisitBritain and VisitEngland's core activity, enabling us to lead the sector to a more sustainable future.
- a. The UK currently has a £26bn deficit in outbound visitors. VisitEngland's domestic marketing and product creation seeks to tackle this deficit and encourage people to holiday at home all year around, in both familiar and unexpected destinations. Domestic holidays offer a lower carbon alternative to international air travel and in turn, domestic tourism supports economic growth across England. Increased Government support for marketing could help us to further reduce the deficit of outbound travel.

- b. VisitBritain and VisitEngland's activity also promotes longer stays and higher spend by visitors in order to support local economies and create sustainable destinations. For example, a day tripper in England spends an average of £37, while an overnight domestic holiday visitor spends £73 per night.
 - c. VisitBritain's #MyMicroGap campaign encourages millennial travellers to stay in the UK for short breaks to enjoy enriching experiences and opportunities for self-development that have traditionally been reserved for gap years abroad. The campaign is part of an effort to retain younger travellers and get them to holiday at home, thus reducing the outbound deficit. Part of the MicroGap campaign focuses on 'giving back', suggested itineraries focus on volunteerism particularly focusing on environmental activities. Activities featured on VisitBritain's website include Ranger guided walks around the Peak District to learn about conservation, a silent disco litter pick on Brighton beach, and paddleboard litter picks along the Thames in London.
 - d. VisitEngland runs the Business Advice Hub, which offers a range of support to tourism businesses, including guidance on how to become more sustainable.
 - e. As the national tourist board, VisitBritain and VisitEngland have a statutory duty to advise Government on tourism policy. VisitBritain and VisitEngland's relationships with industry, and role in project managing the implementation of the Tourism Sector Deal, put it in a strong position to help industry collaborate on the issue of sustainability and share insight with Government.
4. The Government must continue to deliver on its commitments to the Business Events sector, as set out in the International Business Events Action Plan.
- a. Business Events provide destinations with out of season investment, diversification of asset use and aids in the creation of year round skilled employment – factors vital to the creation of sustainable destinations.
 - b. The International Business Events Action Plan sets out three key areas of focus for Government support, including; Government Advocacy, Financial Support, and Arrival and Welcome. These provisions are key to encouraging new events and conferences to come to the UK and promoting the sustainable growth of existing events.
 - c. VisitBritain plays a key role in the plan, assisting on Government Advocacy and destination marketing and promotion. Financial support is also administered by VisitBritain, through its Business Events Growth Programme.
 - d. In its first three years the Business Events Programme awarded almost £755,000 across 38 events. One funded project, the UK Security Expo in London saw a 53% increase in international attendees as a result of additional financial support.

(2) How well is the UK industry managing the impact of tourism in line with its obligations under the sustainable development goals, at home and abroad?

- 1. The Tourism Sector Deal is working to increase productivity and support the recruitment and retention of a skilled workforce, in line with Sustainable Development Goal 8 (SDG8)

to “*promote sustained, inclusive, and sustainable economic growth, full and productive employment and decent work for all*”.¹

- a. Increasing productivity in the sector promotes the efficient use of assets, across the country, all year around. Extending the season supports the economic growth of destinations, and also consistent and reliable employment for workers.
 - b. The Skills campaign outlined in the sector deal further supports SDG8. The inclusion of mentoring, new T-Levels, apprenticeships, and in-work training, supports the recruitment and retention of and meaningful employment.
2. Sustainable Development Goal 9 (SDG9), “*Build resilient infrastructure, promote inclusive and sustainable industrialisation and foster innovation*” is also closely linked to the outcomes from the Tourism Sector Deal.²
- a. Tourism Zones seek to provide local areas with the support to make small localised infrastructure changes to support the visitors in getting around more easily. The Tourism Zones further promote innovation within regions to drive up productivity, extend the season, and create new product.
 - b. The Tourism Data Hub, also included in the Sector Deal further provides an evidence base for future innovation, working towards the creation of Smart Destinations which will build a better understanding of visitor flows and behaviours.
 - c. Investment in infrastructure also facilitates innovation, the Sector Deal outlined plans for 130,000 new hotel rooms, showing investor confidence in the UK tourism industry.

(3) Should the UK Government take more responsibility for the impacts of outbound tourism, for example waste and resource management, protecting habitats and species and community and cultural impacts?

