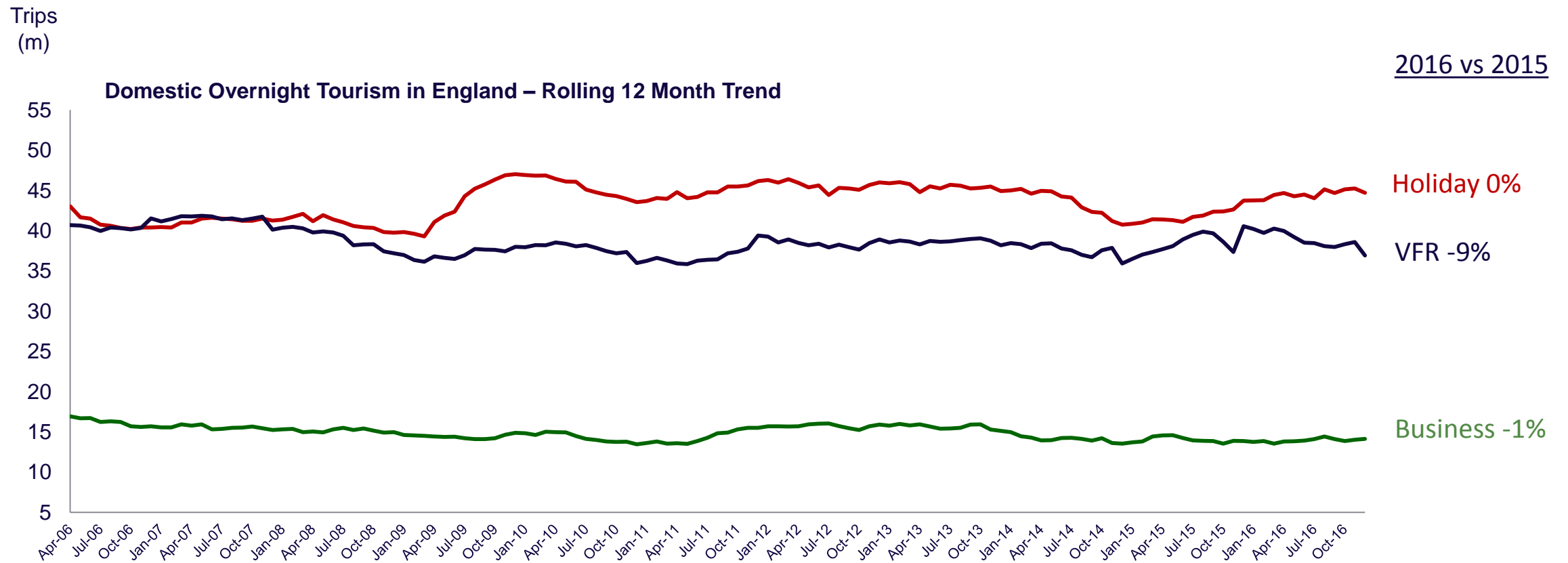


# Tourism Performance and Trends

Sharon Orrell

November 2017

