



Why getting the Visitor Welcome right matters

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VisitBritain/Rod Edwards: Bristol



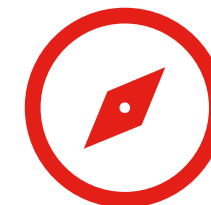
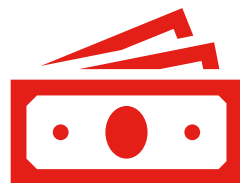


Latest research and findings

Domestic Day Visits – Q3 2023



Between July – Sept 2023:



Tourism Day Visits within England reached 272 million in Q3 2023, on par with Q3 2022, with visits peaking at 102 million in August.

Visitors **spent a total of £11.9bn** during the 3 months, up 10% vs Q3 2022 (with the largest value attributed to August). In real terms, visitor spending was up 3% vs Q3 2022.

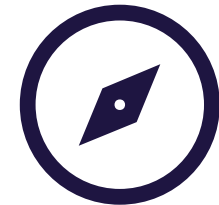
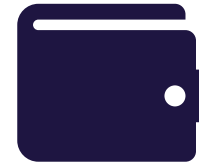
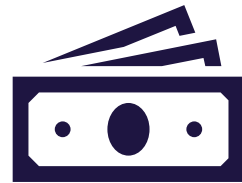
The **average spend per visit** was £44, up 10% vs the previous year, for visits within England. Taking inflation into account, spend per visit was up 3% vs Q3 2022.

In Q3 2023, the **South East** received the highest volume of day visits (49 million), overtaking London (48 million).

Domestic Overnight Trips – Q2 2023



Between April – June 2023:



There were **25.1 million overnight trips** in England (up 7% vs Q2 2022) made by British residents.

There were in total **69.8m nights away** and they spent **£6.7bn** on their trips (up 12% vs Q2 2022).

Great Britain residents spent on average **£269 per trip** in England (up 5% vs Q2 2022) and **£97 per night** (up 14% vs Q2 2022).

Regions with the largest shares of trips in England were South West (17%), North West (14%), South East (14%) and London (14%).

Domestic Sentiment Tracker – Jan 2024



January 2024 (in comparison to December 2023):



Visitor Attractions Headlines – 2022



VISITS & ADMISSION FEES

42%

Annual increase in total visits of England's attractions

6%

Annual increase of adult and child admission fees

ACCESSIBILITY & SUSTAINABILITY

54%

Over half of attractions investing in accessibility provisions

62%

The majority of attractions have an environmental strategy and/or budget

Inbound Tourism Forecast 2024



2024 Inbound tourism forecast Overseas visits to the UK



2024 Inbound tourism forecast Spending by overseas visitors in the UK



Source: International Passenger Survey to 2020 and 2022; VisitBritain model and forecasts for 2021, 2023-24.
(m = millions)

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All spending is in nominal terms (bn = billions)



#2024forecast



The importance of Welcome



Alamy Stock Photo: Bristol

A global driver

Welcome is one of key global drivers of destination choice in 2022.