1. The tourism industry and Government have the ability to work together through groups, such as the Tourism Industry Council, in order to agree sustainability guidance for visitors that could be used for both inbound and outbound visitors.
2. VisitBritain believe that in order to mitigate the environmental impact of outbound tourism, there should be more emphasis on encouraging British tourists to holiday at home and reduce the outbound tourism deficit.
 - a. See question 1, section 3a.
 - b. UK visitors spent 44.8bn overseas in 2017,³ offering an opportunity for the industry to convert outbound visitors to domestic, thus contributing to reducing emissions of outbound air travel.

¹ <https://www.gov.uk/government/publications/tourism-sector-deal>

² <https://www.gov.uk/government/publications/tourism-sector-deal>

³ House of Commons Library, Tourism: statistics and policy (2nd January 2019)

3. Government should also consider how best to utilise the income from Air Passenger Duty to carbon offset flights, ring fencing funding to support green initiatives.

(4) How can the Government reach its net zero emissions targets through influencing sustainable travel patterns? Is there a role for offsets in sustainable tourism?

1. See question 3, section 2.
2. Air travel is the most popular way for international visitors to travel to Britain, VisitBritain welcome the work the aviation sector is doing to improve its efficiency, but encourage Government to support the airlines in going further.
 - a. In 2018, 77% of visitors travelled to the UK by Air, 13% by Sea, and 11% by the Channel Tunnel.⁴
 - b. There must be consideration into how a sustainable agenda will impact tourism marketing strategies. While a focus on long haul sees fewer but higher spending visitors and longer trips, short-haul sees short duration breaks in high volumes.
 - c. Sustainable Aviation's 2015-17 progress report 90,095 tonnes of CO2 has been saved due to more efficient flights and a 2% increase in fuel efficiency since 2014, despite 28.8m more passengers in 2016 compared to 2014.⁵ Sustainable Aviation also show a 2.3% increase in public transport use to access airports in 2016 compared to 2014.⁶
 - d. As visitors who travel by air tend to spend more per visit than those using other means of transport, the share of visitor spend accounted for by visitors who fly to the UK stood at 86% in 2018.

(5) How should the UK tourism industry balance the need to encourage tourism whilst protecting fragile environments?

(6) Where should the balance lie between affordable travel and influencing sustainable travel choices? Are taxes and incentives needed?

1. VisitBritain believe that regional spread and extending the season is a key part of encouraging sustainable travel choices for both inbound and domestic travellers. Promoting both out of season travel, and underutilised destinations does not only alleviate pressure on roads and local services, but also supports productivity, regional economic growth and year-round skilled employment.
2. Tourism is a fiercely competitive global industry, people have a lot of choice and our research shows that Britain is already seen as an expensive destination. We also want to promote a message of welcome, remove barriers to travel and make it easier for domestic and international visitors to explore more, travel further and stay longer, boosting the economy.
 - a. VAT is charged at the standard rate of 20% for tourism products in the UK, however other competitor destinations have much lower rates of VAT on tourism

⁴ <https://www.visitbritain.org/inbound-tourism-trends>

⁵ https://www.sustainableaviation.co.uk/wp-content/uploads/2018/06/SA-8pp-leaflet_Progress-Report-2015-2017-1-1.jpg

⁶ https://www.sustainableaviation.co.uk/wp-content/uploads/2018/06/SA-8pp-leaflet_Progress-Report-2015-2017-1-1.jpg

visitors who don't wish to drive, assisting them in exploring more of Britain in a sustainable way.

6. Looking to the future of sustainable travel there are considerations to be made around targeting high value visitors over volume as well as balancing long haul and short haul passengers.
 - a. Spend and length of stay are important factors when measuring the sustainability of inbound visitors. The more visitors spend whilst they are visiting Britain, the more money is invested into local economies, supporting businesses and jobs within the community.
 - b. Spend usually increases in line with length of stay, meaning that encouraging visitors to stay in Britain for longer, and explore the country more widely, has economic benefits that in turn contribute to creating a more sustainable tourism industry. Long Haul travellers tend to stay in the UK for longer (Figure 1), and travel around Britain more widely during their stay – 18% of long haul visitors stayed in more than one area of the UK, compared to just 8% of European Visitors.

