

VisitBritain – Written evidence (TTS0047)

About VisitBritain

The BTA (British Tourist Authority) is the national tourism agency, operating as a non-departmental public body funded by DCMS. VisitBritain promotes Britain overseas and is a delivery partner of the Cabinet Office's GREAT campaign. We have offices in 19 countries across the globe, and are often co-located with FCDO colleagues.

Our role is to drive immediate tourism recovery from the COVID-19 pandemic by building back visitor spend as quickly as possible and supporting the industry.

As well as international marketing, we support the wider visitor economy by ensuring Britain is sold in international markets - connecting trade partners, hosting events to connect buyers and suppliers, and promoting positive stories of Britain to the international media and using our social and digital channels. We also have a business events team that supports destinations in bidding for events in key sectors from AI to life sciences be hosted in the UK.

The BTA also has a statutory duty to advise Government on tourism policy, to do this we draw on our expertise, industry engagement, and detailed research.

Our response to this inquiry focuses on the use of the public transport network by domestic and international tourists. We have responded only to those questions which we felt had a particular relevance to the use of the public transport network for the purpose of tourism and have marked other questions as 'not applicable'.

1. What are the current and anticipated levels of public transport demand and capacity in towns and cities in England? What influences public transport travel patterns? How does the choice of public transport vary across different demographic groups?

VisitBritain contribute questions to the Office for National Statistics International Passenger Survey, to help us better understand the needs and characteristics of overseas visitors to Britain. Prior to the pandemic, findings from 2018, show:

- The most commonly used mode of transport was 'bus, tube, tram or metro train (within town/city)', which was reported to be used by around half of all respondents (49%).
- Over one-in-four used a taxi during their time in the UK (28%).
- 23% used a train to travel outside of towns and cities.
- Within towns and cities, transport sharing apps (eg. Uber) have become a common alternative mode of transport, with 10% of inbound visitors using these.
- Only 5% took a public bus or coach outside of towns and cities

In terms of what influences transport use, some trends from 2018 include:

- Duration of trip: looking at the number of modes of transport used on average, there seems to be a positive relationship between the duration of

the visitor's stay and the average number of internal modes of transport used.

- For those who visited either one or two areas in the UK, taking the bus, tube, tram or metro train is more popular in the London area than in any of the other English regions or British nations, as are car sharing apps such as Uber.
- Visitors to Scotland and the North East over-indexed for domestic flight use and visitors to Wales and the South West are more likely to use their own car to get around.
- Those aged 16-34 years old are more likely than other groups to use Uber or other sharing apps, while children and older age groups are less likely to do so.
- Men, 0-15 and 55+ year-old visitors are also less likely than others to use cities' public transport options – bus, tube, tram or metro train.

There was also some substantial variation, in terms of the internal modes of public transport which international visitors used during their time in the UK, based on their country of residence.

To give some examples, in 2018 a large majority (more than 70 percent) of visitors from Argentina, Brazil, Indonesia and Thailand reported using a bus, tube, tram or the metro on their trip. By contrast, far fewer visitors (less than 30%) from Poland, Romania and Ukraine took these forms of transport.

2. How might public transport travel patterns shift in the next 10 years? What impact could digitalisation and the COVID-19 pandemic have on travel patterns in the long term?

Not applicable.

3. What can be done to improve connectivity across public transport modes? How could better integration be delivered in urban areas outside London?

VisitBritain want to encourage international visitors to explore more of Britain – staying longer and travelling further across our nations and regions.

In 2019, London received a record 21.7 million inbound visits – this was four times as many as the next most popular region (the South East). We want to ensure the public transport network is utilised to encourage higher visitor numbers to all parts of Britain; thereby spreading the economic benefits of tourism, supporting growth, job creation and retention.

We know that many visitors lack the confidence to explore the country's wider scenic beauty, heritage and culture offering; unless they are part of an organised tour, or have prior knowledge of travelling by rail in Britain. Improving connectivity, particularly between major train stations and the attraction a visitor is trying to reach (referred to in our sector as the 'final mile'); and ensuring the availability of up to date and easy to access information, will help to boost traveller's confidence in venturing beyond London.