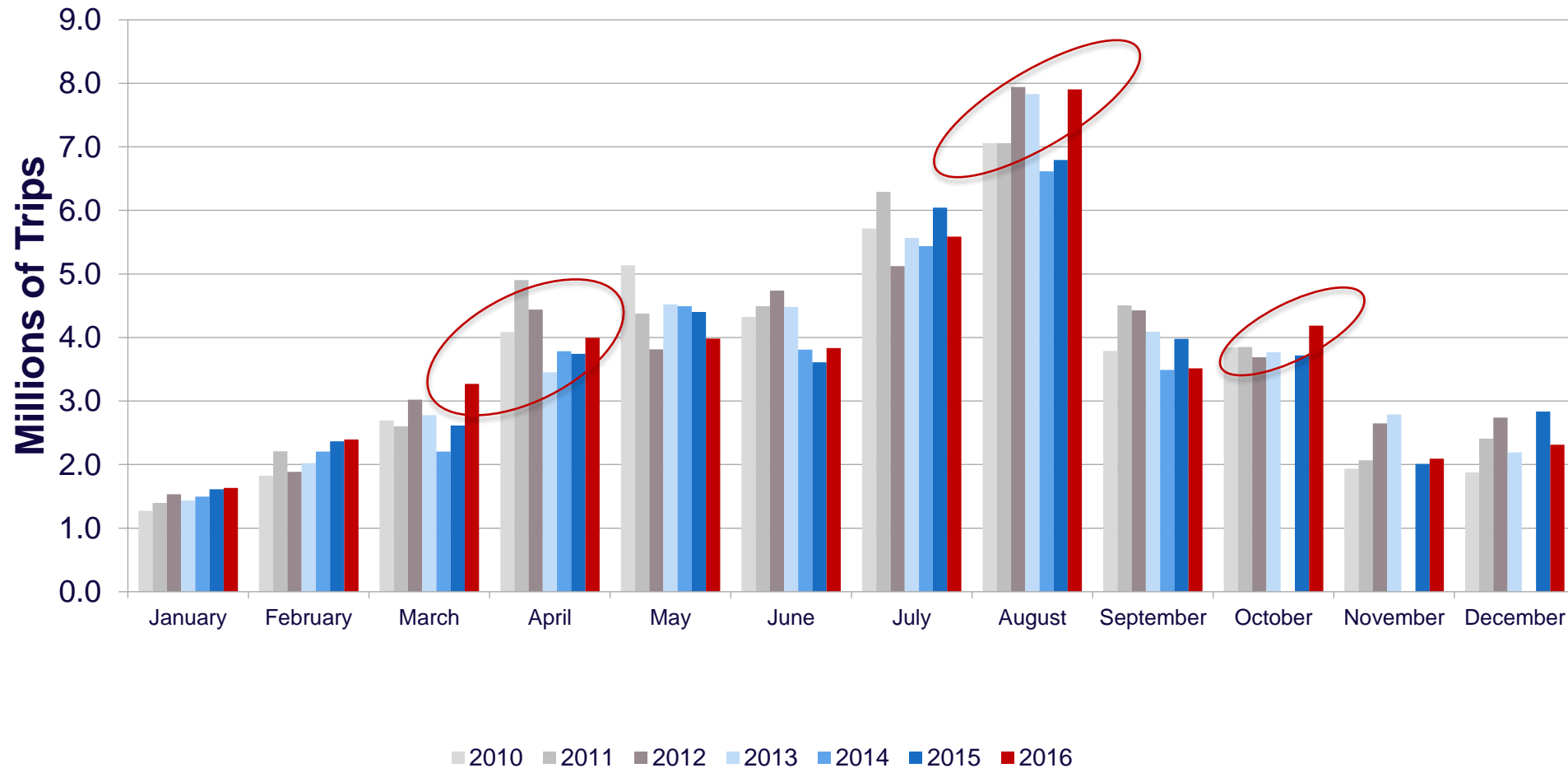
## The last decade in domestic overnight tourism