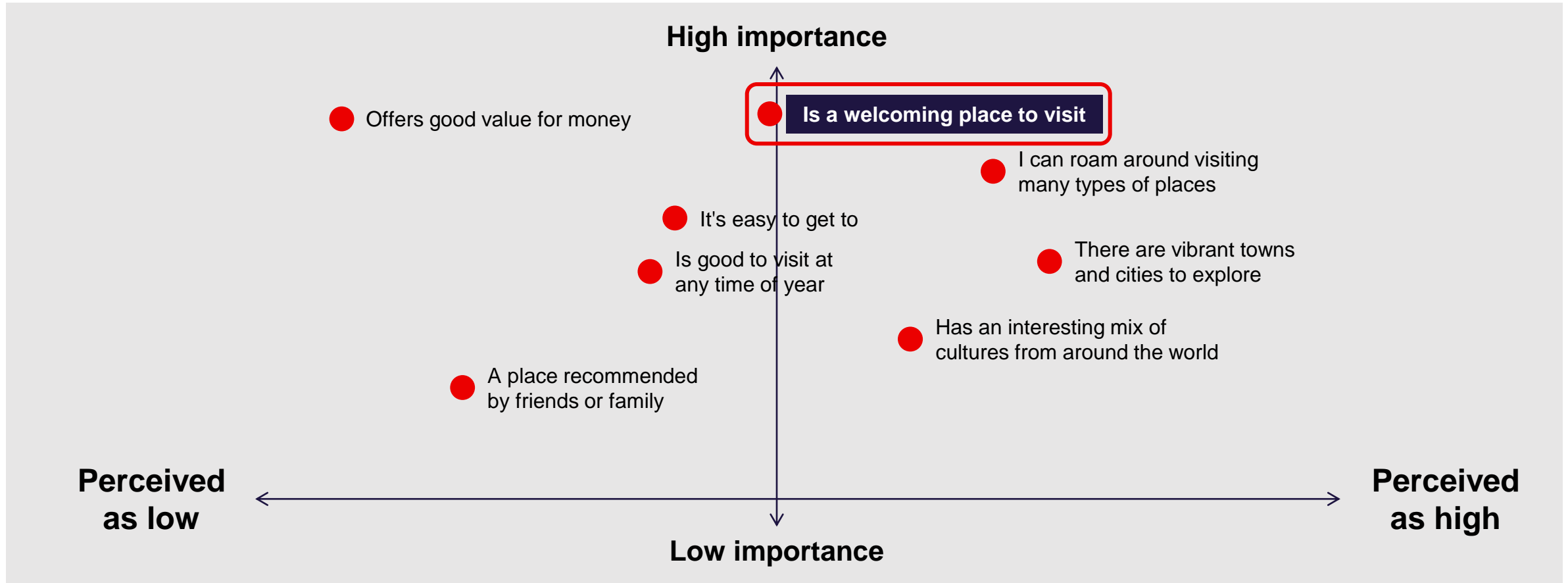
Drivers of Influence in Selecting an Destination for an International Break/Holiday (Top 3 box*)



*Analysis by Top Box (7/7) shows identical rank-order of drivers

Perceptions of Britain

The UK's overall welcome still relatively competitive although not strongly match tourists' needs.



How Britain compares

Despite surpassing some main competitors, being welcoming is not a distinguish trait.

ASSOCIATION AT A GLOBAL LEVEL	RANK				
	BRITAIN	FRANCE	GERMANY	IRELAND	ITALY
Is a welcoming place to visit	2 nd	4 th	5 th	3 rd	1 st
There are interesting local people to meet	3 rd	4 th	5 th	2 nd	1 st
Is inclusive and accessible for visitors like me	1 st	3 rd	5 th	4 th	2 nd
It has experiences I can't have anywhere else	2 nd	3 rd	5 th	4 th	1 st
Is good for relaxing, resting, recharging	4 th	2 nd	5 th	3 rd	1 st

The personal touch matters

The UK's people component in welcome attribute is still relatively low.