Europe	Long-Haul	Average Overall
5.5 nights	10.8 nights	7.0 nights

Figure 1: Average length of stay.

- c. The top ten inbound markets contributed 53% of all spending, with the USA worth £1.9 billion more than the next most valuable market in 2018, Germany.
- d. Figure 2 demonstrates how long haul markets such as Canada and China have higher levels of spend when in Britain, despite not appearing in the top 10 markets for volume.

Top ten markets by VOLUME 2018				Top ten markets by VALUE 2018		
	From	Visits (000)	% of all visits	From	Spend (£m)	% of all spend
1	USA	3,877	10%	USA	£3,378	15%
2	France	3,693	10%	Germany	£1,520	7%
3	Germany	3,262	9%	France	£1,386	6%
4	Irish Republic	2,782	7%	Spain	£1,110	5%
5	Spain	2,530	7%	Australia	£1,044	5%
6	Netherlands	1,954	5%	Irish Republic	£895	4%
7	Poland	1,817	5%	Italy	£784	3%
8	Italy	1,808	5%	Netherlands	£716	3%
9	Belgium	1,116	3%	Canada	£676	3%
10	Australia	1,003	3%	China	£657	3%

Figure 2: VisitBritain's top markets by Value and Volume in 2018.

⁸ <https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/2013-7%20%E2%80%98Beyond%20London%E2%80%99%20Research.pdf>

- e. While long-haul markets feature heavily on spend, European markets provide the majority of inbound volume, accounting for 71% of visits in 2018.⁹ As Figure 1 demonstrates, such markets tend to stay in Britain for shorter periods of time.
- f. When looking at the future of the tourism industry, and determining the future focus of VisitBritain's activity, the balance between long-haul, but more valuable and regionally diverse visitors, and short haul breaks, must be considered carefully.

(7) How effective are sustainable tourism practices by large tourism companies such as cruise ship and package holiday operators?

1. The 'Leisure Excursions in Southern England' DEF project provides some best practice in ensuring that the local economy capitalises on incoming cruise passengers, ensuring their use of the city becomes more sustainable.
 - a. The Leisure Excursions in Southern England for Cruise and Conference project will focus on growing the range of shore excursion itineraries, boosting tourism for the ports of Southampton and Plymouth. It aims to increase visitor numbers for businesses and attractions by encouraging visitors to stay local for longer.¹⁰
2. VisitBritain can play a role in facilitating the sharing sustainable best practice within the industry.
 - a. VisitBritain run a number of industry stakeholder groups, which bring together senior representatives to discuss policy, destination management, and best practice. Such groups can be utilised to encourage the sector to take further action on sustainability.
 - b. VisitEngland's business advice hub offers a range of advice to businesses, including information on how to improve the sustainability of your business. Such guidance could be extended to reflect Government goals and best practice developments.
 - c. VisitEngland's 2019/20 Awards for Excellence include a 'Ethical, Responsible and Sustainable Tourism Award' category, where we recognise leading tourism products and accommodation for their sustainable activity. Previously named the 'Sustainable Tourism Award', the 2017 recipient was Battlesteads Hotel and Restaurant in Northumberland, whose hotel features carbon-neutral heating and hot water, organic locally sourced toiletries, a foodwaste to compost scheme, and polytunnels that provide fresh fruit and veg for the restaurant all year around.
 - d. A number of major tourism and hospitality brands have recently taken action to cut down on waste, a practice which more brands could replicate. In July 2019, IHG announced the phase out of mini plastic toiletry bottles in their hotels. The group stated that this would mean 200m plastic bottles a year would be removed from their 843,000 hotel rooms.¹¹ Qantas Airlines (who operate at Gatwick and Heathrow Airport) have also announced that 100 million pieces of single-use

⁹ Europe (excluding Turkey – VisitBritain definition) accounts for 71% of visits: 26.9m

¹⁰ <https://www.southampton.gov.uk/news/article.aspx?id=tcm:63-402892>

¹¹ <https://www.businessstraveller.com/business-travel/2019/07/30/ihg-to-phase-out-mini-plastic-toiletries-across-entire-portfolio/>

plastic would be removed from flights by the end of 2021, reducing the airline's waste by 75%.¹²

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¹² <https://www.qantas.com/travelinsider/en/trending/new-qantas-flight-waste-free-sustainable.html>