Some best practice and practical steps taken by the sector to improve this:

- **Rail companies offering 'through ticketing' options on popular routes.**

Some positive examples of where this has been achieved are by Great Western Railway, which operates passenger rail services between London and tourism hotspots in South West England, South Wales and The Cotswolds.

The company recognised the business opportunity of offering through-ticketing – where travellers purchase one ticket for a complete journey that passes through a number of different transport networks. Through-ticketing is standard practice worldwide, especially within Europe, and is perfectly suited to both leisure and business travellers.

GWR saw the potential to make train services from London available as 'airline add-ons' to flights arriving and departing from Heathrow Airport. The through-tickets needed to include travel on the Heathrow Express, which directly links Heathrow to London Paddington station, and GWR's train services.

GWR acquired an airline Global Distribution System (GDS) code to enable reservation agents to book and issue tickets as one seamless customer transaction, with an associated cost saving e.g. Singapore to Swansea tickets consisting of flight and two rail journeys (Heathrow Express to Paddington and Paddington to Swansea). This offers passengers better choice and easier connectivity beyond London into the regions.

The company has also been involved in the Great West Way touring route project, led by Visit Wiltshire and funded by VisitEngland's Discovery England Fund. The touring route from London to Bath & Bristol which is suitable for visitors to travel by car, coach, rail, cycling, walking or by boat. A range of themed itineraries and trails, including heritage, food and drink, countryside, film tourism etc. allows visitors to explore the route in depth and aims to rival any of the great touring routes in the world.

The BritRail Pass, sold by VisitBritain in our online shop, enables international visitors to make unlimited train journeys around the whole country, or a region of their choice, for a single fixed price – the pass is another example of how ticket buying, and route planning, can be made easier for international visitor.

Working with the Rail Delivery Group, the Government and VisitBritain will pursue the development of a similar domestic rail product to accelerate the recovery of domestic tourism in the wake of the COVID-19 pandemic.

- **Collaboration with major attractions along routes to jointly address opportunities for seamless ticket offers:**

No matter how appealing a tourist attraction might be, if visitors are not provided with a clear and simple way to travel there, they are likely to choose to go elsewhere. Working together, transport providers and attractions on their routes, can greatly simplify this process for visitors. For instance, by providing a shuttle bus from the station to the attraction itself (Warner Bros. Studio Tour London being just one example of this in action); or giving cost incentives for using public transport (such as a 2-4-1 admission voucher) for guests who have travelled by train.

- **Translation of information announcements and brochures into the most common languages used by passengers.**

An example of where this has been done successfully is on the train line between London Marylebone Station and Bicester Village, which attracts high numbers of international visitors from China, Saudi Arabia, Kuwait and the UAE.

In 2017, Chiltern Railways, manager of London Marylebone station, introduced platform announcements in Mandarin and Arabic. The announcements were recorded by native-speaking employees, and new members of staff fluent in the languages have been employed to assist on the station concourse. The train company makes onboard announcements in both languages as trains approach Bicester Village, and Arabic and Mandarin signs are installed at the station.

Measures to assist Mandarin and Arabic speakers at London Marylebone complement existing multi-European language announcements made onboard Heathrow and Gatwick Express trains, as well as the Eurostar service, helping overseas visitors to travel to and from London with more confidence.

- **Improved facilities for travellers with large amounts of luggage:**

International visitors on longer trips to Britain, are likely to be travelling with large amounts of luggage which it will not be practical to take along to every attraction. A number of ways to make this experience easier for them include:

- Increasing the availability of storage solutions for luggage at train and bus stations.
- Improving signposting to left luggage facilities where they are provided.
- Reviewing the ease of access around stations for people with suitcases.
- Increasing onboard luggage capacity where possible and ensuring new carriages have sufficient provision.

- **Improved connectivity between different modes of transport to assist visitors in making the 'final mile' of their journey.**

One positive example of this was achieved by West Somerset Railway on England's longest heritage railway – which carries hundreds of thousands

of visitors each year between Bishops Lydeard station and the coastal resort of Minehead.

Travel via public transport meant visitors arriving by mainline train services into Taunton, then having to use a local scheduled bus service to transfer to Bishops Lydeard, before they reached the attraction.