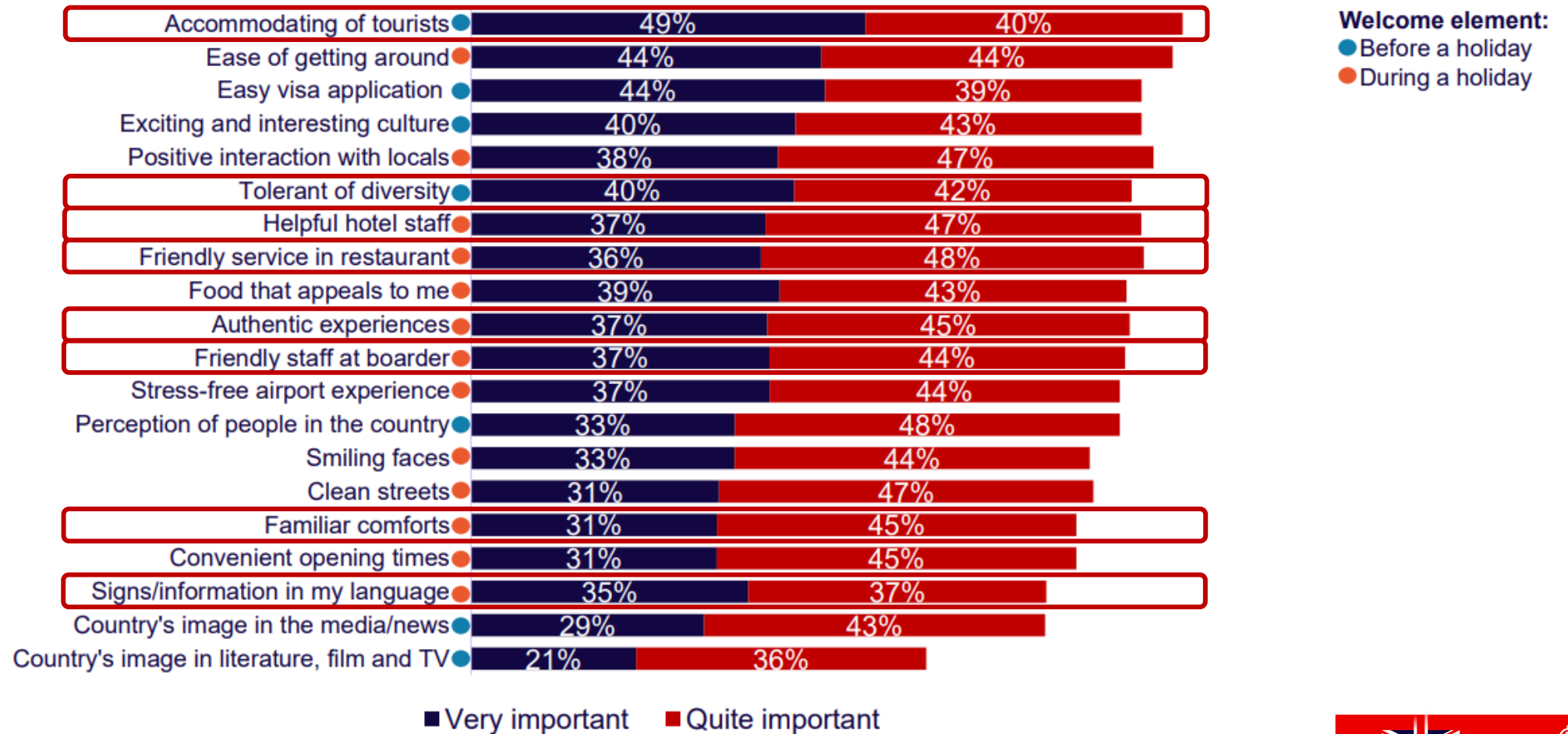
Dimension / Attributes UK ranks from 2008-2023	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
PEOPLE	6	6	6	4	4	4	4	5	7	6	6	7	4	10	8	10
If visited, people would make me feel very welcome	14	13	13	12	13	10	13	11	12	13	15	16	11	18	16	19

Dimension / Attributes UK ranks in 2023 by market	Total	Argentina	Australia	Brazil	Canada	China	France	Germany	India	Italy	Japan	Mexico	Poland	Russia	Saudi Arabia	South Africa	South Korea	Sweden	Turkey	United Kingdom	United States	Spain
PEOPLE	10	24	6	10	13	17	16	22	4	16	7	10	15	56	16	12	11	7	3	1	7	19
If visited, people would make me feel very welcome	19	43	10	22	14	26	21	37	12	19	10	24	21	57	33	15	19	18	8	6	15	35
SAFETY* – I would feel safe in this country	14	14	11	8	14	17	16	21	7	18	7	7	19	43	26	12	11	20	6	10	13	17

*Attribute is not related to the overall NBI score or ranks

How do visitors view welcome?

There are more elements to Welcome that also need to be considered.