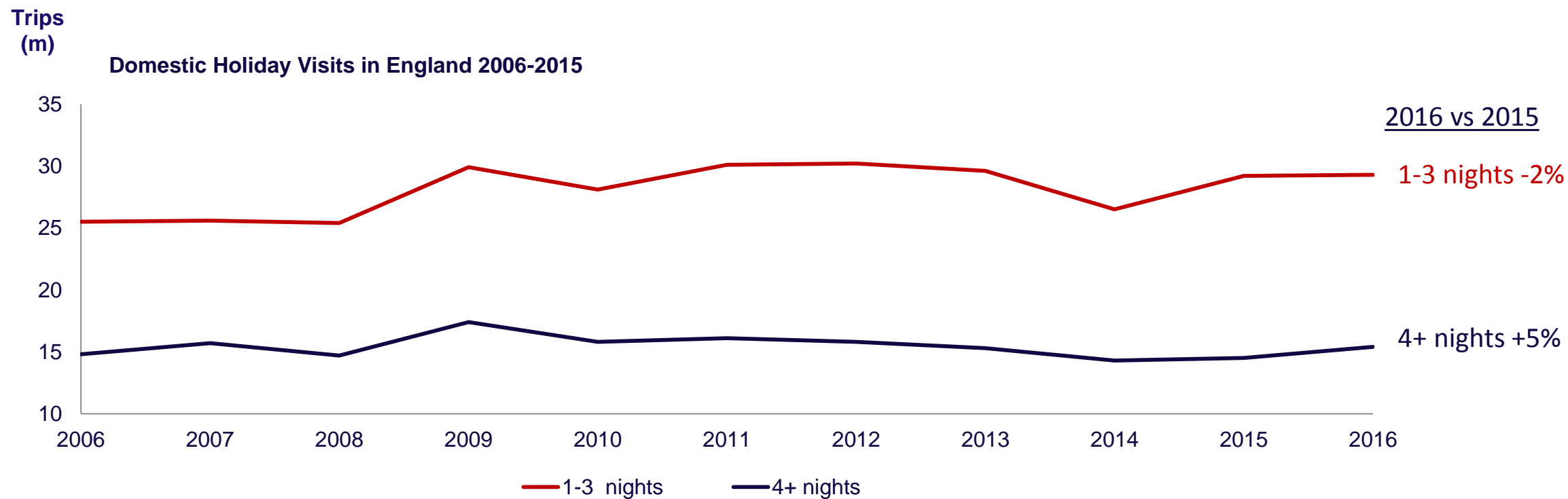
## So was there really a 2016 staycation?