Recognising the challenge of this multistep, multi-ticket process, West Somerset Railway enlisted the help of their DMO, Visit Somerset, to work with Great Western Railway (GWR) and bus operator Buses of Somerset and agreed on a one-ticket solution.

Journey times and prices from West Somerset Railway service were added to GWR's computerised system, enabling passengers to book a seamless journey from their station of origin through to Minehead, inclusive of the bus connection. The one-price, one-ticket solution represented a 19% saving against buying the separate components for those travelling from Taunton.

GWR also removed peak-time restrictions on the early London to Taunton service, enabling visitors to enjoy West Somerset Railway as an affordable day trip from London. At the point the scheme was introduced based on similar through-ticket examples Visit Somerset projected they would see an increase of 60,000 visitors and a £1million boost to the local economy over a five-year period (although it should be noted that these projections will likely have been impacted by the COVID-19 pandemic).

Another example of best practice can be found in the 'The Mountain Goat' service in the Lake District which provides both tours and a connection for visitors from the major rail stations to the scenic destinations across the national park.

4. What are the likely areas of innovation in urban public transport over the next 10 years? How should public policy be shaped considering both incremental and transformational innovations? How could data help transport services meet consumer demand?

Our response to this section focusses primarily on the final question of how data can be used to help better meet the needs of consumers.

Through our work with the International Passenger Survey Data VisitBritain is able to provide Government with a wealth of information about where visitors travel to and from during their time in Britain. As well as which groups of visitors are most likely to use certain forms of public transport. We would welcome improved connections with both the Department for Transport, and transport providers to make use of datasets like this, in order to better understand the needs of travellers on the network, and how they can be met.

The example cited in our previous answer, of London Marylebone Station and Bicester Village providing information to passengers in Mandarin and Arabic, because they know that a particularly high number of international visitors from China, Saudi Arabia, Kuwait and the UAE travel on this route, is an excellent illustration of this in practice.

As an organisation, we would also like to access the data collected by transport providers to inform our own marketing and policy work. We know that many gather passenger feedback data, and would encourage the inclusion of questions such as country of origin and the tailoring of questionnaires for overseas tourists given that their needs are very different to those of domestic customers.

5. Are local authorities well equipped with appropriate funding and powers to deliver high-quality public transport services? Would further devolution of transport policy contribute to better outcomes?

Not applicable.

6. Could better policy coordination across government departments, and between central and local government, improve public transport outcomes? If so, how can this be achieved?

The Tourism Recovery Plan, published by DCMS in 2021, identifies how many of the levers for tourism policy sit across Government Departments including the Department for Transport.

We welcome the establishment of an inter-ministerial working group on tourism as an important step to address this, as it will bring relevant ministers together to discuss tourism policy specifically. We hope this will enable tourism policy to move up the Government's wider policy agenda.

VisitBritain/VisitEngland stand ready to act in our statutory duty to advise Government on tourism policy to work across Government to shape policy that benefits the visitor economy.

7. What are the barriers to improving urban public transport, in terms of delivering the necessary infrastructure, increasing connectivity and improving the consumer experience?

Our response to this question primarily relates to the barriers to improving consumer experience.

VisitBritain are keen to ensure that the needs of visitors, both domestic and international, are considered as part of future improvements to the urban public transport network, given the economic benefits tourism can bring to towns and cities across Britain.

Factors which could improve visitor's experience of using public transport in Britain include the following (several of which have been discussed in detail elsewhere in our response):

- Simple and cost-effective ways to pay for journeys, including those which involve several stages or multiple modes of transport in order to reach a given destination or attraction.
- Simple, accessible information to assist with route planning. This should be available in a range of languages.
- As far as possible, information at stations and announcements on trains and buses should be provided in a range of languages.
- Facilitating joint working between different providers of public transport, ourselves, and local DMOs, with the aim of ensuring visitors can reach attractions that are not close to a major rail transport hub, as easily as possible (for instance, by joining up bus and train timetables; or the provision of a shuttle bus direct from station to attraction).

8. Are there other important changes, not covered elsewhere in these questions, which would improve matters?

No further comments.

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