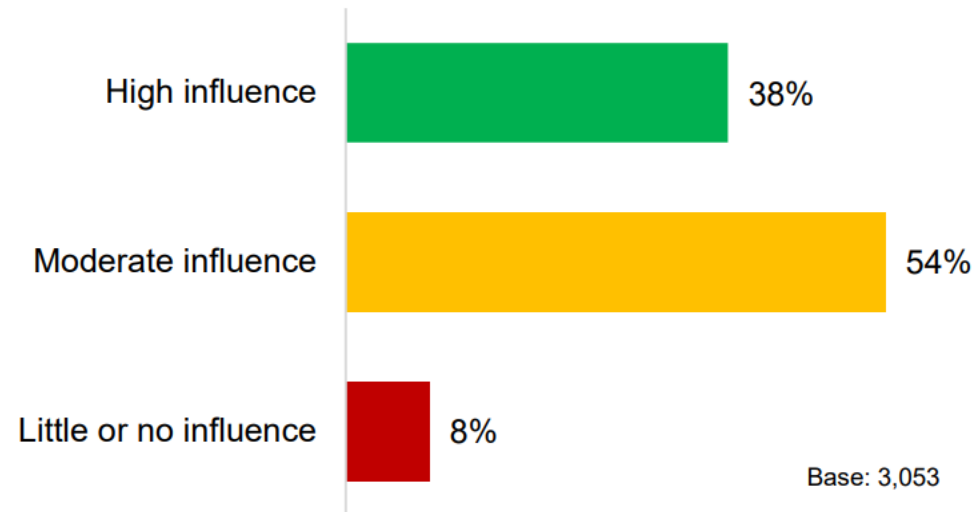
Welcome and accreditation



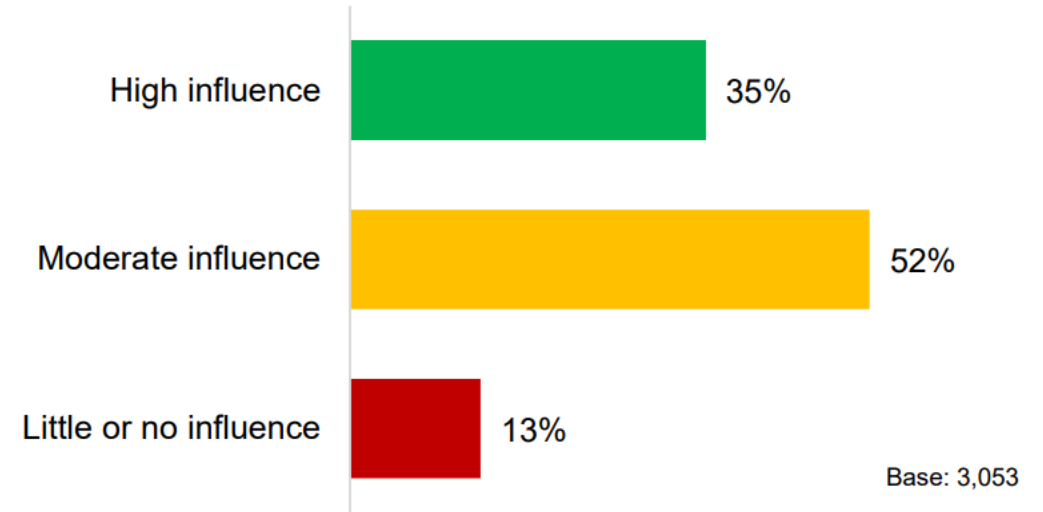
Influence of quality in decision-making

Star ratings and customer reviews, which provide commitment and consistency of service quality (including Welcome), are significantly influencing travellers' decisions.

"How much influence would customer reviews have on your decision of where to stay?"



"How much influence would official star ratings have on your decision of where to stay?"



Significance of quality influence

The influence of how service quality delivered is significantly and fairly distributed across age groups, accommodation types, and trip purpose.

Age	% highly influenced by customer reviews	% highly influenced by official star ratings
18 – 24	46%	37%
25 – 34	54%	42%
35 – 44	42%	39%
45 – 54	35%	33%
55 – 64	30%	29%
65+	26%	32%

Base: 3,053

Accommodation type	% highly influenced by customer reviews	% highly influenced by official star ratings
Hotel	39%	37%
B&B / guesthouse	36%	31%
Self catering	37%	35%
Caravan & camping	30%	25%

Trip purpose	% highly influenced by customer reviews	% highly influenced by official star ratings
Leisure	35%	32%
Business	43%	46%

Base: 3,053

Quality – a new approach

Strengthening the role of quality through modernisation – acting on research findings that consumers globally do not see customer reviews as the single trusted source and industry relevance.

86%

A percentage of consumers agree there is still a role for official star ratings in aiding accommodation choice, **comparable to customer reviews**.

They are even **more important to international visitors**. Both forms of guidance influence younger consumers.

Source: **Consumer research**, Strategic Research and Insight 2022

“ .. I want that scheme to continue but I want a modern scheme .. ”

There is a need for a baseline scheme to protect and reassure customers. However, relevance are of paramount importance.

Source: **Industry research**, Mustard 2022

Quality and inclusion

To ensure more inclusion – providing businesses with assessment and toolkit to confirm and guide specific consumers are welcomed to the establishments.



Access accessibility and inclusive tourism toolkit here:



Accreditation:



**Business
Advice Hub:**



**Stay connected, sign up
to our industry
newsletter here:**



**Send your content and your news to:
pressandpr@visitbritain.org**





Thank You

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