## Strongest growth in school holiday periods



## Biggest YOY increase in 4+ night trips since 2009 (but short breaks still dominate)



## Into 2017 - a strong start to the year in the domestic holiday market

### England Domestic Overnight Tourism January – July 2017

Trips -2 % / Spend +4%

Trips



Holiday  
+6%

VFR  
-6%

Business  
-8%

Spend

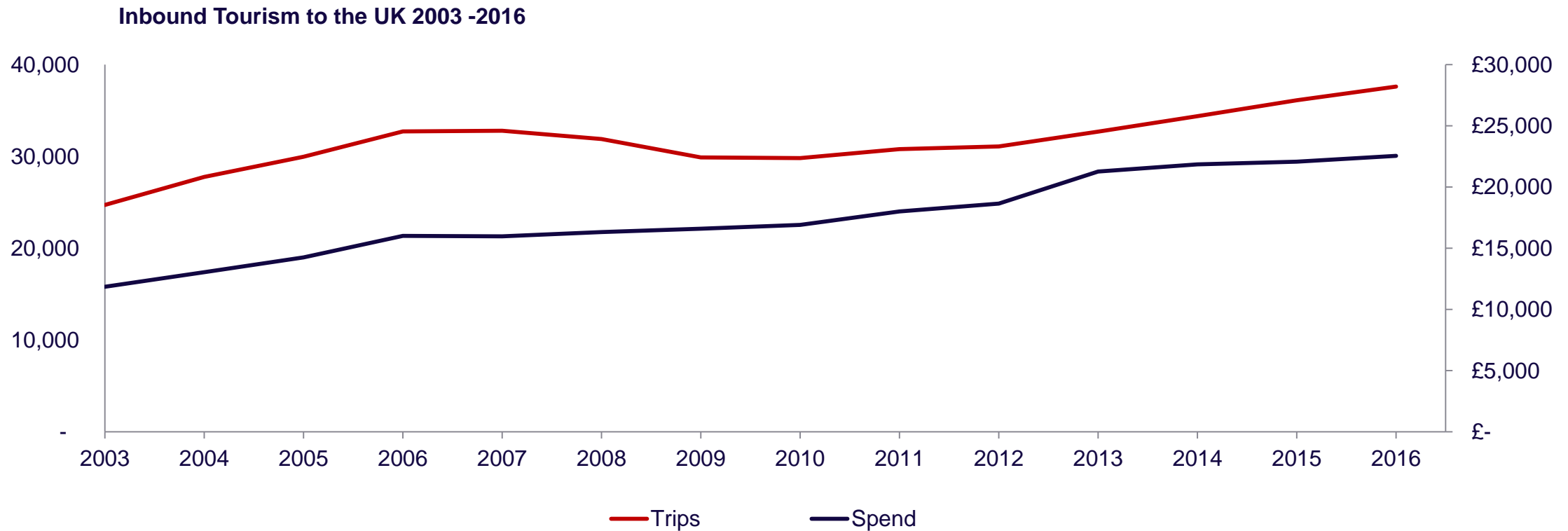


Holiday  
+11%

VFR  
-2%

Business  
-6%

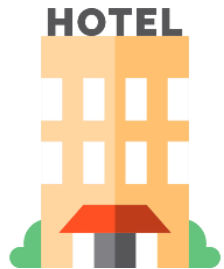
2016 was a record year for inbound tourism, with 4% more trips and 2% more expenditure than in 2015



## Inbound growth in 2017 driven by holidays and long-haul markets

### UK Inbound Tourism Trips January – July 2017

**+8% All Trips**



**Holiday  
+19%**

**VFR  
+5%**

**Business  
-3%**



**EU  
+4%**

**North America  
+21%**

**Rest of World  
+18%**



## 5 Trends for Tourism

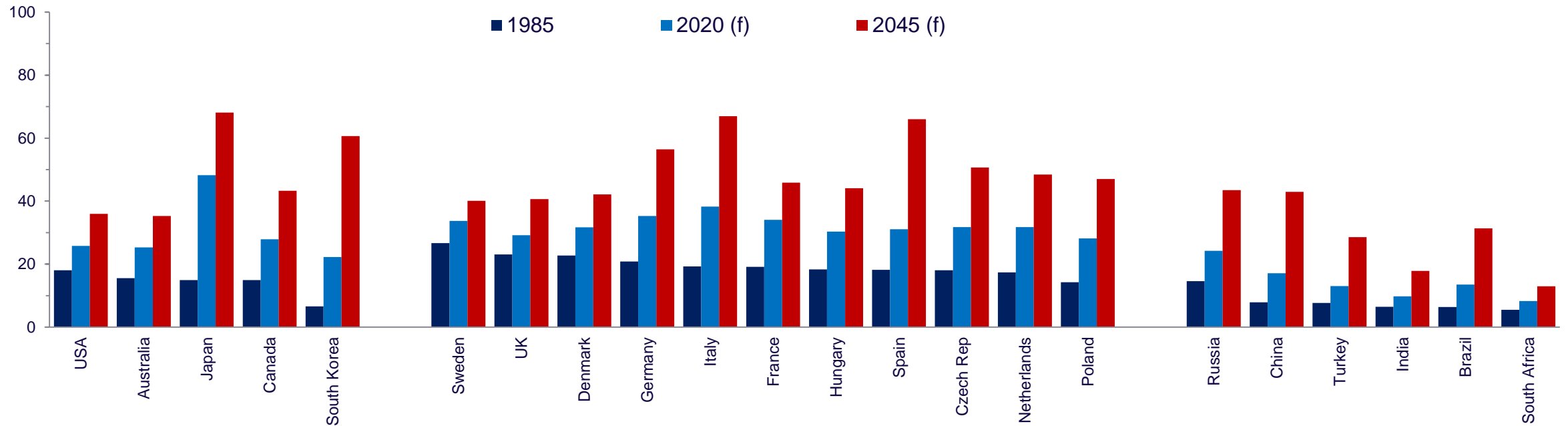


# 1. The Changing Demographic Landscape



# The ageing society

Ratio of population aged 65+ per 100 population aged 15-64

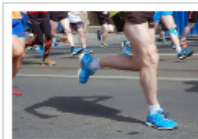


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# THE AGE OF NOT ACTING YOUR AGE

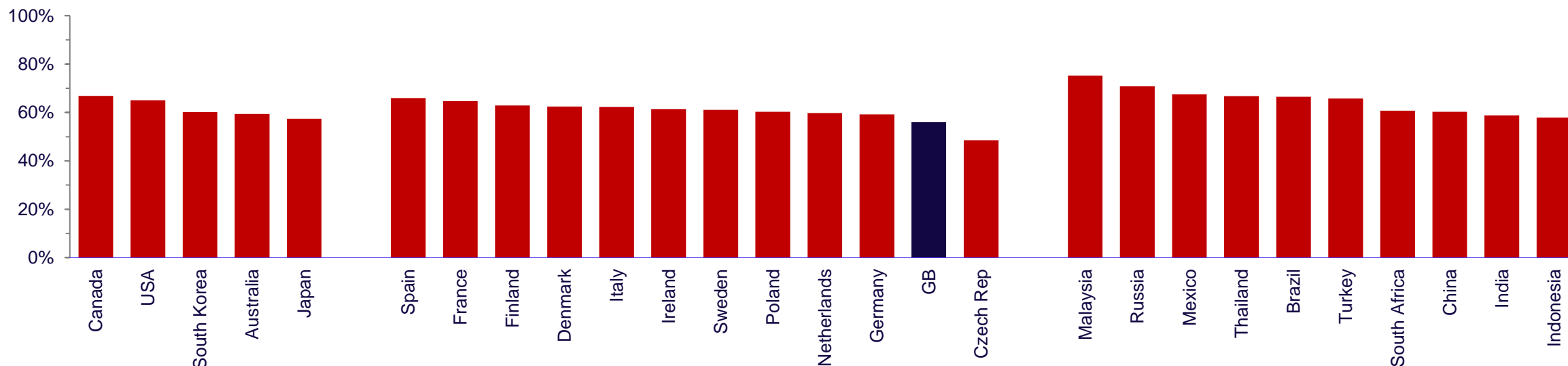
## 2. Filter Bubble



# The filter bubble has its advantages

**“How interested would you be in a service that suggested a holiday and itinerary of activities based on your interests and budget”**

**% who are very interested or quite interested**





...but we'll need to burst it to drive growth

**VisitDenmark** draws attention to attractions by using the on-trend #hygge hashtag



**Helsinki Secret Residence** invites influencer on a experiential trip to the Finnish capital



### 3. Performative Perfection

***“Checking in and sharing this on Facebook is seen as a status symbol and people usually only check in at glamorous, non-trivial places and when doing something special”.***

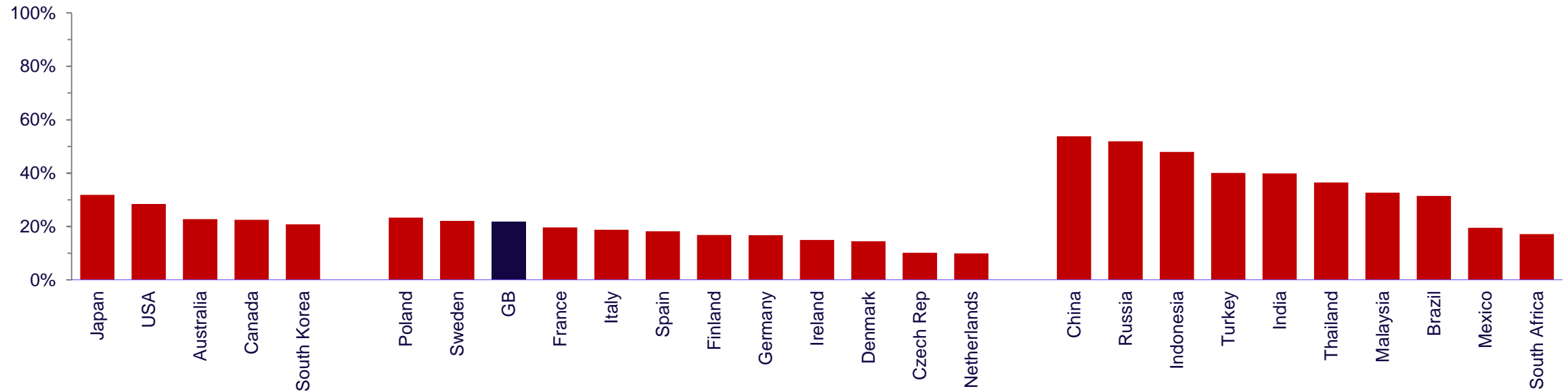
***FEMALE, 27, FRANCE***





# The importance of self-presentation

**“I wish I could be more like the person I describe myself as on social media”**  
**% who agree or strongly agree**



# Enabling performative behaviour

**W Hotels** in the US and GB has launched a set of branded geofilters on **Snapchat** for their guests. The filters turn the guest's snaps into a postcard to share with followers.



Organisations such as **Aperture Tours**, as well as locals in various destinations are organising photo walks



## 4. The Pursuit of Real

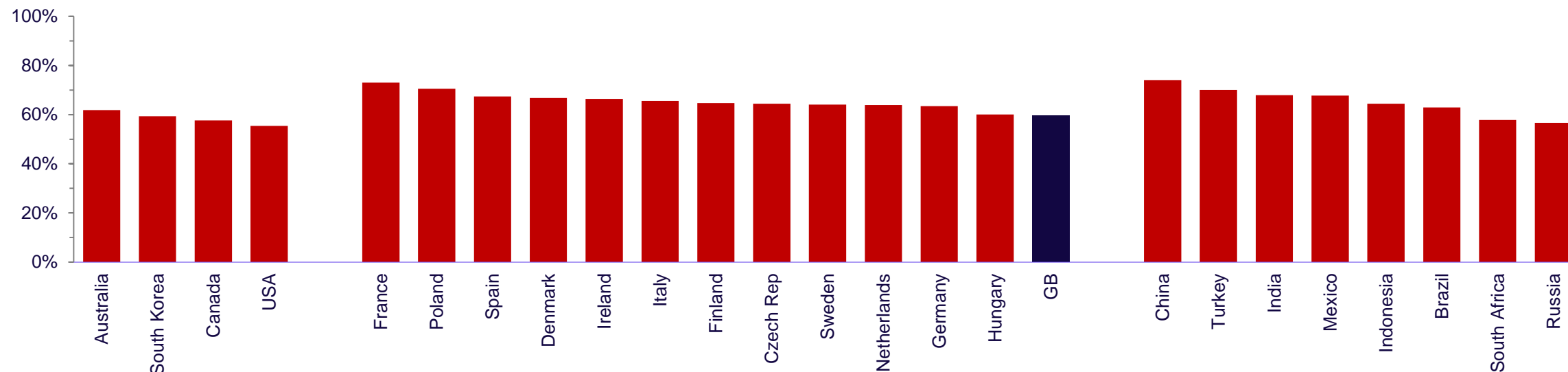
***“People don’t want to think of themselves as tourists nowadays, they want to think of themselves as travellers. They have an increasing desire to have tea where local Londoners go, or visit Indian restaurants where the Indian ex-pats eat”.***

***NICK LARSON, HEAD OF PLATFORM AT TIMELOOPER***



# Seeking out the “authentic culture” of a place is a global wish

**“When I go on holiday, the most important thing for me is to experience the authentic culture of a place” | % who agree strongly or agree**



# Experiencing England and English Life



Meeting  
locals

*The Islanders they are different ... I want to go the pub with them and talk... to find out about their lives why they get up in the morning (GER)*



Doing the things  
locals do

*For the cricket, I don't need to see the highest level, but just more ordinary just to get the feel of ordinary people - it's even nicer. (NL)*



Eating and drinking  
what locals do

*I like the crazy breakfast and the fish & chips and greasy heavy pies and all that. Going out to eat I have to order it just to find out what it is (NL)*



...though we're not rejecting the icons quite yet!



## 5. The Leisure Upgrade

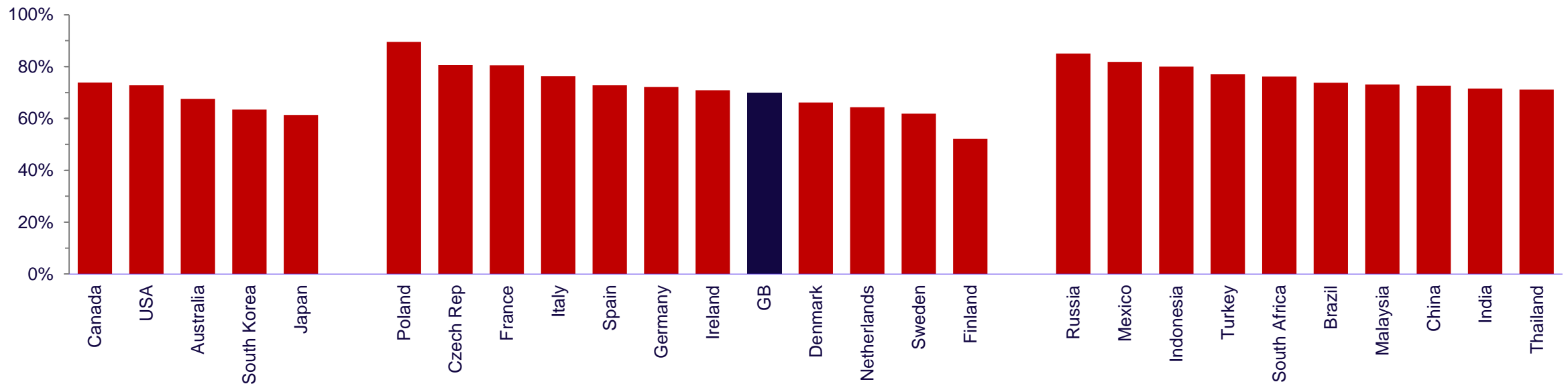
***“We have had a lot of what I call professional reality TV programs like MasterChef and The Great British Bake Off. What we see are people that are amateurs trying to be professional more of the time and participating in that, and also using their hobby more often as a tourism experience”.***

**IAN YEOMAN, TOURISM FUTURIST**



# There's more to free time than having fun

**“Entertainment should be about learning new things as much as simply having fun”**  
**% who agree strongly or agree**





# From Airbnb experiences to integrated holiday offerings

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Types  Categories 



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**£65** Learn the art of taxidermy with an artisan



**£60** Silkscreen art deco wallpaper  
★★★★★ 50 reviews



**£30** Explore the street art of East London



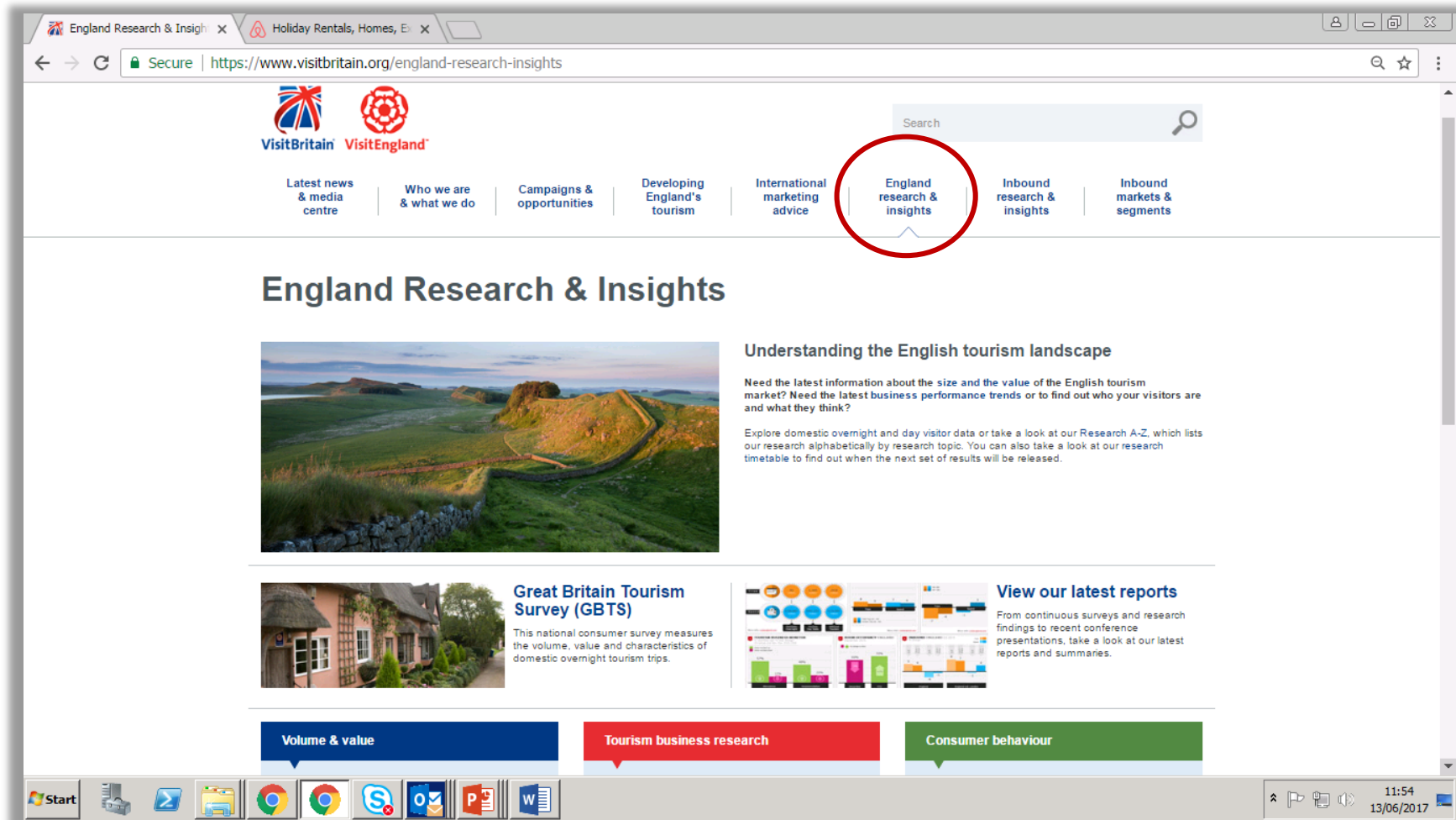
**£55** Design and make your own model for a larger piece  
★★★★★ 16 reviews



**£35** L  
Lond



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# Latest DEF Research Publications – City Profiles / Day Visits

## Discover England: summary insights on overseas visitors to England's regions

Destination Summary Reports

October 2017



## Discover England: summary insights on overseas visitors to England's regions

Day Visits report: a profile of overseas holiday visitors who take day trips from England's cities and towns

October 2017



VisitEngland 

### Key differences and highlights among the top 20 English destinations for inbound holiday trips

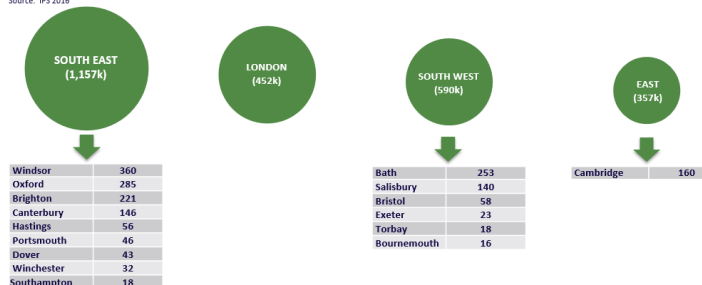


9

VisitEngland 

### Number of 'day trippers' VISITING regions and cities/towns in England. By top four regions visited

Source: IPS 2016



After London (452k day trippers), Windsor (360k), Oxford (285k), Bath (253k), Brighton (221k), Cambridge (160k), Canterbury (146k) and Salisbury (140k) are the other cities/towns recording international day trippers in excess of 100k.

*N.B. Salisbury includes day trippers visiting Stonehenge.*

Day trip destinations

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Thank you!

Sharon Orrell

November 2017